
So Many Galleries, So Little Time

The Impact of Evening Gallery Opening

Market Research Analysis

September 2002

Produced by

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***“I open my senses
in the evening”***

Evening Opening Attender

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INTRODUCTION

MORRIS HARGREAVES McINTYRE, carried out a substantial programme of marketing research for the Love Art Later initiative and assisted Love Art Later in the development of an outline marketing strategy in support of the Arts Council of England's New Audiences Programme.

The New Audiences Programme is an initiative designed to bring new audiences to the arts and to take new art to audiences across the country. One of the key aims of this programme is to find new and more effective ways of presenting the arts.

MORRIS HARGREAVES McINTYRE was subsequently commissioned by the Arts Council of England to conduct an extensive programme of qualitative and quantitative research with visitors to evening opening events at visual arts venues. This report presents the findings from this research that will now be used to evaluate the impact of flexible opening hours operated during the Love Art Later campaign.

CAMPAIGN OBJECTIVES

The Love Art Later initiative is a campaign involving 9 galleries in London which will address new approaches to opening hours in the visual arts.

The aims of this promotion are

- to continue to raise awareness amongst the public that galleries are sociable places to visit
- to attract a wider audience
- to increase visitor numbers after the traditional closing time of 6pm

The objectives of the original campaign

- To build on the awareness raised through the first Late Night campaign (Spring 2001) that galleries operate flexible opening hours
- To challenge the perception that galleries are boring and stuffy and to introduce the concept of galleries as a social venue and an exciting place to be
- To publicise that in addition to collections and exhibitions, galleries have a wide range of other activities that visitors can enjoy including special events, lectures, tours, live music, restaurants, bars and shops
- To increase visitor numbers after 6pm at participating galleries
- To understand who the audience is for late night gallery openings, are they regular gallery visitors or are we attracting a whole new audience

The content and objectives of Love Art Later changed significantly from the original campaign. The revised objectives of this research were subsequently refined.

RESEARCH OBJECTIVES

The revised aims and objectives of this research

- Evaluate the potential of evening opening to develop audiences by
 - Broadening the range of audiences attracted
 - Deepening the engagement of audiences

Evaluate evening openings to identify critical success factors for evening opening, including product, place, promotion and other elements of the marketing mix

METHODOLOGY

Quantitative Research

The quantitative element of the Love Art Later research was undertaken in TWO stages:

1. Mini survey data collection at each Love Art Later event across each of the nine venues
2. Post-visit e-survey of attenders at Love Art Later events

The mini survey was designed to meet two objectives:

- Provide a demographic profile of attenders at Love Art Later events
- Supply e-mail addresses for post-event follow up e-survey

The demographic data provided by the mini survey was used to weight the e-survey data, to ensure that the e-survey was representative of all Love Art Later attenders (not just those with access to e-mail/Internet).

Total samples collected were 3,306 for the mini survey and 313 for the e-survey.

Qualitative Research

The qualitative research comprised

- Vox pop interviews with visitors at each Love Art Later event across each of the nine venues
- Four Focus Groups with evening opening gallery attenders

The focus group participants were recruited from the initial data collection. The groups were recruited to reflect the range of visitors to particular venues; range of motivations and interests in visual art eg specialist interest or social interest.

Issues explored in the focus groups included

- Attitudes towards the visual arts and galleries
- Responses to the Love Art Later campaign
- Positioning of galleries as day time and evening attractions
- Whether evening openings would challenge perceptions of galleries
- Suggestions for improving the experience and attracting a wider audience

OUR APPROACH

MORRIS HARGREAVES McINTYRE takes an holistic approach to analysing market intelligence. Rather than producing basic demographic profiles we aim to get inside the minds of current and potential visitors. Our research is about exploring visitors' needs. We use a combination of quantitative and qualitative research methods which allow us to understand the attitudes and motivations which drive visits to galleries.

To understand these drivers we have pioneered the use of psychographics in the arts: segmenting markets by their attitudes, values and motivations rather than their postcodes.

Our research has shown that one of the key issues in understanding gallery attenders is understanding what effect confidence has on their behaviour, perceptions, motivations and ultimately the needs they are trying to satisfy.

What Do We Know About Gallery Visiting Generally?

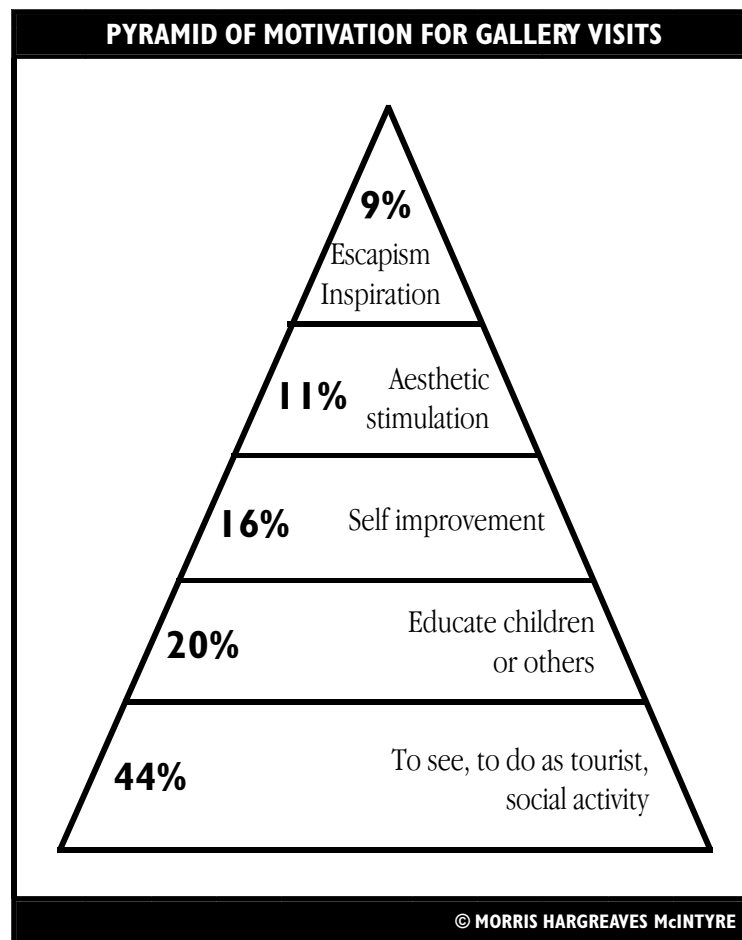
What Drives Gallery Visits?

Different people have different ways of using art galleries, different needs and expectations of galleries and different expectations of the behaviour of other visitors.

MORRIS HARGREAVES McINTYRE carried out a population survey in the North East of England which enabled us to quantify the different motivations people have for visiting galleries generally.

The pyramid model below reveals:

- Almost half of all gallery attenders are motivated by the social side of a visit or by the desire to be in a particular destination or 'do' the tourist trip.
- Another 20% attend galleries as a way of educating children or other people with them.
- 16% attend as a way of learning or of self-development.
- 11% attend for specific aesthetic or intellectual stimulation or as a form of creative research and development.
- 9% attend in order to gain a form of spiritual sustenance, inspiration or escapism.



To see, to do as tourists or the norm 44%

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: (4 Dennis Robb Results of Research into the contemporary visual arts 1992)

'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'

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.

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'

Entertainment, Social Interaction 20%

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.

Some people visit art galleries as part of organised groups e.g. 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.

Self improvement, Research and Aesthetic or Creative Stimulation 16%

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 always searching for new ideas in paintings'

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

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

Isolation, Escapism and Inspiration 9%

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 go to there and I always want to walk through because it gives me a nice feeling, may be it's because I know it, it's quite a serene'

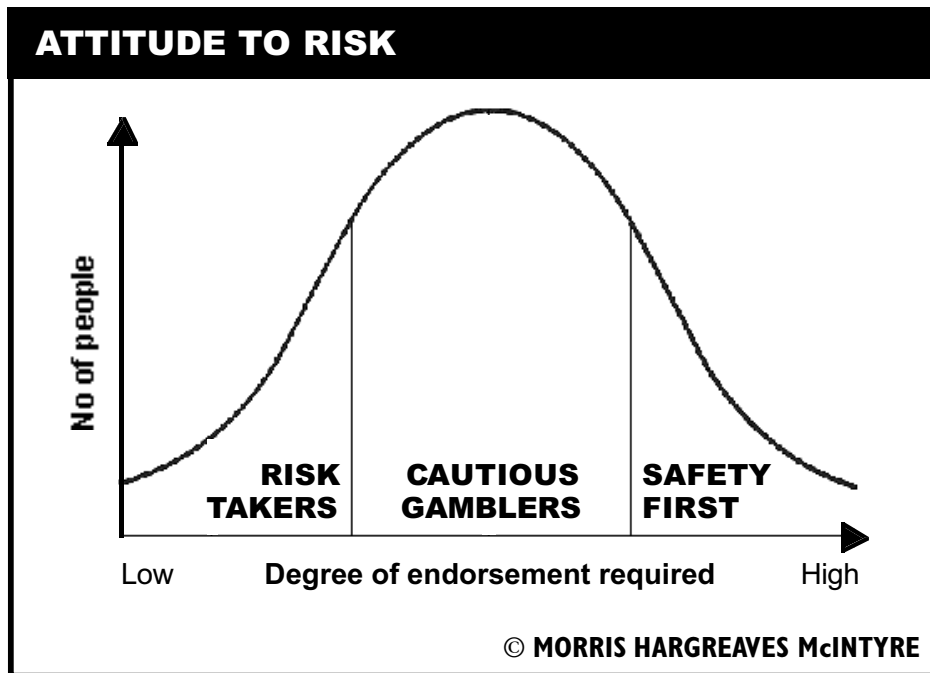
'I did not really engage with the artwork I engaged with the space and the layout, it was a very contemplative experience but I did not engage with the idea of the artwork'

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

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 which is really committed to audience development should address this diversity if people's needs are to be met.

