

***Visitor Impressions of Rembrandt:
A Genius and His Impact***

Date: April, 1998

A Research Report By Deidre Giblin, Bronwyn
Higgs and Mary Hollick

Contents

Acknowledgments	4
Executive Summary	5
Part One: Introduction	10
1.1. Aim of Research	10
1.2. Methodology	10
1.3. The Sample Size and Sample Selection	11
Part Two: Demographic Profile of the Sample	12
2.1. Gender of Respondents	12
2.2. Highest Education Level Attained	13
2.3. Age of Respondents	14
2.4. Family Status of Respondents	15
2.5. Geographic Origin of Respondents	16
2.6. Respondents' Affiliations	18
2.6.1. Affiliation with the Arts	18
2.7. Consumption of Other Leisure Activities	19
Part Three: Prior Experience with the National Gallery of Victoria and Major Art Exhibition Experience	22
3.1. Prior National Gallery of Victoria Experience	22
3.2. Respondents Prior Experience with Major Art Exhibitions	23
Part Four: Motivations to Attend the Rembrandt Exhibition	25
4.1. Planned and Unplanned Decisions	25
4.2. Purpose of Visit	26
4.3. Motivations to Attend the Rembrandt Exhibition	27
4.4. Hindrances to Attendance	28
Part Five: Sources of Information Consulted	29
5.1. Number of Information Sources Consulted	29
5.2. Principal Sources of Information Consulted	30
5.3. Non-personal Sources of Information	32
5.4. Personal Sources of Information	39

Part Six: Sponsor Recall	40
6.1. Unaided Sponsor Recall	40
6.2. Aided Sponsor Recall	41
6.2.1. Aided Recall of Major Sponsor	41
Part Seven: Visitor Expectations	43
7.1. Expectations of Core Service	43
7.2. Expectations of Peripheral Services	44
7.2.1. Respondents' Price Expectations	44
7.2.2. Queue Expectations	44
Part Eight: The Service Experience and Customer Satisfaction Ratings	47
8.1. NGV Services Visited	47
8.2. Visitor Satisfaction Ratings	48
8.2.1. Overview of Visitor Satisfaction	49
8.2.2. Satisfaction with Selected Attributes	50
8.2.3. An Overall Satisfaction Ratings	54
Part Nine: Behavioural Intentions	56
9.1. Predisposition to Recommend the Rembrandt Exhibition	56
9.2. Predisposition to Revisit Other MAEs	57
Part Ten: Matching Expectations and Perceptions	58
Part Eleven: Conclusions and Recommendations	61
Appendices	
Appendix One: Comparative Summary of the Two Questionnaires	65
Appendix Two: Population and Sampling Data: Respondent Numbers Per Day	66
Appendix Three: Price Expectations: Detailed Tables	68
Appendix Four: Factor Analysis	
Appendix Five: Unsolicited Qualitative Comments	69
Appendix Six: Daily Attendances at the Rembrandt Exhibition	
References	70

List of Tables

2.1	Gender of NGV Visitors		5.15	Brochure Source	
2.2	Highest Education Level Attained by NGV Visitors		5.16	Recommended by Friends/Relatives	
2.3	Age of NGV Visitors		6.1	Comparison of Unaided & Aided Recall	
2.4	Family Status		6.2	Unaided Sponsor Recall	
2.5	Geographic Origins of NGV Visitors		6.3	Aided Sponsor Recall	
2.6	Victorian Postcodes		6.4	Comparison of RACV Aided & Unaided Recall	
2.7	Affiliations with the Arts/Sponsors		7.1	Expectations of Core Service	
2.8	Comparative Visitation of Leisure Activities in Past 12 mths & 3 yrs		7.2	Relationship Between Visual	
2.9	Movie Attendance in Past 12 Mths		7.3	Relationship Between General Public & Motivation to Attend	
2.10	Attendance to Horse Races in Past 12 Mths		7.4	Estimates of Admission Fee to NGV	
2.11	AFL Attendance in Past 12 Mths		7.5	Estimates of Admission to Rembrandt Exhibition	
3.1	NGV Visitation in Past 12 Mths		7.6	Comparative Admission Expectation	
3.2	NGV Visitation in Past 3 Yrs		7.7	Comparative Queue Expectation	
3.3	Prior Expectations with MAEs		8.1	Gallery Services Visited	
3.4	Past MAEs Visited		8.2	Summary of Satisfaction Ratings for Selected Criteria	
4.1	Visitation of Nearby Attractions		8.3	Satisfaction Rating with Selected Criteria	
4.2	Other Attractions Visited (on same day as Rembrandt exhibition)		8.4	Overall Satisfaction Ratings – A Summary	
4.3	Motivating Factors		8.5	Overall Satisfaction Ratings	
4.4	Visual Art Industry Workers By Motivation Compare Rembrandt With Pupils		9.1	Predisposition to Recommend	
4.5	Serrano Effect		9.2	Predisposition to Revisit MAEs at NGV	
5.1	Number of Sources Consulted		10.1	Expectations & Perception: A Comparative Table	
5.2	Number of different Sources Consulted				
5.3	Principal Source of Information		Figure		
5.4	Newspaper Source				
5.5	Type of Newspaper Information				
5.6	Newspaper Source by Age				
5.7	Age by Newspaper Title Consulted				
5.8	NGV Visitors' Consumption of Radio Compared with Melbourne Station Ratings				
5.9	Type of Radio Information				
5.10	Radio Source by Age				
5.11	Magazine Source				
5.12	Magazine Source by Age				
5.13	Type of TV Source				
5.14	TV Source by Age				

Figures

[illegible]

Acknowledgments

This research was made possible with a grant from the University of Ballarat. The researchers wish to extend their appreciation for the grant and the support of the School of Business at the University of Ballarat.

Executive Summary

Aim and Methodology of the Study

The object of the study was to document customer satisfaction ratings for the National Gallery of Victoria (NGV). A total of 550 respondents were interviewed during 'Rembrandt: A Genius and His Impact' exhibition. Structured questionnaires were supplemented with direct observation techniques during the staging of the exhibition.

Type of Visitor

The research quantifies the elite nature of the visitors attending the NGV. Respondents came with significant cultural capital reflected by their high education levels, preparedness for the exhibition, breadth of reading from newspaper and magazines and their prior experience of attending major art exhibitions (MAEs).

The exhibition drew an impressive proportion of highly educated, younger visitors in the 18-29 age group; a segment many other cultural providers find difficult to draw. The profile overall, however, suggests a healthy spread of visitors across a wide range of generational segments.

As a generalisation, NGV visitors are heavy consumers of cultural and arts products but are very light consumers of spectator sports and other leisure activities.

Motivations to Attend

The majority of visitors combined a visit to the NGV with other leisure pursuits in the city centre or Southbank. However, the decision to attend a MAE was motivated by the following factors, listed in order of importance:

- the opportunity to see priceless art (very important for 60% of respondents)
- the opportunity to see a collection of Rembrandt's works (very important for 51% of respondents)
- admiration for Rembrandt's work (very important for 36%)
- routine attendance of all major art exhibitions (32%)
- learning about Rembrandt's influence (27%)
- seeing 17th century works of art (26%)
- comparing Rembrandt with his pupil's works (23%)

It is worthwhile noting the incongruence between curators' ideal exhibition and the public's ideal exhibition. Visitors were far less interested in Rembrandt's influences than in the display of the master's own works.

