The BALTIC Centre for Contemporary Art

Audience Profiling

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The BALTIC Centre for Contemporary Art - Audience Profiling

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1 Introduction

Morris Hargreaves McIntyre was commissioned to carry out an audience-profiling programme providing primary data about BALTIC's audience. This report is based on the findings from an interview led exit survey of visitors to the BALTIC Centre for Contemporary Art carried out during November and December 2007.

1.1 What did we want to know?

The main aims of the research were to:

- Gain a deeper understanding of visitors, who they are, their motivations and attitudes
- Put forward recommendations for how Baltic can deepen engagement and improve the current offer
- Assess how BALTIC compares to other regional/national museums or art galleries

More specific questions were asked of this research:

1. What is the size of the audience?
2. Who visits?
3. How many visits are exhibition driven?
4. Have visitors paid to visit exhibitions and would they pay in the future?
5. Why do they visit?
6. How do they find out what's on?
7. Are visitors aware of the exhibitions/activities programme?
8. What is the usage level of the facilities, particularly the shop and the café?
9. How satisfied are visitors?
10. Would visitors return and recommend it to others?

1.2 What we did

Visitors were asked about their reasons for visiting Baltic. Visitors were also asked to rate their experience of the BALTIC, its services and exhibitions.

A total of 176 visitor interview-led exit surveys were completed during November and December 2007, and analysed.

The following exhibitions took place at the BALTIC during this period:

- Kader Attia
- Ant Macari
- Mark Titchner
- The Zabludowicz Collection
- Kendell Geers

We have used other data from our databank of past research undertaken at other museums and art galleries nationwide, to provide in depth comparison with current trends and results of this research project.

We have used BALTIC past reports to establish comparisons with current results.

- "A Year at BALTIC" 2004. A year long interview-led survey. This first piece of significant visitor research undertaken offers a closer description of the general audience.
- "The BALTIC Centre for Contemporary Art – Winter 2006 Visitor Survey". Snap shot of specific exhibitions (Candice Beritz, Chiho Aoshima, Keith Haring and "Spank the Monkey")

1.3 Notes on the data

All the data in tables and charts are %.

While we have provided statistical analysis, the small size of some of these sub-samples must be borne in mind e.g. we only had 21 respondents who were lapsed visitors.

Within the tables:

- The symbol "–" denotes a nil response
- % are rounded to the nearest full number

2 Who is visiting?

This chapter describes the visitor profile, primarily their demographic profile, but it also looks at their knowledge and connection to the visual arts. We have also used the data from this research to estimate the size of the audience.

2.1 How often do people visit?

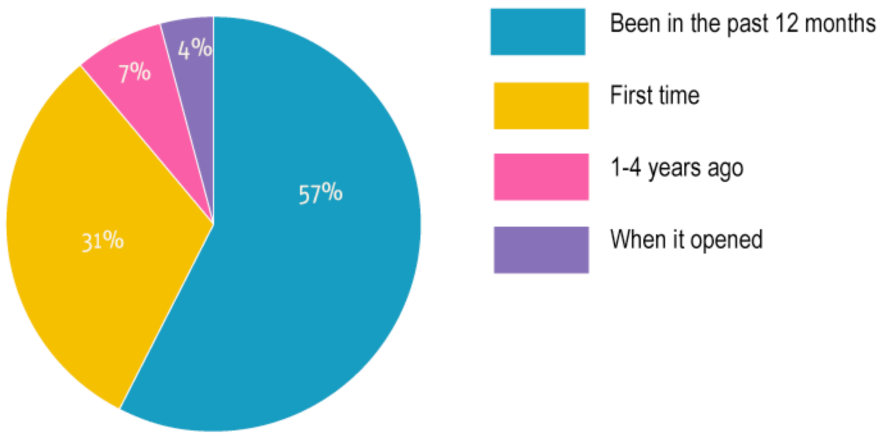
We asked people to tell us whether they had ever visited Baltic and how often they had been in the past 12 months.

From this data we can establish the size of the audience and to what extent Baltic are retaining audiences and/or developing new audiences.

Baltic has a loyal core audience

Two thirds of visitors have been in the past 12 months, and on average they visit 3.3 times a year. What this means is that Baltic has a loyal and regular audience that they can rely on to visit many of their exhibitions.

When did you last visit BALTIC?



Baltic continues to attract new visitors

Around a third of the people we interviewed were visiting for the first time. They are most likely to be from outside the North East (50% are 'rest of the UK'), or overseas tourists (27%).

In 2003 the proportion of people visiting for the first time was 54%, which is to be expected given that the gallery had just opened.

However, Baltic is not re-activating its lapsed audience.

Whilst it is retaining its audience, and continuing to be a major draw for tourists to the region, only 11% have been to Baltic before and are returning. What this means is that visitors to the building are far more likely to be either regulars or first timers, it does not tend to appeal to infrequent visitors, or to those who may have visited in the first few months of opening. This presents both a challenge, and an opportunity, for Baltic, as potentially there is still a local and regional market that could be reactivated by the organisation.

How big is your audience?

In 2001 we conducted a population survey of people living in a 90 minute drive-time of Baltic. This found 23% of people were interested in attending, overall this worked out to be 610,000 people.

In the first year of opening, between July and December, Baltic attracted nearly 630,000 visits and in 2003-2004 (January to December) it received over 640,000 visits. Using the data we gathered during our survey in 2003 we calculated this number of visits to represent around 214k people/visitors. Visits have steadily declined since this 'honeymoon' period and in 2006-2007 just over 390,000 visits were made.

Using the same formula we used in 2003, we are able to estimate the size of the audience.

% of visitors x visits recorded in 06/07 / visit frequency = number of people

The calculations shown below summarise the proportions of regulars, first timers and lapsed attenders, and their annual visit frequency. This data allows us to work out the size of the audience.

57% regular visitors x 390k = 222,300 / 3.3 times = **67k people**

11% lapsed visitors x 390k = 42,900 / 1 time = **43k people**

31% first time visitors x 390k = 120,900 / 1 time = **121k people**

Therefore, 390,000 visits are made by 231,000 people.

You can see from these figures that you can rely on a fairly small, but loyal and regular core audience, of nearly 70k people, and the remaining visits largely come from first timers.

74% of first timers say they are likely to visit again, about 90k of people, the rest are unlikely to come back, mainly because they are UK or overseas tourists (however, you could assume that these 31k people are replaced by others in 2008). If all of these 90k of people do come back, without further research, it is hard to predict whether they will become one of the loyal core, or the infrequent lapsed. On-going quantitative research will be able to test this retention and help to predict the extent to which the loyal core is expanding, contracting or remaining static.

Growing the audience does not just depend on retaining first timers, it also requires re-activation of lapsed visitors. They provide a useful source for building a core audience and Baltic should review how it could attract these lapsed visitors and work to retain them. We would recommend that further research be undertaken with lapsed visitors to find out why they have lapsed and what you would need to do to persuade them to re-visit. A major blockbuster exhibition could be what is needed to re-launch Baltic but the experience must be extremely positive to convince these lapsed visitors to return, and data capture processes should also be in place to record their contact details so they will receive future communications.

2.2 Who is your audience?

The following charts illustrate the major demographic trends and audience profile.

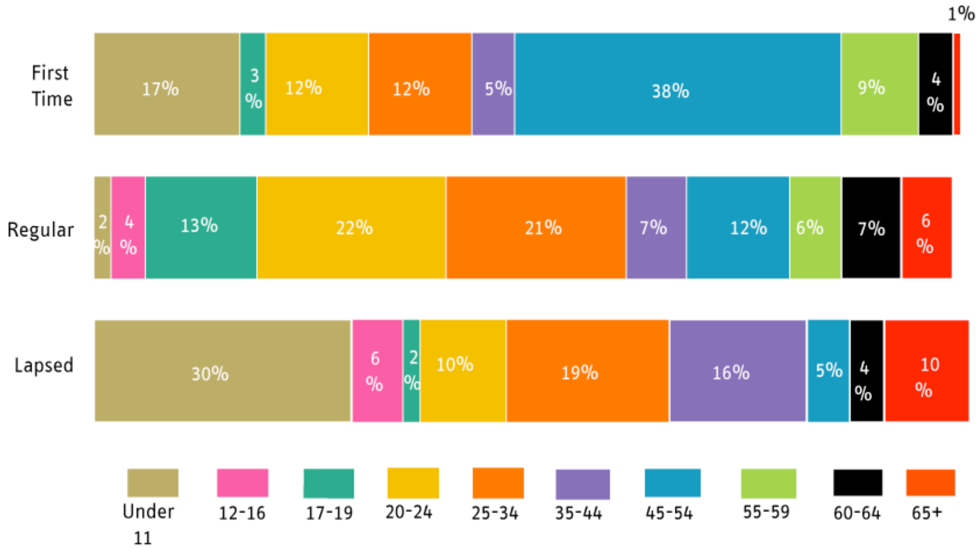
Visitor's age profile

BALTIC's regular young audience is young, 62% aged under 35, compared to other major art galleries in the UK (30-40%).

Lapsed visitors are more likely to visit as a family or with children (36% under 16 years old).

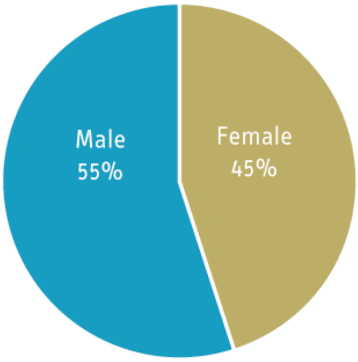
First time visitors are more likely to be 45-54 (38%) and come from outside the region. A similar pattern can be observed at Scottish museums and art galleries.

Visitor's age profile BALTIC



Gender

BALTIC has a slightly higher level of male visitors (55%), other national art galleries tend to have a larger female audience base (between 58% to 60%). The gender profile follows a similar trend for first time, regular and lapsed visitors.



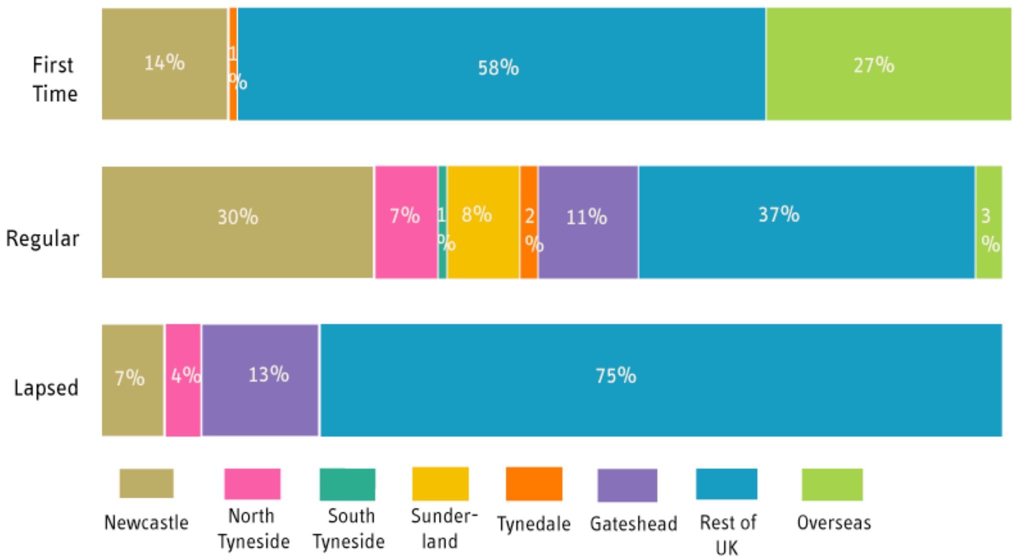
Visitor's gender profile

There is a significant number of non-local visitors

43% of all respondents came from the Tyne and Wear region.

48% came from other areas in the UK and 9% from overseas. These visitors have been motivated to visit as BALTIC because it is a major tourist attraction in the area, something to see or to do.