Psychographic Segmentation

MORRIS HARGREAVES McINTYRE analyse the market according to the degree of endorsement people require before feeling confident in seeing an exhibition or attending a gallery. This is the basis upon which we segment people according to *Attitude to Risk*.



RISK TAKERS are defined as people who are prepared to take risks with work they don't know about and without any endorsement.

CAUTIOUS GAMBLERS will take limited risks with work they know a little about with some endorsement from other sources eg reviews, friends. Our research has shown that younger people are also more likely to be Cautious Gamblers.

SAFETY FIRSTS are people who avoid taking risks and need external endorsement before attending.

This means that these different groups of attenders have different needs in terms of types, depth, format and content of information.

The Diversity Of The Market

Our research illustrates that there is a diversity of markets and a diversity of responses to art galleries.

- Some people see galleries as solitary pursuits whilst others see them as sociable activities
- Some people like introducing others to art galleries, others wouldn't like to presume their friends would enjoy a gallery experience
- Some people like peace and quiet and therefore fear or resent the intrusion of groups of children, others positively welcome the sight of children enjoying the gallery experience

It is difficult to begin to prioritise these needs and expectations. Art galleries need to develop methods of responding to the whole spectrum of visitor needs and behaviour.

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.

MORRIS HARGREAVES McINTYRE *has recently completed a substantial programme of research on behalf of the London Arts Board. In analysing the findings from the London Arts Board research we have modelled the markets for the smaller galleries in London. If we could share the data from the London Arts Board research and the findings from this report we could formulate a model for the whole of London.*

THE GALLERY MARKET

The section outlines what we are able to source from the limited body of existing research on the market for art galleries.

We must bear in mind however, that there are virtually no data on audiences for visual arts which allows us to produce any overview of the size of the market or its profile. Much of the information available combines galleries with museums or is specific to a particular exhibition.

Target Group Index indicates that over 21% of the adult population of Great Britain visit art galleries or exhibitions. In London it is estimated to rise to 29%. (BMRB International – Target Group Index 1994 + 1995)

Higher social classes are far more likely to visit galleries. ABC1s account for 83% (BMRB International – Target Group Index 1994 + 1995) of gallery visitors but only around half of the UK population (MORI 2001 Visitors to Museums and Galleries in the UK)

Students and ABs between 45 and 65 are the most likely people to visit museums and galleries. (MORI 2001 Visitors to Museums and Galleries in the UK)

The profile of gallery attenders is characterised as:

- educated to tertiary level and beyond
- in the higher ACORN group
- attenders to other art forms

This existing data of daytime visitors are useful and indeed robust. However, there are a number of limitations. The data are:-

- Purely Quantitative
- Provide a minimal demographic profile
- Don't provide any form of attitudinal profile

What Do We Know About Daytime Gallery Visitors?

The diversity of the galleries in this project, in terms of size, type, purpose, pricing strategy, artistic policy and services offered is a significant determinant of visitor profile. Each gallery and each individual exhibition will attract a subtly different visitor profile, this creates a number of variables which have to be taken into consideration when comparing data across the participating galleries.

Merging the existing data in a meaningful way is therefore problematic due to

- Incompatible information gathered at each gallery
- Much of the data is exhibition specific
- Data does not span a twelve month period
- Unknown sample sizes prevent calculating an accurate norm
- Incomplete data on number and frequency of visits

It has been possible to compare the major demographic information which does provide us with a snap shot picture of the daytime gallery market. Each participating gallery provided existing data on daytime visitors. The table on the following page shows information collated from the most recent research available from each gallery.

(The galleries have been assigned a code to respect the confidentiality of the data.)

Daytime Visitor Data

	G1	G2	G3	G4	G5	G6	G7	G8	G9
Male	48%	46%	33%	39%	41%	53%	29%	49%	42%
Female	51%	54%	67%	61%	59%	47%	71%	51%	58%
Under 35	63%	44%	26%	27%	46%	39%	35%	37%	
Over 35	37%	55%	75%	72%	53%	59%	65%	64%	
Full Time Employment	33%		47%				38%		
First Time Attender	31%	50%	19%	35%	56%	64%		33%	
Ethnicity (White)	51%*	95%	94%	93%	92%	93%		94%	
Origin London	67%	42%	40%	27%		31%	59%	41%	

Where the figures do not amount to 100% this is due to computer rounding

* White British figure

- Overall there are is higher proportion of female visitors to galleries
- G7 has a relatively low ratio of males to females (this may be due to the specific exhibition which was running during the data collection period)
- There are more visitors overall in the older age range
- G1 has the highest proportion of under 35s compared to the other galleries
- Approximately three quarters of the visitors attending G3 and G4 are over 35
- Most of the visitors are not in full time employment
- There is a high tendency towards repeat visiting
- G6 is attracting the highest proportion of first time attenders
- Most of the attenders to G3 are repeat visitors
- The majority of visitors are white
- A significant amount of visitors to G1 and G7 are from London
- Most of the visitors to G4 and G6 are tourists (National and International)

This allows us to compare the basic profile of daytime visitors to the evening visitors.

KEY FINDINGS

Who Attended Evening Openings?

Full Data Collection

The table below shows the findings from the initial data collection at each gallery.

	Total	G1	G2	G3	G4	G5	G6	G7	G8	G9
Base	3306	103	459	404	742	357	504	87	641	9*
Male	43%	46%	50%	39%	44%	49%	39%	45%	37%	22%
Female	57%	54%	50%	61%	56%	51%	61%	55%	63%	78%
Under 35	56%	75%	61%	41%	64%	44%	59%	64%	52%	56%
Over 35	44%	25%	39%	59%	36%	56%	41%	36%	49%	44%
First Time Attender	27%	40%	33%	16%	20%	33%	35%	17%	28%	22%
Aware of Late Night Opening	58%	56%	61%	72%	56%	63%	57%	65%	47%	22%
Aware of Love Art Later	6%	8%	5%	6%	7%	5%	4%	3%	6%	56%

*only 9 interviews were carried out at G9 – circa 20 visitors in total

- There is a higher proportion of female visitors overall
- The gender profile for G2 and G5 is split much more equally compared to the overall figures
- There is a higher proportion of younger visitors over half being under 35
- G1 has a significantly younger profile with three quarters of the visitors aged under 35
- G3 has the highest proportion of over 35 year olds
- Most of the visitors are repeat attenders
- G7 and the G3 have a relatively low figure of first time attenders which points towards the visitors being amongst an ‘in the know’ group
- There is a fairly high overall awareness of late night opening
- Awareness of Late Night Opening is considerable amongst G3 visitors this may be due to a longer tradition of evening openings

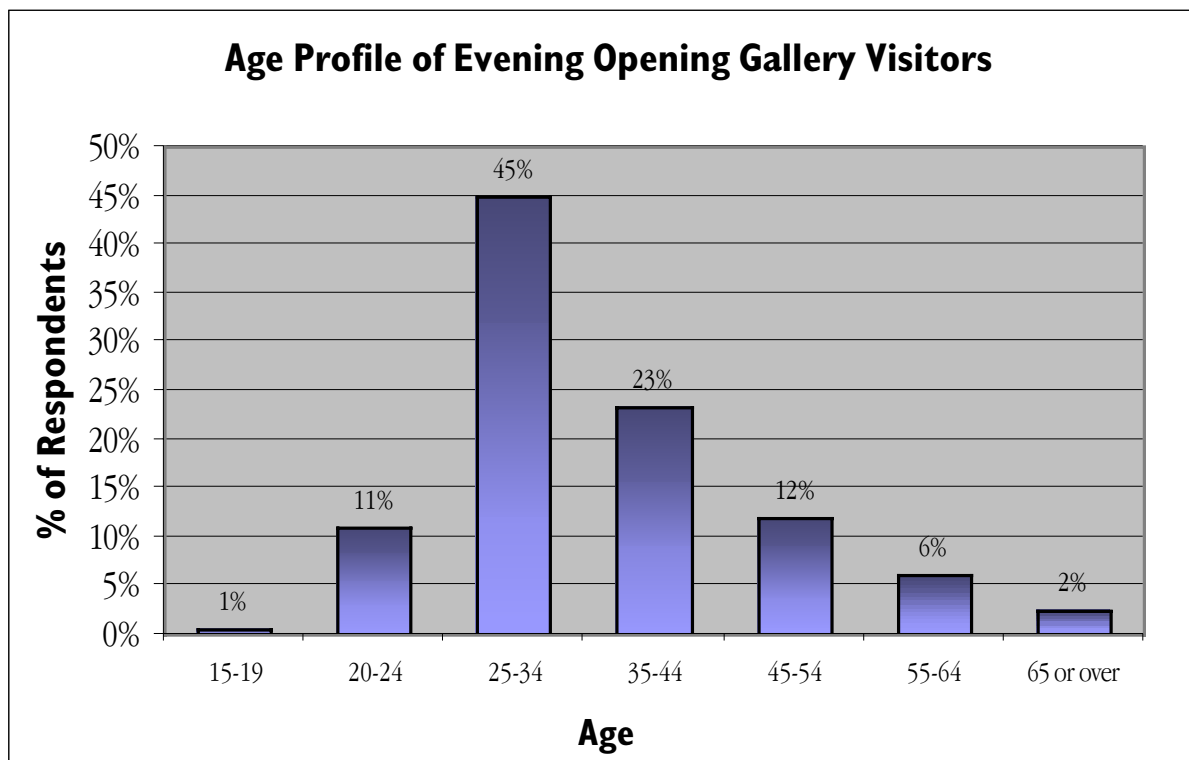
The information from the full data collection reveals the profile of all visitors who contributed to the second stage of the research. The data presented from the second stage is circa 10% of those involved in this full data collection.