Sources of Information

The NGV obtained excellent exposure across a range of communications media. The findings indicate the breadth and depth of NGV's exposure in the print media, electronic media as well as its relationships with other Galleries and the arts community. In addition, the findings are indicative of respondents' hunger for knowledge about the event. On average, respondents consulted a total of three different sources prior to attending the Rembrandt exhibition. The most frequently-used sources, in order of importance, were:

- newspapers (77% of respondents)
- radio (68%)
- billboards (56%)
- magazines (33%)
- television (32%).

Detailed analysis of types of publications and cross tabulations, included in the report, indicate that the target market prefers printed material rather than electronic communications. The market demonstrates a clear preference for non-commercial radio and television. With respect to the print media, the market shows a distinct preference for quality press. Given the reliance on non-commercial sources, this can be a difficult audience to reach.

In respect to media consumption, the NGV visitor is atypical. Their preference for non-commercial broadcast media runs contrary to population trends. In addition, their preference for quality media, such as the relatively low circulation *Age* is also different to readership patterns within the State.

Despite the obvious difficulties reaching the audience, the data indicates that the NGV generated excellent publicity and effectively capitalised on low cost promotions.

Sponsor Recall

Sponsor recall was generally fair. Although the major sponsor, Shell, performed moderately well in recall tests, its combined recall of 65% fell short of previous performance levels¹.

In contrast, a minor sponsor, RACV, produced some interesting results. Although the RACV's level of recall may not have been as high on individual recall tests, there was an impressive consistency of recall across a range of distribution channels (eg. *Royalauto*, booking facility, logo) suggesting that the RACV capitalised effectively on their sponsorship. The RACV's strong performance provides a valuable lesson on the need for active sponsor commitment of an event.

¹ Giblin, D., *An Investigation into Factors affecting the Success of a Major Art Exhibition Focusing on the Case of Van Gogh*, VUT Masters Thesis, 1995

Visitor Expectations

Visitors to the NGV bring exceptionally high expectations for the experience, both in terms of the core service (the display of artworks) and peripheral service (the facilities and staff). This is to be expected given their relatively high levels of cultural awareness. Since high expectations have important implications for quality, a more detailed discussion of the conclusions may be found in the section on matching expectations and quality perceptions.

Specific features of an ideal exhibition nominated by visitors, in order of importance, were that it should:

- represent a rare opportunity to view works (82% believed it to be extremely important)
- provide an opportunity for enhanced learning (66%)
- contain works that are correctly attributed (54%)
- would contain works of great beauty (50%)
- evoke strong emotions (41%)

Visitors did not expect that an ideal exhibition should illustrate a network of relationships among artists. Only 12% considered this to be an extremely important feature of an ideal exhibition. Interestingly this group comprised a large percentage (60%) of visual arts industry workers, suggesting that different target groups are motivated by different benefits.

Visitors were generally very price-aware. The majority of respondents correctly identified the range of admission prices as falling between \$10 and \$20. Visitors' price expectations clustered around three price points; namely \$10, \$14-5 and \$18, which correspond to the standard admission and concessions. However, small numbers expected to pay for admission almost a year after changes to pricing policy. Because free admission represents a major competitive strength, more could be done to communicate the change in pricing policy. Effective marketing of the main collection is pivotal to any initiatives designed to attract potential new visitors.

Visitors' expectations to queues were also interesting. More than half of respondents expected queue length to be about the same or longer than on previous visits. Our qualitative observations indicated that queuing was highly streamlined. Yet, visitors recorded relatively poor satisfaction levels with this attribute. The incongruence between s suggests that more could be done to manage visitors' impressions of the queues by reducing clutter and experimenting with simpler design. Further research could be useful to identify the causes of visitors' poor scores on waiting times and traffic flows.

The Service Experience

The majority of respondents visited a range of services at the NGV including:

- the gift shop (65%)
- the authenticity of the display (57%)
- the coffee shop (38%).

In contrast, relatively few respondents (26%) made use of the video display.

Given that respondents wanted opportunities for enhanced learning, the poor patronage of the video requires some explanation. Our qualitative observations suggest that the duration of the videos was daunting and served as a disincentive. The opportunity to provide short, pithy and relevant videos as part of the package of services in future exhibitions should provide visitors with the range of experiences they are seeking.

Most visitors took the time to engage in more than one activity during their visit to the main exhibition. This suggests that visitors are seeking a related set of benefits that are designed to enhance their appreciation of the MAE.

Satisfaction Ratings

Satisfaction scores were recorded on nineteen items. Subsequent factor analysis revealed that these items loaded onto four factors², corresponding to five broad dimensions of quality:

Physical Facilities (physical facilities, lighting, range of souvenirs)

Exhibition (display of advertised works, availability at promised times, authenticity of works)

Process (monitor traffic movement, operating hours, waiting times)

Personal Service (willingness to help, prompt service, problem solving abilities)

Overall the NGV scored relatively high satisfaction ratings on all nineteen items identified by the survey. Respondents were almost universal in their satisfaction with the exhibition itself, including the appropriateness of the interpretation, the interpretive frameworks and documentation of authenticity. Potential problems, where they were detected, dealt with the peripheral services including the physical facilities, process and personal service levels.

High scores were recorded for the following attributes:

- the appearance of staff
- respondents' feelings of safety
- the promptness of service
- managing visitor traffic.

The NGV's performance in personal service dimension was relatively weak. Two items in this dimensions were among the lowest scores: an understanding of visitor needs and the ability to solve visitor problems were ranked lower than 3.5 out of 5.

Respondents were ambivalent about the physical facilities dimension. While low scores were obtained for the appearance of the NGV's physical facilities, the range of food and beverages was deemed satisfactory.

² Appendix Six reproduces the factor analysis for the nineteen scaled items included in the questionnaire

Matching Expectations and Perceptions: Diagnosing Potential Service Quality Problems

Although the majority of visitors' reported very high satisfaction ratings on most attributes, this was tempered by the fact that the respondents had very high expectations. The research identified items where visitors believed that the actual delivery failed to meet their expectations.

In order of seriousness, the quality gaps are:

- the ability to show a sincere interest in solving problems
- the appropriateness of lighting levels
- management of traffic flows
- management of queuing
- provision of services at the times promised
- the display of all advertised works
- the appearance of physical facilities
- convenience of operating hours
- understanding the individual needs of visitors
- employees' willingness to help visitors.

These quality gaps were confined to the areas of ***physical facilities*** (lighting and facilities), ***process*** (queuing and traffic management) and ***personal service***.

