



Scottish **Arts** Council

Visual Arts Audiences in Scotland

Current profile and barriers to attendance

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The views expressed in this report are those of the authors and do not necessarily represent those of the Scottish Arts Council.

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Executive Summary

The objective of this project is to support Scottish Arts Council funded visual arts organisations in their audience development strategies of reaching out and providing enjoyment for an ever-growing number and range of people. Over the past two years quantitative research, in the form of a population survey across seven regions in Scotland, and in-venue interviews at eight contemporary galleries was coupled with qualitative research in the form of focus groups and 'mystery visitor audits' to inform the audience development strategies and recommendations in this report.

The research methodology comprised of a nationwide population survey and focus groups held in Glasgow and Edinburgh. Additionally, eight contemporary galleries (Collective Gallery, Edinburgh; Crawford Arts Centre, St Andrews; Dundee Contemporary Arts (DCA); The Fruitmarket Gallery, Edinburgh; Talbot Rice Gallery, Edinburgh; Glasgow Print Studio, Glasgow; Project Ability, Glasgow; Street Level Photoworks, Glasgow,) carried out surveys with visitors to their exhibitions over a twelve-month period*. We also asked twenty-five people from target audience development groups to visit specific galleries as 'mystery visitors' and feedback on their experience through evaluation questionnaires.

There are signs that there is a significant and growing market for contemporary art throughout the UK. The enduring popularity of Tate Modern and the growing levels of interest in the Turner Prize evidence this. In Scotland, the Glasgow Art Fair attracts more support each year and venues such as Dundee Contemporary Arts, which are visitor focused and committed to customer care, have shown that this increased potential audience can be converted to current attenders given the right marketing strategies and staff attitudes.

For the galleries involved in this research, whilst there is neither the aim to reach a mass market, nor the scale of attractions and facilities to operate on the same level as some larger venues, this research shows that there is clearly an opportunity to develop audiences for their work. This is not a simple or straightforward process however. Despite the contribution that big brand institutions and competitions might be making to the expansion of audiences for contemporary art, for many, it is still an acquired taste, even if more people are hopefully acquiring it.

Research undertaken by Morris Hargreaves McIntyre, including this particular study, has identified that the main barriers to attendance at contemporary art galleries, are feelings of intellectual exclusion and that the work or venues in question simply do not appeal on an aesthetic, psychological or motivational level. Contemporary art galleries are often seen as solitary activities and smaller galleries often cannot offer the added attraction of refreshments or the wider benefits of the endorsement of a household brand and attractive destination. There is also a strong element of risk associated with visiting a smaller art gallery in that if the art doesn't engage or satisfy, the visitor has little to fall back on. Contemporary art is also seen to demand intellectual proactivity on the part of the viewer. This deters those who prefer a passive leisure activity.

For these galleries, that are working at the smaller scale of operations, their audiences not surprisingly tend to reflect the more specialised nature of their offer. These galleries prioritise their role in artistic and artform development, and the extension of critical discourse, rather than social enjoyment and access. Their exhibition programmes often feature relatively unknown artists and sometimes the gallery staff, for a variety of reasons, concentrate their restricted publicity activity on attracting the attention of their peers.

In the belief either that peers do not need much information, or that the art should speak for itself, there is little support in the form of information for the uninformed visitor to the gallery.

The data gathered in this research reveals that the potential market in Scotland for art galleries, the total number of people who would consider visiting any gallery, is 43% of the population or 1.777 million people.

24% of the population, 1.020 million people, do presently visit art galleries and have visited one in the past 12 months. This is the current market. A further 17% have visited in the past 5 years. The current market equates to a market penetration of 57%. This is consistent pattern across most of the Country, slightly lower at 16% in two regions (Tayside, Fife and Central and Ayrshire and Lanarkshire) but very much higher in Glasgow at 38% of the population.

The data reveals that people can be selective about when they visit galleries. There are some that will only visit galleries whilst on holiday or visiting a new City; others will only attend Blockbuster exhibitions or major collections. However generally the data shows that the majority of existing and potential visual arts attenders in Scotland are open minded and receptive to a wide range of possibilities.

Of the potential market, around 1.1 million people, or 27% of the population, would consider attending a Core Funded Organisation (CFO) gallery. This is 62% of the potential market.

Gallery attenders are difficult to characterise using conventional methods. The demographic profile of current visitors to the CFO galleries, that is their gender, age, ethnicity, does not reveal very clear patterns. However, their socio-economic or psychographic characteristics, by which we mean their occupations, attitudes, motivations and mindsets, do reveal very clear patterns.

Unlike other population surveys of potential attenders that we have carried out, which have shown that the majority of people visit galleries because they are tourist attractions, 'to see or to do' the important landmarks in the area, this research revealed that the largest single motivation, for potential gallery visitors in Scotland, was self-improvement. This is an important finding as we know that those who are seeking further knowledge about the arts, or intellectual stimulation, are generally more likely to visit contemporary art spaces than those who visit galleries as an extension of sight seeing.

One third of the potential audience is made up of 'risk takers'. This means that they are open to attending exhibitions by unknown artists where they have received little prior information or endorsement. Cautious Gamblers, those who need more endorsement before visiting a gallery, make up over 40% of the potential market. Any audience development scheme should address this need for more prior information about the collection or exhibition.

The comments of the mystery visitors supported the findings from the qualitative research by Robb¹ and other extant research into the contemporary visual arts. Some visitors commented that they were not able to relate to the work, that they did not have enough background knowledge to appreciate it and that the galleries could have provided more information to illuminate the exhibitions. On the whole, visitors enjoyed the gallery spaces, but suggested that there was 'not enough' displayed to merit a special trip.

¹ Denis Robb, Results of Research in the Contemporary Visual Arts, The Research Practice, 1992, Arts Council England

This type of comment, of course, could be related to the fact that they, on the whole, did not feel that they received much benefit from the art displayed or had to travel large distances to get to relatively small spaces.

This research reveals that there is a very large potential audience for contemporary art in Scotland but 43% of this market is deterred from visiting contemporary spaces through a combination of factors. The main one of these is lack of awareness and information: many people were not aware of galleries' existence or of their current programme. This is generally a reflection of woefully inadequate marketing budgets and lack of specialist staff. Another reason is lack of appeal, publicity material that fails to provide helpful information and buildings and or staff that do not appear welcoming. Then there is the perception of contemporary art. Contemporary art is associated with risk and many people are resistant to exposing themselves to risk. This risk might be feelings of embarrassment and inadequacy; a failure to connect or understand; appearing foolish in front of companions or children; wasting time. Once people find this fear of risk is confirmed they tend not to expose themselves to it again. Most people are looking for some sort of guarantee or reassurance from an art gallery.

The majority of people, whether they are ordinary members of the public or students of art, require more information on contemporary art than they are generally provided with by galleries. This is information in advance, as well as information on the visit.

Information in the form of publicity, orientation guidance and interpretation helps to minimise the risk for potential visitors. It helps to overcome the questions raised when faced with an unknown artist's name or an impenetrable exhibition title; it helps to locate and find out more about the gallery; it compensates for low brand strength of a gallery or artist; it helps a visitor find their way into and around an unfamiliar space and it helps gain insight into what might be baffling art that the visitor desperately wants to understand or gain access to.

Galleries therefore need to be concerned not just with attracting new customers, but also with encouraging existing and potential audiences to engage more deeply with the art and artists that they exhibit.

1.1 Recommendations

An Audience Development Strategy with an objective of developing a larger and more diverse audience for Scotland's contemporary visual arts venues requires the following:

- Clear aims, objectives and strategy with targets set for each participating gallery with benchmarks and an evaluation strategy.
- Clarity on target segments and a prioritisation of target segments to ensure that resources are being channelled cost effectively, and organisations are not being expected to develop an unrealistic number of different types of hard-to-reach market segments.
- Help for galleries to develop an approach to segmenting their existing and potential markets on a psychographic basis, rather than relying on socio-demographics.

- Recognition that the most inexpensive form of Audience Development would be to target present cultural consumers, who don't happen to use the smaller contemporary galleries.
- Development of a Gallery Go- type scheme aimed at drawing in people who are interested in art but require a high level of introduction and interpretation to get the most out of contemporary art.
- The development of a centralised E.list for cultural Risk Takers in Scotland - these would be open-minded, culturally active individuals who wish to be kept informed about innovative, cutting edge work taking place in Scotland including festivals. This would require an active recruitment campaign and the pooling of existing lists by participating organisations. This need not be limited to visual arts audiences.
- Guidelines published, drawn from a search of secondary literature, on how to attract specific target groups to contemporary visual arts, with case studies, for example: teenagers; minority ethnic groups; C2DEs.
- Regular meetings of the CVA organisations to exchange information, share practice and assist in professional development. The organisation of visits to successful visitor-focused organisations elsewhere in the UK, presentations and research sharing.
- Financial resources available for Gallery-Go-type scheme; collaborative marketing schemes; pilot audience development projects; increased awareness raising activity; database recruitment.
- The development of a post of Coordinator for the Visual Arts Audience Development Strategy to help co-ordinate collaborative schemes and collate intelligence and good practice case studies.
- The production of an advocacy document to harness support for the development of larger audiences for contemporary visual arts.

2 Introduction

2.1 The role of marketing and audience development within galleries

Until 10 years ago the role of marketing and audience development in art galleries was barely articulated compared to the activity undertaken in these areas by performing arts organisations.² This lack of interest in audiences could be seen as being a major factor impacting on audiences and a real barrier to attendance.

One reason for this lack of interest in the audience was an over-riding concern by galleries to be seen to be addressing peers within the visual arts sector and to be seen to be prioritising a role in critical debate. The primary audience therefore was the peer group. A further more practical reason has been a lack of available funds for marketing and audience development and no immediate return on investment for efforts made to develop audiences.

A great deal has changed in the intervening years. Under successive governments publicly-funded organisations have been encouraged to become more market-focused and increase earned income to compensate for a decline in public funding. Organisations are under increasing pressure to acknowledge public accountability and to address social exclusion issues by increasing their access to a wider and larger diversity of people.

In addition to this, individuals such as Peter Jenkinson when he was at Walsall and David Fleming when he was in Tyne and Wear braved the criticism of peers and illustrated that developing audience-focus does not necessarily equate with dumbing-down or artistic compromise.

In more recent years the Tate and other national organisations have engaged in this change process to make audience-focus an acceptable position for a major institution to adopt. The result is the growing acknowledgement that there are large numbers of the British public: intelligent and articulate people, inquisitive and culturally-hungry life-long learners, students and children, who welcome, respond to, and are benefiting from, these more visitor-friendly venues. Contemporary art shows little sign of being any less intriguing to these people than any other subject, rather it is the opposite. For a sector that is all about innovation, it is ironic that the contemporary venues, in some instances, have been the slowest to change, although change is starting to take place. The core funded organisations in Scotland have also experienced some changes. They are now more likely to have specialist audience development staff either established within the organisation itself or are able to bring in this expertise from a shared resource made available by joint funded initiatives, though there may not have been an increase over the past 3 years of these specific audience development resources. These galleries also have in place marketing and audience development plans and clearly defined priority markets. Whilst for some galleries internal changes, such as dedicated marketing posts, evaluation methods in place and increased market intelligence about their markets has helped them change their approach to marketing and audience development, there is not necessarily a consistent change across all the CFO galleries.

² Morris, G. Marketing Museums and Galleries ACE and NWAB, 1992.

This research project is driven by the desire of the Scottish Arts Council to help visual arts galleries evaluate their current audience development and marketing programmes and to make available resources to support all the CFOs. Because of increasing accountability to funders, an ever more competitive environment and the need to be accessible to more people, funded galleries need to know more about who their audiences are; what motivates or deters them from attending and how can they be reached cost-effectively.

Scottish Arts Council recognised that whilst venues can monitor the number of visitors through their doors, it is often not within their financial resources to carry out consistent and meaningful research on their markets. In commissioning Morris Hargreaves McIntyre to design and help implement this project the Arts Council intended to address these issues and meet the needs for audience research.

2.2 Research Objectives

The main research objectives were:

- To undertake a quantitative population survey across seven regions in Scotland (Highlands and Islands, Grampian, Tayside, Fife & Central, Edinburgh & Lothians, South of Scotland (Borders, Dumfries & Galloway), Ayrshire & Lanarkshire and Glasgow & environs) which would identify and quantify current and potential attenders. This survey was particularly intended to provide statistical evidence of the current visitor profile for visual arts exhibitions in relation to a number of key issues including cultural diversity, gender, age, economic class, disability, geographical origin etc. As well as to assess the potential visual arts market
- To undertake a quantitative, year-long in-venue visitor survey at contemporary galleries funded by Scottish Arts Council. This survey was designed to provide statistical evidence of the current visitor profile at contemporary galleries in relation to a number of key issues including cultural diversity, gender, age, economic class, disability, geographical origin and psychographic profile.
- To conduct qualitative research in the form of focus groups and mystery visitors, who would provide further insights into motivations and barriers for attendance
- To identify issues for non-attenders particularly with key groups such as Black and Minority Ethnic audiences, families with young children and people with disabilities. Also, to evaluate the effectiveness of existing approaches to publicity

This report is presented in five sections:

1. Current Gallery Visiting in Scotland

The first section discusses Scottish gallery visitor patterns.

2. Why do people visit art galleries?

Gallery visits can be driven by a variety of motivations. These motivations determine the types of gallery experiences that attenders seek out, or indeed, the types of exhibitions that they would be open to visiting. If galleries want to better serve their existing audiences, as well as attract new visitors, they must understand visitor motivation so as to ensure that they are addressing these needs.

3. What type of people visit art galleries?

Before planning an audience development scheme, it is important to understand the composition and motivations of the current attendee base. To this end, the second section presents the majority of the primary research findings regarding current attendees and gives an audience profile for the current visual arts audience in Scotland, including that of visitors to the participating contemporary galleries. It outlines:

- Who visits Scottish art galleries, in terms of mindset and attitudes
- How this psychographic profile affects gallery attendance
- What we know about gallery visiting behaviour

4. What do people get out of visiting galleries?

This section analyses the ways that Scottish Arts Council funded galleries are currently meeting the needs of their visitors. The quantitative data, as well as comments from the focus groups, reveal what the current attendees perceive to be the strengths of the galleries. The mystery visitor observations suggest what potential gallery attendees would enjoy about visiting the galleries. By comparing the two, galleries can find ways of catering to both current and potential attendees, and making sure that their current strengths do not get overlooked, or limited, in future audience development programmes.