Visitor's origin BALTIC



The core regular audience is mainly local (60% from Tyne and Wear).

New and lapsed visitors tend to be non-local

First time visitors are more likely to be from outside the region (58% other UK, 27% overseas), and similarly, the lapsed audience is more likely to come from outside the region (75% other UK).

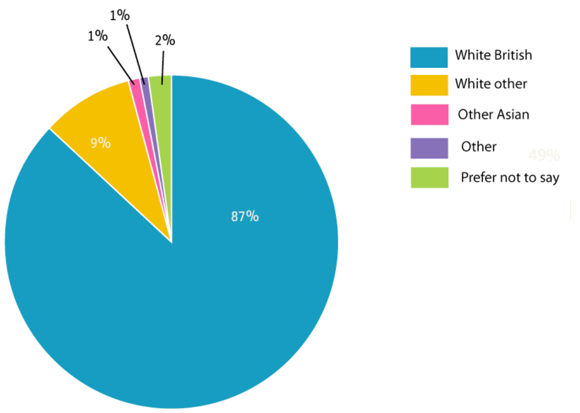
2007 does not reveal major shifts in terms of visitor's originations, compared to 2005.

Those results highlight a clear need to reactivate lapsed regional visitors as well as target first time visitors from local and regional areas (only 23% are visiting).

Predominantly a White British audience

BALTIC's audience is predominantly White (96%), matching the audience type in the North East (Census 2001: White 97%).

Visitor's Ethnicity

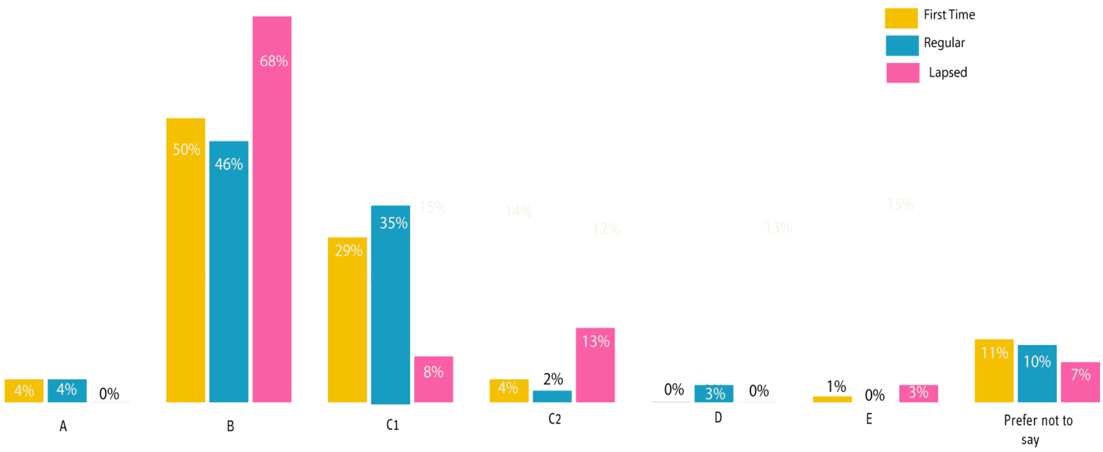


They are predominantly ABC1

83% of the audience is in the ABC1 social group. Similar results can be observed at art galleries across the UK.

There is a higher proportion of B's across visitors – first time (50%), regular (46%) and lapsed (68%).

Social grade and visit pattern

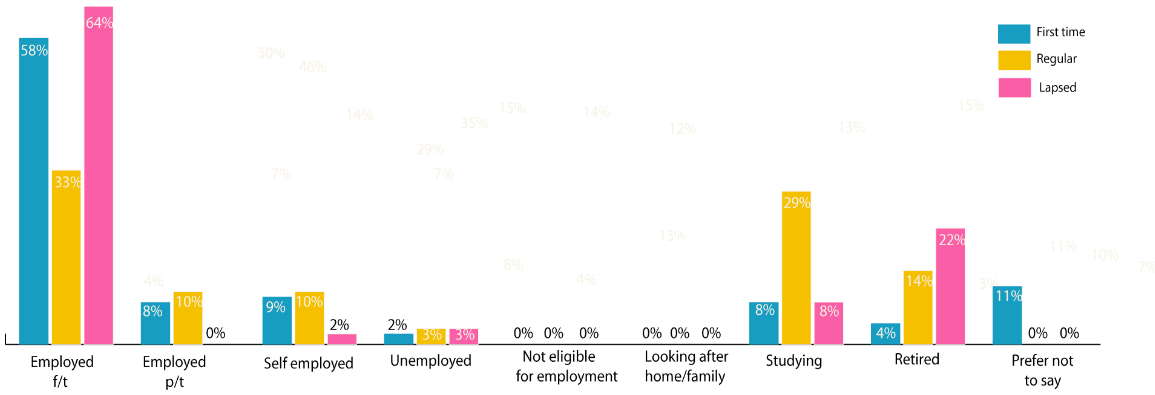


82% of the audience is employed or studying

The audience encompasses a wide group of employed or visitors who are studying (82%). A higher figure compared to other galleries in the UK (around 70%). This can have an impact on visit patterns with more visitors using the building during the day, their lunch hour or potentially interested in late night opening after work.

20% of all visitors and 29% of regular visitors are students, this was a pattern identified in 2003, when we identified this segment of CVA connected visitors. Regular visitors are more likely to be studying (8%), or practicing artists (19%) and this helps to explain the higher number of students in this regular visitor sub-segment. The size of this student needs to be considered when developing the shop and café products and calculating possible income from these facilities.

First time and lapsed visitors are more likely to be employed full-time (respectively: 58% and 64%).



2.3 Knowledge and involvement

Respondents were asked about their involvement with visual arts.

- 38% of all visitors had a professional or academic involvement with visual arts (34% in 2005, and 29% in 2003). This is slightly higher than other art galleries in the UK (around 30%).
- 20% of lapsed visitors are involved with visual art.
- 41% of first time and regular visitors have a connection with visual art.

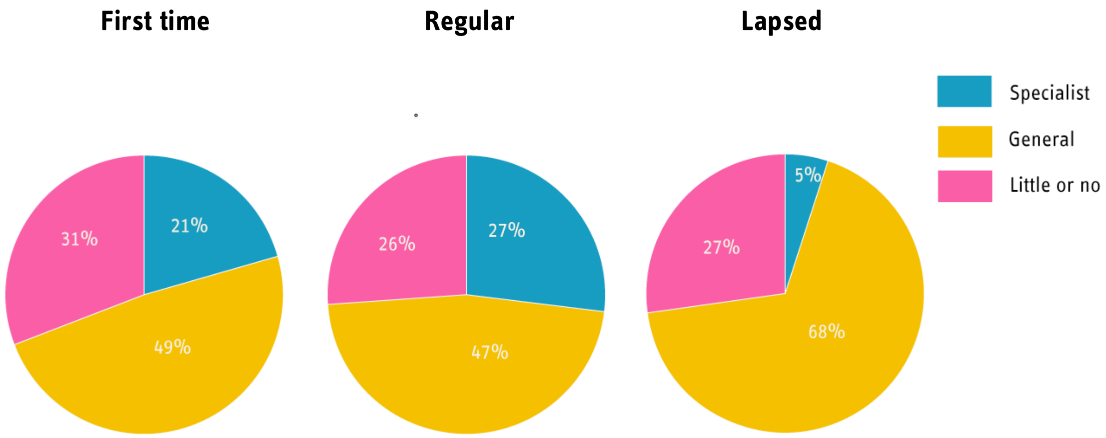
Although the proportions of visitors who are connected to the visual arts is fairly high it does not mean that they are experts.

Most visitors claim to have a general knowledge of art

Respondents were also asked about their knowledge of visual arts.

- Overall, 22% of visitors have a specialist knowledge (from past research at BALTIC: 20% in 2005, 16% in 2003). Figures are similar in other galleries in the rest of the UK.
- Overall, 50% of people claim to have a general level of knowledge about visual arts (59% in 2005 and 49% in 2003). The audience is less generalist than other galleries in the UK (70%).
- 68% of lapsed visitors claim to have a general knowledge
- 27% had little or no knowledge (21% in 2005 and 35% in 2003).
- A third of first time visitors (31%) say they have little or no knowledge of visual art. This means that BALTIC needs to provide interpretation throughout the exhibitions that does not assume visitors have pre-existing knowledge, but that is accessible and informative.

Visitor type and visual art knowledge



2.4 Summary of findings and recommendations

Baltic has a loyal core audience of regular attenders, visiting on average over 3 times each year. Because they are such regular visitors they represent a relatively small proportion of people. For example of the 390,000 visits made in 2006-2007, only 67,000 were regular visitors.

A third of visitors to Baltic are new = 121k people in 2006/07. These first time visitors tend to be from outside the region or from overseas, few of them are local. It is important that Baltic provides excellent orientation information and guidance for these visitors.

Only a small proportion of the audience are lapsed visitors (11%) = 43k people, which means that there is scope to tap into the market of people who visited in the first couple of years of Baltic opening and have not returned.

The composition of the audience needs to be considered when calculating the potential 'worth' of the each sub-segment in terms of any income from the shop, café and paid exhibitions. For example, first time visitors are more likely to buy items from the shop, but less likely to pay to see an exhibition or visit to see unknown artists.

Baltic should concentrate on building this core audience by:

- Persuading more people to visit for the first time
- Encouraging first timers to return and then to visit as regularly as the core audience – this depends on the quality of the visitor experience and data capture so you can target your communications
- Re-activating the local and regional lapsed audience ('re-launch' Baltic to give people a reason to return – blockbuster exhibition, engaging/quirky marketing campaign etc)

Overall, the audience is fairly young and a third of the regular audience are students. An audience worth developing may be affluent older visitors, who have both time and money, and could be a source of revenue via the café and shop.

4 in 10 visitors have a connection with visual arts, but they are not experts or specialists. Half of all visitors say they have a general knowledge and a third of first timers say they have little or no knowledge. This has implications for the interpretation strategy, as there is a demand for information to support the artworks and this needs to multi-layered to appeal to the diverse experience and knowledge of the audience.

Recommendations

Develop an audience development strategy that grows the core audience (more people, reactivate the lapsed audience, retained the first timers)

Provide excellent orientation information for the 120,000 new visitors to the building

Provide multi-layered interpretation for specialists to novices

3 Reasons for visiting

In this chapter we explore the reasons why people visit Baltic. Are they making an intentional visit? And what aspects of the overall Baltic offer is the primary reason for them visiting?

And finally we look at their motivations for visiting, and by this we mean the fundamental benefits they hope to get from visiting.

3.1 Are visits to Baltic intentional or incidental?

Visits are slightly more likely to be intentional

59% of visits to BALTIC were intentional. Overall, this is around the average figure for other galleries in Scotland or the UK (intentional visit ranging between 60-70%).

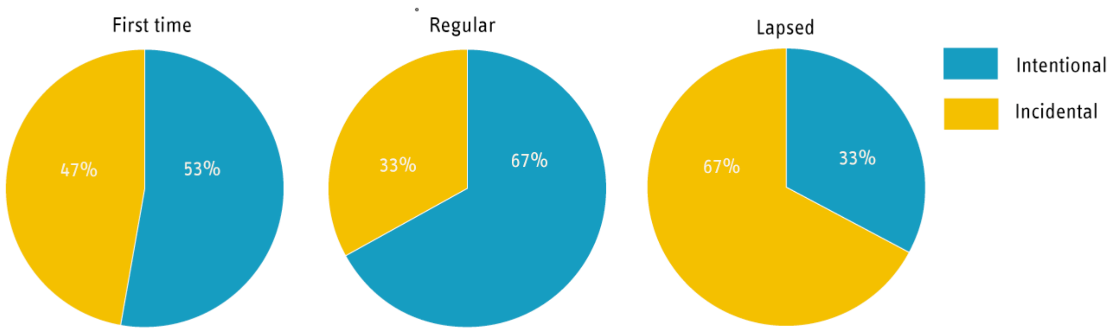
(2003, 73% of visits were intentional and mainly a result of the launch effect).