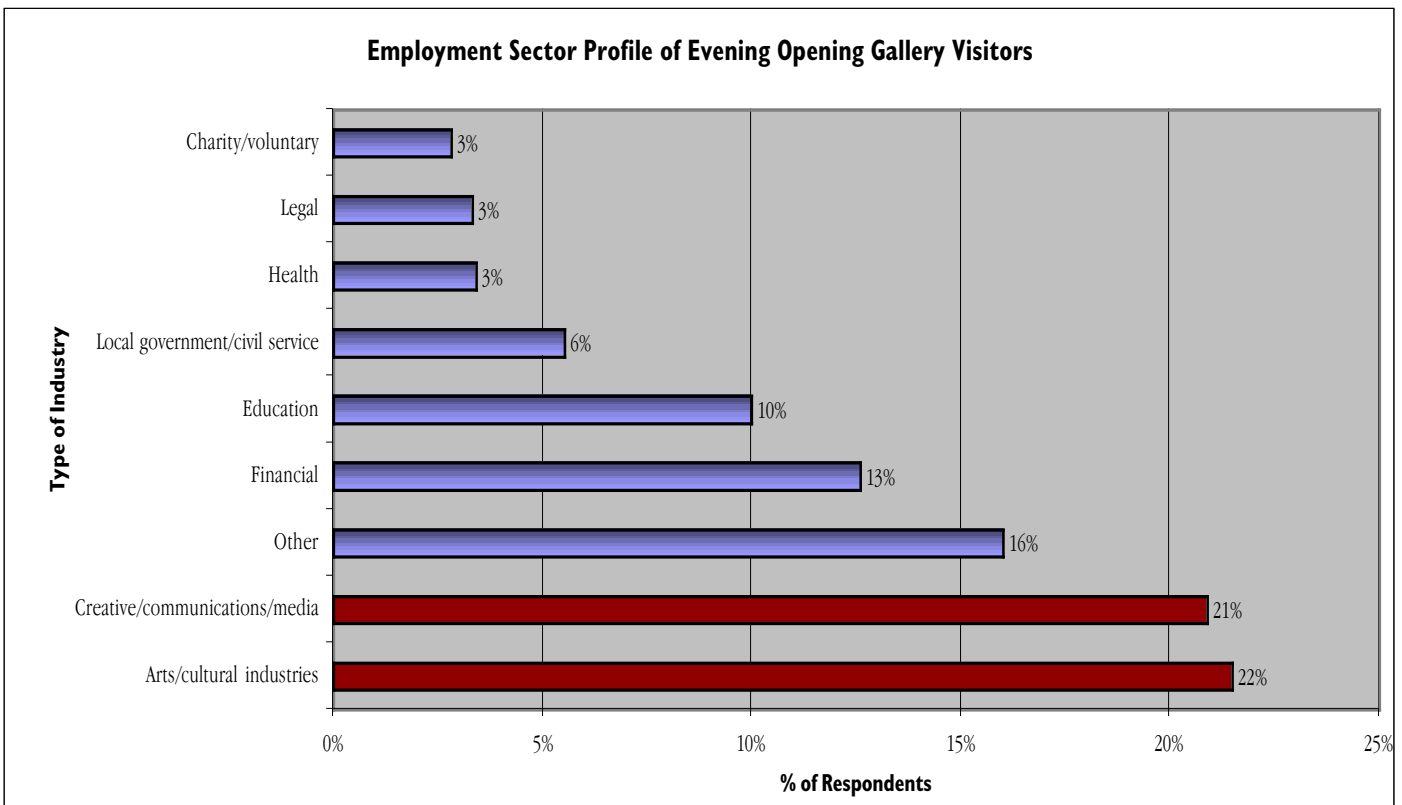
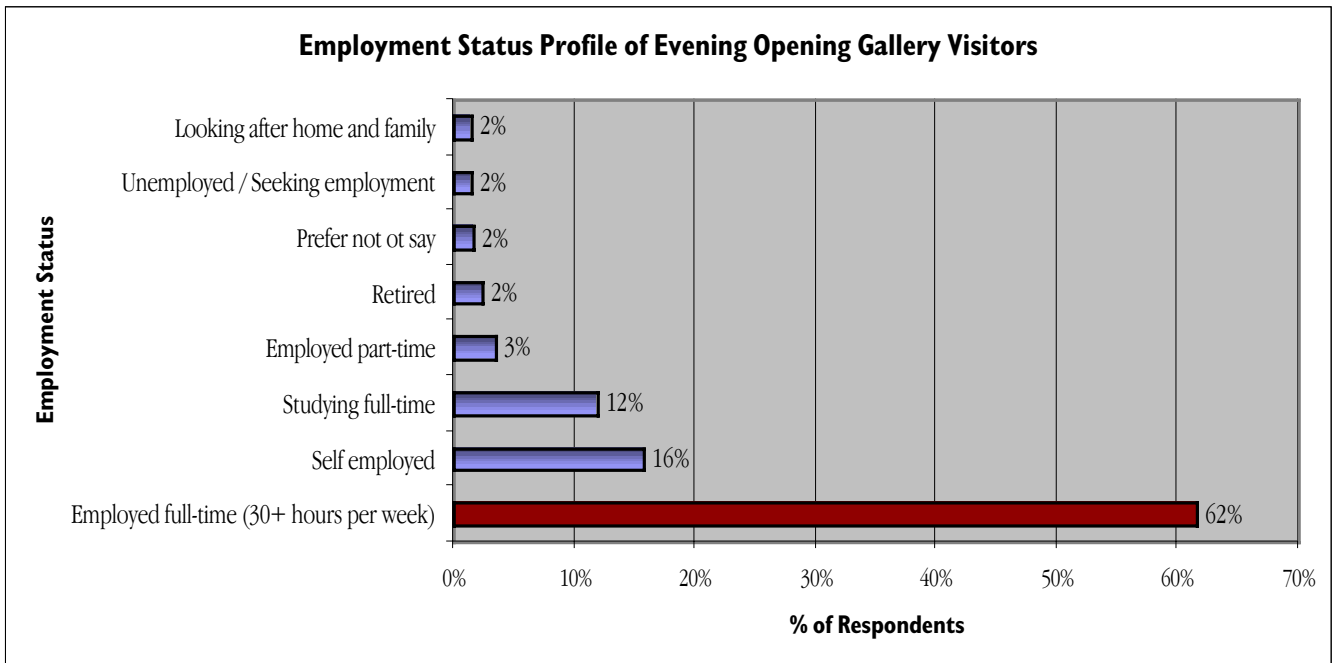
KEY FINDINGS

Who Attends London Galleries In The Evening?

Demographic Profile

- 57% are female
- Over half of the visitors are aged under 35
- At 62%, full time employed people account for the largest proportion of visitors
- 40% work in the cultural and creative industries
- 85% of the visitors describe themselves as white
- Almost all of the attenders do not have dependent children living at home





KEY FINDINGS

Who Attends London Galleries In The Evening?

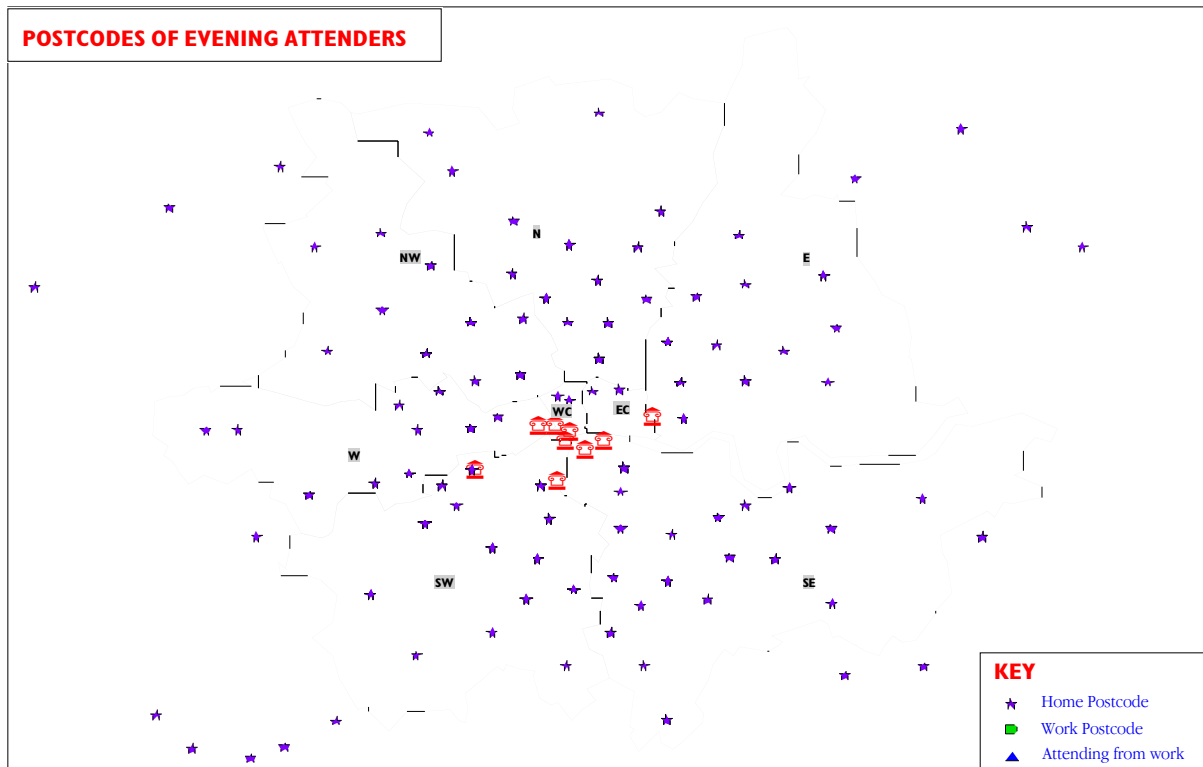
Demographic Profile

- The majority of the visitors live and work in Inner London
- Visitors originate from across the City and *not* from any one particular area
- The South West of London is the most frequently occurring postcode for both residential and place of work, this may be due to the location of the galleries