5. How can we reach potential gallery attendees?

This section investigates how galleries can communicate the most attractive 'offer' to potential attendees. It is important to explore what types of publicity are most effective and ways to minimize potential barriers to attendees.

6. Factors that impact attendance

The final section explores how the barriers impact attendance and constrain audience growth. It discusses how they can be minimized.

3 Methodology

3.1 Quantitative Research

In the quantitative population survey, 2,500 people in seven regions were consulted, resulting in the completion of 900 full, in-depth interviews. The catchment area for this research included the Highlands and Islands, Grampian, Tayside, Fife & Central, Edinburgh & Lothians, South of Scotland (Borders, Dumfries & Galloway), Ayrshire & Lanarkshire and Glasgow & environs.

The in-venue research was carried out at eight Scottish Arts Council funded contemporary galleries (Collective Gallery, Edinburgh; Crawford Arts Centre, St Andrews; DCA, Dundee; The Fruitmarket Gallery, Edinburgh; Talbot Rice Gallery, Edinburgh; Glasgow Print Studio, Glasgow; Project Ability, Glasgow; Street Level Photoworks, Glasgow). In 2003-04, these eight venues recorded a total of almost 200,000 visits. Assuming there is no crossover in attendance, and that each gallery has its own discrete market, we estimate that these visits were made by 63,000 people.

Each venue had a target of 200 interviews to be collected over twelve months between Spring 2003 and Spring 2004. In the case of Talbot Rice Gallery their data collection took place from Spring 2004 to Spring 2005. Two venues achieved in excess of this target, four galleries carried out over 100 interviews and one venue collected 45 surveys. Whilst the venues have a commonality in that they are all contemporary galleries, there were significant differences in their visitor figures, ranging from 4,912 to 103,430 visits. These differences in visitor figures, and hence visitor flow, may have made the targets easier to achieve in the busier venues; Project Ability however, succeeded in collecting 210 surveys with 5,703 recorded visits, proving that the target was achievable, even at the smaller galleries.

For both the population and in-venue surveys, only a sample of the 'population' has been interviewed so we cannot be certain that the figures obtained are exactly those we would have found had everybody been interviewed (the 'true' values). However, for any percentage given, we can estimate 'confidence intervals' within which the true values are likely to fall. For example on a question where 30% of the people in a sample of 300 respond with a particular answer, the chances are 95 in 100 that this result would not vary by more than five percentage points from a complete coverage of the entire population using the same procedures. The following table shows that the sampling tolerances vary with the size of the sample and the percentages involved. The larger the sample, the smaller will be the confidence interval and the more accurate the measurement.

Sample sizes	95% Confidence Intervals		
	10% or 90% ± %	30% or 70% ± %	50% ± %
50	9	13	14
100	6	9	10
150	5	7	8
250	4	6	6
300	3	5	6

3.2 Focus Groups

We recruited and moderated four focus groups, two in Edinburgh and two in Glasgow. In each city we ran one group with contemporary visual arts attenders and the other with individuals who would definitely consider attending CVA galleries but did presently do so.

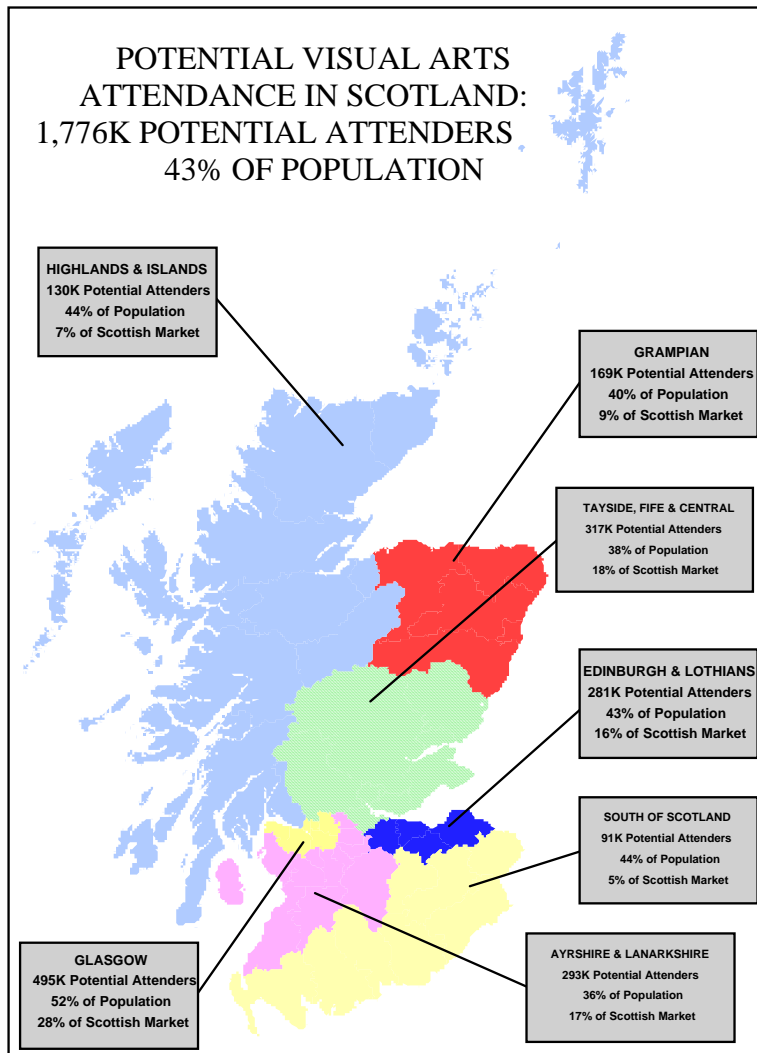
3.3 Mystery Visitors

A total of 25 mystery visitors were recruited from across the regions on the basis that they were interested in contemporary visual arts but had not visited the gallery before. They were asked to visit one or two of the core funded CVA galleries and complete a qualitative semi-structured questionnaire on:

- Existing awareness of galleries
- Perceptions
- Reasons for selecting their choices of galleries
- Obtaining information and orientation guidance
- Pre-visit expectations
- Locating and accessing the gallery
- Response to the exhibition (s)
- Use of, and response to, information and interpretation
- Response to visitor services
- Evaluation of support facilities
- Evaluation of customer care
- Post visit reactions
- Likelihood of returning

4 Gallery visiting in Scotland

The population survey revealed that visiting galleries is a very popular cultural activity in Scotland. Almost half of the population (43%) would consider visiting an art gallery or exhibition. Similar research conducted by NFO System Three in May 2002 states that the figure for the percentage of the population that ever attended art galleries is 42%. This small variation can be accounted for by a slight difference in the wording of the question. Both research projects report that art galleries and exhibitions are certainly the most popular and accessible art form. The following map illustrates the size of the potential market in each region.



One factor that could impact on gallery attendance is the high dominance of rural or rugged terrain in Scotland. Of the 5 million population, 3 million live in the Glasgow/Edinburgh central belt. It might be assumed, therefore, that much of the population (the remaining 2 million living in more rural regions) might not be attracted to pursuits more often associated with urban life-styles; but this is far from the case. As the maps on the following pages show, propensity for gallery attendance is spread fairly evenly across the country. Glasgow is notable, in that 52% of the population are

potential gallery attenders; but the potential audience in the remaining six regions are still relatively high, falling between 38% and 44%.

Actual visiting levels (the market penetration) are lower than propensity. About one quarter of the population (24%) have attended an art gallery in the past 12 months, with a further 17% having visited in the past 5 years. This equates to a current market penetration of 57%, though it ranges across the individual regions:

66%	Grampian
47%	Highlands and Islands
41%	Tayside, Fife & Central
60%	Edinburgh
70%	Borders
45%	Ayrshire & Lanarkshire
73%	Glasgow

This means that within each region there are significant numbers of visual arts interested people who could be persuaded to visit:

58k	Grampian
69k	Highlands and Islands
186k	Tayside, Fife & Central
111k	Edinburgh
37k	Borders
162k	Ayrshire & Lanarkshire
132k	Glasgow

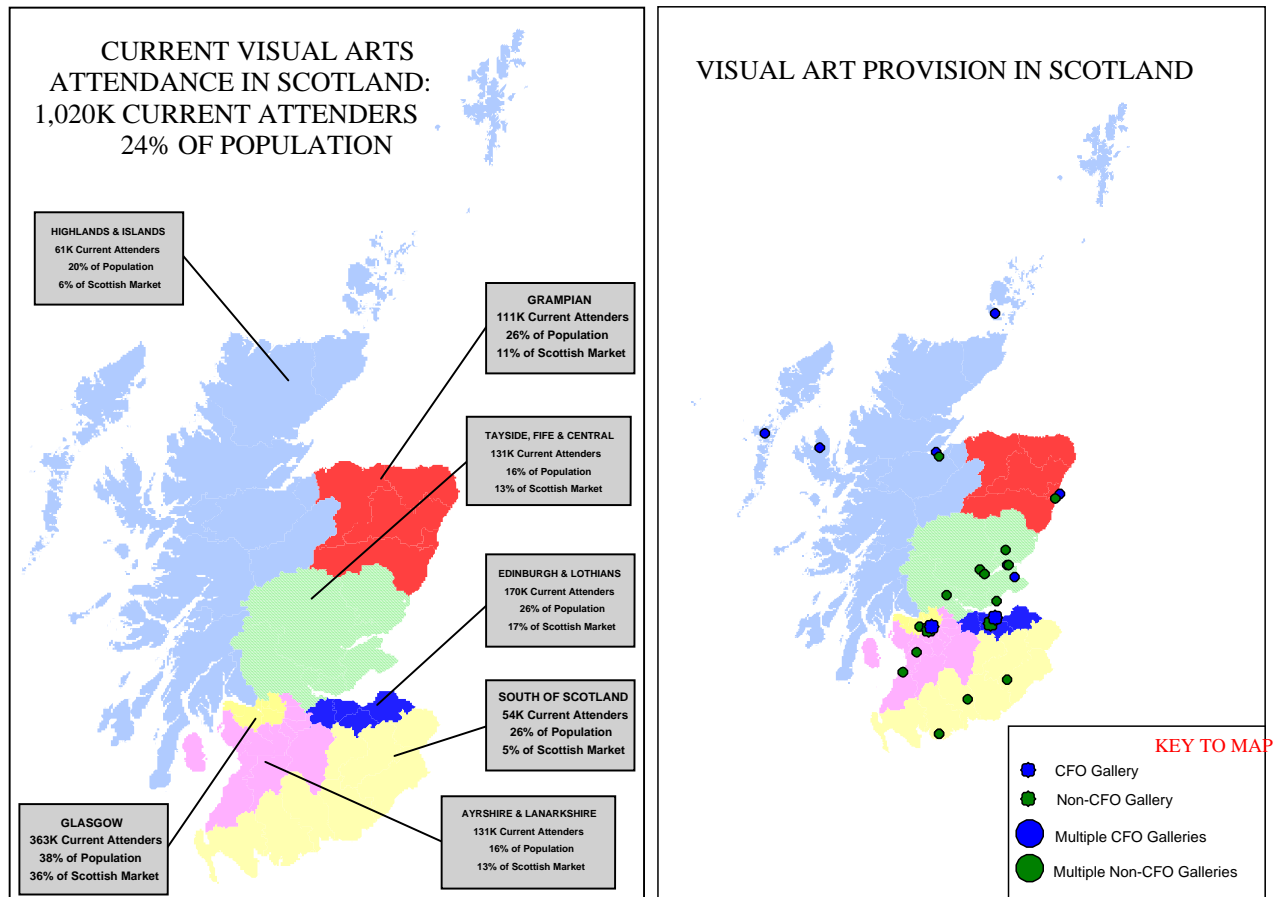
It would stand to reason that gallery provision accounts for this variance in penetration. As the maps on the following pages show, however, provision and attendance do not necessarily follow the same pattern. At first glance, there seems to be evidence to support this, as the South of Scotland (Dumfries & Galloway and Borders) has no CFO galleries and only accounts for 5% of the current attender market. This region however, has a market penetration of 70%; whereas Tayside, Fife & Central has two CFO galleries and accounts for 13% of the Scottish visual arts attenders, but only has a 41% penetration.

Perhaps the most obvious case against the provision argument can be found in the contrast between Edinburgh and Glasgow. Even though Edinburgh has 6 CFO galleries, accounting for 33% of the provision nationwide, it only accounts for 17% of the current visual arts visitors in Scotland. One explanation of this low percentage could be that the Edinburgh gallery market is saturated, that is to say that having six galleries in the city has no advantage over having only two or three if all of the potential visitors already attend. The penetration figures from Edinburgh and Glasgow suggest, however, that is not the case. In Glasgow, where there are 5 CFO galleries, the market penetration is 73%; whilst in Edinburgh penetration is 60%. Compared to other major cultural cities, Edinburgh still has a fairly high gallery market penetration, so it makes more sense to investigate why Glasgow's is so inordinately high. Anecdotal evidence and assumed wisdom would support the theory that attendance is still raised from Glasgow's year as a City of Culture and the idea that the city has a history of egalitarian gallery visiting, the city also holds one of the largest municipal collections outside London, with very high quality collections including the very popular Burrell Collection. A further reason for the high market penetration in Glasgow may be that Scotland has been on the international map with regard to

the visual arts for some time. These suggestions are however speculative, additional research would be required to determine why Glasgow has such a high incidence of gallery visiting.

Outside of this central belt, other regions also have higher attendance figures than their gallery provision would suggest. Grampian, for example, with only 6% of the CFO gallery provision, has 11% of the Scottish gallery market. Clearly, provision and attendance do not have a direct correlation. Other factors that may have some bearing on the variance in potential or actual attendance could include distance to the galleries, ease of transport, marketing of the arts across the regions and the prevalence of other leisure activities available.

In terms of the size of the market for CFOs rather than galleries generally, 27% of the population in Scotland, or 1.1 million people would consider attending a CFO. This does not include the 384,000 people living in Ayr and Lanark and the South of Scotland, who would consider attending a gallery but have no CFOs in their region. In the two years prior to this research, 359,000 people or 8.6% of the population had been to at least one CFO; this equates to a market penetration of 32%, or in other words, there were 755,000 people in Scotland who could be persuaded to visit a CFO but hadn't done so in the previous two years.



5 Who visits art galleries?

In building a picture of the audience we have started with the demographic profile of current and potential attenders.