Compared to first timers and lapsed visitors, the core audience of regular visitors are more likely to be making an intentional visit

67% of BALTIC's regular audience made an intentional visit to BALTIC, although this may not be to see a specific exhibition, rather it is for a general visit, or to use the shop/café.

First timers and lapsed visitors are more likely to be in the area for another reason, mainly shopping and other leisure activities, either in Gateshead or Newcastle.

Intentional vs. incidental visits per type of visitors



3.2 What elements of the offer are driving visits?

Visitors were asked about what they did during their time inside the building and also their reasons for visiting BALTIC. The results are presented in the chart below.

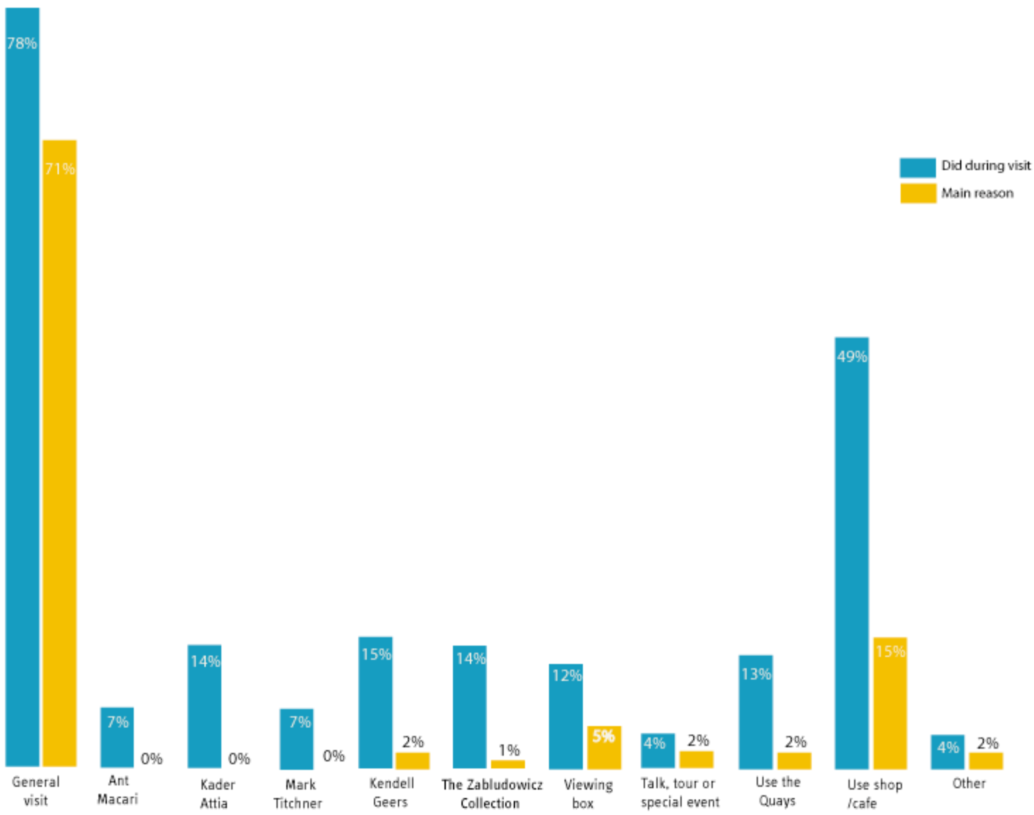
Visits made during this period were general rather than exhibition specific

The vast majority of visitors (71%) are making a general visit to BALTIC (in 2005 only 35%). Just over 10% came specifically to see one of the exhibitions (27% in 2005).

More visitors came specifically to see exhibitions in 2005 reflecting the higher profile artists and exhibitions (Candice Beritz, Chiho Aoshima and Keith Haring, “Spank the Monkey”).

The shop and/or the café are a draw in themselves with 15% visiting primarily to use these facilities (10% in 2005). Therefore, BALTIC continues to be a social space, where visitors can spend time.

Visit content and main reasons for visiting



3.3 What needs do visitors hope will be met?

Based on extensive previous research with museum and gallery visitors, we have classified different motivations for visiting. These are split into 15 different statements that can then be grouped into four key drivers: spiritual, emotional, intellectual and social.

This table shows the detailed responses of first time, regular and lapsed visitors. We have highlighted the key differences in red.

Motivations and main motivations for visiting Baltic

Drivers	Motivations	Reasons			Main reasons		
		First	Regular	Lapsed	First	Regular	Lapsed
Social	To use facilities e.g. shop/cafe	41	42	57	0	29	9
	To look at the views	71	46	74	19	3	17
	To visit one of the major attractions	82	35	78	47	9	0
	To spend time with people in a nice place	26	19	9	11	7	5
Intellectual	To encourage children's interest in art	15	8	51	2	2	37
	To improve my own knowledge	51	33	13	3	7	0
	I've a personal/academic/prof' interest	25	28	18	2	6	9
Emotional	To see how the building has changed	17	13	24	1	0	9
	To gain a deeper insight into art	29	29	22	1	4	0
	Experience awe-inspiring, interesting artworks	26	32	25	2	14	6
	To be moved emotionally	12	15	11	2	0	0
	To feel a strong sense of personal connection	5	8	16	0	0	0
Spiritual	Stimulate my own creativity	25	30	49	2	7	0
	To reflect and contemplate	22	30	11	1	3	0
	To escape and recharge my batteries	34	39	13	6	10	9

The building continues to be a major draw for new and returning visitors

For large numbers of first timers and lapsed visitors their reasons for visiting are to see the building and visit one of the major attractions in the region. This was also the case in 2003 when the building first opened. The fact that this iconic building is still a draw in itself provides an opportunity to attract new audiences, whose primary motivation may not be to see the art, and once they are in the building communicate the wide ranging offer and reasons to return.

First timers are keen to learn more about art

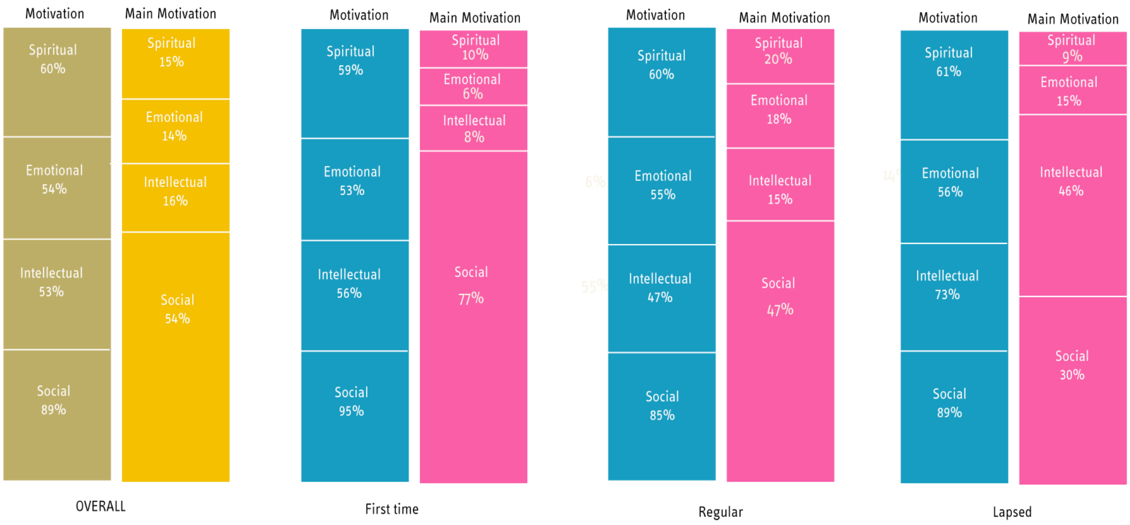
51% of first timers said that one of the reasons for visiting was to improve their knowledge of art. It is important for Baltic to respond to this desire to learn if they are to meet their needs.

Regular visitors have a range of reasons for visiting Baltic

Compared to the first timers and lapsed visitors, there are few reasons that predominate. This core audience visit to use the facilities, see the views, improve their knowledge, pursue interests, see the art, and relax. In 2003 we identified different types of audiences visiting Baltic, the art interested, social spacers and visual art professionals. The sample for this piece of research is too small to undertake this segmentation, but you can see from the data generated from the motivation question that there are sub-groups within the regular audience who are art interested and those who are social visitors.

This model summarises these 15 statements into the four drivers.

Motivations and main motivations



This final model summarises the needs of different types of visitors, and therefore what Baltic needs to provide to meet each of their needs.

See gallery as a...	Have this driver...	And they seek this from a visit..
CHURCH	SPIRITUAL	Creative stimulation and quiet contemplation, they see gallery as an opportunity to escape and recharge their batteries, food for the soul
SPA	EMOTIONAL	May have a personal connection to the subject matter, want to see facinating objects in an inspiring setting, seek ambience, deep sensory and intellectual experience
ARCHIVE	INTELLECTUAL	Keen to encourage their children's or their own interest and knowledge, may have professional interest in the subject, seek a journey of discovery, to find out new things
ATTRACTION	SOCIAL	See galleries as an enjoyable place to spend time with friends and family, seek ease of access and orientation, good facilities and services, welcoming staff

3.4 Summary of findings and recommendations

Most visits made to Baltic are intentional but tend not to be exhibition specific. 71% of visitors were making a general visit to see whatever exhibitions were on, only 10% came specifically to see one or more of the artists showing in November-December.

The building continues to be a draw for new and lapsed visitors. The challenge is to ensure these 'building driven' visitors are engaged sufficiently to feel that there are other elements of the offer that will give them a reason to return. Baltic needs to find ways of ensuring visitors engage with the art, through how the work is displayed, and most importantly interpreted. It must communicate, clearly, other aspects of the offer that provide a reason to return, such as the activities, tours, high quality catering and retail etc.

More lapsed and first time visitors found the visit relaxing and stimulating than they expected to and these messages would be worth communicating as visitor benefits.

Regular visitors have a range of reasons for visiting, some of them are regular users of the café and visit Baltic because it is a social space with art, rather than for the exhibitions themselves. Some visit because they want to see awe inspiring artworks, and others want to be able to relax and re-charge. Generally their needs are being met, but not exceeded. They are confident about what they want from their visit and they get this, but, given the proportions who are not currently using the full range of facilities there is potential to deepen their engagement and exceed expectations. Baltic should firstly raise awareness, and secondly look at what product development is needed. For example, a small proportion of regular visitors expressed some dissatisfaction with the café and shop, so, whilst they may be aware of them Baltic needs to assess what issues they have and decide what can be done to address them.

Recommendations

Raise awareness of the extent of the Baltic offer, pre-visit and at the very least during their visit

Communicate the range of benefits that can be derived from a visit to Baltic

Exceed the expectations of the regular audience and increase use of the facilities – raise awareness and address any issues with the offer

4 Marketing

This chapter summarises the effectiveness of the current marketing activity, the role of the website and sponsorship recall.

Awareness of the exhibition programme and facilities are outlined in specific sections - Exhibition Programme and Facilities.

4.1 Are visitors aware of the marketing activities?

A significant proportion of visitors are not aware of (14%), or need to rely on (37%) any marketing materials, because they have been before and turn up to Baltic knowing there is something to see or do. Around a third of the regular audience (61%) did not use any marketing before visiting.

Banners are well used and have enormous potential

Two thirds of people have seen them in the past month, 57%, and 12% of visitors say they were the main source of information (22% main source for first timers). Given the impact of these banners they provide an opportunity to communicate a number of messages to current and potential audiences, not just the name of the artist, but also other elements of the offer and reasons to visit. The iconic nature of the mill does lend itself to building dressing and when we did our original pre-opening research people were expecting the building to be used to its full potential.