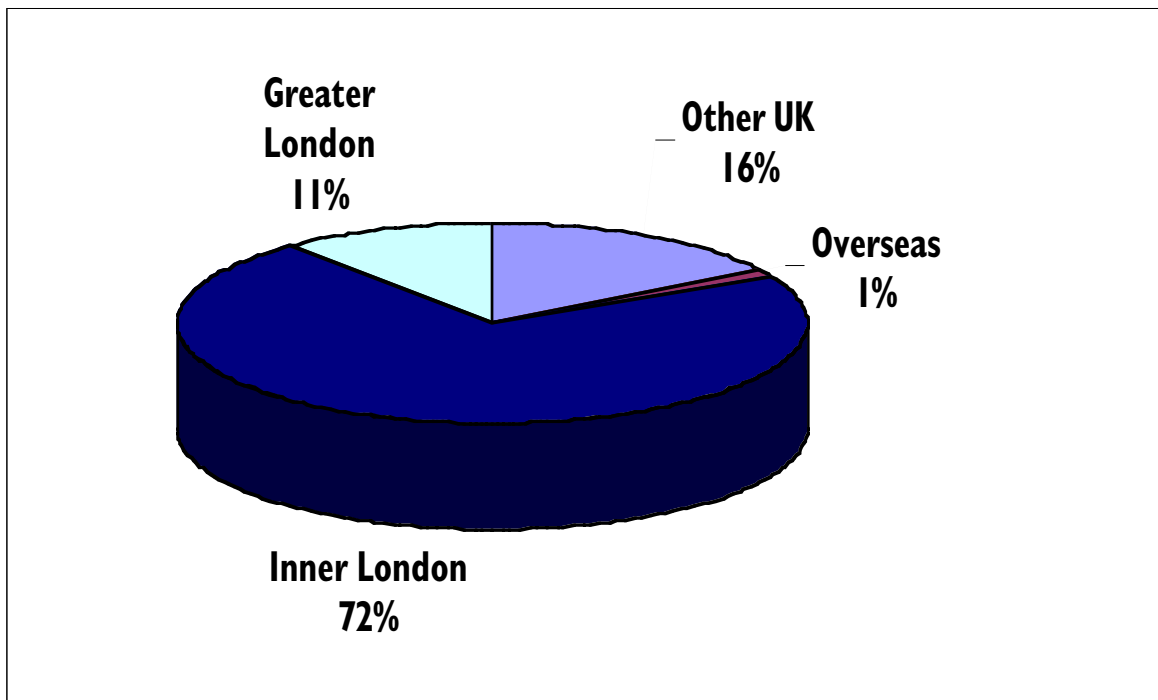
The table below shows the most recurrent residential and place of work postcodes recorded for evening opening visitors

Area	% of Respondents	
	Residential Postcode	Work Postcode
SW	14%	17%
SE	13%	8%
NW	11%	7%
W	10%	15%
E	10%	8%
N	10%	3%
KT	3%	1%
WC	2%	14%
GU	2%	2%
CR	2%	1%
EC	1%	12%
BN	1%	2%

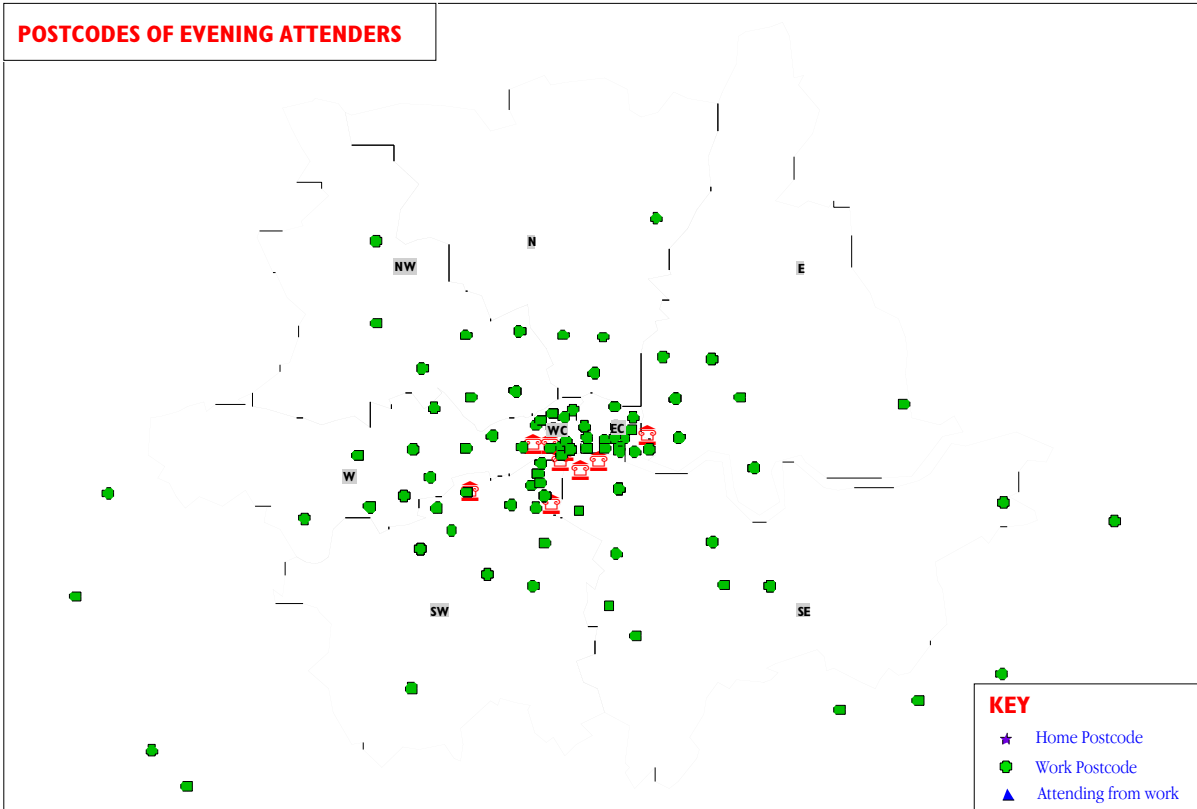
Residential postcodes (London Area)