5.1 Social grade

As shown in the table below, the majority of gallery attenders are in the higher income groups. There is some variance across the regions, though, with regard to the attendance in lower income groups, in Glasgow and Edinburgh, the patterns are as we would expect, with C2 visitors comprising 11% of the attenders in each city. In the less metropolitan areas of the Highlands & Islands and the Borders, this group makes up 25% and 28% of the audience, respectively. This demographic pattern demonstrates the tendency within the Scottish population to find the arts relevant across all the different strata of society, not just the elite.

The pre-dominance of higher income groups (ABC1s) is even more acute at the contemporary venues surveyed. Whilst the proportions of AB visitors are very similar to the figures for general gallery attendance, a higher proportion of C1s visit contemporary galleries. This could be explained by the fact that the contemporary venues are attracting a younger audience of students and young professionals; equally, they might be less appealing to C2s than traditional galleries.

The proportion of DE visitors is similar to general gallery attendance and possibly due to this group consisting partly of ex-students or artists, who are either unemployed or in casual employment.

GEOGRAPHICAL AREAS	AB	C1	C2	DE
	%	%	%	%
Grampian	33	36	23	9
Highlands & Islands	28	42	25	6
Tayside, Fife & Central	36	33	20	11
Edinburgh	44	38	11	8
Borders	30	34	28	9
Ayrshire & Lanarkshire	32	40	16	12
Glasgow	41	32	11	16
SCOTLAND	37	36	17	11

GALLERIES	AB	C1	C2	DE
	%	%	%	%
Fruitmarket	32	52	9	7
Collective	20	65	6	9
Crawford	40	44	3	13
DCA	35	43	15	7
GPS	37	42	5	16
Project Ability	33	54	6	7
Streetlevel	25	57	6	12
Talbot Rice Gallery	71	17	2	2

GALLERIES	Employed	Self-employed	Unemp.	Retired	Studying	Other
	%	%	%	%	%	%
Fruitmarket	49	14	3	7	22	5
Collective	44	14	10	-	28	4
Crawford	46	8	2	19	19	6
DCA	41	9	2	14	33	1
GPS	30	11	5	20	20	14
Project Ability	56	8	11	7	10	8
Streetlevel	45	11	5	4	21	14
Talbot Rice	39	18	4	16	22	1

5.2 Life Stage Profiles

Extant arts research reveals that different patterns of attendance can be found among life stage groups. Families, for example, tend to visit venues that will be of interest to children. MORI research indicates that 20% of adults with children ages 4 and under felt that a gallery visit would not interest their child. According to the same research, over a third (37%) of students had visited a museum or gallery in the past 12 months though they tend to be infrequent visitors. The group accounting for the largest proportion of gallery visitors, however, is independent adults. In Scotland, however,

this group made up 41% of the gallery attenders; second to people between the ages of 25 and 44 (43%). (There is no research in the public domain which looks specifically at the relationship between life stage profiles and contemporary art galleries).

The table following shows the breakdown of the current Scottish visual arts audience by age.

GEOGRAPHICAL AREAS	Young People 15-24	Young Adults and Families 25-44	Independent Adults 45+
	%	%	%
Grampian	16	26	49
Highlands & Islands	11	34	53
Tayside, Fife & Central	18	41	41
Edinburgh	19	51	31
Borders	12	33	56
Ayrshire & Lanarkshire	16	41	43
Glasgow	16	46	38
SCOTLAND	16	43	41

The greater appeal of the contemporary venues to a younger, student audience is reflected in the overall age-profile of their visitors. Whilst the proportion of 25-44 year olds at the contemporary venues is very similar to that at galleries in general, the proportion of under 25s at most of the contemporary venues is twice that found at galleries generally.

GALLERIES	Young People Under 24	Young Adults and Families 25-44	Independent Adults 45+
	%	%	%
Fruitmarket	32	41	27
Collective	42	50	8
Crawford	29	35	36
DCA	40	29	31
GPS	22	35	43
Project Ability	15	53	32
Street Level	33	48	19
Talbot Rice	17	27	49

5.3 Gender

The gender breakdown in the Scottish visual art audience shows, as with most other arts markets, that women make up a slightly higher percentage (54% female, 46% male). There was very little variance between the regions. The audiences at the contemporary galleries showed a similar split of male to female visitors.

Whilst this demographic data is interesting we find stronger and more meaningful patterns when we examine visitor motivations and their psychographic profile, rather than simply defining the audience using demography.

5.4 Psychographics

This section goes on to explore visitor motivations and attitudes and in so doing builds a picture of the audience that has greater depth and provides a clear indication as to the needs of the audience.

Whilst demographics and motivations help us to understand, define and classify different types of gallery attenders, psychographic characteristics help us understand why some people are more open to contemporary art galleries than others. By psychographics we mean the psychological characteristics, attitudes, occupational orientation and mindsets of people. Research has found that the more discretionary and niche market the activity, the more relevant are the psychographics of the market.

The type of exhibitions that people are open to often reflects their mindset. Whilst some people prefer work that reflects their expectation that art should show great skill and fulfils their idea of beauty, others appreciate the unsettling and provocative nature of some contemporary art and enjoy the intellectual challenge it presents.

Morris Hargreaves McIntyre research has also found the profile of contemporary visual arts attenders are:

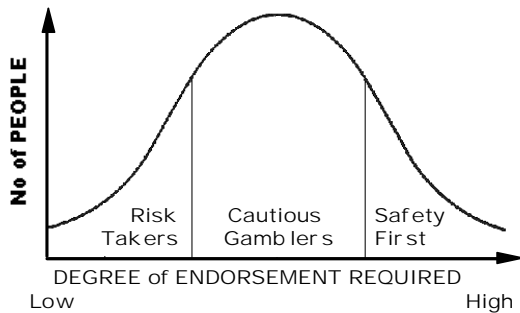
- Educated to tertiary level and beyond
- Often vocationally involved in the visual and more general arts sector: artists, students of art, art teachers and lecturers.
- Involved in education (circa 20%), health (circa 10%) & media or communications (circa 5%)
- Confident in own responses
- Often motivated to attend art galleries for self-improvement rather than leisure or entertainment

A useful way of thinking about what characterizes visual arts attenders is to consider how receptive they are to innovation and taking risks. Contemporary arts attenders have a similar profile to those groups known in marketing as innovators, early adopters or inner directed. Exploring the characteristics of these groups can help clarify what makes certain people attend galleries, and suggest ways of encouraging a wider range of visitors.

Innovators and Early Adopters are:

- Those within any given market who are prepared to take up a new idea or product very early in its life-cycle and advocate it to other people
 - Peer-group leaders, trend-setters
 - Confident in their own opinions
 - In need of little endorsement for their ideas
-
- Inner-directed people are:
 - Self-sufficient
 - Not in need of reassurance from other people or affirmation of other people to feel confident
 - Well balanced and independently minded

Innovators, early adopters or inner-directed people normally account for less than 20% of the population but make up the majority of visitors to contemporary visual art galleries. Morris Hargreaves McIntyre has developed this model to show how the market for any given artform can be divided into three broad groups.



The Risk Takers are those who are naturally open to innovation, including artists and creative people, who can make up their own minds about what they want to see and participate in. They tend to set trends and pass around and rely upon word of mouth recommendation. Their enthusiasm can push a new exhibition or artist into wider markets.

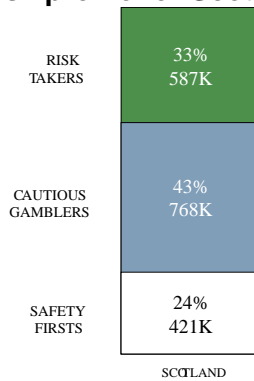
The Cautious Gamblers need a certain degree of endorsement before they feel happy to participate in something. This would take the form of media reviews or widespread media attention, popular word-of-mouth recommendation. This group is open to new experiences but need reassurance in order to minimise the risk they are willing to take with something.

The Safety First Group prefers to stick with things they feel sure of, that reflect their own value systems and provide them with a feeling of security and reassurance. This group can be very conservative or reactionary and are especially vociferous in their opinions on contemporary art.

Research suggests there is tremendous scope for galleries to increase their audiences by extending their appeal to people lying within the Cautious Gambler group. Thinking in terms of levels of confidence and what people need to feel more confident about visiting galleries is an effective way to begin building new audiences.

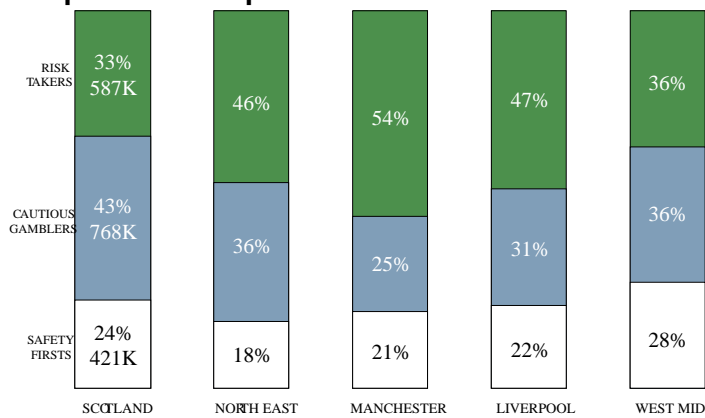
This analysis of the profile of motivations to visit galleries informs our understandings of the key findings of the primary research carried out for this project. The chart below shows the attitude to risk within the art interested market in Scotland - those in the population who either currently visit galleries or would consider doing so.

Risk profile for Scotland



The risk profile of the Scottish gallery market is also compared against gallery markets we have researched in other regions and cities in England. As it reveals, there is a comparatively high number of Cautious Gamblers in Scotland, which should be kept in mind when planning marketing and audience development programmes.

Comparative risk profiles



The high proportion of Risk Takers found amongst contemporary gallery attenders in previous research conducted by Morris Hargreaves McIntyre is also evident at the eight venues surveyed in this research, where between one half and three-quarters of visitors regard themselves as Risk Takers.

GALLERIES	Risk Takers	Cautious Gamblers	Safety Firsts
	%	%	%
Fruitmarket	54	35	11
Collective	71	23	6
Crawford	61	29	10
DCA	59	31	10
GPS	50	40	10
Project Ability	73	21	6
Street Level	72	23	5
Talbot Rice	50	43	7

The perceived risk taken by contemporary art gallery attenders in visiting an exhibition may be qualified by the fact that some galleries have very high proportions of visitors who are arts professionals and/or have a pre-existing knowledge of contemporary visual art.

KNOWLEDGE OF CVA	Specialist	General	Little
	%	%	%
Fruitmarket	30	56	14
Collective	65	23	12
Crawford	15	48	37
DCA	18	45	13
GPS	25	64	11
Project Ability	17	61	22
Street Level	54	45	4
Talbot Rice	31	51	16

INVOLVEMENT IN CVA	Vocational	Non-Vocational
	%	%
Fruitmarket	49	51
Collective	84	16
Crawford	31	69
DCA	46	54
GPS	45	55
Project Ability	37	63
Street Level	75	25
Talbot Rice	50	50

6 What do people want from a visit to an art gallery?

6.1 Motivations

Different people have different ways of using art galleries, different needs and expectations and different expectations of the behaviour of other visitors. The following analysis of the different motivations for gallery visiting has been developed from extensive qualitative research which Morris Hargreaves McIntyre has undertaken for a wide range of galleries:

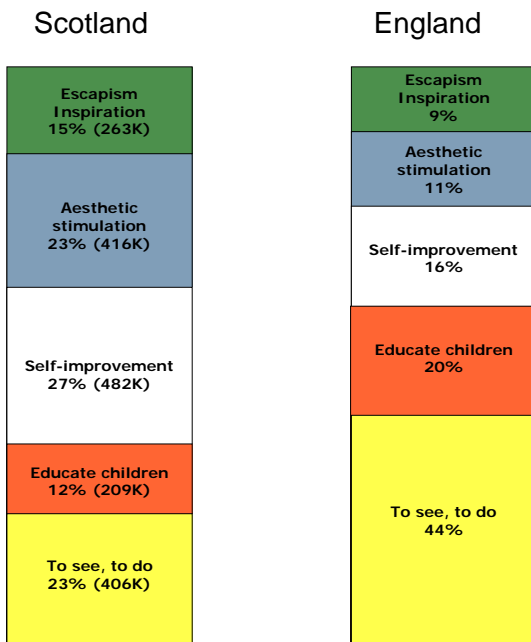
Tate Liverpool; Tate Britain; Tate Modern; Camden Arts Centre; Whitechapel Art Gallery; Manchester Art Gallery; Whitworth Art Gallery, Manchester; New Art Gallery; Walsall; Wolverhampton Art Gallery; IKON; Baltic centre for visual arts; Liverpool Biennial; M6 Group.

Not all of these research projects focused exclusively upon contemporary art since some of the organisations have historic, modern and contemporary collections.

Morris Hargreaves McIntyre carried out a population survey in the North East of England that enabled us to quantify the different motivations people have for visiting art galleries generally. These motivations can be categorized as:

- To see, to do as tourist, social activity
- Educate children or others
- Self improvement
- Aesthetic Stimulation
- Escapism, Inspiration

The pillars below show the breakdown of motivations that resulted from the Scottish Arts Council research as well as previous Morris Hargreaves McIntyre research into the visual arts in England.



The following section goes on to describe each of these types of visitors. The statements in brackets relate to the options that respondents were asked to choose from during the quantitative research.

To see, to do as tourists or as a social activity 23%

(Statement: They are often one of the major visitor attractions in an area)

Some people see galleries as places you visit as a tourist to a foreign city: eg you need to visit the National or Tate when you go to London; the Louvre in Paris; the Uffizi in Florence etc. Outside of these experiences these people might never visit galleries closer to home:

When I went to the Cezanne exhibition I felt that there were people there just doing it. They were going because it was something that they could tick off on a social list or an itinerary.³

Some people wander into art galleries simply because they are on a leisure trip to the vicinity and are pleased to take in activities that are incidental to their main purpose but enhance the trip.

I also sometimes go to London on work trips and quite often will find a leisure activity down there as part of the work trip (CVA Attender Edinburgh)

Some people respond to publicity for major exhibitions by artists they have heard of, and will travel a long way to see a major exhibition: Salvador Dali, Monet, Cezanne, Picasso etc. These people do not necessarily respond to local galleries or exhibitions by artists they have not heard of or where the quality of the work is not widely endorsed.