Areas where the NGV exceeded visitors' expectations were:

- the range of souvenirs
- the appearance of employees
- range of food and beverage

Areas where the NGV met expectations were:

- the documentation of authenticity
- the interpretation of the collection
- visitors' feelings of safety

In general, it can be concluded that the NGV performed very well in terms of delivering on the ***core service*** including the curatorial functions. It performed less competently on systems including queue and traffic management. Similarly, it performed below expectations on most aspects of employee service. Visitor impressions of the tangible dimensions of the service were ambivalent. It should be stressed, however, that the relatively poorer scores were only marginally below average expectations indicating that there is no immediate problem. However, the data signals an emerging problem that should be managed.

Part One: Introduction

1.1. Aim of the Study

The purpose of this research project was to elicit information about visitors' perceptions of quality of a major art exhibition (MAE). The research included questions designed to capture both 'expectations' and 'perceptions' of the Rembrandt exhibition that was staged at the National Gallery of Victoria (NGV) between 1st October and 7th December, 1997.

Specifically, the objectives were fourfold, namely to

- measure visitors' perceptions of quality: to measure their expectations with actual perception
- provide a demographic profile of visitors to the Rembrandt exhibit
- measure the performance of the NGV while under stress during the presentation of a MAE
- measure the level of visitor satisfaction

1.2. Methodology

A literature search was used to research and design the proposal and the questionnaires. The questionnaire was modelled on SERVQUAL, a robust instrument, designed and used by American researchers, specifically to conduct service quality research.³

We have extended and modified the questionnaire to suit the needs of the NGV. Extensions were designed to elicit data about visitors' expectations as well as the sources of information consulted prior to making a decision to visit. Members of the NGV staff were consulted at each stage of the design process and additional questions were included at the NGV's specific request.

Interviews were conducted at entry and exit points at the NGV in St Kilda Road. Two male, three female interviewers were employed to ensure lack of bias in the selection of respondents.

Structured interviews were supplemented with observations carried out by the researchers during the Rembrandt exhibition. This type of qualitative research particularly focused on queuing, traffic flows, crowding and discussions with floor staff about a range of related issues.

³ The original questionnaire may be found in Appendix 1 of *Delivering Service Quality* by V. Zeithaml, A. Parasuraman and Berry, Leonard L., Free Press, 1990.

1.3 The Sample Size and Sample Selection

A total of 550 respondent visitors to the Rembrandt exhibition, aged over 18 years, were interviewed between the dates of 22nd November and 5th December 1997. The sample size was more than adequate for statistical reliability with 95% confidence.⁴

The total sample was divided into two groups. A total of 298 respondents were interviewed prior to visiting the exhibition (known as the entry group) and 252 were interviewed on departure from the exhibition (known as the exit group.) The questionnaire for the entry group contained additional questions about their expectations. A comparison the two questionnaires may be found in Appendix One.

A notable feature of the interviewing phase was the eagerness demonstrated by NGV visitors to participate in the research. Interviewers reported that many visitors approached them requesting an interview. In addition, interviews commented on the quality of responses, noting that many visitors gave thoughtful and reflective responses to questions.

⁴ William G. Zikmund, *Business Research Methods*, 4th ed., 1994, p. 412

Part Two: Demographic Profile of the Sample

Geo-demographic data was collected on gender, age group, family status, highest educational level attained and geographic origin. Given that respondents were selected randomly, it may be assumed that the reported results are representative of the population of NGV visitors. Results were compared with census data for the state of Victoria.

2.1. Gender of Respondents

Interviewers were asked to simply note the gender of respondents. The sample was weighted towards females; with 64% females and 36% males. The obvious skew towards females may suggest that females are key decision-makers when deciding to visit major art exhibitions or galleries.

Figure 2.1

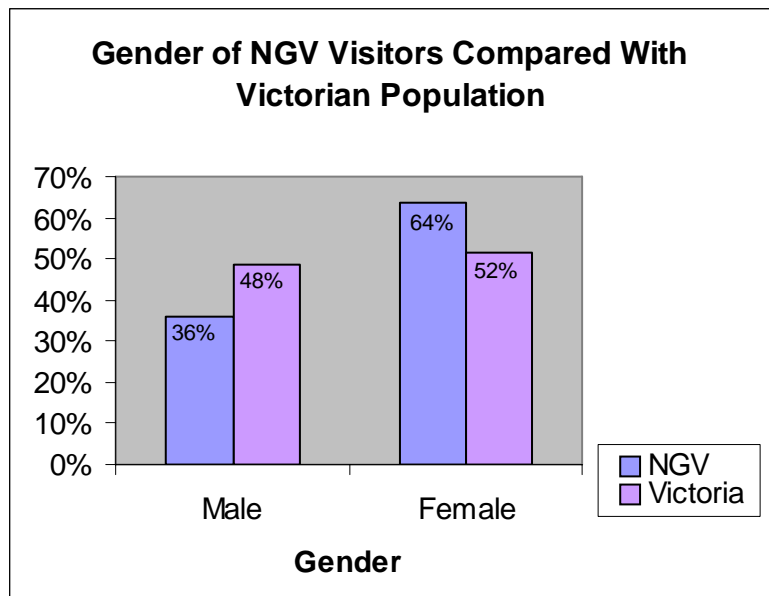


Table 2.1

Gender of NGV Visitors

		Frequency	Valid Percent	Cumulative Percent
Valid	Male	197	36.1	36.1
	Female	349	63.9	100.0
	Total	546	100.0	
Missing		4		
Total		550		

2.2. Highest Educational Level Attained

Respondents were asked to nominate the highest level of education attained. Compared with national averages, the sample was well educated, with 51% having attained a degree or higher and a further 28% having undertaken some tertiary education.

Figure 2.2

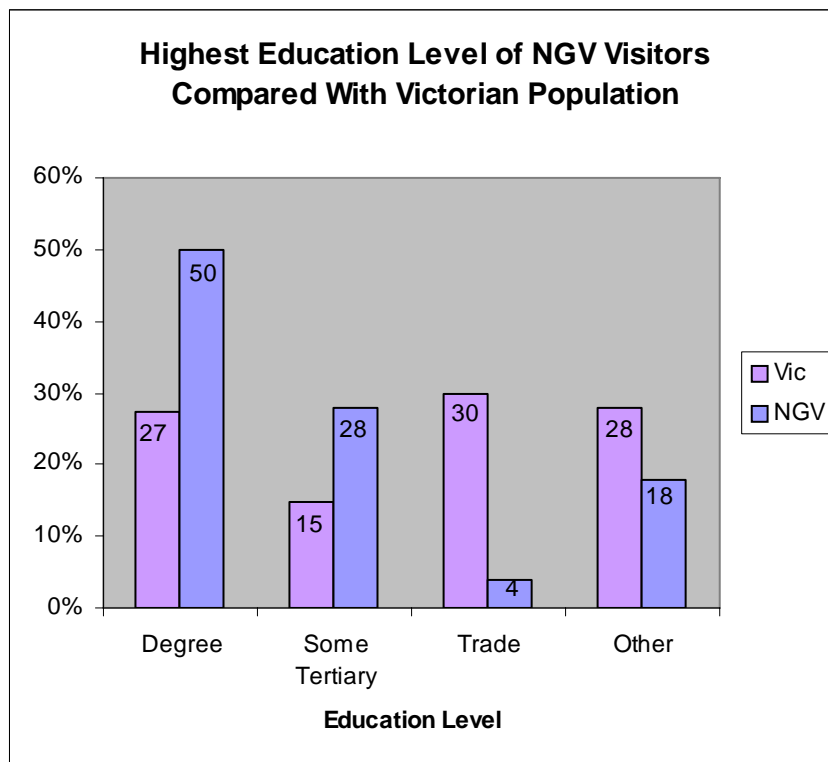


Table 2.2

Highest Education Level Attained By NGV Visitors

		Frequency	Valid Percent	Cumulative Percent
Valid	Degree or higher ^a	277	50.7	50.7
	Some tertiary	152	27.8	78.6
	Trade school	20	3.7	82.3
	Other	97	27.8	100.0
	Total	546	100.0	
Missing		4		
Total		550		