> *Yes a state of mind. One of the big things about the building is that it is very tactile and it has a huge ability to give you a sense of space that you have never had before and I think that is one of the reasons that it will be successful and I think as long as the mission of Baltic remembers that then there is a sense of power through those emotions and it is not just the intellect it is physicality of its presence. I think that will be a key to its success* **CVA attender, Baltic research 2003**

Including building dressing as a significant element of the marketing strategy, and using it consistently and regularly, will establish it as a method of communication that more people can rely on.

Some visitors do use what's on guides

What's on guides are used by around 10% of the audience, particularly lapsed attenders (32%). Our research with arts attenders has found that people do look in local papers and what's on guides for listings, particularly families, so this may be worth exploring as a marketing tool and monitoring over time to track its return on investment.

Sources of information used by visitors

Source of information	Aware of	Main source
Banners outside the building	57	12
Piece in a national paper/magazine	17	3
Advert in local paper	10	2
Piece in local paper/magazine	12	5
Listing on What's On guide	24	9
Specialist art magazine	4	-
Private view invitation	3	-
Mentioned on radio	7	-
BALTIC website	17	5
E-mail from BALTIC	3	-
Other website	6	-
E-mailed information (other)	2	-
Specific exhibition flyer	5	-
Baltic leaflet picked up	23	3
Building plan picked up	3	1
Recommendation	26	10
Been before	37	32
None of these	14	14
Other	7	4

Recommendation is a useful source of information particularly for first timers

24% of first timers say that recommendation was the main source of information for their visit. Ensuring visitors have a positive experience will feed positive recommendations. It may also be worth even suggesting to visitors to 'spread the word' and this could be done in a light hearted, engaging way rather than being too evangelical. Creating a buzz around the building, and the activities that take place there, will also generate a talking point and build word of mouth.

Other methods of communication are used by a small proportion of visitors

The table lists the range of marketing channels that we tested and shows what proportion of people this is reaching. To an extent this will be self-fulfilling, if the circulation of leaflets is fairly small then the impact will be low.

We recommend a review of the marketing strategy to establish what messages are a priority to communicate, and to which target audiences. For example, it makes sense to encourage the regular audience to come more often, but also to use other parts of the offer, such as the café, shop, The Quay etc. They will visit Baltic, on spec, expecting to be able to see some art and therefore do not need to rely on marketing materials or to know exactly what exhibitions are on.

Lapsed visitors on the other hand, need a reason to re-visit, and the exhibitions alone may not be enough, particularly if they are lesser-known artists. But, a visit may be activated by an invitation to see what's new, to see the building, a place to take visiting friends and relatives etc. Additional research will help to identify and hone these key messages and methods of communicating them to this lapsed audience.

We would also recommend that e:marketing is a cost effective and efficient method of communicating with the existing audience and reflects the Baltic's contemporary and creative image. Other research we have undertaken has found that at least 30% of arts audiences would like to receive what's on information via email, which would reach three times as many people as the banners.

4.2 Are visitors using Baltic.com?

Regular visitors are more likely to be aware of the website

75% of regular visitors are aware of the website and 57% have used it. However, there are still a quarter who did not know that Baltic had a website and this should be addressed by more active promotion.

The website is now more established and usage has grown since 2003, but the profile still needs to be raised

The usage of the website has increased from 19% in 2003, to 36% in 2005, and 46% in 2007.

However, there are still many first timers and lapsed visitors who are not aware of the site, and usage is lower compared to regular visitors.

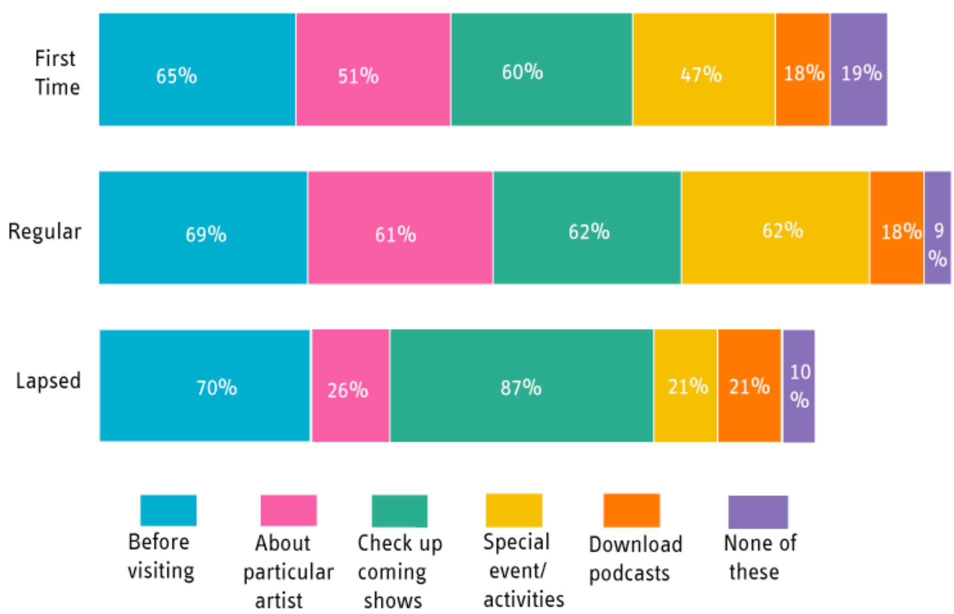
- 42% of first timers were not aware of the website and only 29% had used it.
- 55% of lapsed visitors were not aware of the website and only 38% had used it.

The website can be a great promotional tool. It can be used to stimulate visits and enhance the visitor experience.

The site should be promoted more extensively inside the building and externally, and a creative and innovative campaign directing people to visit the website would drive physical visits.

The following chart shows how different types of visitors say they would use website.

***Would you be interested in accessing the website for any of the following*?**



It provides a useful pre-visit planning guide and helps people get the most from their visit

Most visitors, regular, lapsed and first timers, are interested in using the website in advance of a visit, and to find out about the exhibition programme.

Regular visitors, in particular, would use the site to find out about events and activities

There is some interest in podcasts

Currently the interest in downloading podcasts from the site is fairly low, with about a fifth of visitors saying this would be a useful facility. However, this is likely to increase

87% of lapsed visitors surveyed have used the website after their visit to the BALTIC to see what's coming up in the next few months.

4.3 Sponsor recall

20% of visitors to BALTIC were able to name the following sponsors:

- Arts Council England (11% of all visitors)
- Northern Rock Foundation (9%)
- European Regional Development Agency (5%)
- One North East (5%)
- Think Media (1%)

The most effective source of information about the sponsors were; print (21%), signs in the building (12%), posters (5%), word-of-mouth (3%).

4.4 Summary of findings and recommendations

Visitors, particularly the regulars, turn up to Baltic knowing there is something to do and something to see, they tend not to rely on any marketing (48% of regulars did not use any publicity before visiting).

Banners are well used and have significant potential for communicating key marketing messages.

Listings and What's on guides are useful as a way of reminding people that you exist, they have limited usefulness in terms of how much information you can convey, but can act as a reminder to lapsed visitors.

Although usage of Baltic.com has increased since 2003, there are still gaps in the level of awareness amongst the audience, even the regulars, and this should be addressed. The people we interviewed were interested in using the site to find out more about what's on, as well using it to get background information so there is untapped potential. An inexpensive and effective way of raising awareness would be to promote the site in the building. You could have a terminal in the foyer area and show people what's on offer, produce postcards to tell people more about what's available on the site etc. The interpretation information could also drive people to the site to find out more about the artists and artworks.

Recommendations

Review the current marketing strategy and develop a communications strategy based on the findings of this report and additional qualitative research, particularly with the lapsed audience.

Whilst this report provides useful data about the audience, it does raise a number of questions about visitor's motivations, needs, attitudes and responses. It would be worthwhile to explore these in more depth to inform this communication strategy.

Raise awareness of the website and maximise usage by current and potential visitors.

5 Exhibition Programme

This chapter focuses on the exhibition programme, looking at what proportion of the audience are aware of the exhibitions, how many of them visited each exhibition and to what extent they engaged with the art.

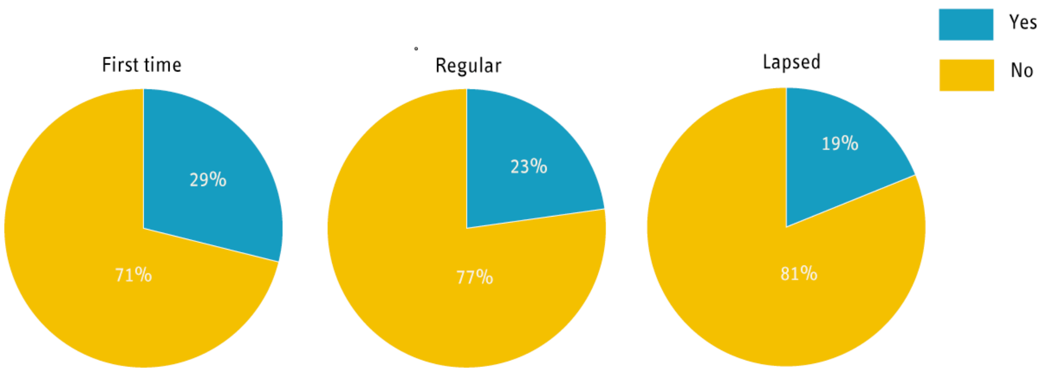
We also report on what potential there is to curate paid exhibitions at Baltic and the size of the market for lesser known artists.

5.1 Are visitors aware of the exhibition programme?

87% don't need to know what's on before they visit

There is a low awareness of the exhibition programme. 76% of all visitors had not checked what was on when they visited, they tend to make a general visit rather than being exhibition driven. This was also the case in 2003, and shows that Baltic as a destination, and a contemporary visual art gallery drives visits, rather than specific artists. That is not to say that a high profile exhibition would not be a draw for visitors.

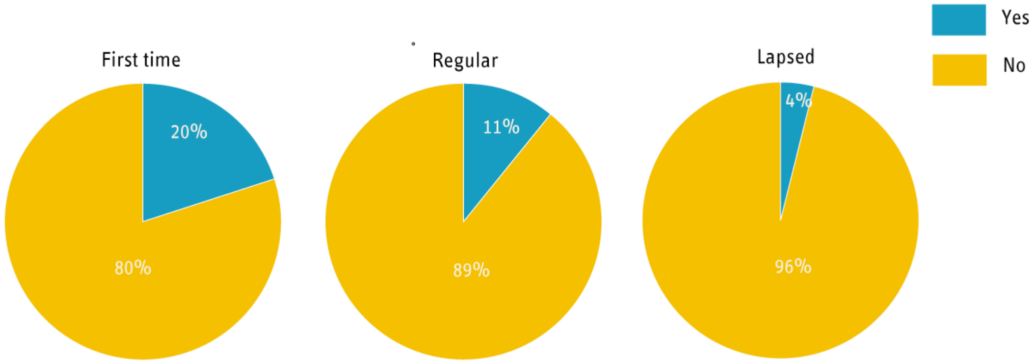
Did you check what's on before your visit today?



Only a small proportion are interested in exhibition information pre-visit

Only 13% of visitors expressed the need to know what exhibition is on before they make a visit. This indicates that there is a high readiness to experience new artists or exhibitions. Most visitors would visit BALTIC without prior knowledge of the exhibition's programme, and indeed currently do.

Do you need to know what exhibition is on before you make a visit?



This can impact on the level of marketing support required for future exhibitions. Knowing that the majority of visitors do not necessarily need prior information for every exhibition means that the foundation of the marketing strategy should be to communicate general messages about Baltic's offer, and the benefits of visiting, without spending significant resources on exhibition specific marketing, particularly print. Exhibition specific messages can be communicated via e:mail, the website, specialist art magazines (to reach the specialist audience), building dressing, editorial etc. all of which should be relatively inexpensive to produce.