The Picasso exhibition brought me here. I just go for things that I actually like.⁴

I will go if there is something special like a Monet exhibition or something on at Edinburgh because they really do it well (CVA Non-Attender Glasgow)

Entertainment, Social Interaction (included in the 23%)

(Statement: They're a nice place to spend time with friends and family)

Some people see galleries as places that feature in their leisure and social activities and make the effort to keep informed about what is on and where and try to make the time to visit, talking other people into visiting with them.

We have been to the Dean Gallery but we made a special outing to get there and usually it is when friends are here. (CVA Attender Edinburgh)

Another thing about the Modern Art Gallery is if you are showing friends around you can say we will go to the gallery and then have lunch and it is a nice day out it doesn't mean that you wouldn't go to other galleries but sometimes you want to make a day trip and just get that bit extra. (CVA Attender Edinburgh)

I like to go somewhere as well where you can get something nice to eat so I make it a whole day. (CVA Attender Edinburgh)

³ Robb, D. Results of Research into the Contemporary Visual Arts. The Research Practice, 1992.

⁴ Robb, D. ibid.

Some people visit art galleries as part of organised groups for example students, members of social and specialist interest societies.

Some people visit galleries as a pleasant way to spend time socialising with someone else. Here the visit to the gallery is sometimes peripheral to the desire to spend time with other people or individuals.

Recent research for a consortium of London museums and galleries into the impact of late night openings has revealed that there is a group of Londoners who welcome the idea that London's galleries should have late evening events which combine social activities with the opportunity to visit the gallery.⁵ They are attracted by the convenient timing that fits in with their busy, professional lifestyles, the informality and the opportunity to introduce non-gallery-visiting friends to a new venue without the pressure to be intellectual or well-informed.

Educating children or others 12%

To take children to encourage their interest in art

Parents and grandparents as well as adults on behalf of other adult friends, relatives or partners regard galleries as valuable informal learning experiences and opportunities to expand their own and others' cultural education.

Up until a few years ago when my girls became teenagers we used to go regularly on a Sunday to art galleries and places so I used to take them down. (CVA Non-Attender Edinburgh)

Self improvement, Research 27% and Aesthetic or Creative Stimulation 23%
(Statements: Art is something I'm particularly interested in, to improve my own knowledge or experience of art and artists, for aesthetic pleasure)

Some people are actively engaged and interested in the visual arts for educational or vocational reasons and actively pursue this interest by seeing as many relevant exhibitions as possible.

I am actually doing art history up at the university and so I am now beginning to learn a bit more about what I see and it makes you go back again because you see it in a different light and so I am beginning to understand a little bit more where as before it was just going to look at what you like which I still do but I am beginning to understand a bit more. (CVA Non-Attender Edinburgh)

I am always searching for new ideas in paintings.⁶

I hoped to get something for my notebook. I go to galleries to get inspired.⁷

Others see galleries and educating themselves or their children about art as a vital form of personal development.

You generally go for an intellectual thing and to use your brain and it is about looking around and stimulating your senses and making you think. (CVA Non-Attender Edinburgh)

Just under one quarter of the population go for aesthetic stimulation, to see beautiful things.

⁵ Morris Hargreaves McIntyre research for Love Art Later, 2002.

⁶ Robb, D. *Results of Research into the Contemporary Visual Arts*. The Research Practice, 1992.

⁷ Robb, D. *ibid*

I like to see a picture and see sheer beauty. (CVA Non-Attender Edinburgh)

There was something at the one on Princes Street and I kept looking at it and then saw something else and then looked at it again and I kept seeing the picture differently and I must have been there half an hour staring at this picture. So something like that where I find the time goes and I don't know how long I have been there. (CVA Attender, Edinburgh)

It is a relationship in the pit of your stomach and if it is something that really appeals to you then you are transfixed and you will go back again and again to the gallery and it is a kind of raw emotion and you probably don't know why but that is what it feels like. (CVA Attender Glasgow)

And others visit time and time again to see 'old favourites' in the collection.

You can look at one kind of art and then the next time you go you can be in a different mood and enjoy looking at something else. (CVA Attender, Edinburgh)

I think you can go back time after time. Once a year to a museum and gallery and you get more out of it. (CVA Attender, Edinburgh)

I like going back to see the same paintings again and again over a period of time just to remind myself. (CVA Non-Attender Glasgow)

Isolation, Escapism and Inspiration 15%

(Statements: To escape and recharge my batteries, to get inspiration and be stimulated creatively)

Some people value galleries as places they visit spontaneously in order to escape from everyday stresses; seek solace, isolation; gain mental and spiritual uplift. For these people it is often the ambience of the building and the quality of the architecture that they like, as much as the art.

I did not really engage with the artwork I engaged with the space and the layout, it was a very contemplative experience but I did not engage with the idea of the artwork.⁸

I think you can relax and it is peaceful usually in a nice building as well like with the art gallery itself the building is absolutely stunning and you can go and sit (CVA Non-Attender Glasgow)

There is no one else there anyway I don't hear or see anything I am just looking at it and enjoying it. (CVA Non-Attender Edinburgh)

It is interesting this feeling of relaxation because I have always found that when I have gone into art galleries it is sort of a calming feeling you get. (CVA Attender Edinburgh)

For me I am really interested in the building. I like pillars and great sweeping stairs. I think that is why I don't like these new modern box buildings I would want to see the architecture. (CVA Attender, Edinburgh)

I just love the whole feeling of the place. I just find it so awe inspiring to see what people can produce with their imagination and the colours. I relax completely in a different sense and I just love it and could spend all day there and have done. (CVA Non-Attender Glasgow)

⁸ Robb, D. *ibid*

Well perhaps because it is different from your normal daily grind. It is a world that you don't normally enter at least not me because I couldn't lift a pen and draw you anything. As I say it is an entirely different world and wonderful to look at. (CVA Non-Attender Glasgow)

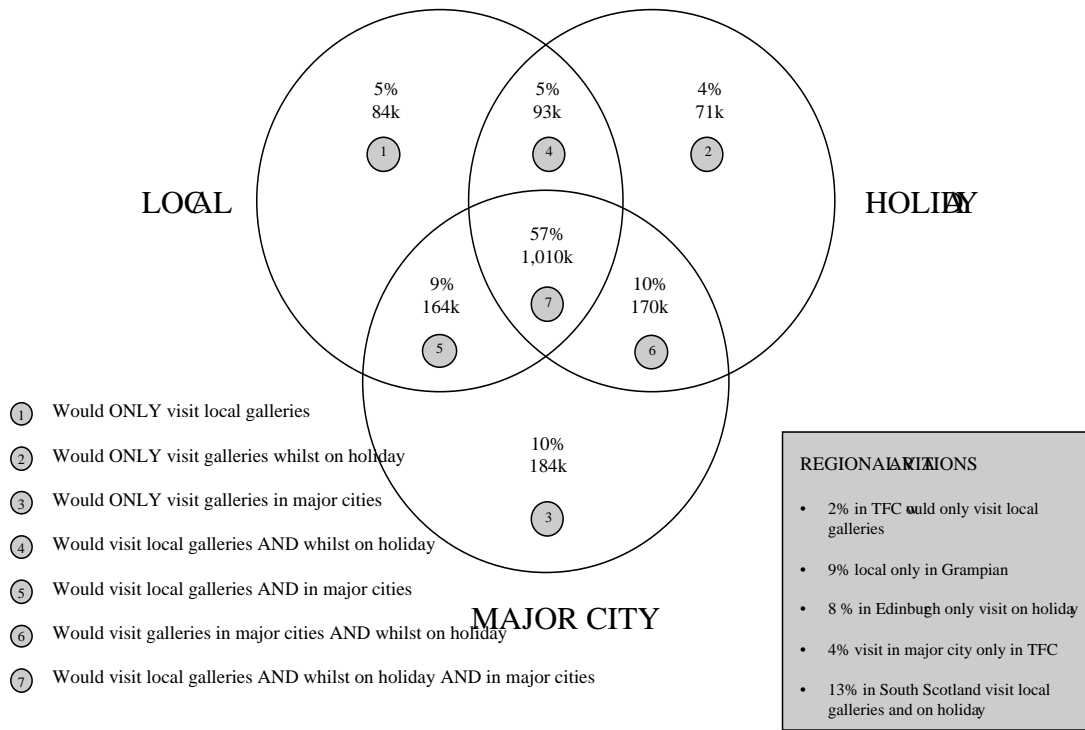
Whereas somewhere like the Tate Modern might attract people from all layers of the pillar, a smaller more specialised gallery would mainly appeal to those who are looking to meet needs towards the top of the pillar.

Findings on factors that drive visits from the population survey

Galleries have worked on the assumption that visitors are proactive and committed in their attendance. Research reveals that there are wide variations in degree of commitment, confidence and understanding represented within the gallery market, and a gallery that is really committed to audience development should address this diversity if people's needs are to be met. The fact that visitors are motivated by higher level reasons does not necessarily mean that they have a higher propensity to visit certain types of galleries. For this reason, we asked people with a propensity to visit, which types of galleries they would visit and for what types of exhibitions. The following Venn diagrams reveal the findings.

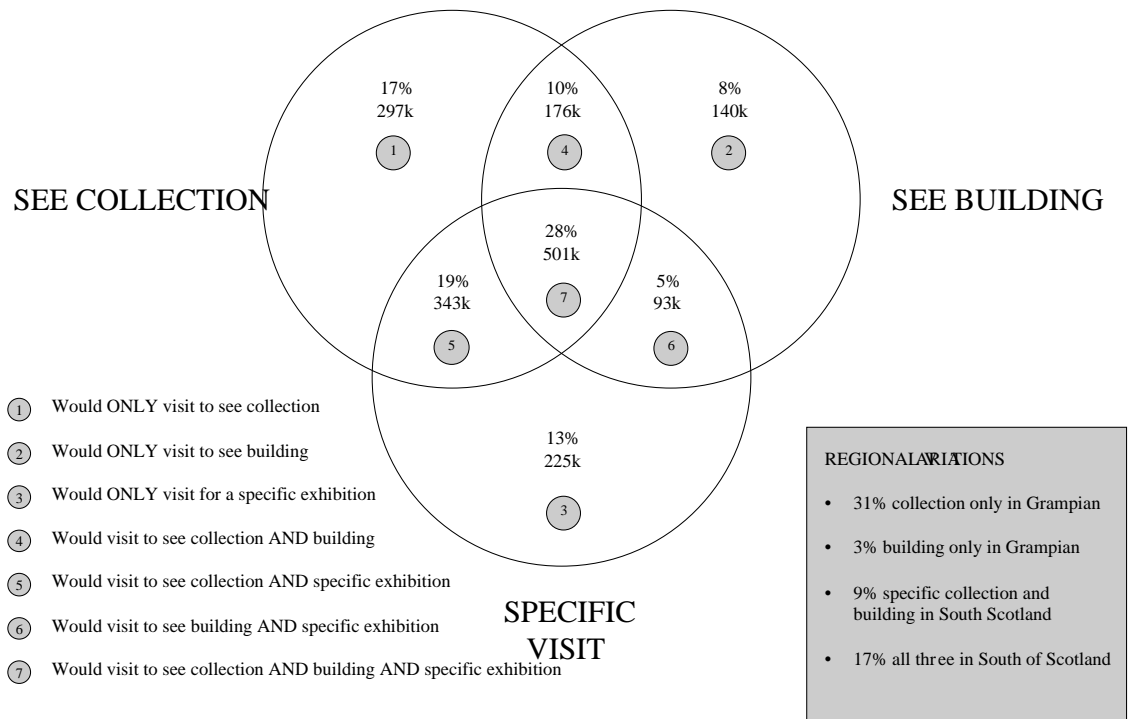
We know that a proportion of people only ever go to galleries whilst on holiday because they want 'To see, to do' a particular attraction, rather than out of a desire to see a specific exhibition. They visit because art galleries are important cultural landmarks; they generally view gallery visits as a social outing and a pleasant day out. In the diagram below, derived from data collected in the population survey, area 7 represents people who visit galleries locally, whilst on holiday and whilst visiting a major city. This figure is higher than we might expect, which correlates with the lower percentage of 'To see, to do-ers' in Scotland.

LOCATION OF GALLERY ATTENDANCE



The Venn diagram on the following page explores the extent to which the building, the collection or a specific exhibition is the main driver for a visit. Once again this reveals that the potential market is motivated by collections and exhibitions rather than just visiting famous buildings.

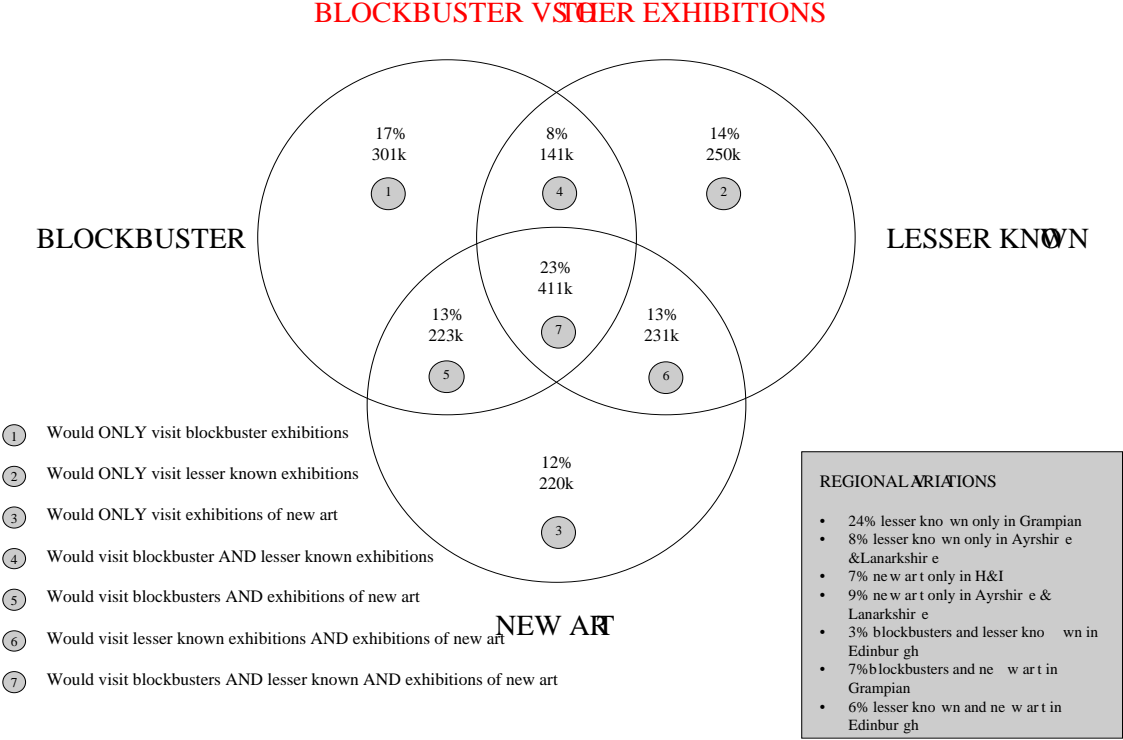
SPECIFIC VS GENERAL VISITING



The research amongst contemporary gallery attenders indicates that many of their visits are intentional, exhibition-driven outings.