2.3. Age of Respondents

Respondents were asked to nominate the age group to which they belonged. All age groups over 18 years were well represented in the sample. In descending order the most populous age groups were 18 -29 (32%); 30-39 (22%); 50-59 (18%); 40-49 (16%) and over 60 (12%).

Figure 2.3

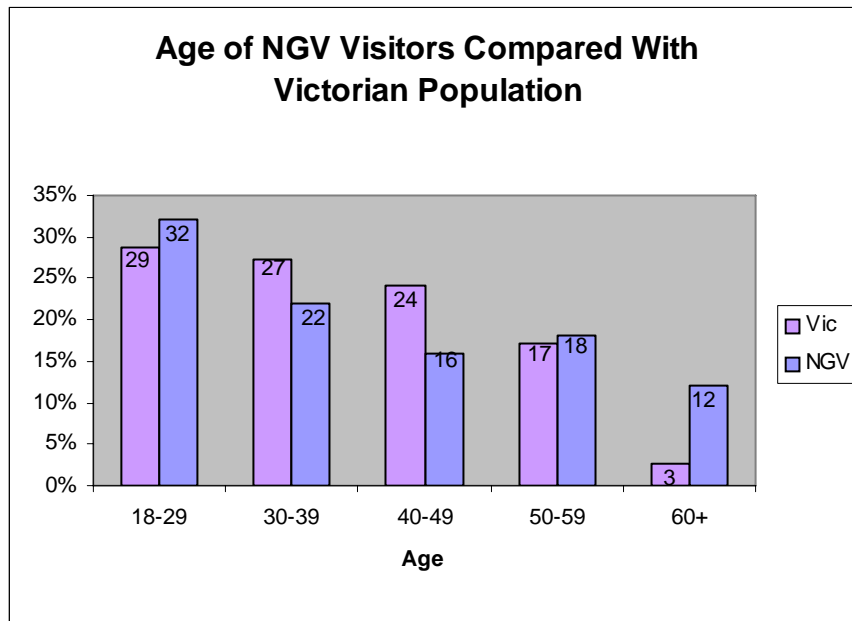


Table 2.3

Age of NGV Visitors

		Frequency	Valid Percent	Cumulative Percent
Valid	18-29	176	32.2	32.2
	30-39	120	21.9	54.1
	40-49	85	15.5	69.7
	50-59	100	18.3	87.9
	60 plus	66	12.1	100.0
	Total	547	100.0	
Missing		3		
Total		550		

2.4. Family Status of Respondents

Respondents were asked to nominate their family status. Respondents without children represented the largest single category. A total of 39% had no partner and no children while a further 27% had a partner and no children. Only 20% had both a partner and children.

Figure 2.4

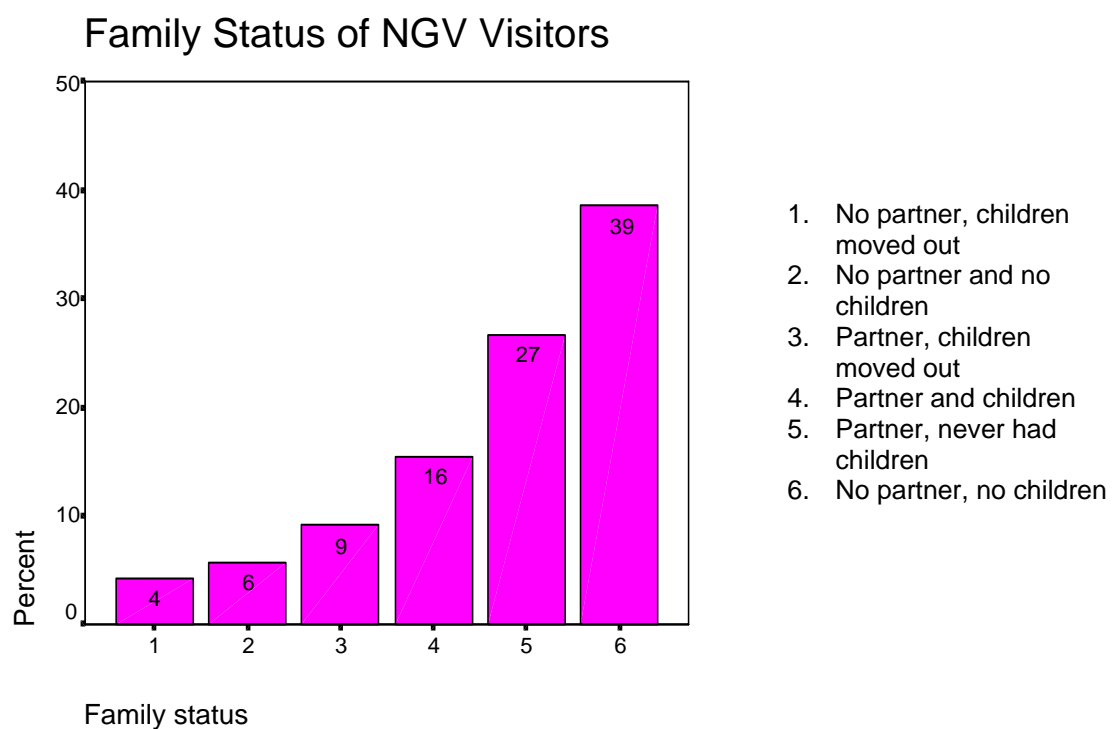


Table 2.4**Family Status**

	Frequency	Valid Percent	Cumulative Percent
Valid Partner, never had children	131	26.7	26.7
Partner and children	76	15.5	42.2
Partner, children moved	45	9.2	51.4
No partner, children	28	5.7	57.1
No partner, children moved	21	4.3	61.4
No partner, no children	189	38.6	100.0
Total	490	100.0	
Missing	60		
Total	550		

2.5. Geographic Origin of Respondents

Respondents were asked to provide their postcode. Results indicate that the majority of respondents reside in Victoria (81%). A further 6% reside in New South Wales. Other Australian states account for 10% of the sample. Further analysis of Victorian postcodes may be conducted at a future date.