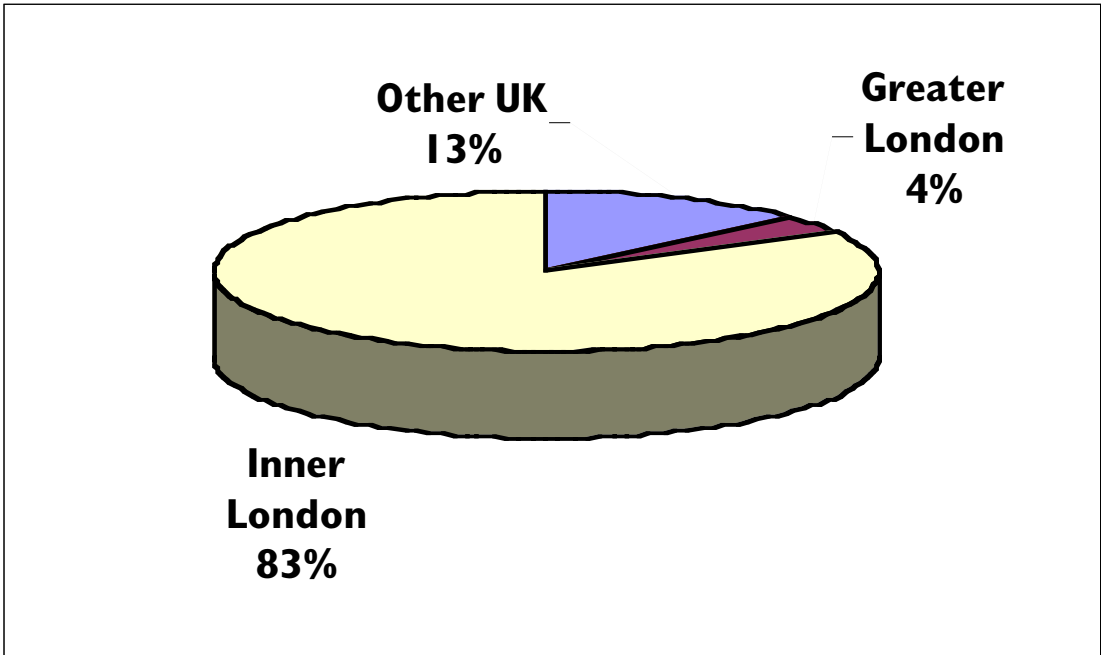
Residential Postcode Analysis



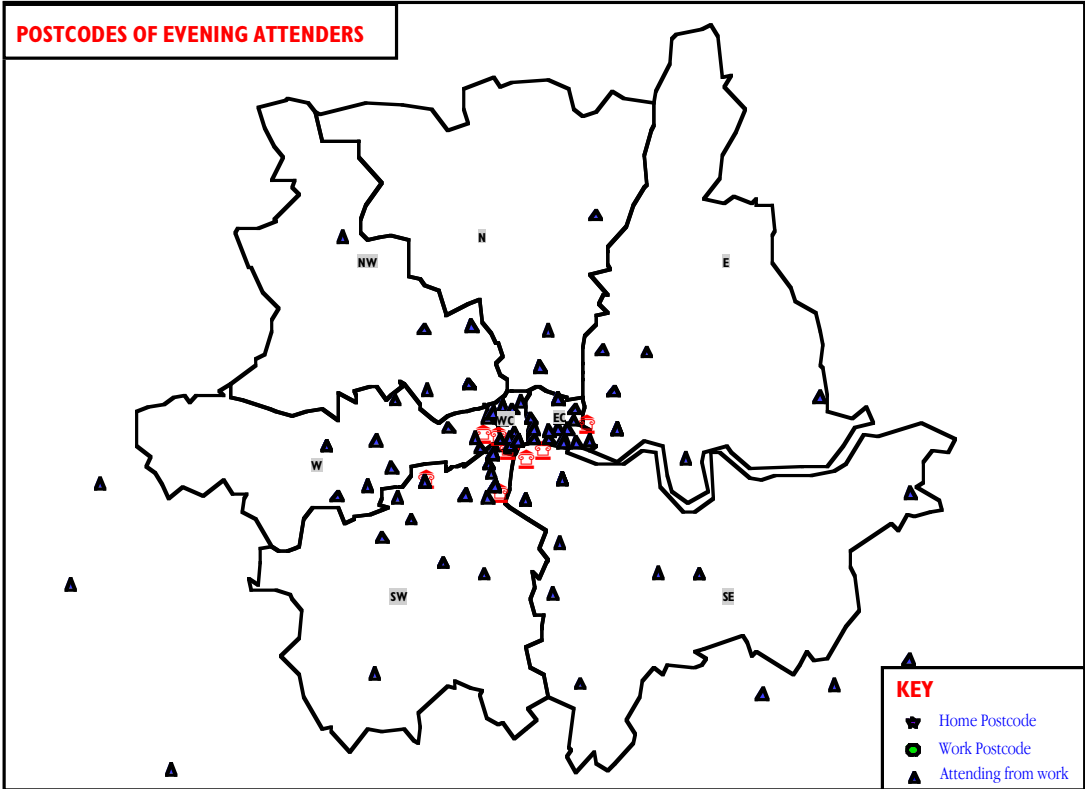
Place of work postcodes (London Area)



Place of work postcode analysis



Work postcodes of visitors attending from work



KEY FINDINGS

Comparison of Profile Data

The data collected from the evening openings has allowed us to create an ‘Evening Visitor Norm’. This is however, an overall figure across the participating galleries and there are a number of variables amongst the galleries (as pointed out earlier) which should be considered before drawing conclusions. (Each participating gallery has been provided with the discrete data comparison on the following page)

Overall Data Comparison

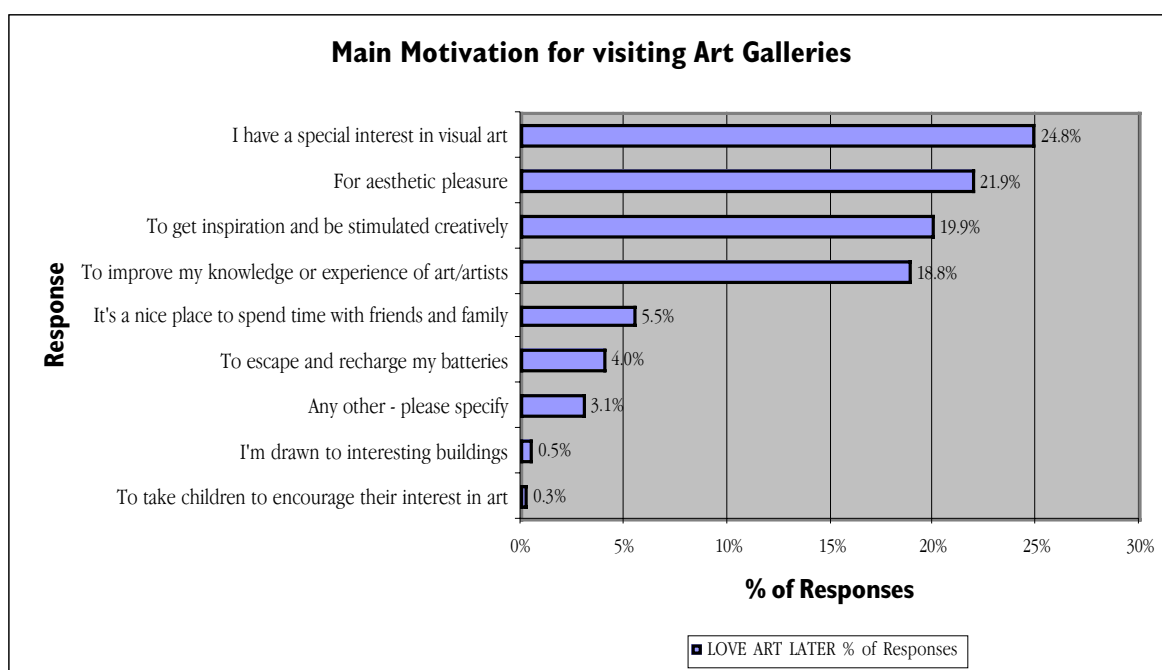
		Daytime Data									
		EVENING VISITOR NORM									
		G1	G2	G3	G4	G5	G6	G7	G8	G9	
Male	43%	48%	46%	33%	39%	41%	53%	29%	49%	42%	
Female	57%	51%	54%	67%	61%	59%	47%	71%	51%	58%	
Under 35	57%	63%	44%	26%	27%	46%	39%	35%	37%		
Over 35	43%	37%	55%	75%	72%	53%	59%	65%	64%		
Full Time Employed	62%	33%		47%				38%			
First Time Attender	27%	31%	50%	19%	35%	56%	64%		33%		
Ethnicity (White)	85%	51%*	95%	94%	93%	92%	93%		94%		
Origin London	83%	67%	42%	40%	27%		31%	59%	41%		

Individual Gallery Data Comparison

KEY FINDINGS

What Motivates Gallery Attendance Generally For Evening Gallery Attenders?

We asked visitors to the evening gallery openings what their main motivation for visiting art galleries generally was *ie in the daytime*



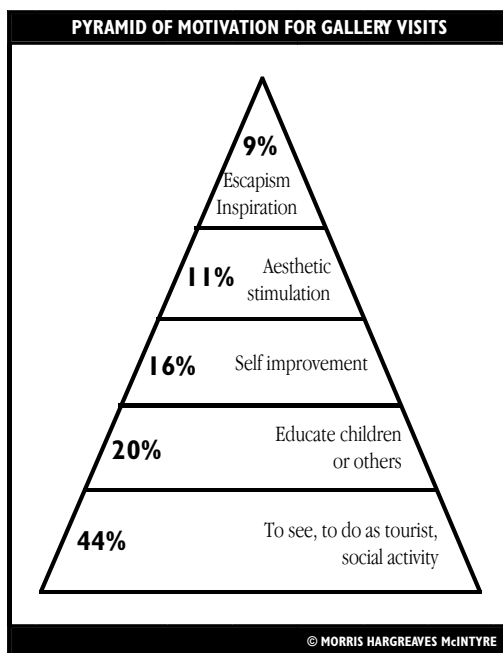
The research reveals that the major motivation (almost a quarter) for visiting a gallery is a special interest in visual art.

KEY FINDINGS

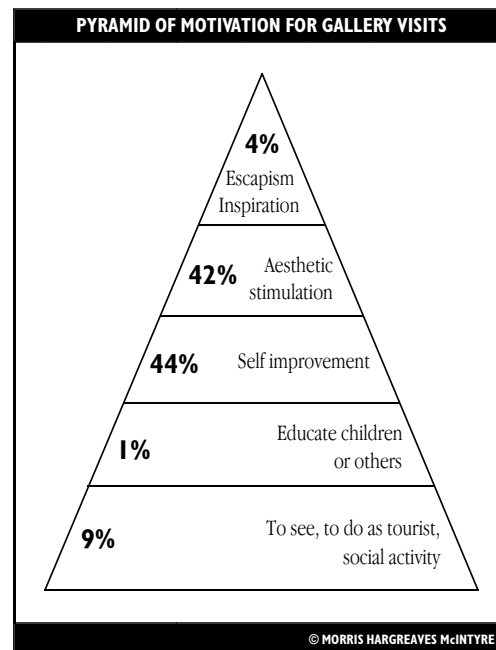
Comparison Of Motivation For Gallery Visits

The research shows that the attenders to the evening openings are much more applied in their use of galleries and visits are driven by more specialised, individual needs.

Population Research



Evening Opening Attender Research



- There is a clear distinction between the population and evening gallery attenders moving the majority of visitors towards the top of the pyramid
- Whereas daytime openings might attract people from all layers of the pyramid, an evening gallery event mainly appeals to the top 36% of the population who are meeting more specialised, individual needs in a gallery visit
- *However, as the evening openings were not promoted as planned, this may have excluded less regular gallery attenders and produced a self fulfilling communication process*

Qualitative Research Responses

The evening gallery attenders articulated their motivations which drive their gallery visiting

it is the appreciation of beautiful things and when you go and see a particular piece of art or a major artist you soak in what you see and looking at art can conjure up such different emotions depending on what you are seeing. (Attender)

*It is the historical aspect ... which is quite fascinating, and the aesthetics as well as history.
(Attender)*

Inspiration and a different way of looking at things. If you see a gallery and artists work it takes you out of your way of thinking and your world and you are seeing the world how someone else is thinking about it. (Evening Attender)

KEY FINDINGS

Who Attends London Galleries In The Evening?

Psychographic Profile

We asked visitors to the evening events to identify the level of endorsement they require when considering attending an exhibition.