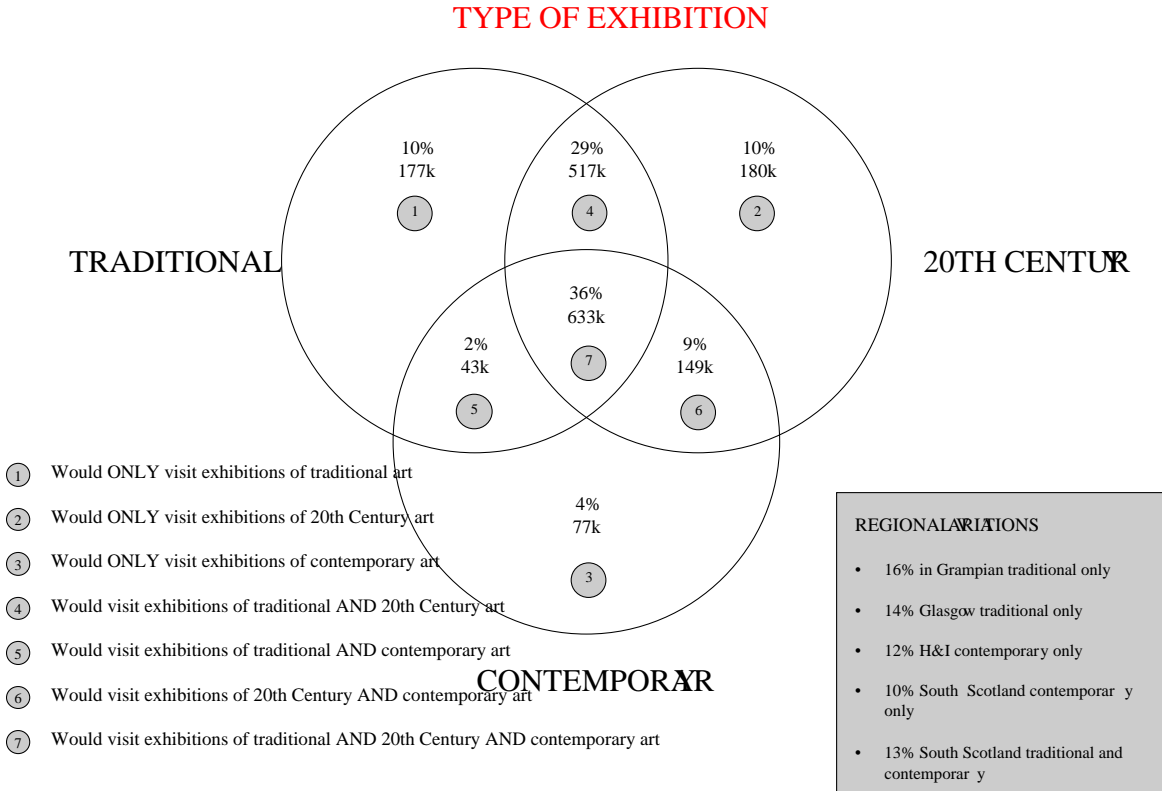
GALLERIES	Intentional	Incidental	Exhibition Driven
	%	%	%
Fruitmarket	72	28	70
Collective	55	45	50
Crawford	49	51	38
DCA	63	37	36
GPS	64	36	50
Project Ability	81	19	42
Street Level	52	48	36
Talbot Rice	68	30	54

As the diagram below shows, whilst 17% of the market would only go to see Blockbuster exhibitions majority of the potential attenders would visit exhibitions by lesser known and new artists, as well as Blockbusters. This data makes sense in light of the fact that the motivation driving the highest percentage of potential attenders is ‘Self improvement’, accounting for 27% of the survey.



Audiences at the eight galleries show a high propensity to take risks, that is they are willing to see work that is unfamiliar. These attenders would want to broaden their knowledge and experience by seeing new or lesser known artists.

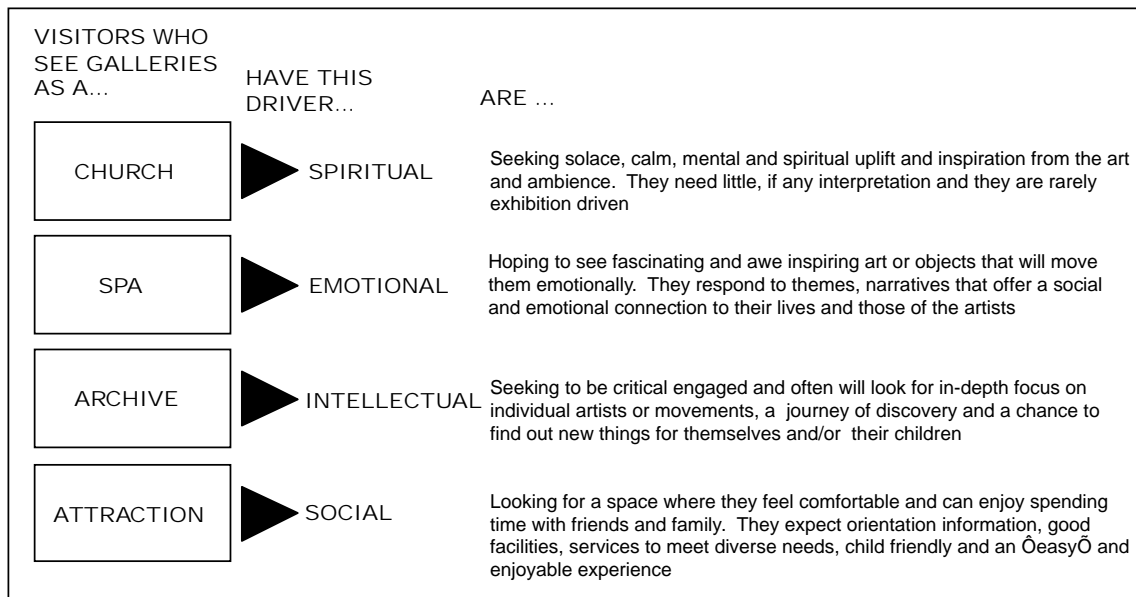
There are few visual arts attenders who would only see one 'style' or genre of visual art. Most of the audience would be interested in, and currently attend, a range of exhibitions, modern, contemporary and traditional.



Whilst visitors are open to seeing a wide range of art the type of support they require, the expectations they have, and their needs may vary depending on whether the work is traditional or contemporary. The following section goes on to summarise our understanding of visitor needs and the implications this has for audience development.

6.2 Visitor Needs

In understanding what motivates or drives visitors we can begin to understand the set of needs visitors arrive with. The model below summarises each of these visitor segments and what each may want from their visit. Though generalisations will, obviously, not apply to all visitors, certain patterns of expectations and needs help galleries better understand their audience and ensure they are getting the most from their gallery experience.



© Morris Hargreaves McIntyre

Again, reflecting previous research carried out by Morris Hargreaves McIntyre into the needs and motivations of contemporary art attenders, the visitors at the eight galleries surveyed are mostly driven by the need for self-improvement. However, whilst contemporary galleries generally may not be regarded as destination or social venues, a reasonably high proportion of visitors at these eight galleries cited social-drivers as their main motivation. This is in contrast to findings of research carried out amongst a group of contemporary galleries in London where emotional and spiritual drivers outweighed any social needs.

GALLERIES	Social	Intellectual	Emotional Spiritual
	%	%	%
Fruitmarket	29	45	26
Collective	35	49	16
Crawford	31	47	21
DCA	34	50	15
GPS	32	41	27
Project Ability	40	40	20
Street Level	21	64	15
Talbot Rice	29	55	36

Levels of satisfaction and propensity to return provide some measure of how successful a gallery has been in meeting the needs of its visitors. The following tables show the extent to which visitors' expectations of exhibitions were met, how satisfied they were with their visit as a whole and the likelihood of their making a return visit at each of the eight venues.

GALLERIES	Better than expected	Worse	As expected
	%	%	%
Fruitmarket	42	9	49
Collective	29	9	62
Crawford	49	6	45
DCA	37	15	48
GPS	23	8	69
Project Ability	49	-	51
Street Level	33	14	53
Talbot Rice	56	8	36

The high proportion of visitors who thought that the exhibition was better than expected, may be due to a combination of high quality exhibitions and the lack of pre-visit expectations.

GALLERIES	Very satisfied	Quite satisfied	Dissatisfied
	%	%	%
Fruitmarket	54	42	4
Collective	39	54	7
Crawford	56	40	4
DCA	41	53	6
GPS	58	38	4
Project Ability	73	23	4
Street Level	37	58	5
Talbot Rice	58	34	4

GALLERIES	Very likely to return	Quite likely	Unlikely
	%	%	%
Fruitmarket	68	28	4
Collective	63	30	7
Crawford	63	33	4
DCA	64	31	5
GPS	62	29	9
Project Ability	68	28	4
Street Level	69	26	5
Talbot Rice	68	229	4

Whilst the figures show that approximately two thirds of visitors are 'very likely' to return, a third remain 'lukewarm' or unlikely to return. It may be that those most likely to return are the well-informed arts vocationals whose needs the gallery has succeeded in meeting. In order to grow the market,

venues need to ensure that the needs of general visitors have also been met and that an acknowledgement is made that not all visitors are confident, knowledgeable, vocationals.

6.3 Interpretation

Our experience and databank of research in the visual arts sector has enabled us to understand visitors' interpretative needs and much of this goes back to understanding, and allowing for, the range of responses to visual art and more specifically contemporary visual art.

Some people have grown up with modern and contemporary art, a younger Edinburgh gallery attender said that, *"I find that I go to see modern art more often and the more you go then the more you understand and then the more you tend to go to it. For example, earlier stuff, Renaissance art, then probably because I know less about it, I probably end up going to see it less."* They can often find it easier to understand than traditional art and they enjoy being challenged to think - as the idea is central, the art provokes thought instead of merely affirming the traditional or conventional. As one Edinburgh attender explained, *"... with some modern art, you think 'why did he do that?' You like being able to think."* Whereas, sometimes they find the traditional pieces are boring. *"Landscapes,"* one attender in Glasgow reported, *"are a waste of space."* Because they have had higher exposure to contemporary art and the accompanying discourse, they feel more comfortable going to galleries that display it.

Based on this experience we have identified ten main ways in which visitors engage and connect with art, the first seven of these are not always apparent in much modern art and even less so in contemporary art.

1. Figurative, recognisable subject matter
2. Narrative
3. Obvious craft skill
4. Aesthetic impact - awe and wonder
5. Endorsement of known artist name
6. Familiarity with artist's biography
7. Controversy, surrounding the exhibition, artist, subject matter
8. Intellectual connection – 'getting' or enjoying the idea or concept
9. Cultural identity and ideological connection
10. Emotional or spiritual connection

Most people tend to respond to objects emotionally and aesthetically, they naturally engage with human interest and narrative stories, and prefer objects to have a social context focus and to be grouped by theme. This can help to underline the narrative and the stories that support the collections.

When I have known a bit about the person and I think that was at the time he was upset or fighting with his brother, but not in a bad way it would just fill me up but I would enjoy it. (CVA Non-Attender Glasgow)

I like a story and for my personal preference if I am looking at a painting I like faces and I like background. I like to see what is going on in the background as well. I like trying to work out the story rather than a still life that doesn't do anything for me. (CVA Non-Attender Glasgow)

I am interested in painting and art and sculpture in general where there is a reference to a life and a history that I can take further. (CVA Non-Attender Glasgow)

Art can also offer visitors a tangible connection to the past or image that is easily understood and relatable (people, places, objects). One potential attender in Glasgow explained that he liked the art of L.S. Lowry because *'it is basic. . . if you look at a Lowry, you see what life is.'* Other traditional art enthusiasts enjoy it because of the soothing feeling that it engenders. *'I like real life things because you can recognise them,'* explained another potential attender, *"and the traditional because it's relaxing.*

As far as paintings themselves are concerned the faces of people in action and I like to try and imagine their lives and emotions and stories and what they are actually thinking at that moment when that snapshot was taken and the Mona Lisa is a perfect example. (CVA Attender Glasgow)

Yes I love backgrounds if you give me a picture the first thing I do is look in the background to see what is going on and see what the people are doing (CVA Attender Glasgow)

They can engage visitors by stimulating feelings of awe and wonder at their scale, beauty, visual impact, age and complexity, sometimes referred to as the 'wow' factor.

You don't have to be an expert to enjoy a painting. (CVA Attender Glasgow)

It is a visual expression of his imagination and you look at that and it is 'wow'. Also the geometric shapes it is still amazing as well it tunes into I don't know it just hit's a nerve that is all you can say. (CVA Non-Attender Glasgow)

A great deal of contemporary art demands an intellectual response and many people feel ill-equipped to find this response, and need help.

I don't think there can be enough information. (CVA Attender Glasgow)

The fewer points of obvious connection, the harder a gallery has to work to make new points of connection, for example, an insight into the artist's motivation, process or biography.

Real life that you can identify with showing you paintings of someone who has seen things like poverty in the world (CVA Non-Attender Glasgow)

It is not enough to assume that the 'art speaks for itself' unless you are sure that all visitors understand that language, or have the same background in art history and historical precedent that the artists and their critics have. Also, people are very reliant on the mentors they meet through life that introduce them to art and induct them into gallery visiting.

She [an art teacher] has opened up more possibilities but without those type of people it is impossible to get in the know how of art. (CVA Attender Glasgow)

Visitors consider interpretation to be an intrinsic part of the exhibition and see it as a duty of the art gallery to support visitors, intervening in the experience in such a way as to enable visitors to engage more deeply and help them to make meaning

from the work. Many of the mystery visitors expected: detailed information on each exhibition – the artist, materials used, processes and staff who are knowledgeable and helpful.