5.2 How many visitors see the exhibitions?

Most visitors are making a general visit to see all the exhibitions

Our data shows that a small proportion of the audience visiting Baltic in December 2007 were exhibition driven. Most of them (71%) arrived with a plan to visit the whole building and to see whatever art was on display rather than a specific artist, this is particularly true for first time visitors (94%).

Only 1% of regular visitors came with the intention of seeing Kader Attia, 1% to see the Zabludowicz Collection and 4% Geers. No first timers or lapsed attenders identified any single exhibition. Whilst we know that few are exhibition driven, we also wanted to find out what proportion of the audience engaged with any of the art on display.

85% engage with the art and see at least one exhibition during their visit

We asked visitors to rate the exhibitions they saw, and these questions provide the data we need to establish what proportion of the audience saw each of the exhibitions.

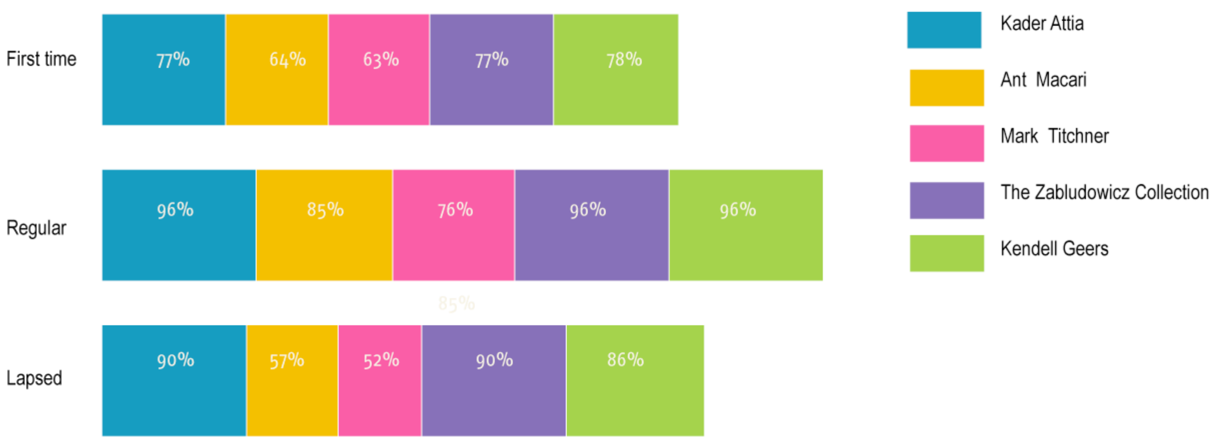
This chart shows that overall, 85% of visitors saw at least one of the exhibitions. Those that were located in a designated gallery space were the most well attended at 85%. Both Macari and Titchner had fewer visitors, 66%-70%, and these were in the orientation spaces.

It is not clear from this research whether visitors did not engage with these exhibitions because they were not in a gallery space, or whether they were unsure that they had seen work by the artist, that is, they noticed the art on display but couldn't recall the artist's name. Observation research in the building would be able to establish to what extent visitors are engaging with these types of exhibitions, and make recommendations for how the work could be displayed and interpreted to increase engagement.

Regular visitors are slightly less likely to see art during their visit, 24% visit primarily to use the café and/or shop

This chart shows the proportions of regular, lapsed and first timers who say they have seen an exhibition during their visit. You can see that fewer regular visitors are seeing an exhibition; this is a reflection of how many of them use Baltic as a social space.

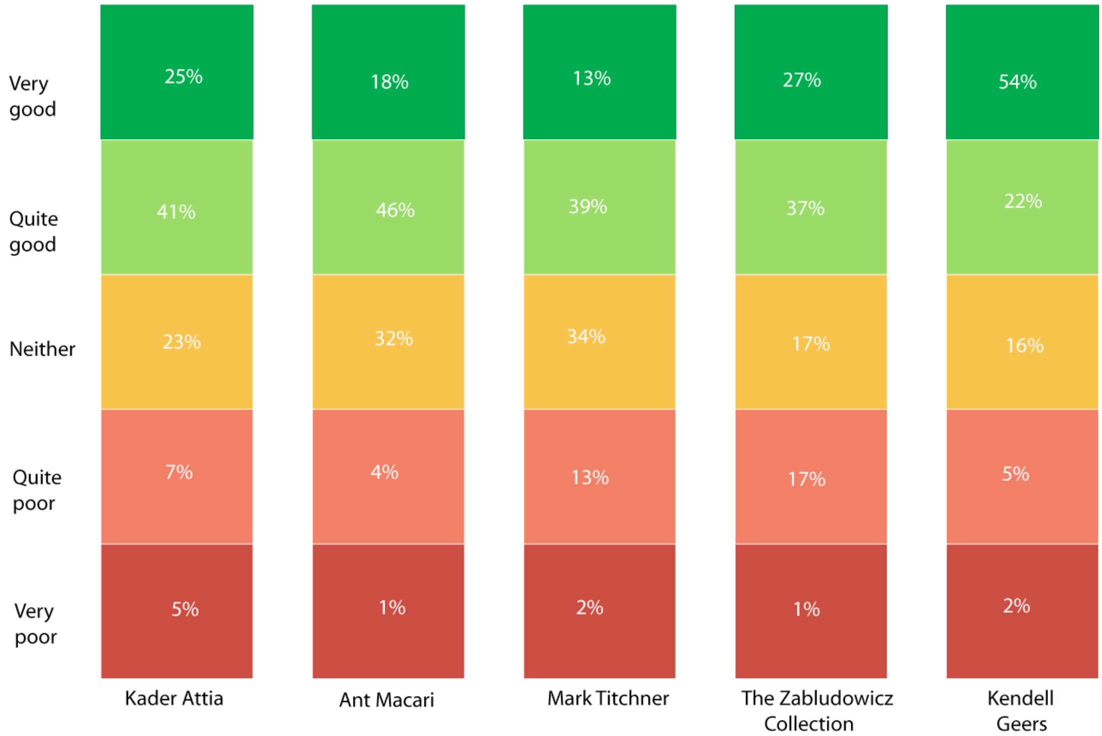
Exhibition attendance



5.3 How do visitors rate the exhibitions?

We asked people who had seen each of the exhibitions to rate them on a scale of very good to very poor. The following chart summarises the responses of all visitors.

Rating of exhibitions



Of all the exhibitions Kendell was the most well received with over half of all visitors rating it as very good.

Although two thirds of visitors rated the Zabludowicz exhibition as good (either very, 27% or quite 37%), 18% felt it was poor.

A third of visitors said that Macari and Titchner were neither good nor poor, and this is likely to be because they did not engage deeply with this exhibition. They may have seen the work on display, therefore felt they had 'visited' it, but did not engage in the same way as they did with those in the gallery spaces, and so were less able to comment on the quality of what they had seen either way.

These rating scores are similar to those collected during the research in 2005, where, as with this study, responses to the exhibitions was mixed with some being more popular than others.

It could be argued that there will always be a range of responses to the exhibitions. Our qualitative research with contemporary visual arts audiences has found that people are philosophical about the prospect that they will not necessarily like all the art on display but they do hope that they will be able to enjoy at least some pieces, artists or exhibitions during their visit.

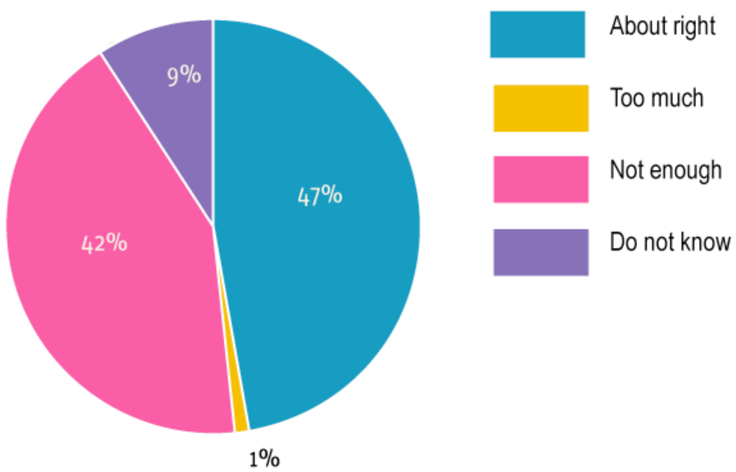
So, whilst Baltic cannot guarantee all visitors will enjoy all the work they show, they do need to ensure that they are facilitating visitor engagement. This might be by how the work is displayed e.g. grouping work to reinforce themes/narratives, but more importantly how the work is interpreted for visitors.

5.4 How do visitors rate the interpretation?

There is a demand for more information

This chart highlights the fact that whilst almost half the audience are happy that the information is about right, nearly as many say there was not enough.

Rating of the interpretation



First timers are slightly more likely to want more information (50%), compared to regular visitors (42%). Those visitors who have an involvement with the visual arts are just as likely to want more information as those who are not connected. What this analysis shows is that there is a need for more information amongst different types of visitors, those who have a level of pre-existing knowledge and experience of Baltic and contemporary visual art and those who don't.

This means that any additional information supplied needs to cater for this range of knowledge and experience, from novices to experts. It should be multi-layered so that different visitors can be access information according to their needs.

Visitors want more information about the artwork and the artist

Most visitors want to know more about the artist; particularly what influences them, the social context of the work and how it was created.

What information do visitors want?

This is a common theme amongst contemporary visual arts audiences, as these quotes from other research we have undertaken illustrate.

> *Not having any art background I sometimes wonder what I'm supposed to be looking at. Sometimes it is obvious, other times I would welcome something because I'm not quite sure what makes a person stand in front of something forever. It makes me think I don't know enough because I'm not really able to appreciate it*

> *Many pieces didn't cover artist's intentions as much as I'd like*

> *Information on social and political backgrounds.*

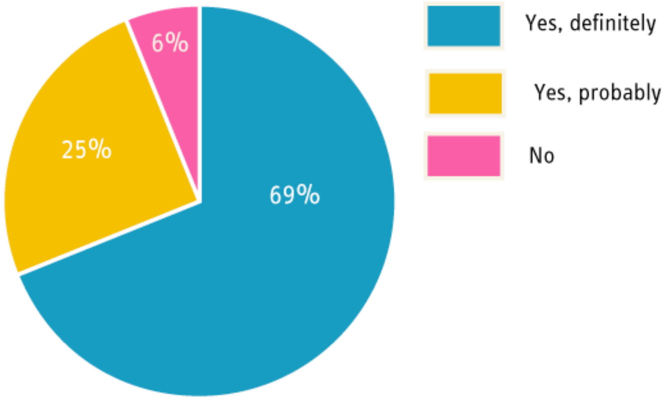
When we asked visitors if they had any suggestions for improvements, of those who did, 41% of them said they wanted more information to support the exhibitions.

More interpretation would deepen visitor engagement with the art, and enhance the visitor experience.

5.5 Are visitors open to seeing unknown artists at Baltic?

Overall, most visitors would visit Baltic and see exhibitions by unknown artists. As this chart shows, first timers are more cautious with 17% saying they wouldn't visit, and lapsed attenders are more inclined to say probably rather than definitely.

Would you visit an exhibition by an un-known artist at BALTIC?



5.6 What potential is there to programme paid exhibitions?

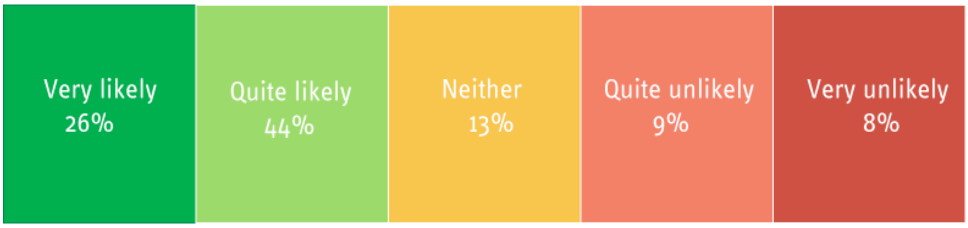
We have administered 1000s of surveys at museums and galleries nationwide, and this has generated a significant volume of data about the market for paid exhibitions.