Only 3% of those interviewed were international visitors. Some of the countries of origin named by visitors include; Austria, India, New Zealand, United Kingdom, Canada, Scandinavia, United States, Italy and the Netherlands.

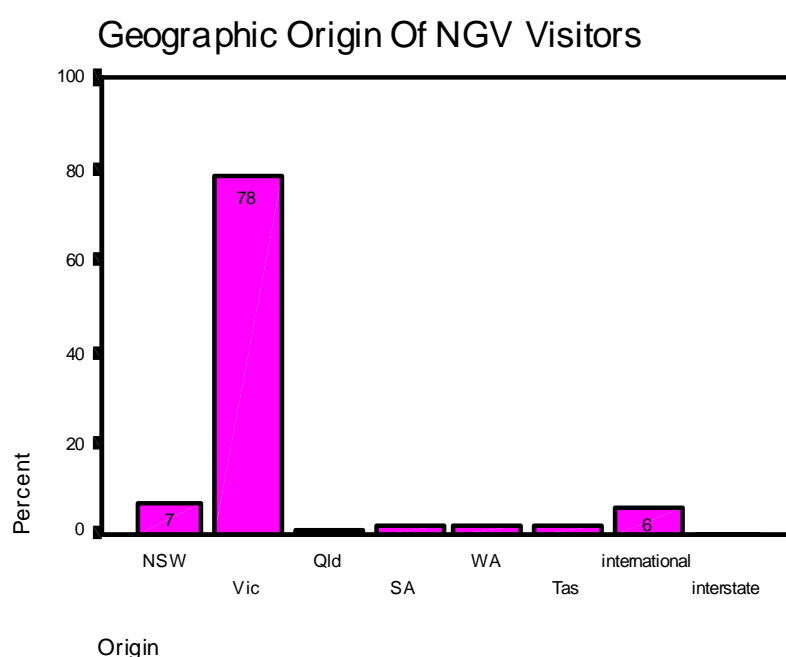
Figure 2.5

Table 2.5**Geographic Origin of NGV Visitors**

		Frequency	Valid Percent	Cumulative Percent
Valid	NSW	20	6.9	6.9
	Vic	228	78.4	85.2
	Qld	4	1.4	86.6
	SA	7	2.4	89.0
	WA	7	2.4	91.4
	Tas	7	2.4	93.8
	International	17	5.8	99.7
	Other/Not Known	1	.3	100.0
	Total	291	100.0	
Missing		259		
Total		550		

Given that Victorian residents represented such a large proportion of the sample, Victorian postcodes were analysed further. The results are presented in table 2.6.

Table 2.6

Victorian Postcodes				
	Frequency	Percent	Valid Percent	Cumulative Percent
Metropolitan	360	65.5	82.2	82.2
Rural	78	14.2	17.8	100.0
Total	438	79.6	100.0	



As table 2.6 indicates, 82 percent of all Victorian respondents lived in the metropolitan region. Respondents were evenly distributed across most of Victoria, with no single postcode accounting for more than 2 percent of the total.

2.6. Respondents' Affiliations

Respondents were asked about affiliations with the arts or the NGV. Fourteen percent of respondents stated that they worked in the visual arts industry. A further 2% were attending the Rembrandt exhibition as part of a work function and 1% were employees of sponsors. By implication, the vast majority of respondents (83%) had no affiliations with the sponsors or the arts.

2.6.1. Affiliation with the Arts

Given that the survey included questions specifically dealing with sponsor recall, it was necessary to establish whether respondents had any affiliations that might affect their answers.

Table 2.7

Affiliations with the Arts/ Sponsors

	Yes	
	Count	%
Attending a Work Function	10	2%
Empoloyee of Sponsor	7	1%
Visual Arts Industry Wworker	72	14%

For the main part, respondents' affiliations with sponsors were so small that any affect on the results would be negligible.

It is worth noting that a sizeable 14% of the total sample were employed in some aspects of the visual arts industry. Although small in size, this is an important market in terms of its influence. As a result of their special knowledge of the arts, industry workers may be seen as opinion leaders. As such, this group represents an important secondary market for the NGV.

2.7. Consumption of Leisure Activities

Respondents were asked about their consumption of other leisure activities such as the AFL football, horse racing and the movies. The results are summarised below.

Table 2.8

Comparative Visitation of Leisure Activities in Past 12 Months		Comparative Visitation of Leisure Activities in Past Three Years	
	Mean		Mean
NGV	4.93	NGV	1.49
Museum of Victoria	.62	Museum of Victoria	1.42
Scienceworks	.27	Scienceworks	.67
AFL Football	1.54	AFL Football	4.69
Horse Racing	.55	Horse Racing	2.15
Live Theatre	3.72	Live Theatre	10.52
Movies	11.64	Movies	34.74
Other Galleries	8.39	Other Galleries	19.29
Madame Tussaud	.18		

It is clear from table 2.8 that NGV visitors are heavy consumers of cultural and arts services. Visitors are also moderate users of cinemas. On the other hand, visitors are light users of spectator sports such as AFL football and horse-racing.

Table 2.9**Movie Attendance in Past 12 months**

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid No Prior Attendance	51	20.2	20.2	20.2
1-10 Prior Attendances	115	45.6	45.6	65.9
11-20 Prior Attendances	58	23.0	23.0	88.9
21-30 Prior Attendances	12	4.8	4.8	93.7
31-40 Prior Attendances	10	4.0	4.0	97.6
41-50 Prior Attendances	3	1.2	1.2	98.8
51-100 Prior Attendances	2	.8	.8	99.6
101 + Prior Attendances	1	.4	.4	100.0
Total	252	100.0		

As table 2.9 indicates, almost 80% of respondents had attended a movie in the past twelve months. A total of 45% had attended at least once but not more than 10 times in the past year.

Table 2.10**Attendance at Horse Races in Past 12 Months**

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid No Prior Attendance	213	84.5	84.5	84.5
1-10 Prior Attendances	37	14.7	14.7	99.2
11-20 Prior Attendances	2	.8	.8	100.0
Total	252	100.0		

As table 2.10 indicates, almost 85% of respondents had not attended a race meeting in the past twelve months.

Table 2.11**AFL Attendance in Past 12 Months**

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	No Prior Attendance	191	75.8	75.8	75.8
	1-10 Prior Attendances	49	19.4	19.4	95.2
	11-20 Prior Attendances	9	3.6	3.6	98.8
	21-30 Prior Attendances	2	.8	.8	99.6
	31-40 Prior Attendances	1	.4	.4	100.0
Total		252	100.0		

As table 2.11 indicates, more than three quarters of respondent had not attended an AFL football game in the past twelve months.

Overview of Demographics

Overall the demographic data shows that NGV visitors span a wide variety of age groups, are very well educated and are more likely to be female than male and are more likely to be single or without dependents. Most visitors are urban Victorians. In addition, NGV visitors are heavy consumers of cultural and arts products and are light consumers of spectator sports.