Staff available somewhere around the exhibition area to answer questions if required. Not necessary to have someone to tell you things but good to have them there for questions (Mystery Visitor)

In developing an interpretative strategy or approach, consideration also needs to be given to the content and delivery of interpretation.

- The content of the interpretation needs to be accessible to an inexperienced and uninformed audience.
- Knowledgeable and helpful staff/information assistants:
 - *Staff could be better informed (Mystery Visitor)*
 - *Staff were disinterested / inconvenienced (Mystery Visitor)*
 - *Would have liked more verbal information (Mystery Visitor)*
- Printed information sheets made available. Not everyone was aware of the printed information that was available, whilst others would have liked sheets to be offered.
- *I wanted an information sheet to refer to (Mystery Visitor)*

- Information about the artist, the process, materials, technology etc.
- *Very little background information - not worth walking up the stairs for (Mystery Visitor)*
- *No information on any of the art individually in the Wish You Were Here exhibition (Mystery Visitor)*

Without this information the result is that visitors struggle to fully engage beyond the aesthetic value of the art. With some contemporary visual art this becomes more problematic as this intrinsic and intuitive level of engagement is not guaranteed. Ultimately this can leave them emotionally or intellectually unstimulated.

What grabs me and makes me come back to somewhere is stories and processes and journeys so if I have just been left cold, and haven't been moved in any way in any direction, then I wouldn't tend to come back. (Current Attender)

I don't find it as emotional more intellectual because that is how I am approaching it and that is why I want the context. (CVA Non-Attender Glasgow)

However, in asking for interpretation visitors are not suggesting they are bombarded with information or that the art is 'dumbed-down'. Not all visitors want or need information, some do prefer to respond instinctively and by providing information, and in a targeted way, visitors can simply choose when, and if, they take advantage of it. How this information is delivered is as crucial to supporting visitors as the actual content. The key finding from our visual arts research is the importance of providing information that is:

- Multi-layered
- Just-in-time
- In different formats
- Consistent

Multi-layered information allows visitors to access information on the basis of where they are starting from, as well as providing a means for visitors to deepen their engagement beyond that starting point and at their own pace.

We have conducted many studies into how visitors behave in art galleries. From this work we know that the first instinct of visitors is to respond visually and spontaneously rather than intellectually and systematically. It is unwise to assume that visitors enter a gallery, search for contextual information, read it and then look at the art. They are far more likely to find themselves immersed in the gallery, searching for information to make sense of what they see, or feeling frustrated that no information has been provided. The most effective way of managing this visitor behaviour is to provide information at key points in the gallery, rather than just at the beginning, that is 'just-in-time' and in response to their need for support.

Visitors search out information about individual pieces of work and expect these to be provided on labels next to the work. However, visitors are responsive to information in other formats, such as printed sheets, audio guides etc. as long as it gives them enough to satisfy their needs.

Some visitors also like to be able to take information away (about 30% of the visitors surveyed at the galleries requested information in this format). Others, but not all visitors, prefer audio guides (between 20%-30%), or talks (20%)

There are a few galleries now where you have a sort of self-controlled guide with a tape recorder. I really like them. (CVA Attender, Edinburgh)

I don't like to feel I am going around the gallery staring at the plaques next to them and not the pictures really so I think they [tape recorded tours] are better. (CVA Attender, Edinburgh)

Or guided tours,

Years and years ago I actually joined a tour one day and I found that a really positive experience because I found out more about the paintings and the context and particular things that went on with the artist and I found that quite a revelation and it really helped my enjoyment. I would recommend people to go on tours. (CVA Attender, Edinburgh)

We went on a guided tour and the guide explained how the painting was composed and what it all meant and it made the painting actually much more interesting to look at and we understood the artist more and for who he put it together because quite often who commissioned the painting had a huge impact on how the canvas was put together. . (CVA Attender, Edinburgh)

though some visitors feel that gallery tours expose their lack of knowledge or intervene too much in their visit.

I will try and join the tour next time and join in at the back and hope no one notices. (CVA Attender, Edinburgh)

Personally what I don't like about art is having it explained by someone else. (CVA Non-Attender Glasgow)

And most visitors expect staff to be able to provide information

I want enthusiastic assistants and people that are experts and in Paisley Gallery I have been to a few things and there is this little New Zealand lady and she is absolutely brilliant and she drags you off to see what you want to see but it is the enthusiasm it just turns you on basically. (CVA Attender Glasgow)

The gallery's interpretative strategy needs to be consistent across all exhibitions to offer some guarantees and help minimise the risk of visitors having a poor or unsatisfactory visitor experience.

The findings of the in-venue research, where between 80-94% of visitors felt that they had available all the information they required, would appear to be encouraging. However, many of these visitors are knowledgeable arts vocationals, who may not need the same, or as much interpretation as non-vocational, non-specialist visitors. When asked about the information they would like to be able to access in future, results indicated that these visitors were indeed looking to deepen their engagement; between 25-50% wanted printed information to take away, about a fifth were interested in attending talks and a similar proportion were interested in attending special events.

7 Factors that impact on attendance

7.1 Understanding the barriers to attendance

The first stage in considering how to attract more visitors is to recognise the barriers that prevent attendance; galleries need to 'examine the circumstances of their communities, and the reason why some people do not make full, if any, use of their services.'⁹

One of the major barriers to attendance at art galleries for people with a propensity to attend is lack of awareness and lack of information on what is on offer. This is explored in Chapter 8.

There is no doubt that for some people there are concrete barriers to attendance. Many of these are specific to certain groups of people. For economically excluded people for example, price is a barrier for paid for exhibitions and venues. For geographically excluded people availability and cost of transport, together with travel time and public transportation difficulties, are barriers. Addressing less concrete barriers, such as social or perceptual hindrances, is equally as important, though often more difficult. These less tangible barriers are the ones that the core funded galleries will need to address. In order to attract more visitors, they will need to widen their market of non-specialist/non-vocational visitors. This can only be achieved by tackling the psychological and intellectual barriers that currently limit attendance at contemporary arts venues. In turn, by encouraging a more psychographically varied audience, the venues will also broaden the socio-demographic scope of their attenders.

These barriers are often most successfully overcome in childhood and young adulthood, before negative perceptions about contemporary art have been fully ingrained, therefore, galleries should start inviting people to attend from an earlier age. To this end, special attention should be paid to the barriers prohibiting the attendance of young people and families.

The barriers to use have been analysed by the Department for Culture, Media and Sport (DCMS) and by Dodd and Sandell in their report 'Not for the likes of You!' and other research and cultural organisations.¹⁰ The findings of these reports, along with salient points from other existing research, are summarised in this section.

7.2 Extant research on barriers to gallery usage

The DCMS report identifies potential barriers to use as;

- Environmental
- Institutional
- Personal and Social
- Related to Perceptions and Awareness

Environmental factors can discourage potential visitors. Galleries that have poor transport links, are out of the way, or have difficult physical access into and within the buildings, can experience difficulties attracting new visitors. Even very minor things, like the practicalities of getting into and out of the building can impact on a

⁹ PLB Consulting, *New Audiences for the Heritage*, Heritage Lottery Fund, April 2001.

¹⁰ Dodd, J & Sandell, R, *Not for the Likes of You: A Resource for Practitioners*, RCMG, Leicester, 2002.

gallery visit, as pointed out by a mystery visitor to the Fruitmarket Gallery in Edinburgh.

Only criticism was the very heavy entrance door, luckily someone on hand to assist. (Mystery visitor)

The issue of transport is a particular problem for some galleries in Scotland, where distance can act as a deterrent in some regions. With over 30% of respondents in Tayside, Fife & Central, the Borders and Highlands & Islands claiming that distance had been a previous barrier to attendance and given that the offer at some of the venues is relatively small, galleries need to find creative ways of making the trip worthwhile. This could be accomplished by holding joint events with other galleries or arts organisations in the same area.

Institutional barriers are those that galleries and their staff create that discourage usage by certain people or sections of the community. They include practical deterrents such as unsuitable or unduly restrictive opening hours, lack of signage in buildings, or lack of adequate facilities for people with specific needs, such as those with disabilities or families. The building itself and its atmosphere can either negatively or positively affect the visitor experience. An attractive building, the right atmosphere, and helpful staff are all important aspects of the gallery for many attenders. Many expect the gallery building to be a work of art itself. People also have preconceptions about what type of atmosphere a gallery should have.

I don't like them when they are too crowded but then again I don't like them when they are too quiet either. (CVA Attender Edinburgh)

The importance of the gallery atmosphere cannot be overstated, as in Glasgow, Ayrshire & Lanarkshire and Highlands & Islands the largest single factor that discouraged people from visiting galleries again was having found a previous gallery's appearance unwelcoming. When asked about whether he would return to the Talbot Rice Gallery in Edinburgh, one mystery visitor commented that the building was a bit intimidating, which was to be expected.

If the exhibits are this vibrant, you can't go wrong. Building is a bit overpowering, but it is Edinburgh. (Mystery Visitor)

In Edinburgh, the Borders and Highlands & Islands, visiting a gallery that was too busy or full of people had acted as a deterrent for future gallery visits for the largest groups of people (35%, 27%, and 28%, respectively).

Institutional barriers can also be somewhat more intangible and more difficult to quantify, like management ethos in the form of inappropriate staff attitude, inappropriate rules and regulations, direct and indirect discrimination by management, other users, or wider society. "Management ethos has the most detrimental effect upon; low income households, socially excluded/ low achievers, people lacking basic skills, ethnic minorities, teenagers, unemployed, disabled and C2DE socio-economic groups."¹¹

It is crucial to have friendly and informative staff on hand. In fact, 22% of those surveyed in Grampian reported that a previous experience with unwelcoming gallery staff has made them more cautious about visiting in the future. It goes

¹¹ PLB Consulting, *New Audiences for the Heritage*, Heritage Lottery Fund, April 2001,

without saying that rude or aloof gallery attendants will negatively impact the visitor's experience, but it is important to recognize the positive way that staff can impact on a gallery visit.

*But you haven't got to have that austere sort of frightening person standing there and people look and think they will 'chop my hands off as soon as look at me'. You have got to have the right people in the job who aren't just doing it they have got to be involved with the gallery.*¹²

The fact that the staff did not acknowledge myself and daughter with so much as a smile made the visit unenjoyable. (Mystery Visitor)

The role of staff become even more crucial if signage in the gallery is poor, visitors then have to rely on staff to provide basic orientation information.

On arrival there was no one to talk to or ask where I should go so I milled around, then someone told me that the main exhibition area was closed and I should come back when the area opened again next week. There were no signs or notices about the exhibitions (Mystery Visitor)

The importance of internal signage and available staff was underscored by a mystery visitor to Art TM in Inverness.

I thought the signs were very clear and helpful, and staff were around if needed. (Mystery Visitor)

By the same token, however, staff can make visiting a gallery a very positive experience. Their enthusiasm and knowledge encourages new visitors to engage with the art on display and get more from their visit.

I want enthusiastic assistants and people that are experts (CVA Attender Glasgow)

Personal and social barriers are causes of social exclusion that can be experienced by individuals, or as a result of cultural or community circumstances. Lack of basic skills in reading, writing and communication, lack of social contact, low income and low self esteem are just a few of the factors that, taken together, can contribute to exclusion of individuals or groups.

Many people also cite a lack of time as their primary reason for not attending arts events. Studies reveal, however, that there is no correlation between the amount of free time a person has and the number of arts events that they visit. It must mean, then, that people would rather spend their free time on other activities, leaving little time for arts events.¹³ Though there can be no doubt that some very real physical barriers to attendance exist, it is only realistic to recognise that there are some people who can see no personal benefit to be derived from contact with art galleries and who meet their needs in other ways..¹⁴

The notion that galleries are 'not for us' exists in both community and individual terms.

¹² Morris Hargreaves McIntyre CAN'T COME, WON'T COME? Non-visitors' awareness of and attitudes to Wolverhampton Art Gallery, 2001, p25.

¹³ Desai P and Thomas A, Cultural Diversity: Attitudes of Ethnic Minority Populations Towards Museums and Galleries, BRMB International for the Museums and Galleries Commission, January 1998, p31.

¹⁴ Northern Campaign for the Arts, 1999, cited in Harland, J, Kinder, K, 1999, p26.

This perception causes difficulties for people who are educationally disadvantaged, think that galleries are not relevant to their lives, or have a lack of awareness of facilities and services and how to use them. Some people feel that the exhibitions at galleries are not pertinent to their lives. They have not been socialised by family or education to believe that they have a connection to the arts. Those that have not experienced this socialisation process do not view galleries as part of their life.

Because I have never heard of it and it doesn't look massively exciting so there is nothing really to inspire me to take an hour off to go.¹⁵

The visual arts sector needs to take some responsibility for generating negative perceptions. There is a feeling that the sector almost deliberately excludes 'non-specialists' and is elitist and exclusive.

...you have got to be quite in the know. You have to have people who are pretentious like they sort of attract those types of people who are interested in it and I think in a way the art world does shut out people who are just interested in looking at the actual work because I have always thought that because you just think that people in the art world are sort of above you and would look down their nose at you. (CVA Non-Attender Glasgow)

I think people are afraid to go to art galleries because they are afraid of the sort of culture that surrounds art and I don't know it shouldn't be like that at all but it is because I think it is always the way it has been. (CVA Non-Attender Glasgow)

One of my bugbears is the pretentious environment in galleries. (CVA Attender Glasgow)

This elitist thing. I want to go to it and feel comfortable and I want my kids around my feet and getting something from it and I don't like the stuffiness. (CVA Non-Attender Glasgow)

The perceived risk of attending an arts event against other forms of entertainment for non-attenders is very high; "60% in London state that they did not like going to see things that they did not know much about."¹⁶ People who do not think they will understand what they are seeing are more likely to believe they will find the trip boring, "Some people believe that museums and galleries require specialised knowledge, for example history, context, and importance of exhibits, how and why they were created and what stories about the past they embody."¹⁷ This is particularly true for art galleries: people assume that knowledge of art history is required and art is not easily understood by the layman.¹⁸

It is aimed at somebody who knows who that artist is. So it is aimed at artists not the general public if you don't know who they are why are you going to go in. You need to know what theme it is.¹⁹

¹⁵ Morris Hargreaves McIntyre, *CAN'T COME, WON'T COME? Non-visitors' awareness of and attitudes to Wolverhampton Art Gallery*, 2001, p24.

¹⁶ Mass Observation survey, 1990.

¹⁷ Mass Observation survey, 1990, cited in Ibid, p26.