Evening gallery attenders are Cautious Gamblers

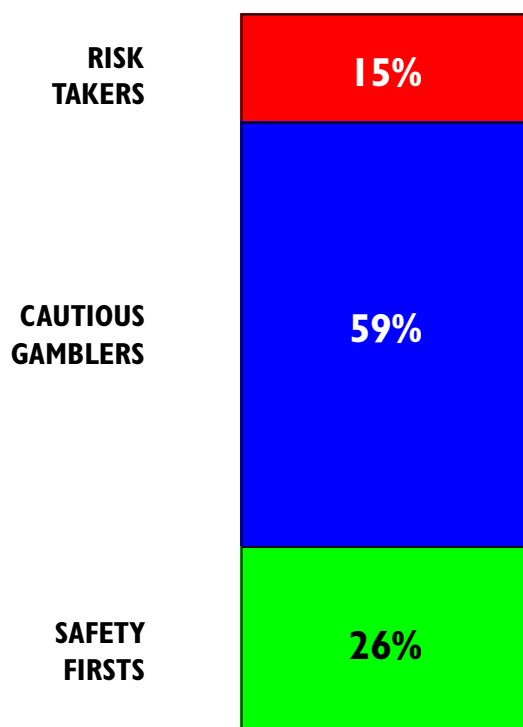
- Almost two thirds of evening gallery attenders are Cautious Gamblers
- 15% describe themselves as Risk Takers
- 26% are Safety First in their approach to attending exhibitions
- Only 13% of visits were incidental (ie attender didn't find out about the event in advance)
- 34% of attenders were told about the event by someone else

Previous research has revealed that a large proportion of visual arts attenders are *Risk Takers*, only 15% of evening attenders describe themselves as Risk Takers.

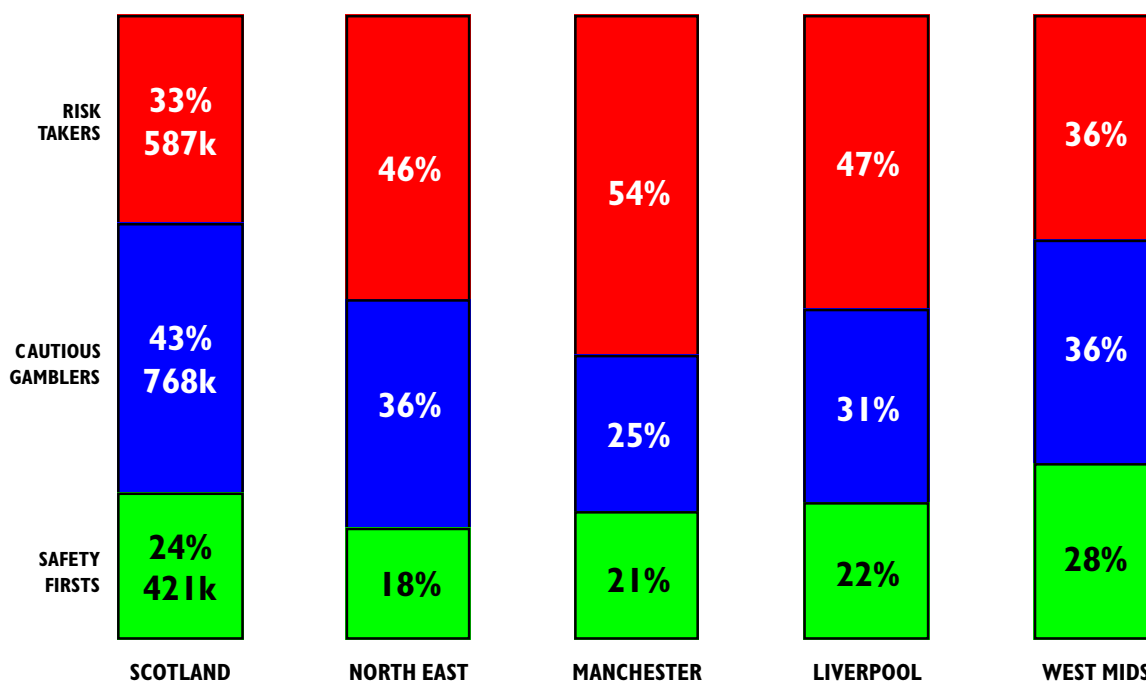
To provide an illustration of the relatively low proportion of risk takers within the visitors to evening opening events we have analysed the findings from five regional population surveys which **MORRIS HARGREAVES McINTYRE** have undertaken recently to compare against the profile for this research.

The evening attender profile has by far the largest proportion of Cautious Gamblers and the smallest proportion of Risk Takers when compared to other samples of the population across the UK.

ATTITUDE TO RISK: EVENING OPENING VISITORS

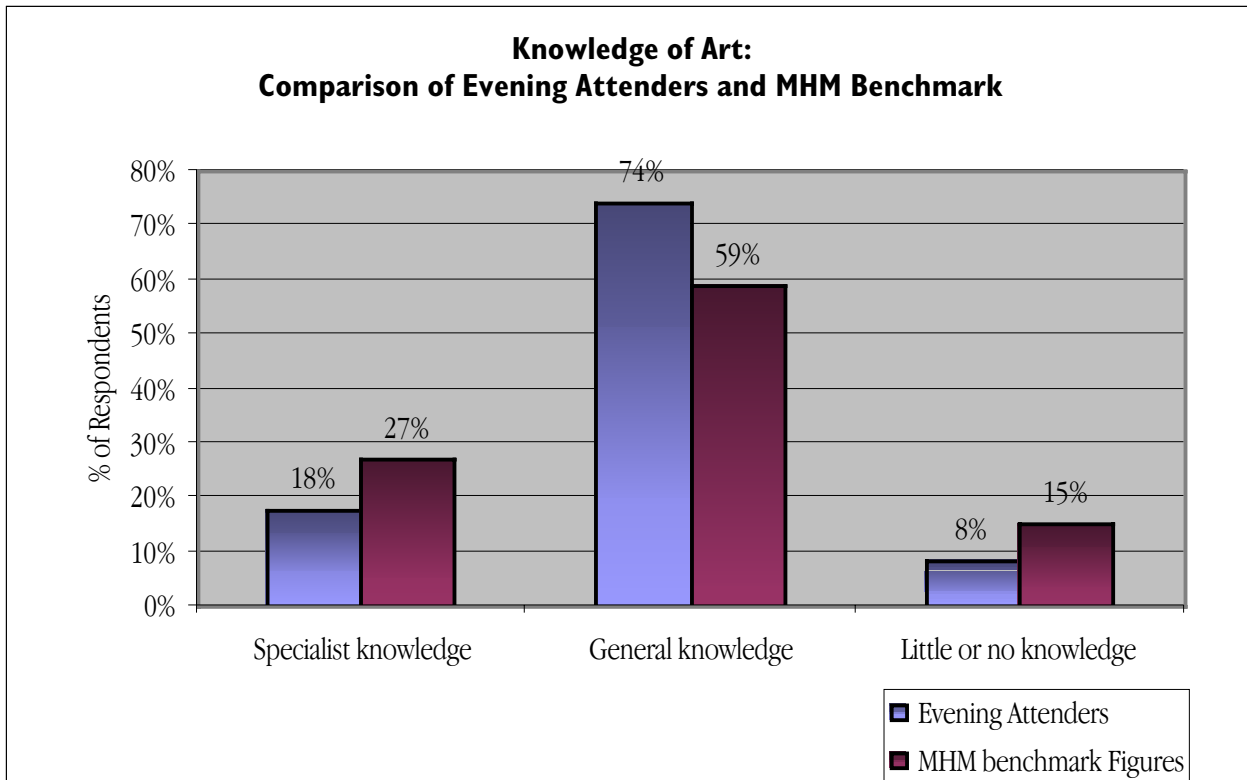


ATTITUDE TO RISK: COMPARISON WITH REGIONAL POPULATION SURVEYS



Evening gallery attenders are well informed

- 74% of attenders have a general knowledge of art
- 18% have a specialist knowledge
- Almost half of the attenders visit a gallery once a month or more



KEY FINDINGS

Why Do People Attend Evening Openings?

The simple answer to this is that there are a number of different reasons.

Through the combined analysis of both the quantitative and qualitative research three main factors emerged which drive attendance at evening openings.

- Evening is the only time available
- Evening openings offer new and novel social opportunities
- Evening openings are preferred

Each factor is defined further below with data to illustrate and support the key finding.

Evening is the only time available

For busy professionals this is the case. They work in the centre of town and tend not to come back in during the week-end which is filled with shopping, housework, sport and catching up with friends. Late night gallery opening helps extend the day, link work with other leisure opportunities and addresses their needs for a guilt-free culture fix in a bite-sized chunk of free time.

Simply more convenient

- 67% of attenders said that the convenient timing appealed to them
- 35% stated that this was the most important factor

the passers by who are usually rushing past on the way to or from work have a chance to actually pop in (Vox Pop Interviewee)

It seems a more relaxed atmosphere in the evening where as during the day you seem a bit more rushed and you don't have to worry about time. (Vox Pop Interviewee)

Busy professionals are unable to attend during the day

A key demographic variable that distinguishes evening gallery attenders from daytime attenders is employment status

- 62% of evening opening attenders are employed full time
- 58% of evening gallery attenders came straight from their place of work

I like going in the evening because of lack of time because I work five days a week (Evening Attender)

I think it is fantastic it provides an opportunity for people who work during the day to visit galleries and also the atmosphere is more relaxing and after a days work it is good. (Vox Pop Interviewee)

I can't come during the day because my work is too busy and I can't afford to take time off. (Vox Pop Interviewee)

going in the evening after work kind of splits the working week up. I find it is quite escapist in a way from being at work all day and being able to go in the evening. (Attender)

Evening is a natural time for leisure activities

- People are used to carrying out leisure pursuits in the evening

I go to the theatre in the evening. I go to listen to a DJ in the evening. I open my senses in the evening and where I come from anyway you expect them to be open at least until 8 in the evening and so I am accustomed to it (Evening Attender)

Weekends are for relaxing, shopping, sport, friends, getting away from the City

at the weekends I try very much to avoid going into town because I am there all week so I do a lot more sport and try and get out of London and do activities outdoors. (Attender)

I find weekends are packed with things and I always want to go and see exhibitions but the whole structure around Saturday and Sunday means I never get to do it because I want to be at home and relax (Attender)

The opportunity to attend a new gallery

The flexible opening hours allow visitors the opportunity to see more exhibitions or visit galleries they wouldn't have necessarily gone to during the day.