Part Three: Past Experience with the NGV and Major Art Exhibitions

3.1 Prior NGV Experience

Respondents were asked how often they had visited the NGV in the past twelve months and in the past three years. The results are summarised in the following tables.

Table 3.1

NGV Visitation in Past 12 Months

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	No Prior Visitation	45	17.9	17.9	17.9
	1-10 Prior Visits	134	53.2	53.2	71.0
	11-20 Prior Visits	43	17.1	17.1	88.1
	21-30 Prior Visits	13	5.2	5.2	93.3
	31-40 Prior Visits	8	3.2	3.2	96.4
	41-50 Prior Visits	2	.8	.8	97.2
	51-100 Prior Visits	3	1.2	1.2	98.4
	101+ Prior Visits	4	1.6	1.6	100.0
Total		252	100.0		

On average, respondents had visited the NGV 1.4 times in the past twelve months. More than half (53%) had visited between one and ten times in the past twelve months. Approximately one third (29.9%) had visited more than ten times in the past year. Over 82% of respondents had attended the NGV previously. The Rembrandt exhibition however, attracted new visitors.

Table 3.2

NGV Visitation in Past 3 Years

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	No Prior Visit	17	6.7	6.7	6.7
	1-10 Prior Visits	162	64.3	64.3	71.0
	11-20 Prior Visits	43	17.1	17.1	88.1
	21-30 Prior Visits	13	5.2	5.2	93.3
	31-40 Prior Visits	8	3.2	3.2	96.4
	41-50 Prior Visits	2	.8	.8	97.2
	51-100 Prior Visits	3	1.2	1.2	98.4
	101+ Prior Visits	4	1.6	1.6	100.0
Total		252	100.0		

Respondents had visited the NGV on average 1.5 times in the past three years. Sixty four percent had visited between 1 and 10 times. However, almost one third had visited more than 10 times in the past twelve months.

3.2. Respondents' Prior Experience with MAEs

Respondents were asked to nominate which MAEs, staged over the past five years they had visited. A total of 510 respondents answered this question. As table 3.3 indicates, most respondents were experienced visitors to MAEs.

Table 3.3

Prior Experience with MAEs

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	No Prior	128	23.3	25.1	25.1
	One MAE	82	14.9	16.1	41.2
	Two MAEs	89	16.2	17.5	58.6
	Three MAEs	71	12.9	13.9	72.5
	Four MAEs	58	10.5	11.4	83.9
	Five MAEs	41	7.5	8.0	92.0
	Six MAEs	34	6.2	6.7	98.6
	7 MAEs	7	1.3	1.4	100.0
	Total	510	92.7	100.0	
Missing		40	7.3		
Total		550	100.0		

Only a small percentage of respondents (25%) had no prior experience with MAEs. The majority (58%) had visited two or more MAEs while a substantial numbers (41%) had previously visited three or more MAEs. The average prior visitation rate was 2.5, indicating that the typical NGV visitor is an experienced NGV visitor and is knowledgeable about the service.

Respondents were asked to nominate which MAEs they had previously visited. Respondents could select more than one answer. Table 3.4 summarises the results.

Table 3.4

Past Major Art Exhibitions (MAEs) Visited

	Yes	
	Count	%
Rembrandt to Renoir	206	39%
Rubens and Renaissance	168	32%
Frederick McCubbin	178	34%
Picasso	195	37%
Tom Roberts	205	39%
Andres Serrano	25	5%
Van Gogh	266	50%

Table 3.4 illustrates that a substantial 50% of respondents had previously visited 'Van Gogh,' 39% of respondents had visited both 'Rembrandt to Renoir' and 'Tom Roberts.' In addition, 37% of respondents had visited 'Picasso.' Only a small percentage of respondents had visited the Andres Serrano exhibition.

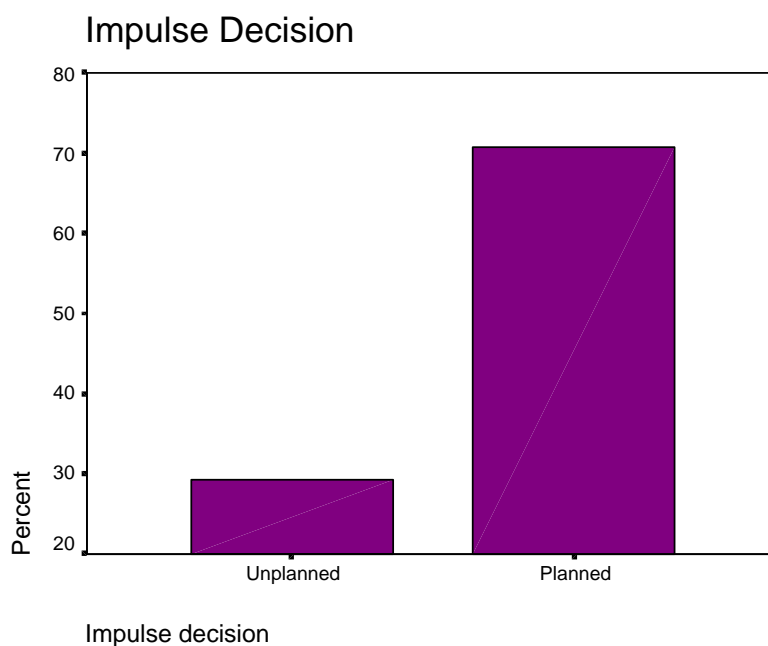
Part Four: Motivations to Attend the Rembrandt Exhibition

A number of questions were concerned with factors that may have motivated visitors to attend.

4.1. Planned and Unplanned Decisions

Respondents were asked whether the decision to attend was an impulse decision. A total of 516 respondents answered this question. Of these, a total of 29% said that they had visited on impulse.

Figure 4.1



For the majority of respondents (71%) the decision to attend the Rembrandt exhibition was a planned one. However, almost one third indicated that the decision was made on impulse. It is worthwhile noting that a number of impulse decisions were prompted by the quality of the external signage at the NGV. These respondents consulted a variety of information sources in making their decision to attend the exhibition.

4.2. Purpose of Visit

Given that the majority of visitors had pre-planned their attendance at the Rembrandt exhibition, we were interested to learn whether they combined this with visitation of other nearby attractions.

Respondents were asked whether they had visited or intended to visit other nearby attractions on the same day as they attended the Rembrandt exhibition.

Table 4.1

Visitation of Nearby Attractions

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	No other attractions	69	26.6	26.6	26.6
	1 Other Attraction	97	37.5	37.5	64.1
	2 Other Attractions	61	23.6	23.6	87.6
	3 Other Attractions	22	8.5	8.5	96.1
	4 Other Attractions	6	2.3	2.3	98.5
	5 Other Attractions	3	1.2	1.2	99.6
	6 Other Attractions	1	.4	.4	100.0
Total		259	100.0		

On average, respondents visited one other attraction on the same day as the exhibition. As table 4.1 indicates almost forty percent of respondents visited at least one other attraction. In addition, more than one third of respondents visited two or more attractions. However, more than one quarter of respondents visited the Rembrandt exhibition as their sole attraction.