¹⁸ Desai P and Thomas A, *Cultural Diversity : Attitudes of Ethnic Minority Populations towards Museums and Galleries*, BRMB International for the Museums and Galleries Commission, January 1998, p35.

¹⁹ Morris Hargreaves McIntyre, *CAN'T COME, WON'T COME? Non-visitors' awareness of and attitudes to Wolverhampton Art Gallery*, 2001, p24.

I do think that there is a barrier surrounding the art world. The art world are not willing to accept people who are willing to come and look at the work from a normal person's perspective. (CVA Non-Attender Edinburgh)

Those who do not have much experience with art galleries are also afraid that they will conduct themselves inappropriately, that they will stick out from the rest of the gallery attenders.

I think it is not knowing where to go, what to do or whether you can speak or not speak. When it is very quiet when you walk in you think where do you start.²⁰

In his 1992 research for the Arts Council, Denis Robb explored some of the psychological barriers of non-attenders.²¹ The following quotes were taken from his report, *Results of Research into Contemporary Visual Arts* and confirm that many people suffer a lack of confidence when it comes to viewing art:

Galleries don't give you any guidance about where to stand in order to best appreciate something. I mean is it the impression from a distance, the colour, or am I supposed to get up close and look at how it's been made. You can feel a bit of a fool that way.

His research also revealed that non-attenders have a limited vocabulary in relation to visual art, which adds to their discomfort about the subject.

With the theatre you have a vocabulary. . . . pace, ending, and so forth, but the ordinary person can't talk about brushstrokes or lighting.

The general public is ignorant of techniques.

There has been a few highbrow exhibitions in big galleries that I have been to and I have tried to find my own connection and I have felt pressured to connect because it is so highbrow and I didn't feel comfortable or relaxed. (CVA Attender Glasgow)

Studies have also been undertaken that examine the attitudes and needs of particular groups of people. In order to encourage a wide audience base, the concerns or expectations of currently excluded or marginalised groups should be addressed.

Family visits

People's perceptions about galleries as well as practical concerns impact family attendance at galleries as well. Research conducted by MORI into family arts habits reveals that 84% of adults surveyed believe that art (paintings and sculpture) could be enjoyed by everyone, young and old alike; but only 47% feel that art would be of interest to young people.²² The single most important issue for families is the view that the arts in general are not perceived as 'family entertainment.'²³ Families have a particular set of needs that must be met before they choose to visit galleries. Research undertaken by Morris Hargreaves McIntyre and Harris Research found that families were concerned that:

²⁰ *ibid*

²¹ Robb, D. *Results of Research into the Contemporary Visual Arts*. The Research Practice, May 1992, p.63.

²² MORI, *Nestle Family Monitor No.6*, June 1999, p35.

²³ Harris Research Centre, 1993, cited in Harland, J, Kinder, K, 1999, p26.

- Children would not be made welcome in a gallery and they would disrupt other visitors

*Children by their very existence are noisy things It doesn't bother me but I think it might bother other people and that is the perspective I have.*²⁴

I was just remembering that we brought our son here when he was about 3 and it was a wooden floor and he was making lots and lots of noise and there seemed to be very serious people looking at us and so we quickly went out and so I don't know whether there should be more child friendly galleries. (CVA Attender, Edinburgh)

I have noticed more abroad than here that there will be a whole bunch of children sitting around a painting and they were all obviously asking questions about it and that was really nice to see and that gave a impression that they were really child friendly although I have never seen it here. (CVA Attender, Edinburgh)

- There would not be enough to entertain and engage children and the family as a whole. There is a need for more inter-active displays – *Children liked to make things happen and see what was going on.*²⁵
- *I had gone to see the Home of the Brave Exhibition which was more of a historical thing about remembrance and American customs than an art thing and they specifically had a part for kids they had a real tepee there for kids to go in and play with it and they thought it was great. (CVA Non-Attender Glasgow)*
- Galleries do not offer a family “day out”, in terms of the activities available
- *Is there any way to encourage families to go to this place? I think one of the things about art galleries for me is that I was never really interested in art at school but I married an art teacher and she was always encouraged to go to art galleries and I never went and one of the things with our children is that we want them to get used to going to art galleries. One of the reasons people don't talk about it is that they see things on TV and there is someone looking at some art and you hear some amazing things but I think to break that down and start with little people and so I would like to be able to take my children who are four and two.*²⁶
- Parents are often concerned that the exhibits will not be on an appropriate level for their children, both physically and mentally.
- *The jewellery and the metalwork was very high up and as I and my children are small, we could not appreciate it properly. (Mystery Visitor)*
- *Previous experience shows galleries don't cater particularly well for children, but there was nothing about this exhibition, its presentation and display that we disliked. My son was very animated- good sign! Lovely tactile quality! (Mystery visitor)*

Content and collection as well as the style of delivery are the key success factors.²⁷

²⁴ Morris Hargreaves McIntyre, Market Research Report for Manchester Art Gallery, 2001.

²⁵ *ibid*

²⁶ Harris Research Centre, 1993, cited in Harland, J, Kinder, K, 1999, p26.

²⁷ MORI, Visitors to Museums and Galleries in the UK, Museums and Galleries Commission, May 1999, p33.

Quality of overall experience and presentation are also fundamental to attracting more family visitors. Will the experience make the family feel good? People expect high quality customer care, a friendly atmosphere, and welcoming staff. They also want to be able to easily navigate the venue and look for ease of orientation and clear signage. And finally, will the gallery suit the family self-image? Galleries need to be able to provide the facilities and services that families need as well as persuading them that these needs will be met.

At the contemporary galleries surveyed, the proportion of children and under 15s amongst their visitors was in most cases less than 3%, the exception being Dundee Contemporary Arts (DCA) where 13% of visitors were under 15.

Young people

The 1994 ACE Youth Audience Report states that a majority of young people cite cost as the inhibiting factor to arts attendance.²⁸ It warns, however, that removing financial barriers might not encourage all young visitors, as attending arts venues also carries a time investment that can be as deterring as financial costs. Given the attitudes of many young people towards arts venues then, it comes as no surprise that this group of potential attenders is often thought to be the most difficult to attract.

- Young people tend to feel that galleries hold nothing of interest are dull and uncomfortable.²⁹ The arts are not perceived by young people to be entertaining a good night out, being value for money and an enjoyable social event³⁰
- Galleries are seen by the young as 'mazes' with poor signage and orientation³¹
- They feel that the gallery staff are suspicious of them and are not very welcoming.³²
- Young people can also be concerned about appearing confident in the gallery. They assume that everyone else is comfortable and they are the only ones who feel out of place.³³

*I think it can be quite intimidating. Being young and not having a lot of experience of going into art galleries. To go into a place that you haven't been to before.*³⁴

While the research found that young people are well represented amongst the audiences at CVA galleries, it would be wrong to assume that, as young people, they are naturally contemporary-minded and confident in their approach to the art they encounter. Young people, including students, articulated a need for guidance, information and mentors in order to feel confident in CVA galleries.

She [an art teacher] has opened up more possibilities, but without those types of people it is impossible to get in the know-how of art (CVA Attender Edinburgh)

In his book *Moving Culture*, based on research commissioned by the Calouste Gulbenkian Foundation,

²⁸ Research Surveys of Great Britain for the Arts Council of England, Youth Audience Research Report, November 1994, p12.

²⁹ Fowle, 1997, cited in Harland, J, Kinder, K, 1999, p28.

³⁰ Harland, J, Kinder, K, Crossing the Line: Extending Young People's Access to Cultural Venues, Calouste Gulbenkian Foundation, 1999, p25.

³¹ *ibid*

³² Morris Hargreaves McIntyre, An Opportunity to Break Down the Barriers: Research into the audience for BALTIC, April 2001, p23.

³³ *ibid*.

³⁴ *ibid*

Paul Willis suggests that in order to attract young people as returning visitors, arts venues must allow themselves to be ‘colonized’ by them to a certain extent.³⁵ Other research proposes that it is not enough to remove some of the physical and psychological barriers that young people encounter, there must also be positive incentives to encourage attendance.³⁶ Clearly, a proactive stance towards encouraging young attenders is needed in order to impact audience demographics.

As with the other groups studied, if young people are to become part of a gallery’s audience, not only should they feel comfortable and welcome, they also need to feel that the gallery is relevant to their daily life- and that they are relevant to the gallery. The practical issues that deter visitors can be easily identified and steps can be taken to minimise them. On the other hand, the deep rooted distrust of arts events and the perceptions people have about the relevance of art in their lives are not so easily pinpointed and usually less easily addressed.

7.3 Dodd and Sandell’s Barriers to Museum and Gallery Usage

The model below, adapted from ‘Not for the Likes of You’, presents a more socially based analysis though there are obvious areas of crossover with other research. This model seeks to utilise the recommendations as a means of further (wider) audience development. It is a useful tool for diagnosing potential barriers and suggesting ways of counterbalancing them.

TYPE OF ACCESS	SOME ISSUES TO CONSIDER	SOME POSSIBLE APPROACHES TO AUDIENCE DEVELOPMENT
PHYSICAL ACCESS	Is our building physically accessible Is it open at times which suit different audiences?	Installation of ramps, handrails and seats
SENSORY ACCESS	Can our exhibitions, events & facilities be used by people with hearing or sight impairments?	Objects which can be touched Varied means of interpretation e.g taped guides, subtitled a/v presentations etc.
INTELLECTUAL ACCESS	Do our displays exclude people with limited prior knowledge of the collections or artists on show? Can people with learning disabilities access services?	Consult and involve new audiences in the production of exhibitions Evaluate levels of understanding amongst a range of audiences when developing exhibitions
FINANCIAL ACCESS	Does our admission fee deter people with low incomes? Do our shop and café sell items that families can afford?	Offer free admission on certain days & publicise it widely Take the gallery into the community Provide free transport Admit schools & community groups for free
EMOTIONAL/	Is our gallery environment	Staff training

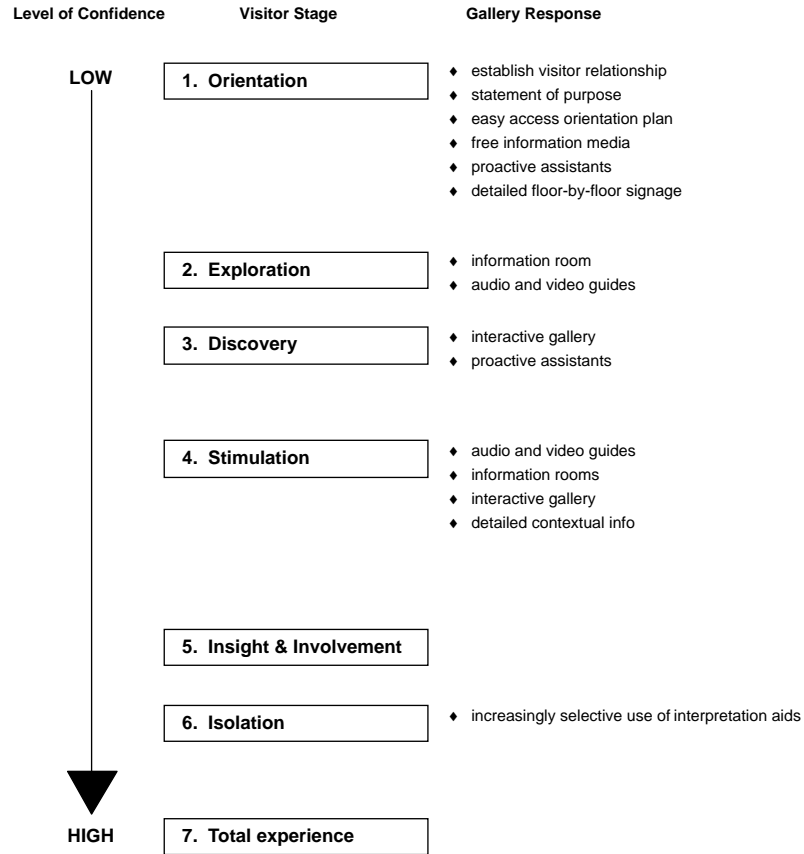
³⁵ Willis P, *Moving Culture*, Calouste Gulbenkian Foundation, 1990, p59.

³⁶ Harland, J, Kinder, K, *Crossing the Line: Extending Young People’s Access to Cultural Venues*, Calouste Gulbenkian Foundation, 1999, p 37.

ATTITUDINAL ACCESS	welcoming to new visitors? Does our staff have open attitudes to diversity? Is the style of publicity inclusive or exclusive?	Special events and activities to build confidence amongst new audiences
ACCESS TO DECISION MAKING	Does our gallery consult potential new audiences and value the input of external stakeholders?	Develop projects in partnership with audiences Establish a consultative panel
ACCESS TO INFORMATION	Does our publicity effectively reach, and communicate with, new audiences?	Develop new/ accessible marketing networks & methods of communication Publicity and orientation in large print/ tape/ Braille/ different languages etc.
CULTURAL ACCESS/ REPRESENTATION	Do our collections, displays and events reflect the interests and life experiences of our target audience?	Proactive collecting Special exhibitions and events Re-displays with appropriate interpretation
TECHNOLOGICAL ACCESS	Does our use of new media facilitate rather than hinder access for our audiences? Do we exploit new advances in technology to enable access?	Use of assistive technologies

The model below was developed as a result of focus groups with non-specialist attendees at the Tate Gallery Liverpool.

Hierarchy of Visitor Needs



© Morris Hargreaves McIntyre

It shows that the less familiar or confident a visitor is with a gallery or venue, the greater are their needs for orientation guidance and clarification on the nature and purpose of the venue and its programme before they feel comfortable to start exploring. Once they feel comfortable exploring, they are free to start making their own discoveries. Alleviating the inhibitions new visitors have, to enable them to free up their responses to the work they see, relies on them being allowed to feel at ease within the gallery environment.

8 How to reach potential audiences

About 43% of the population of Scotland (1.8million people) would consider visiting an art gallery, and 24% of the population (1 million) currently do so. In the two years prior to this research, 359,000 people or 8.6% of the population had been to at least one CFO; this equates to a market penetration of 32%, or in other words, there were 765,000 people in Scotland who could be persuaded to visit a CFO but hadn't done so in the previous two years – a significant untapped market.

8.1 Gallery awareness

Awareness of different galleries varies in each of the regions and is partly a reflection of the size of the galleries and the resources available for marketing. These resources vary with some galleries having a marketing budget of 20k to 30k, or even as high as 60k whilst others only have access to an annual budget of about 5k.