This research has found that anywhere between 4% and 25% of visitors are prepared to pay to see a special exhibition.

5.7 Have visitors paid before for exhibitions and would they pay in the future?

79% of visitors have previously paid to see an exhibition at an art gallery before, and 70% say they would be likely to pay to see special exhibitions at BALTIC, a quarter saying very likely.

Likelihood to pay for exhibitions



Curating paid exhibitions is challenging and depends on four critical success factors

It is extremely difficult to predict exactly how many people a paid exhibition can attract because it depends on a number of variables. In a recent piece of secondary research and consultation with major national galleries and museums we have identified four critical success factors for special, paid exhibitions:

1. Intrinsic appeal

What can people expect to get from visiting, is it obvious, intriguing, appealing?

2. Mass appeal/blockbuster

Monet at Tate Britain achieved daily visitor figures of 4,000, Munch at the RA achieved around 1,500, 'Open Systems: rethinking art around 1970, at Tate Modern, 400 per day, Munter at the Courtauld received 300 per day.

3. Marketing and communications

This needs to be clear, should not assume everyone knows the artist and what to expect and effectively communicate the benefits e.g. showing work not seen for x years

4. Value for money

Again this is not an exact science and setting the ticket price depends on a number of factors e.g. the size of the exhibition (small scale 2D is expected to be free, 2 rooms limited artworks people would pay no more than £5, 3+ rooms, loaned work, mix of media etc £8-£10). So, an average, mid-scale exhibition, one that is not a blockbuster could charge around £5. Prestige also adds to the perception of value for money, profile of the artist, rarity, venue's brand strength, level of endorsement etc. and if many of these elements are present it is possible to increase the ticket price. However, talking to museums and galleries, we found that it is possible to get the pricing wrong, and that ultimately people will pay what they think the exhibition is worth.

> *I think people would expect to pay if they were seeing something of particular merit to pay CVA attender, Baltic 2003 research*

5.8 Summary of findings and recommendations

Most visitors (76%) do not know what exhibitions are on before visiting, this is the case for the regular audience as much as first timers and lapsed attenders.

87% do not feel they need to know what's on before they visit.

We know that the majority of the audience is making a general visit to the Baltic, knowing that there is something to see and do. This has implications for the marketing strategy because it means that a priority should be the communication of messages about the Baltic offer and the benefits of visiting, rather than expending significant resources on exhibition specific marketing. The latter could be done in inexpensive and more targeted ways e.g. building dressing, e:marketing, the website, specialist press, 'what's coming up next' messages displayed throughout the building.

Most visitors (85%) do engage with the art during their visit, even those who are primarily exhibition driven. Artworks displayed in the orientation spaces are more problematic, as visitors are either not able to recall the artist, or not engaging with the work. Macari and Titchner both received lower ratings from visitors so engagement levels may well be lower. We suggest more research is done into how visitors engage with art in these spaces so that more detailed recommendations can be made.

There is a demand for more interpretation, 42% of all visitors felt there wasn't enough available. They want more background information about the artist and how they work was created. Reviewing, developing and implementing an interpretation strategy will help to deepen visitors' engagement with the art, enhance the quality of the experience and therefore help to build and retain audiences. By devising an interpretation policy, Baltic should be able to set a minimum standard of interpretation for all exhibitions, providing more consistency and reducing the risks when seeing lesser or unknown artists.

70% of visitors are prepared to pay to see a special exhibition at Baltic. However, we recommend that Baltic is mindful of the four critical success factors in curating paid exhibitions; intrinsic appeal, mass/blockbuster, marketing, value for money offered.

Recommendations

Review the key generic communication messages and strategy for promoting specific exhibitions

Review and refine the display of artwork in the orientation spaces

Review, develop and implement an interpretation strategy that better meets the needs of visitors. Provide information about the artist's background, context and process. It should be multi-layered to help visitors access interpretation based on their experience and knowledge and preferably accessible in different formats, e.g. wall labels, take away sheets, laminated sheets, computer terminals, staff, guided tours etc.

Use the four critical success factors to help you review any approach to charging exhibitions

6 Facilities

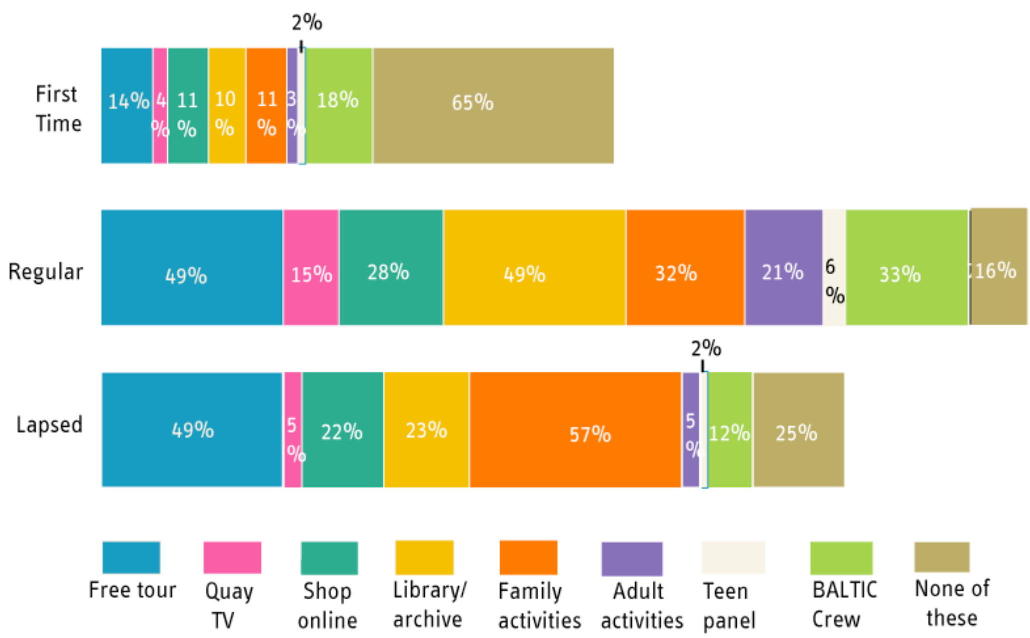
This chapter focuses on the range of facilities on offer at Baltic, such as the guided tours, library, shop and café. We highlight levels of awareness, interest and usage of these facilities.

6.1 Are visitors aware of the facilities?

First timers are less likely to be aware of the current offer

The following graph summarises the level of awareness of the facilities per sub-segment. 65% of first time visitors were not aware of any of the facilities we tested.

What facilities are you aware of?



Most of the people who have visited before are aware of elements of the current offer

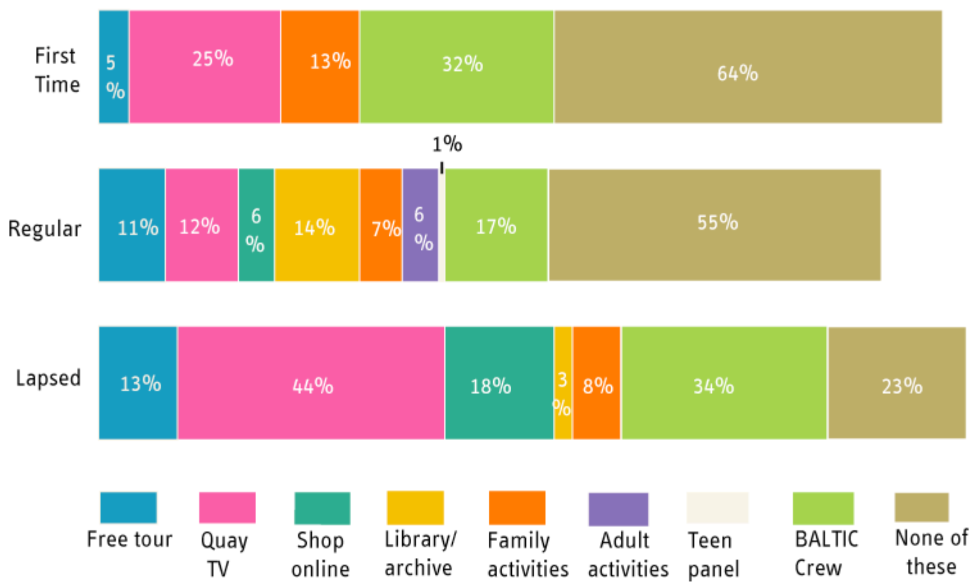
Only 16% of regular visitors were not aware of any of the activities or services and only a quarter of lapsed visitors were not aware.

However, awareness of each element varies - half of the visitors who have pre-existing knowledge of Baltic know about the guided tours, and whilst half of the regular attenders are aware of the library only 23% of lapsed visitors know about it.

6.2 What proportion of visitors use the facilities?

Usage of the activities and facilities is low, with around two thirds of regular and first timers not using any of those we tested

What activities have you used?



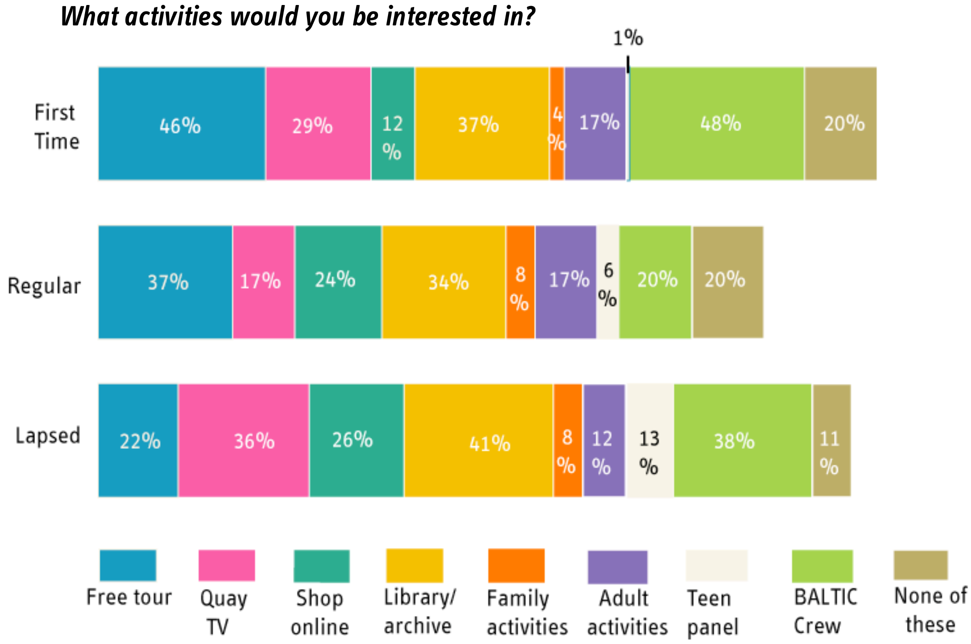
There is currently a significant untapped potential market for the activity programme

This table shows what proportion of visitors are using each of the facilities, and taking part in the activities, and how many of them are actually interested in them. The column at the end translates this interest into the size of the untapped potential market in the month of December 2007 (22,060 visits)

Activities and services	Used %	Interested %	No of visitors
Free guided tours	9	38	8382
Quay TV	20	23	5074
Baltic shop on-line	6	20	4412
Library and archive	8	36	7942
Family activities	9	7	1544
Adult activities	3	16	3530
Blah Blah Blah	0	5	1103
Baltic crew	24	31	6839
None of these	32	19	4191

This graph illustrates which visitors are interested in each facility/activity.

What activities would you be interested in?



First timers are most interested in the free guided tours and getting information from the Baltic crew.