- Over a quarter of evening opening attendees were first time visitors to the particular gallery
- 56% thought that evening openings would encourage them to try new galleries

Visitors who are driven by this factor can also be influenced by either one of the factors below.

Evening openings offer new and novel social opportunities

There is a group of mainly younger people who are seeking novel social opportunities that are not exclusively centred around bars and drinking. They see galleries as offering a new social attraction with an emphasis on style.

At the same time, by switching the emphasis to a social rather than cultural event, those individuals who are attracted to social events in galleries see them as routes through to introducing friends to galleries who might not usually see themselves as gallery-visitors. Others identify these social events as informal opportunities to enjoy the gallery in a less pressurised or elitist environment, where there is no presumption of existing knowledge and therefore see them as a good opportunity for introducing new attenders.

To this extent evening openings perform an audience development function by relegating the art to an incidental attraction of the social event.

Provides a social gathering space

- 56% of attenders thought it would be a good place to arrange to meet someone

...we all go down for a social gathering and it is quite fun. (Attender)

I probably wouldn't go on my own in the evening. If I go to galleries in the evening it is usually because I have got some social thing (Evening Attender)

Fills the break between work and meeting friends for a meal / drink / theatre

- 58% of evening gallery attenders came straight from their place of work
- Of those who came from work 40% went for a meal immediately after attending the gallery
- 22% of those who came from work went for a drink after their visit

there is a gap there between that and the theatre which you could spend in a noisy pub or something but you often don't want that (Evening Attender)

The places... I go to are either cheap or very easy to get to from my work or home.(Attender)

Combine an evening gallery visit with another leisure activity

- 19% went for a drink after their visit
- 37% went for a meal

It is nice to go out for a drink afterwards or a meal. (Vox Pop)

It is not clear from the research whether the gallery visit was an extension of the subsequent activity or vice versa. This could be explored with future research.

More diverse mix on offer which makes the experience an exclusive / special event

- 61% of attenders were looking for a different experience / ambience from an evening visit
- The music and performances provided a different ambience than that of a regular gallery visit, this transformed the experience into a special event for some.
- Attenders consider themselves as part of a select group of people ‘in the know’ about these events and enjoy the exclusivity.

... they had a performance and an opening and musicians and it kind of created a really interesting buzz but I agree with you that I am worried as well that they are going to get ruined by too many people going (Attender)

... one of the reasons I like going late at the moment is because it feels special where as if every museum was open late every night then it would be like whatever and I would may be go less where as now I go more because it is a special evening (Evening Attender)

Evening openings are preferred

In contrast to the group driven by the social factor, people within this group see evening openings as opportunities to reclaim the galleries from the hustle and bustle created by school groups and hoards of disinterested tourists. They welcome the idea of quiet contemplative spaces where they can be at one with the art in the company of discerning and knowledgeable gallery visitors like themselves.

Art is the main focus not the other events

- The music and bar events are not regarded as adding value to the experience by some attenders.

I was very put off by the fact that it was so noisy and there were all these musicians everywhere and in one particular gallery you couldn't get to see the paintings because it was so full of people standing around talking and drinking and listening to the music and I don't go to a gallery to be involved with all these other things. (Attender)

I hated it because of that ... had I gone there just to appreciate the art I would never have gone back. (Attender)

if it just turns into a place to meet people and there is no interest in the art it is just because it is different and a sexy kind of atmosphere to be in then I don't think that adds anything. (Attender)

Desire / Expectation that galleries will be quieter / no children

- 52% stated evening openings are a way of avoiding the bustle of the weekend
- 47% stated that the galleries being quieter than usual appealed to them

... people that go in the evening really want to be there where as a lot of the time you go to galleries and you feel that it is like people are there because they are in London and feel they have got to go and you are part of this milling mass that is just there that is not really engaging with anything that is in there where as I do get the feeling that the evening thing everyone wants to be there because they want to be there. (Attender)

I just assume that the evening hours are not quite so busy but it is I think they are actually becoming quite popular which is a bit of a drag actually but the other added attraction is that there are no children and no coach loads of nice old ladies which I will be one day myself but it is slightly less manic even though it can still be quite crowded (Vox Pop)

you can expect it to be quieter and it will be more space to look. (Vox Pop)

it just seems so nice to go and see it quietly when there are five people in the room rather than where there is 250 all the time. (Evening Attender)

I go to a gallery in the evening because I don't want a lot of people to be there ... that is the main reason I go in the evenings it tends to be a lot quieter but I always feel concerned that they are going to stop the evening openings because they have got to pay for all these people to sit in the individual rooms and if there is only a few people going then may be you want a few more people going but not too many to spoil the experience. (Attender)

I think it is a really good opportunity to go and have a closer look at rooms that may be you wouldn't spend as much time in because of the very reason that you said like there will be thirty school children in there and tourists or people just standing in front having a conversation about work. (Attender)

CONCLUSIONS

To what extent is the visitor profile for evening openings different from the general gallery visitor profile?

Young

The people who attended evening openings were predominately young but actually no younger than day-time visitors for galleries generally.

Cautious

Attitudinally evening visitors crossed the range from innovative to conservative roughly in proportion to what would be expected of the population. This profile would probably have been different had attenders been attracted by a viral electronic campaign, but the implication is that the current natural market for evening attenders are not by nature risk takers and therefore need a degree of endorsement, either through venue brand or artist brand, before engaging with an event.

Independent Adults

Evening opening attenders manifested the profile of independent adults rather than family-minded people with most of them having no dependent children living at home and very few of them being motivated to visit galleries for the purpose of educating children.

Busy professionals

Almost two-thirds of attenders at evening openings are employed full-time compared to much lower figures during the daytime.

Is this a new market or the usual gallery visiting market choosing different times to visit?

Confident gallery visitors

Present attenders of evening openings are generally active gallery attenders or at least see themselves as such. Three quarters feel they have a general knowledge of art and only a tiny proportion feel they have little or no knowledge of art. Over half say they visit galleries on a monthly basis.

Art interested

On the whole their motivation for visiting galleries reflected a greater interest in and engagement with art than for the population as a whole. It is not surprising that the profile of attenders at evening openings excluded the tourism and destination-driven visitors but did include people who are already active gallery visitors.

Time Poor

Evening openings did uncover a possibly lost market segment of people who see themselves as gallery visitors, or lapsed gallery visitors, but who now cannot find the time for such luxuries due to the pressures of work and domestic commitments.

Opportunity to introduce non-gallery visitors

The focus groups revealed that these confident gallery visitors, or disenchanted lapsed gallery visitors, welcomed evening openings as either opportunities to introduce new attenders, or times to renew their own gallery visiting, attracted by the expectation that the galleries would be more informal, that visitors would not be expected to have existing knowledge, and a less intimidating or elitist ambience generally.

Has evening opening challenged perceptions of the galleries?

Attenders held a positive perception of the participating galleries even before the evening events. Rather than challenging perceptions of the gallery, the events changed perceptions of the other visitors and the expected behaviour for a gallery visit. There is a level of expectation that the galleries should already have been operating a more flexible approach

It changed my perception of the people that go there (Group2)

Is there potential for galleries to position themselves as social destinations?

Simply the act of opening in the evening can stimulate this perception amongst visitors. People are actively seeking an alternative to the existing social destinations ie bars and pubs. There is potential to augment the surrounding products which make up the gallery experience - for example special events, music, cafes, restaurants. The galleries need to cater for those whose primary motivation is for the art

If galleries are open in the week then it just changes the way I look at it and that is why I think it has become a more social thing to do going to galleries because now if you want to go out to dinner you can also go to an exhibition (Evening Attender)

It shows they are definitely making an attempt to accommodate the needs of working people and to generally have a much more open door policy. (Vox Pop Interviewee)

WHERE DO WE GO FROM HERE?

Implications of research findings

The research on the 2002 evening opening provides a useful benchmark against which to plan and measure future campaigns.

It reveals that there is a need for evening openings and broadly that the potential attenders have diverse motivations which can be met through a variety of evening opening formulae.

DEVELOPING THE MARKETING MIX

Attendees have diverse motivations which drive them to attend evening openings. However, the motivations which drive a visit to a gallery in the evening could be extremely different to the motivation behind attending an *evening event which just happens to be at a gallery*. The offer which each gallery communicates to the market obviously determines who will be attracted. As each event at each participating gallery differed we have extrapolated the main reasons visitors attended the evening openings and further segmented the market into two groups.