This gallery is a great asset to Aberdeen but is very much a 'well kept secret' – its accessibility needs to be promoted to a wider public, especially the opportunity to see new work (Mystery Visitor)

I must admit there is places (core funded galleries) in here that I never knew existed.” (CVA Non-Attender Glasgow)

Not surprisingly, because of the high concentration of galleries in the areas, those living in Glasgow and Edinburgh have some of the highest awareness in the country. This is not to say, however, that there is little awareness of galleries in other regions, with Aberdeen Art Gallery for example having an awareness of 96%. The other gallery in Grampian, however, Peacock Visual Arts, only has an awareness of 29%.

The table on the following page gives the percentage of those surveyed who were aware of various galleries in each of the regions as well as whether or not they would consider attending.

Gallery	Awar e %	Consi der %		Awar e %	Consi der %
Edinburgh			Grampian		
City Art Centre	82	90	Aberdeen Art Gallery	96	96
Collective Gallery	30	74	Peacock Visual Arts	29	67
Edinburgh Print Workshop	43	73	None of these	5	4
Fruitmarket Gallery	79	83	Tayside, Fife & Central		
Inverleith House	69	79	Alloa Museum & Art Gallery	21	47
National Gallery of Modern Art	91	90	Changing Room Gallery	29	64
National Gallery of Scotland	92	93	Crawford Arts Centre	41	65
National Portrait Gallery	84	83	Dundee Contemporary Arts	68	71
Stills Gallery	33	73	Ferguson Gallery	35	67
Talbot Rice Gallery	47	72	Forfar Museum & Art Gallery	31	50
The Dean Gallery	62	76	Kirkcaldy Museum & Art Gallery	42	57
None of these	2	1	McManus Galleries	44	65
Glasgow			McRobert Arts Centre	54	67
Glasgow Art Gallery & Museum	97	98	Meffan Institute	15	45
Burrell Collection	96	92	Montrose Museum & Art Gallery	29	50
Centre for Contemporary Art	59	75	Perth Museum & Art Gallery	58	72
Gallery of Modern Art	83	84	Smith Art Gallery & Museum	27	63
Glasgow Print Studio	54	74	None of these	6	6
Tramway	81	80	Borders		
Modern Institute	27	67	Castle Douglas Art Gallery	69	78
Paisley Museum & Art Gallery	65	69	Gracefield Arts Centre	65	79
Project Ability	8	51	Hawick Museum & Art Gallery	44	63
Street Level	34	56	Tolbooth Arts Centre	57	71
Transmission	22	48	None of these	11	11
None of these	1	1	Ayrshire & Lanarkshire		
Highlands			Dick Institute	52	66
An Tuireann Arts Centre	27	52	McLaurin Art Gallery	56	74
Art TM	39	72	Rozelle House Gallery	50	71
Inverness Museum & Art Gallery	79	86	None of these	19	16
Pier Arts Centre	24	49			
Taigh Chearsabgh	19	43			

None of these	14	10			
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It is important to bear in mind, though, that just because a gallery has a relatively high awareness does not mean that it is accessible to all potential attendees.

Those small galleries I think may be it is my impression they are not very welcoming and they are not very accessible. (CVA Attender Edinburgh)

Though Inverleith House in Edinburgh has an awareness of almost 70%, one of the mystery visitors there commented that there needed to be better advertising and external signage. In the survey we found that 24% of the art interested population were dissatisfied with the information available.

Didn't find the gallery or its exhibits to be well advertised at all, not many people I knew had even heard of it. Well sign posted inside the (botanical gardens), but not outside. (Mystery visitor)

Could not find a listing for it ... not listed in gallery guide, family and friends weren't aware of gallery (Mystery visitor)

The need for exterior directional signs, especially for those galleries that are not directly in a city or town centre, is echoed by a mystery visitor to the An Tuireann Arts Centre.

Not many signs- as it is outwith the village- more signs are needed. (Mystery Visitor)

A number of mystery visitors commented that the Tourist Boards could only supply orientation information but had no idea what exhibition was on. This was true for Stills Gallery, Pier Arts Centre, Talbot Rice Gallery and Tramways.

The local tourist office should be able to provide more than the address (of Talbot Rice Gallery). Even titles of exhibitions would be helpful (Mystery Visitor)

Most of the mystery visitors knew 'of' the gallery but did not know what exhibitions might be programmed, the facilities that would be available or overall what the visitor experience would be like.

Only that it (Taibh Cearsabhagh) existed (Mystery Visitor)

Didn't realise there was so much there (Fruitmarket Gallery) – I thought it was just a coffee shop with a small gallery (Mystery Visitor)

Had seen the name but knew nothing about it (Art TM) (Mystery Visitor)

To go to a new exhibition you need to know where it is and you don't want to be apprehensive. (CVA Attender Edinburgh)

Many of the mystery visitors were delighted that through this project they had been given an opportunity to 'discover' somewhere new.

I felt I had 'discovered' a gallery I hadn't even noticed before (Mystery Visitor)

8.2 Media Sources

The printed word is still the dominant source of information for gallery goers. Almost half (46%) of the people surveyed said that local papers were their main way of finding out about arts events and 61% of people used them. Word of mouth was the second most prevalent information source, with 15% of the population overall stating that they found out what was on from other people. Other media sources, like television, radio, posters, and the internet, are, by comparison, insignificant with less than 10% of those surveyed volunteering them as their main information source. There was very little variance across the regions.

Visitors at the contemporary galleries surveyed were more pro-active in sourcing information, having either joined mailing lists and being in receipt of brochures and leaflets through the post or picking up leaflets in other galleries, bars, cafes and libraries etc rather than using the local papers (only 3% rely on the newspaper to find out what's on). Word of mouth was also an important source of information for this audience.

GALLERIES	Info. in post	Pick up leaflets	Word of mouth
	%	%	%
Fruitmarket	6	11	13
Collective	8	10	22
Crawford	4	20	22
DCA	10	17	14
GPS	14	8	36
Project Ability	13	20	21
Street Level	15	14	12
Talbot Rice	8	18	21

We tested usage and interest in the internet and e:marketing, as well as the conventional method of postal information. 48% of those we surveyed (the art interested population) would like information sent to them, 28% wanted information by e:mail. Half of all those we surveyed had access to the internet, either at home or work/college/school. And, of all those we interviewed, 45% of the arts interested population would consider accessing a preview website to find out more about the exhibitions.

8.3 Effective Marketing

During the focus groups we explored the audience's response to gallery publicity. This exercise revealed that there are a number of critical success factors in producing effective publicity:

- Acknowledge the importance of pictures

I would like more pictures so I would know what I was going for. (CVA Attender Edinburgh)

Just flicking through and I was actually looking for a picture to grab me and take my interest but there was nothing although I was interested but none leapt out and grabbed me (CVA Attender Edinburgh)

- Avoid the use of jargon and language that assumes a great deal of visual arts knowledge

I think for someone who is very serious about it and they definitely want to go and see this exhibition. It does not appeal to me but that is just me really. (CVA Attender Edinburgh)

If you knew one of the artists it might be all right but if you don't then... (CVA Attender Edinburgh)

... Yes it is like you know about the artists and it is almost speaking to the people who are already coming (CVA Attender Edinburgh)

The first one I read was quite pretentious. On the second page, 'striving towards permanence that is undermined by the fragmented deconstructed conditions...' (CVA Attender Edinburgh)

I don't think you would interest the uninitiated with that. I have read that three times and it is beginning to get through what she means but that is too much like hard work. (CVA Non-Attender Edinburgh)

- Provide detailed and accessible information about the artist
- *It gave you information about one of the artists and when they were born and that is kind of interesting. (CVA Attender Glasgow)*
- Be evocative and convey some of the magic behind the work
- Do not rely on endorsement if this appears insincere
- Ensure that visitors are told about forthcoming exhibitions, particularly during installation periods, so that visitors know that it is worth returning.
- Talk about how the exhibition will make people feel

8.4 What product development would encourage attendance?

Galleries can, and in fact must, address barriers to attendance in order to encourage new attenders. The research revealed that dealing with very practical, mundane concerns like opening times would draw more visitors.

I work five days a week and Saturday I go out with the wife and Sunday is the only day I have to do my hobby and most of these places are closed in the evenings. If you want to go out in the evenings there is nothing open. (CVA Non-Attender Glasgow)

It would be useful if this place was open on a Sunday. It would be a really nice place to go on a Sunday (Mystery Visitor)

I was talking to a friend today about this and that is what he was saying because he works quite long hours and that is why he doesn't go he would like to go to art galleries but by the time he has finished work there isn't anywhere really to go unless it is festival time. (CVA Non-Attender Glasgow)

Over 50% of the potential visitors surveyed said that Sunday openings and social events in galleries would make them more likely to visit (see table below).

As almost half of the potential audience is employed full time (49%), it makes sense that the option to visit galleries on Sundays would enable more people to attend. As a higher proportion of attenders in the Borders and Highlands & Islands are retired (29% and 23%, respectively), it is not surprising that not as many people in those regions would benefit from Sunday openings. The percentages of people who would like evening openings is slightly higher in Edinburgh and

Glasgow, which may be accounted for by the type of lifestyle that people who work in larger cities enjoy.

Social events such as evening openings with music and a bar would also allow people more flexibility in scheduling visits. Moreover though, it would make the gallery offer more appealing by adding an element of safety. Cautious attenders tend to feel more comfortable visiting a venue where there was entertainment or a bar to enjoy if they are hesitant about investing time on what is often perceived as 'risky' contemporary art.

I remember going to a gallery where it was an artist's exhibition and they offered you a glass of wine that I thought was really nice it sort of mellowed everything.
(CVA Attender, Edinburgh)

	Grampian	Highlands & Islands	Tay, Fife, Central	Edinburgh	Borders	Ayrshire & Lanarkshire	Glasgow
	%	%	%	%	%	%	%
Sunday opening	60	53	72	65	54	56	75
Evening opening	37	51	52	54	49	46	57
Social Events	55	59	65	68	56	60	67
Other arts events	47	40	52	44	46	48	53
Private views	32	43	52	49	46	43	49
Saturday family events	43	45	51	43	43	53	62

9 Conclusions and Recommendations

This research demonstrates that the visual arts is almost a majority interest in Scotland. Galleries should recognise this and take the necessary steps to convert the potential audience into actual attenders. In order to make tentative potential attenders feel comfortable, galleries must get to know their audience, recognise their motivations and needs, and *like* them as opposed to just *bearing* them. Galleries need to recognise that their visitors come from all different backgrounds and are largely intelligent, professional, open-minded people, interested in life long learning and self improvement.

Because the profiles of the current audiences are remarkably similar across all of the participating venues, it opens up the possibility of collaboration between the organisations. By encouraging those who currently attend exhibitions of contemporary visual arts to try other similar venues, all of the organisations could increase their attender figures very cost effectively.

Beyond this type of cooperative marketing activity, however, the galleries will have to target non-specialist audiences if they hope to increase attender figures and diversify their audience. The intellectual and psychological barriers to attendance are the most important for contemporary arts venues to overcome, without doing so any efforts to attract a broader demographic group will be largely ineffective. If these venues minimize the perceived risk of contemporary art and succeed in attracting non-specialist, non-vocational attenders, the demographic profile of their visitors will change accordingly.

Potential attenders need to be aware of what is on offer. Galleries need to focus on publicity that reaches their potential audience and speaks to them. Visitors need to know not only what exhibitions and events are available, but what they are likely to get out of them. The most convincing and effective marketing is that which helps people know what to expect.

The first requirement for small artistically-focused venues to become more visitor-friendly is a culture change which encourages staff to widen their perception of the market and address a wider range of needs. This requires galleries to devote more time and resources to making their existing programmes and venues more user-friendly and more psychologically and intellectually accessible. This requires, first of all, a shift in focus and an internal desire to be relevant to more people than a tight group of professional peers. As evidenced by the success of staff policies at Dundee Contemporary Arts, a change in attitudes and staff involvement can lead to a dramatic increase in accessibility, visitor figures, and overall enjoyment. This simply requires an acknowledgement that a growing number of people are interested in contemporary art than is often considered and that public galleries have a role to play developing that audience. It then requires more investment in external communications to help raise awareness, alter perceptions and build confidence. It also requires more internal mediation to enrich the visitor experience. More, easily accessible, information is the plaintive cry of many existing and potential gallery visitors. It is also asked for by art students who do frequent these galleries and who are hungry for as much background and factual information as possible, but often left unsatisfied.

9.1 Recommendations

An Audience Development Strategy with an objective of developing a larger and more diverse audience for Scotland's Contemporary Visual Arts Venues requires the following:

- Clear aims, objectives and strategy with targets set for each participating gallery with benchmarks and an evaluation strategy.
- Clarity on target segments and a prioritisation of target segments to ensure that resources are being channelled cost effectively, and organisations are not being expected to develop an unrealistic number of different types of hard-to-reach market segments.
- Help for galleries to develop an approach to segmenting their existing and potential markets on a psychographic basis, rather than relying on socio-demographics.
- Recognition that the most inexpensive form of Audience Development would be to target present cultural consumers, who don't happen to use the smaller contemporary galleries.
- Development of a Gallery Go- type scheme aimed at drawing in people who are interested in art but require a high level of introduction and interpretation to get the most out of contemporary art.
- The development of a centralised e.list for cultural Risk Takers in Scotland - these would be open-minded, culturally active individuals who wish to be kept informed about innovative, cutting edge work taking place in Scotland including festivals. This would require an active recruitment campaign and the pooling of existing lists by participating organisations. This need not be limited to visual arts audiences.
- Guidelines published, drawn from a search of secondary literature, on how to attract specific target groups to contemporary visual arts, with case studies, for example: teenagers; minority ethnic groups; C2DEs.
- Regular meetings of the CVA organisations to exchange information, share practice and assist in professional development. The organisation of visits to successful visitor-focused organisations elsewhere in the UK, presentations and research sharing.
- Financial resources available for Gallery-Go-type scheme; collaborative marketing schemes; pilot audience development projects; increased awareness raising activity; database recruitment.
- The development of a post of Coordinator for the Visual Arts Audience Development Strategy to help co-ordinate collaborative schemes and collate intelligence and good practice case studies.
- The production of an advocacy document to harness support for the development of larger audiences for contemporary visual arts.

10 Appendix

Focus group transcripts
Population survey
Mystery visitor form
Mystery visitor analysis
Venue survey
Venue data