Both of these services need to be promoted more pro-actively and staff can play a crucial role in that initial welcome and information giving, so that all visitors, but particularly first timers are made aware of the tours and additional staff interpretation that is available to them. This will also help to address the demand for more interpretation to support the exhibitions, it will enhance visitor engagement and improve the quality of the visitor experience.

People who have visited Baltic before are interested in many of the activities/facilities on offer and these should be promoted to them

6.3 How many visitors use the shop?

All visitors we interviewed were aware of the shop, but usage and purchasing varies.

Regular visitors are the least likely to use the shop – 24% did not go in on that visit

The reasons for not using the shop or not buying anything, were; a lack of time (21%), no particular reason (27%), and 27% said that the items were too expensive

The challenge is to convert the browsers to buyers

The majority of first timers and lapsed visitors did go into the shop and browse and overall just over half of all visitors to the Baltic do browse in the shop (56%), which is similar to other major national museums and galleries we have data for. The proportion of buying is around a third (27% of all visitors). So, if about 12,000 people went into the shop during December just less than half of them bought something.

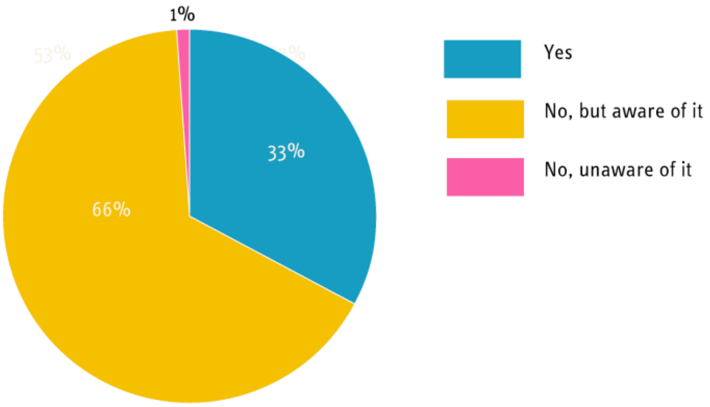
There are a number of obvious ways of increasing sales in the shop – get more people in, and therefore 30% of a greater footfall is more sales, convert more browsers to buyers by getting the product right and/or increasing the spend per head. (As a guide we have a figure of £12.22 for average spend in the shop of a major London museum). Ideally you need to be able to do all three. The fact that only 4% of visitors had been in the shop before and not seen anything they liked suggests that the product range is not a major issue. However, 32% said that the items were too expensive, so price may be a factor.

We recommend further research is undertaken specifically focusing on the shop to explore how turnover and profit can be increased e.g. understanding what regular attenders want to see in the shop to persuade them to make the time to visit.

6.4 How many visitors use the café?

Only 1% of visitors were not aware of the café, but like the shop, usage varies.

Café users



Overall café usage is good compared to many other museums and galleries

Usage of the café amongst first timers is relatively high compared to other museums and galleries. Those that have a particularly good catering offer, and where it is an attraction in its own right, you can expect around 50% of visitors to use it. Generally museums and galleries can expect around 35-45% of visitors to use the catering facilities during a visit. This suggests that Baltic is doing well at persuading people to use the facility, but further research could refine this product to reduce the numbers of people saying they plan to eat/drink elsewhere (17% first timers, 39% lapsed) and respond to the 13% of regular visitors who say that it is too expensive and the 12% who say they have used it before and didn't enjoy it.

6.5 Summary of findings and recommendations

Whilst visitors are aware of the shop and the café there is a gap in their knowledge about other facilities, this is particularly true of the new visitors, who are clearly not getting the information before or during their visit.

There is significant untapped potential for the facilities Baltic has to offer, particularly the guided tours, library and archive, and the crew. The amount of interest there is in the tours and the staff reflects the audiences' graving for more information.

A quarter of regular visitors did not use the shop, some saying the items were too expensive. Given that this is a reliable audience and accounts for 67,000 people, converting them into buyers would be a useful income stream. Half of all visitors, more so first timers and lapsed visitors, go into the shop and browse, and half of them buy something. The challenge is not just to get people into the shop, it is also to persuade them to buy. More research into their views of the shop will help you to refine the retail offer.

Café usage is good, but more could be done to refine the offer to persuade people to spend money during their visit. It is worth better understanding why some regular visitors have not have a good experience and why they don't think it offers value for money.

Recommendations

Raise awareness of the range of activities and facilities pre-visit and during the visit.

Review the retail and catering offers to increase footfall and the number of transactions.

7 Satisfaction

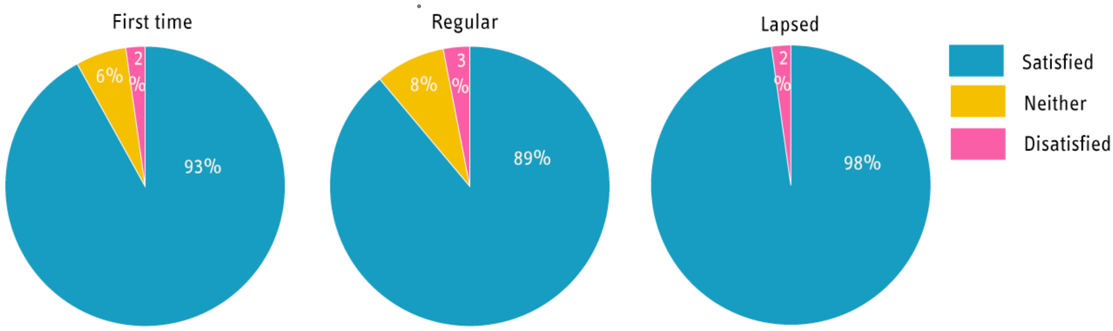
This chapter presents the findings relating to visitor satisfaction. This set of data looks at overall satisfaction, visitor outcomes, likelihood to recommend and re-visit. Finally, we summarise what visitors like best about Baltic and what suggestions they make for future improvements.

7.1 How satisfied are visitors?

Visitor satisfaction is high

91% of visitors are satisfied with the overall experience they had at BALTIC, which is just slightly lower than 2005 (98%).

Overall satisfaction per sub-segment

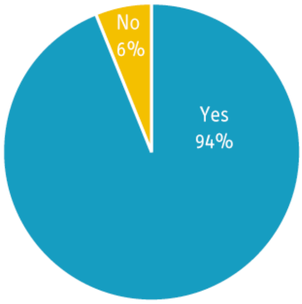


Regular visitors gave the least positive answer about their overall satisfaction (89%). When we look at outcomes we find that the core audience are having their needs met, but not exceeded, and this might help to explain why 8% said they were neither satisfied nor dissatisfied. Further research with the core audience will establish how the visitor experience can be enhanced and engagement deepened.

Baltic is described as a welcoming place

94% of visitors agreed BALTIC was a welcoming place.

Do you find BALTIC to be a welcoming place?



7.2 Satisfaction with facilities for disabled and long-term sick

Only 6% of all visitors considered themselves as having a long-term illness, health problem or disability.

89% of the visitors surveyed were satisfied that their needs were met on their visit.

7.3 Visitors outcomes

We asked visitors to tell us what benefits they derived from visiting Baltic. This directly relates to the ‘motivations for visiting’ question and uses the same set of statements to explore what people got from visiting. It helps to provide context to the satisfaction ratings.

These charts compare the main motivation for visiting, against the outcomes each sub-segment identified.

Main motivations and outcomes

The needs of the core audience were met, although not exceeded

Whilst it is positive finding that these regular visitors specified what they wanted from their visit and Baltic delivered, targets should be set to exceed expectations, deepen engagement and enhance the visitor experience, essentially to give visitors something they weren’t expecting.

First timers and lapsed attenders found the experience more relaxing and creatively stimulating than they expected.

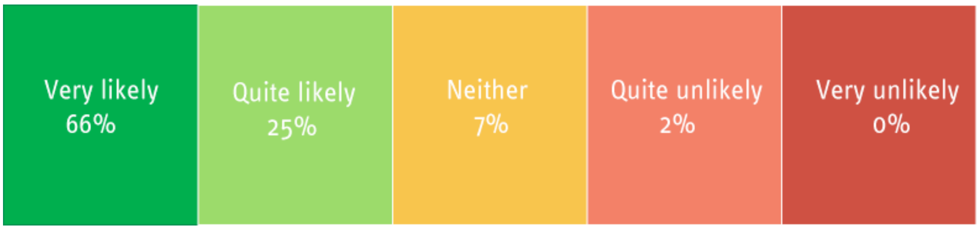
All of the benefits, or outcomes, that visitors were rewarded with during their visit to Baltic should be included in communication messages. A review should also be undertaken to establish what the visitor experience should be, and how changes can be implemented to ensure this is delivered. Further research will help to identify the current gaps in this visitor experience, the minimum visitor requirements and 'delight factors' to inform this review.

7.4 Returning for another visit

91% respondents said that they were either very or quite likely to visit again. Similar results were obtained in 2003 (90%) and 2005 (92%).

Only 2% of visitors would not return for another visit.

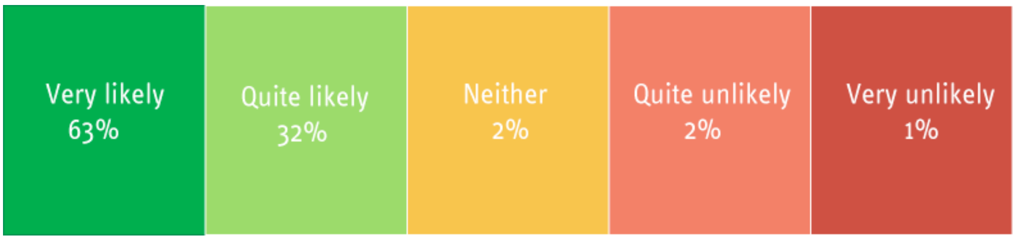
Likelihood to return



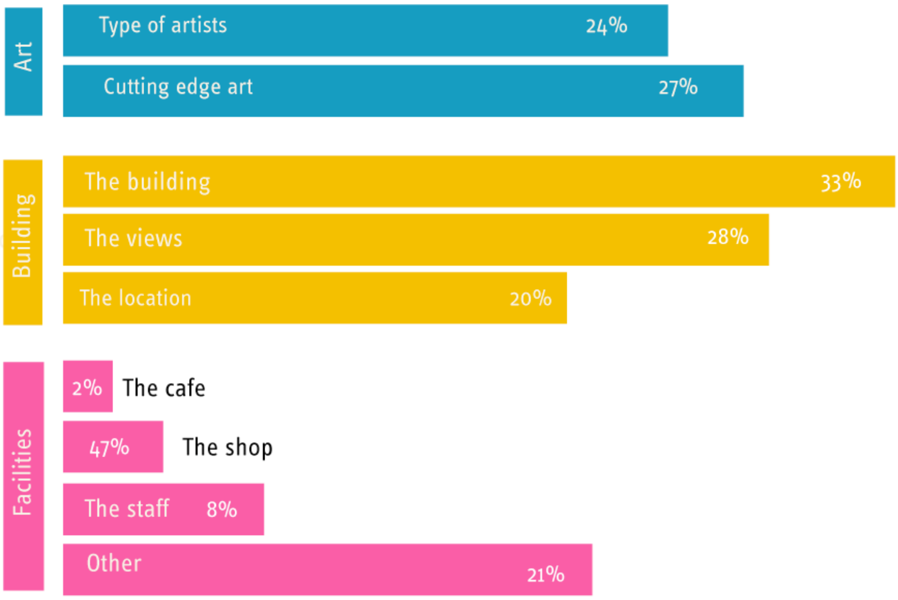
7.5 Recommending BALTIC

96% of all visitors would recommend BALTIC to a friend or relative.

Likelihood to recommend BALTIC



7.6 What visitors like best about BALTIC



The art and the exhibition programme are valued most by the core audience

Regular visitors are more familiar with the exhibition programme, and although they may not always be exhibition driven they do make general visits to see what's on (14% visit primarily to see awe-inspiring artworks).