Table 4.2

**Other Attractions Visited
(On Same Day as Rembrandt Exhibition)**

	Count	%
Southbank	110	45%
Arts Centre	32	13%
City centre	108	44%
Gardens	41	17%
Other event	18	8%
Casino	223	9%

Almost one half (45%) of respondents plan to combine a visit to the NGV with a visit to Southbank. A similar number (44%) planned to incorporate a visit to the city centre. Relatively small numbers (9%) were planning to visit the casino.

These findings suggest that most respondents combine a visit to the NGV with other leisure activities in the city or Southbank precincts. Combined with the findings that most visits are also planned, it may be assumed that respondents engage in some degree of planning and preparation for an outing designed to occupy a full day. This suggests that there may be opportunities for the NGV to investigate strategic alliances with local business with a view to developing packages.

4.3. Motivations to Attend the Rembrandt Exhibition

Respondents were asked to state whether they agreed or disagreed with seven statements representing a range of motivating influences. The number and corresponding percentage of respondents who agreed and strongly disagreed are summarised below. Respondents could give more than one answer.

Table 4.3

Motivating Factors

	Agree		Strongly agree	
	Count	%	Count	%
Have Always Admired Rembrandt	179	33%	196	36%
Like Attending all major exhibitions	153	28%	176	32%
Seeing a Rembrandt collection	188	34%	281	51%
Seeing 17th Century Art	168	31%	144	26%
Learning about Rembrandt's influence	198	36%	148	27%
Seeing priceless art	137	25%	331	60%
Comparing Rembrandt to pupils	155	28%	129	23%

It is clear from table 4.3 that the principal motivators are the opportunity to see priceless art (60% strongly agreed) and the opportunity to see a collection of Rembrandt's works (51% strongly agreed). However, as table 4.3 suggests, respondents were somewhat motivated by a range of factors. Surprisingly, the least important attribute was the opportunity to compare Rembrandt with his pupils. Yet this was a central feature of the exhibition.

As table 4.4 indicates more than half (60%) of those who were motivated by comparison of Rembrandt with his pupils' work were drawn from the visual arts industry. This suggests that arts industry workers are motivated by a different set of benefits to the general public.

Although visual arts industry workers represent only a small proportion of NGV visitors, they exert a disproportional influence due to their role as opinion leaders. The data suggests that there are significant differences between the factors that motivate the visual arts industry workers compared with the rest of the sample.

Table 4.4

Visual Arts Industry Workers By Motivation to Compare Rembrandt With Pupils

Count		Like Comparing Rembrandt to His Pupils' Work					Total
		Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	
Visual Arts	No	21	59	139	132	97	448
Industry Workers	Yes	6	9	14	15	28	72
Total		27	68	153	147	125	520

4.4. Hindrances to Attendance

Respondents were asked to consider whether the concurrent staging of the Rembrandt and Serrano exhibitions would have affected their decision to attend the NGV. Respondents were asked to express their feelings on a scale of 1 to 5 where 1 represents 'definitely would not attend' and 5 represents 'definitely would attend.' This question was only included in the entry questionnaire. The valid responses from 293 respondents, therefore, represent a smaller sample than for other questions common to both questionnaires.

Table 4.5

Serrano effect

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid 1. Definitely would not attend	9	3.0	3.1	3.1
2	4	1.3	1.4	4.4
3. Neutral	37	12.4	12.6	17.1
4	4	1.3	1.4	18.4
5. Definitely would attend	239	80.2	81.6	100.0
Total	293	98.3	100.0	
Missing Total	5	1.7		
Total	298	100.0		

The majority of respondents (82%) said that they definitely would have attended the Rembrandt exhibition, even if the Serrano exhibition was being staged. Only a small proportion of respondents (4.4%) had believed that the Serrano exhibition would have negatively influenced their intention to attend.

Part Five: Sources of Information Consulted

The questionnaires contained several questions dealing with the sources of information consulted by visitors prior to making a decision to visit the Rembrandt exhibition. The results are summarised in this section.

5.1. Number of Information Sources Consulted

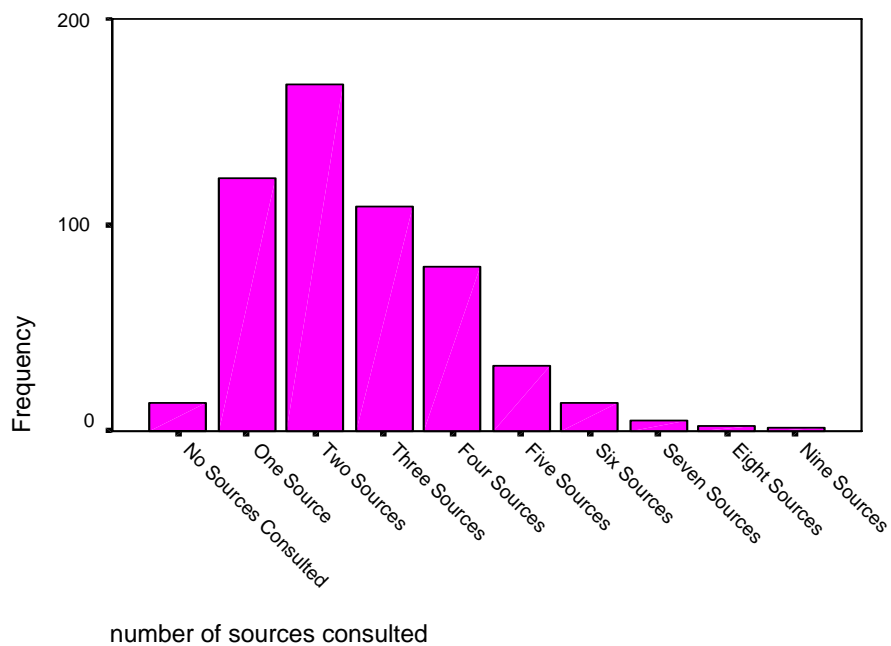
On average, respondents consulted a total of three different sources prior to attending the Rembrandt exhibition. More detailed analysis of the types of sources reveals that the majority of respondents consulted at least one newspaper plus additional sources. More than 75% of the sample had consulted two or more sources of information. This suggests that respondents had actively sought-out information about the exhibition as part of their preparation for the visit.

Table 5.1

Number of Sources Consulted

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	No Sources	14	2.5	2.5	2.5
	One Source	123	22.4	22.4	24.9
	Two Sources	168	30.5	30.5	55.5
	Three Sources	109	19.8	19.8	75.3
	Four Sources	80	14.5	14.5	89.8
	Five Sources	32	5.8	5.8	95.6
	Six Sources	14	2.5	2.5	98.2
	Seven Sources	5	.9	.9	99.1
	Eight Sources	3	.5	.5	99.6
	Nine Sources	2	.4	.4	100.0
	Total	550	100.0	100.0	
Total		550	100.0		

Table 5.2
Number of Different Sources Consulted



5.2. Principal Sources of Information Consulted

Respondents were asked detailed questions about thirteen types of personal and non-personal information sources typically consulted. Respondents could list multiple sources. The results indicate that the NGV received excellent exposure in a range of different media.