The main reasons for attending the galleries in the evening are

- Like minded visitors (no tourist groups or children)
- More of a personal gallery experience
- Opportunity to Socialise
- Invite people they wouldn't normally
- Less intimidating
- Less intellectual
- Less effort (already in the city)
- Lower expectation

The two market segments which emerged from analysis of the qualitative research are

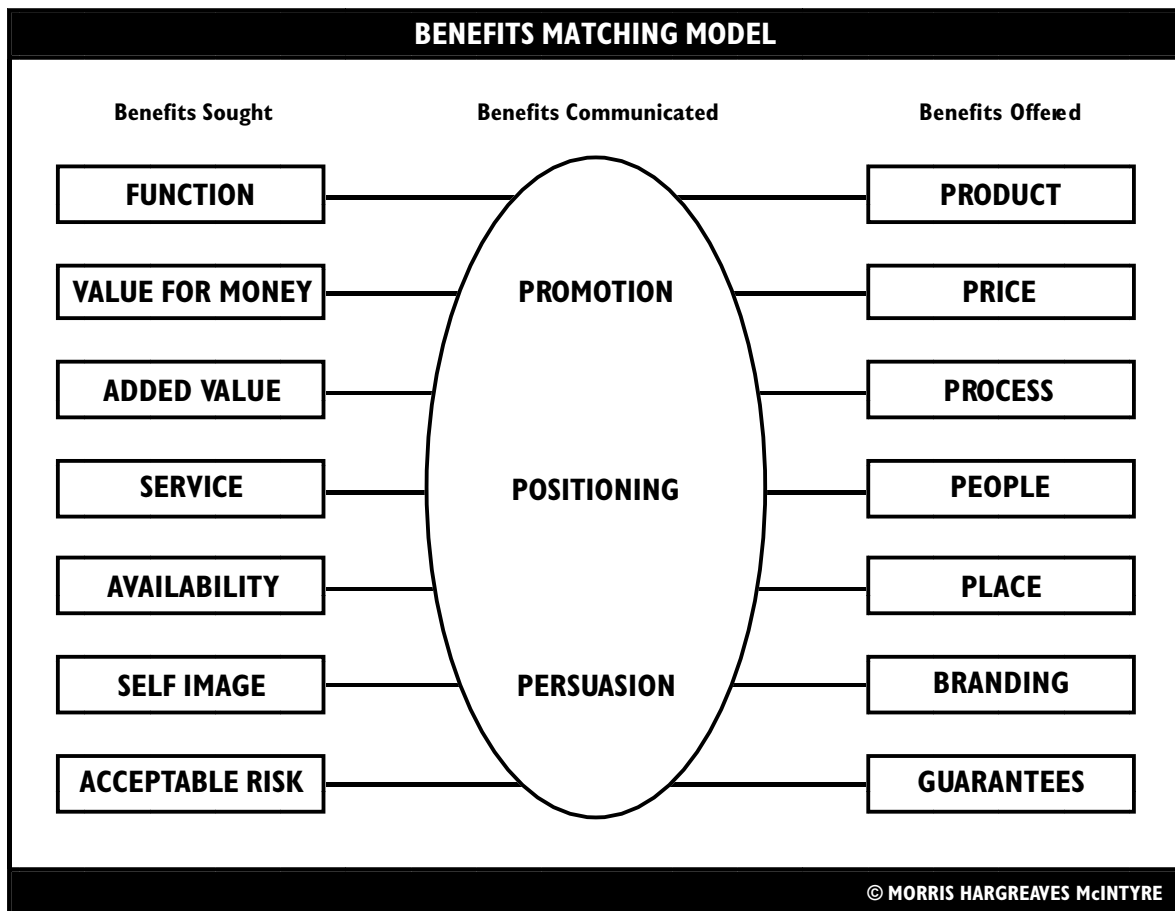
- Social spacers
- Art Lovers

Each market segment has different needs and wants. In order to meet these, the gallery must adopt differentiated marketing mixes or offers.

Matching the benefits

The Benefits Model (below) illustrates the process of matching the benefits sought by a particular market segment to the benefits offered by the evening opening and how those matched benefits are communicated.

BENEFITS MATCHING MODEL



Benefits Sought By Evening Gallery Attenders

The analysis below outlines the benefits sought by the two distinct groups of evening gallery attenders. These can be matched by the *Benefits Offered* in alternative marketing mixes developed by each gallery.

ART LOVERS

SOCIAL SPACERS

Function

Reclaim the gallery space. Opportunity to appreciate artwork with likeminded others in a quieter environment.	Place to meet new people or introduce friends. Alternative to other social spaces such as bars or pubs.
---	---

Value For Money

Expect evening opening to be free but would be willing to pay admission into special exhibitions	Would pay admission to a gallery event
--	--

Added Value

Able to use the gallery as their own space. Would value invitations to 'special' previews or private viewings, artist talks, presentations.	Staffed bar, drinks promotions, music, performances, restaurant
---	---

Service

Minimal input from gallery staff	Guidance and information on exhibitions
----------------------------------	---

Availability

Evening opening at least once a month where galleries remain open until 10pm	Regular opening on a Thursday/ Friday. Special events every month.
--	--

Self Image

Cognoscenti, innovative, Early adopters	Culturally aware, sophisticated, Early adopters
---	---

Acceptable Risk

Confident in their response to visual art. Risk Takers and Cautious Gamblers in their approach to galleries, will visit specialised galleries with little endorsement	Need some level of endorsement, dependent on reference groups. Cautious gamblers in their approach to galleries
---	---

Benefits Communicated to Evening Gallery Attenders

The analysis below outlines the communication of the benefits for the two distinct groups of evening gallery attenders. This refers to the central communication section of the Benefits Matching Model (above) PROMOTION, POSITIONING, PERSUASION. Each segment requires a discrete communication strategy which conveys the particular benefits sought.

ART LOVERS

SOCIAL SPACERS

Positioning & Persuasion	
<p>This group is very well informed about the cultural offering in London, are generally as proactive as time allows and select from what is on offer in a discerning manner. They do not need to have the benefits of evening openings pointed out to them since they recognise these already and only wonder why galleries have only just begun to introduce this service.</p>	<p>This group is event-led rather than gallery or time-slot-led. They therefore need to have their attention drawn to the events and will tend to be more reactive in their response.</p>

ART LOVERS

SOCIAL SPACERS

Promotion	
<p>Tube – this group uses the tube as an information source. They would welcome a generic poster listing which galleries are open on which nights as a straightforward information service</p>	<p>Time-Out – events entered in listings and display advertisements. Brands, of venue, sponsors and featured artists, as endorsement of the event, are important for this group. Recruitment to an e.list for future events could be achieved through a display ad in Time Out directing people to a web-site. (Also for Guardian Guide and other nationals)</p>
<p>Time Out – a generic display advertisement listing which galleries are open which nights, again as a straightforward information service. Supported by listings. The ad would be even more useful if it was printed in the form of a pull-off credit card to keep in wallets. These methods assume a predictable pattern of evening openings</p>	<p>E-list and web-site – identifying gallery evening events. Notices need to facilitate ‘sneezing ‘ onto friends</p>
<p>Guardian Guide and other national listings – similar information service as for Time Out</p>	

RECOMMENDATIONS

This research leads us to conclude that there is strong justification in galleries collectively promoting evening openings.

Three different strategies can be adopted and pursued by galleries participating in future Love Art Later campaigns:

Market Penetration – encouraging more existing gallery attenders to attend more often by altering the Place and Promotion elements of the marketing mix to maximise opportunities to visit and awareness that these opportunities exist.

This strategy would be directed at the Art Lovers

Market Development encouraging new attenders by stimulating existing attenders to bring friends or by reaching new attenders through presenting opportunities for new social and cultural experiences in gallery setting through non-art events with new communications approaches and revised positioning.

This strategy would be directed at Social Spacers

Product Development Enhancing the gallery experience for existing or lapsed attenders by developing the product offering through special art-related events, talks and guided tours with or without additional non-art features.

This strategy would be directed at Art Lovers

Each can result in additional visits to galleries which would not otherwise have been made.

It is important that participating galleries clearly identify their objectives behind these strategies and which strategy and market segment they are pursuing.

We would recommend that the separate strategies are pursued collectively by groups of galleries so that the product proposition and communications aspects of the marketing mix can be clearly differentiated and the market segments targeted accordingly.

Combining these strategies could result in the Art Lovers being alienated since the benefits they recognise are different from those recognised by Social Spacers. To target only the Social Spacers could result in Art Lovers feeling they have lost any chance to reclaim the galleries as their own, and instead could conveying an impression that galleries, when not crowded with tourists and school groups, are full of drunken, trendy revellers focused only on free vodka and with no interest in the art. This is not advisable.

So Many Galleries, So Little Time

The Impact of Evening Gallery Opening

Market Research Analysis: Appendix

September 2002

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Overall Data Set

Cross Over Between Galleries

The table below shows the proportion of attenders who visit the other participating galleries. The data reads across from left to right with the left column being the gallery visited in the evening during this research.

For example we can see that 97% of visitors to G1 evening event have visited G2 and 62% of the visitors to G6 have visited G8.

	G1	G2	G9	G3	G4	G5	G6	G7	G8
G1		97%	25%	59%	72%	64%	68%	71%	71%
G2	33%		23%	55%	63%	64%	65%	43%	59%
G9	34%	95%		85%	69%	86%	78%	59%	74%
G3	33%	94%	35%		64%	77%	72%	47%	66%
G4	36%	95%	25%	57%		64%	65%	48%	61%
G5	30%	90%	29%	64%	60%		70%	42%	67%
G6	32%	92%	27%	60%	62%	71%		41%	62%
G7	53%	96%	32%	62%	72%	66%	64%		71%
G8	38%	94%	29%	62%	65%	76%	69%	51%	

Average Party Sizes

Gallery	Average Party Size	Mode
G1	1.7	2
G2	2.8	2
G3	2.1	2
G4	3.8	2
G5	1.9	1
G6 ^	4.9	2
G7	2.4	2
G8	2.8	2
G9*	3	1

^ 2 very large groups

*Only 4 groups 1 group with 8 people

Duration of Visit

	Up to 30 mins	Up to 1 hour	Up to 1 hour 30 mins	Up to 2 hours	Up to 2 hours 30 mins	Up to 3 hours	Over 3 hours
G1		15%	46%	8%	15%	8%	
G2		7%	17%	24%	13%	15%	21%
G3		7%	28%	37%	20%	6%	
G4		13%	20%	21%	25%	11%	5%
G5	4%	15%	33%	19%	15%	4%	7%
G6	9%	41%	24%	15%	6%		
G7		44%	44%	6%			6%
G8	3%	6%	34%	26%	20%	9%	
G9			25%	50%			25%

Qualitative Research Transcripts