- The type of artists exhibiting (38%),
- The opportunity to see cutting edge work (34%)

But they also like the physical space

25% of the core audience said they liked the building and 22% said they liked the views.

First timers like the building, the views and the location

The fact that many of them are visiting to see the building and to visit a major attraction explains which elements they liked best:

- The building (57%),
- The views (51%),
- And the location (36%)

7.7 Suggestions for improvements

71% of visitors have offered suggestions for improvement. The main issues were related to the need for further information supporting the exhibitions (41%) and wanting to see more art (23%), and many of these have been discussed in other sections.

Increase the level of information

Open ended comments recorded in the survey highlight the need from visitors for more information about the artwork, the artist and the exhibitions. 65% of first time visitors felt the need for multi-layered information, where they could find more information when needed.

> *Current exhibitions available on leaflet. More info on artists' background and how work was made* ***BALTIC visitor***

> *More contextual info on walls as you come in* ***BALTIC visitor***

> *To make people aware of information about the art and artists* ***BALTIC visitor***

> *More info on artists' background and how work was made* ***BALTIC visitor***

More art to see

Visitors expressed the need for more art and for a greater representation of the art forms exhibited (23%). Lapsed visitors were more likely to request improvements to the art programme (57%).

> *Too much emphasis on installation art. more paintings please* ***BALTIC visitor***

> *More accessible art for general public. more variety to suit interest of everyone. Less obscure art* ***BALTIC visitor***

> *More art. Different types of art work* ***BALTIC visitor***

> *Maybe have one floor of art that everyone will recognise eg Antony Gormley* ***BALTIC visitor***

November and December hosted exhibitions with a lower profile compared to past exhibitions programmes, this might have impacted on visitor's reactions to the type of art displayed or the exhibition choice.

Signage and access

Visitors also mentioned signage (9%) and access (7%).

Signage within the building is a more important issue for first time visitors (16%), whilst lapsed visitors had issues with getting to BALTIC (39%) – bad road signs/ can't find gallery.

> *Directional / promotional signs understated more in your face signs* ***BALTIC visitor***
>
> *Better signage for car park* ***BALTIC visitor***
>
> *Signs for toilets need to be bold* ***BALTIC visitor***
>
> *More outdoor instructions (use the space)* ***BALTIC visitor***
>
> *Bad road sign for Baltic* ***BALTIC visitor***

Given the proportion of first time visitors to Baltic, and that during the course of a year it equates to around 120,000 people, it is vital that orientation information is provided instantly and easily. We know from this research that many visitors are unaware of the range of services and facilities available at Baltic, and this is particularly true of first time visitors. If Baltic is to improve the visitor experience, deepen engagement, in terms of the use of the offer, retain and build audiences, this orientation information is essential.

7.8 Summary of findings and recommendations

Satisfaction is high, and people describe Baltic as a welcoming place, that they will re-visit and recommend to others.

The regular audience value being able to see cutting edge work and like the exhibition programme and enjoy spending time in the physical space. New visitors like the building, the location and the views.

Generally visitors' needs are being met, but rarely exceeded, and there is potential to deepen engagement and enhance the visitor experience. Visitors specifically wanted more interpretation, better orientation guidance, more art or at least one accessible exhibition they can visit.

Recommendations

Improve the quality of the visitor experience and deepen engagement by:

Providing orientation guidance for all visitors so they get the most from their visit

Developing and implementing an interpretation strategy

Reviewing and refining the catering and retail offer

Raising the profile of all elements of the Baltic offer so that visitors can deepen their engagement

Reviewing the exhibition programme and how exhibitions during a given period complement each other e.g. mixed media, accessibility etc. so that there is a greater possibility of appealing to a diverse audience

8 Conclusions and recommendations

This snapshot study of Baltic's audience has identified a number of issues that relate we have split into three areas:

1. Audience development
2. Marketing and communication
3. Visitor engagement

8.1 Audience Development

Baltic has a regular, core audience of visitors. We estimate that 67,000 regular visitors made over half of the 390,000 visits recorded from January to December 2007. They visit on average 3.3 times a year, a third of them to use the café or shop. They are happy not knowing what exhibitions are on before they arrive, they expect there will be something to see. These visitors are reliable, loyal and should be nurtured and developed.

Baltic's iconic architecture, location, views and reputation as a major attraction in the region, means that it continues to attract a significant number of new visitors. In 2007, around 120,000 people visited Baltic for the first time, the vast majority from outside the region and overseas (over 30,000 visitors were from outside the UK). Whilst a third of them say they are very likely to visit again (about 40,000 people), Baltic needs to ensure that it provides a high quality, engaging visitor experience that leaves them wanting to come back. It should also capture their contact details so they can be targeted with information giving them a reason to return.

The lapsed audience is a challenge and an opportunity for Baltic. Before Baltic opened, we completed research that estimated the size of its potential market. Over 600,000 people living in a 90 minute drivetime would consider visiting, and around 350,000 of them were existing gallery visitors, therefore already in the visual arts market. Whilst the first 2 years saw huge numbers of visits being made to Baltic, the visitor figures have now levelled off to around 400,000 and the challenge is to at least sustain this and ideally increase visit numbers. This piece of research found that only 11% of visitors were lapsed, that is, had not been in the past 12 months, and only 5% were returning after an absence of at least 2 years. At many other galleries the lapsed audience is between 20%-25% of the total. This finding suggests that significant numbers of people living in the region and particularly locally, think they have 'done'

Baltic and need a reason to return, or the quality of their experience was such that they do not want to visit again. Research with these lapsed visitors will shed light on why they have not returned, and on what basis they would re-visit. Whilst a proportion of first time visitors could be persuaded to return, as we found, many of them live too far away to ever become regulars, whereas the regional and local lapsed audience hold greater potential for helping to build the size of the core audience.

The audience development strategy should focus on:

- Encouraging regular visitors to visit more often and use more elements of the Baltic offer
- Ensuring returning lapsed visitors become part of the regular core audience
- Persuading those people who visited in the first couple of years after opening to come back
- Providing new visitors have a high quality experience and a reason to return and recommend

The effectiveness of this audience development strategy depends upon the marketing strategy and the quality and depth of visitor engagement.

8.2 Marketing Strategy

During this period we found that the majority of visits were general (71%), rather than exhibition specific (10%). Only 13% of people said they would want to know what was on before they visited. Those people visiting for the first time were slightly more concerned about pre-visit exhibition information (20%), but even then it is still a relatively small proportion. There is an expectation that there will be art on display, and visitors are generally open to seeing whatever exhibition is on at the time (69% of visitors would definitely visit an exhibition by an un-known artist at Baltic).

This has implications for the marketing strategy and the allocation of resources, as it is clear that visitors do not need to know exactly what artists are showing before they decide whether or not to visit.

As well as finding visitors were not exhibition driven, our data also revealed that people visit for many different reasons.

The regular core audience are a mix of art interested visitors who want to pursue their academic, professional and personal interests, improve their knowledge and see awe inspiring art, people who want to spend time in the café with friends, and others just wanting to get away from it all, relax and re-charge. They tend not to rely on any publicity, they turn up with clear needs and expectations and these are currently being met.

New and returning visitors are more likely to be visiting to see the building, enjoy the views and to see a major attraction, the art is not their primary driver. Some of them do find the experience more relaxing and stimulating than they expected, and these benefits should be communicated.

These findings should inform communication messages and further research will help to refine and target these messages.

We know why people visit, in terms of what benefits they hope to get from their visit, and what they do when they visit, and this shows that the audience are not aware of the extent of the Baltic offer. There is scope to increase awareness and usage of the guided tours, the archive, and the staff, in particular. This would serve not only to deepen engagement and enhance the visitor experience, but will also provide people with a reason to visit and re-visit. One of the key messages to communicate is the extent of the offer, that there is more to Baltic than the building and the art. It also means that orientation information needs to be improved to ensure people are aware of everything they can do during their visit, and what they can plan for their next visit, this is even more important for the 120,000 new visitors each year who arrive with no pre-experience.

In terms of how messages should be communicated we found that the banners, what's on guides and recommendation are the most well used, but this finding is largely determined by what marketing activity already takes place. There is scope to increase awareness and usage of Baltic.com (34% of visitors did not know about the site and 46% have used it), which visitors are keen to use as a tool for planning their visit to exhibitions and events, and for follow-up background information about the artists. We recommend that the website is promoted more heavily as a way of telling people about the extent of the Baltic offer. The website, combined with e:marketing, would be an efficient, effective and targeted method of communicating regularly with the audience, driving exhibition and event specific visits, as well as general visits. Building dressing also has scope to communicate key messages, not just the name of the artist, although it is less targeted, this research does show that people do notice the banners.

- Our main recommendation is to review and refine the marketing strategy in the light of the findings contained in this report, and if possible in response to additional research. The communication messages need to be developed, tested and refined, and we would suggest that the resources allocated to the different marketing channels should be reviewed and re-prioritised and then tested to ensure any changes are actually effective and efficient.

8.3 Visitor engagement

Visitors are generally satisfied with their visit, they describe Baltic as a welcoming place and somewhere they would recommend to others. They like the building, the location, views and for regular visitors in particular, they value the opportunity to see cutting edge art.

However, from our analysis and interpretation of this data we recommend that Baltic needs to facilitate a deeper engagement with the art, and the activities and services it provides.

We know from this data that people are likely to be making a general visit to Baltic to see whatever exhibition is on at the time and that overall 85% of visitors do engage with the art by seeing at least one of the exhibitions. However, purely on a practical level, artworks displayed in the orientation spaces are not accessed to the same degree as those in the dedicated galleries. Observation research focusing on these parts of the building would help us to better understand what the issues are and how they could be addressed.

Ratings given to the exhibitions varied and this is likely to always be the case, not everyone will enjoy everything. Nevertheless, there is a very clear demand for interpretation of the artworks and providing this should have an impact on exhibition ratings as well as overall visitor engagement. Nearly half of all visitors felt that there was not enough information available, they want background information to the artist and the artistic process. Their level of interest in the guided tours and crew reflects their desire for interpretation and contextual information.

There is considerable potential to increase the number of visitors using activities, such as free tours, the archive, website, quay TV, adult sessions etc. Raising awareness will have an impact on usage, as currently awareness levels are low for some of these services and effective and targeting marketing will continue to grow the audiences for specific elements of the offer.

Awareness of the café and shop is not an issue for visitors to the building, it is converting this awareness into usage that is the challenge. More people need to be persuaded to go into the shop, as some regulars tend not to bother because they feel the products are expensive and unappealing. Around half of the people who go into the shop actually buy something, so the shop also needs to work harder at converting browsers to buyers. A review of the retail offer would be useful to gain a better understanding of what Baltic need to do to increase footfall and purchasing.

A third of the regular audience are motivated to visit Baltic for the café or shop, but there are some regular visitors who don't use this facility because they did not enjoy their last visit, and this should be explored in more detail. We also found that some lapsed and new visitors planned to eat or drink elsewhere, so we need to better understand why they chose not to make this part of their visit, and again more research would help.

If catering and retail are to be a major source of income in the future we recommend that specific research is undertaken with users and non-users of these facilities in order to assess what changes are required to increase revenue.

Deepening visitor engagement requires:

- An interpretation strategy is essential if Baltic is to meet the needs of visitors. This should be a consistent policy for all exhibitions, providing multi-layered, contextual information and ideally in a range of different formats.
- A review of how visitors access artworks in the orientation spaces and recommendations for how to improve engagement with these types of exhibitions.
- Raising awareness of all the services and facilities will encourage usage of a broader Baltic offer. Promoting the guided tours and encouraging crew to get more involved with providing information about the artworks would contribute to the interpretation strategy, and help visitors engage with the art.
- A review of the catering and retail offers would be useful to better understand what visitors like, what they would like to see improved and produce recommendations for how to increase visitor spend.

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