Table 5.3**Principal Sources of Information**

	Have Used	
	Count	%
Friend or Relative	195	39%
Gallery Society	60	13%
Newspaper	404	77%
Television	32	32%
Radio	140	68%
Magazine	45	33%
Billboard	289	56%
Information Booth Brochure	50	10%
Travel Agent Brochure	29	6%
Other Brochure	56	11%
Trams	88	17%
Petrol Outlet	18	4%
Other Source	21	91%

Respondents consulted a wide range of information sources. The principal non-personal sources of information were newspaper, consulted by 77% of respondents. Other important sources were radio (68%) and billboard (56%). Principal personal sources of information included friends and relatives (39%).

Brochures are an interesting source because they often straddle the boundaries between personal and non-personal. Potential visitors not only pick up brochures to read at their leisure but they also have an opportunity to discuss the event with staff at the point of distribution. In this survey, brochures represented an important source with a total of 27% of respondents having consulted them. Brochures were obtained from a wide variety of sources, including: the NGV, RACV, tourist information booths and other galleries, notably the Ballarat Art Gallery

An under-utilised distribution point was petrol stations, with only 4% of respondents having obtained information from this source. The usage level was disappointing in the light of Shell's sponsorship. The researchers qualitative evaluation of Shell's retail outlets reinforced the quantitative data. A number of service stations visited by the researchers showed a general lack of interest in the Rembrandt exhibition. Without exception, outlets visited by the researchers were unable to provide brochures. When questioned Shell staff expressed no knowledge whatsoever of the Rembrandt exhibition.

5.3. Non-personal Sources Of Information

A number of analyses were conducted on non-personal sources of information: including detailed breakdowns by title and type of information. Given the usefulness of this data in allocating promotional expenditure, it was decided to prepare cross tabulations by age for all principal media. A summary of these findings is included in this section.

Table 5.4
Newspaper Source

	Newspaper	
	Count	%
Herald Sun	56	15%
The Age	246	70%
The Australian	27	7%
Sydney Morning Herald	10	4%
3 or more papers	2	1%
Other	13	4%

Of the 77% of respondents who consulted newspapers, the majority (70%) found information about the Rembrandt exhibition in the *Age*. Table 5.4 shows that the sponsor paper, *Herald-Sun* was a source for 15% of newspaper readers. An additional 1% of readers consulted three or more sources, typically this included both the *Age* and the *Herald-Sun*. The type of information consulted is illustrated in the following table.

Table 5.5
Type of Newspaper Information

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Ad	105	19.1	49.5	49.5
	Review	62	11.3	29.2	78.8
	Both Ad & Review	45	8.2	21.2	100.0
	Total	212	38.5	100.0	
Missing		338	61.5		
Total		550	100.0		

Table 5.5 indicates that 80 percent of all newspaper readers recalled having seen an advertisement for the Rembrandt exhibition. In addition, more than half recalled having read reviews of the exhibition.

Table 5.6**Newspaper Source By Age**

Count		Newspaper		Total
		Not Used	Used	
Age	18-29	46	124	170
	30-39	26	86	112
	40-49	18	61	79
	50-59	18	80	98
	60 plus	13	51	64
Total		121	402	523

As table 5.6 indicates, there were few differences in newspaper usage between age groups. The over 50s were only marginally higher than average in their use of newspaper as a major source of information.

Table 5.7**Age By Newspaper Title Consulted**

Count		Newspaper Title							Total
		Herald Sun	Age	The Australian	SMH	Other Capital Dailies	Regional Dailies	Misc Papers	
Age	18-29	17	78	7	2	0		1	107
	30-39	10	59	4	1	3		1	80
	40-49	14	37	6	3	2	2		65
	50-59	8	49	2	3	0			64
	60 plus	7	31	2		2		1	44
Total		56	254	21	9		2	1	361

Newspaper titles were cross-tabulated against age to provide a more detailed break-down of principal sources used by respondents. Table 5.7 illustrates that the *Age* newspaper emerges as a principal source across all age groups. Less important newspapers were the *Herald-Sun* and the *Australian*.

Table 5.8

NGV Visitors Use of Radio Compared with Melbourne Station Ratings

Radio Station	NGV Visitors		Melbourne Metropolitan ⁵
	<i>Count</i>	<i>%</i>	<i>Station Rating (%)</i> *
Unable to Recall	127	56	-
3LO	27	12	9
ABC	27	12	1.5
3AW	15	6	14.7
Triple M	12	5	9.5
Radio National	6	3	1.5
Other	13	6	-

* *Radio ratings from A.C. Nielsen, Survey 1, 1998*

The second major source of information was radio, used by 68% of respondents. Table 5.8 shows that the majority (56%) were unable to recall the radio station. However, the remaining break down may be used as an indicator of radio exposure. The data indicates that NGV visitors are heavy users of non-commercial radio, with the ABC and 3LO recording the highest rates. On the other hand, Melbourne's highest rating station, 3AW was used by only 6% of Gallery visitors. In this respect, NGV visitors' consumption of radio is atypical.

Table 5.9

Type of Radio Information

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Ad	93	16.9	56.7	56.7
	Review	61	11.1	37.2	93.9
	Both Ad & Review	10	1.8	6.1	100.0
	Total	164	29.8	100.0	
Missing		386	70.2		
Total		550	100.0		

Table 5.9 indicates that more than half (63%) of all those who listened to radio recalled having heard advertisements for the Rembrandt exhibition. An additional 43% recalled having heard radio reviews.

⁵ For comparative purposes, the Radio ratings published in Survey 1 (February, 1998) were used because this was the closest to the time of the research.

Table 5.10**Radio Source By Age**

Count		Radio		Total
		Not Used	Used	
Age	18-29	29	51	80
	30-39	20	35	55
	40-49	5	23	28
	50-59	9	21	30
	60 plus	4	9	13
Total		67	139	206

A useful cross tabulation is to provide a breakdown of radio usage by age. As table 5.10 indicates radio is a major source of information for the 18-29 age group, both in aggregate and percentage terms.

Magazines

Of the 33% of respondents who used magazine sources, the following table suggests the main titles used.

Table 5.11**Magazine Source**

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Inflight Magazine	17	3.1	20.0	20.0
	ABC 24 Hours	3	.5	3.5	23.5
	Arts Magazine	13	2.4	15.3	38.8
	Tourist Magazine	1	.2	1.2	40.0
	RACV Royalauto	13	2.4	15.3	55.3
	Frequent Flyer	1	.2	1.2	56.5
	The Bulletin/ Time	3	.5	3.5	60.0
	Good Weekend	4	.7	4.7	64.7
	Australian Magazine	4	.7	4.7	69.4
	Glossy Magazines	2	.4	2.4	71.8
	Melbourne City Weekly	2	.4	2.4	74.1
	Unable to Recall	20	3.6	23.5	97.6
	Unspecified News Magazine	1	.2	1.2	98.8
	Quadrant	1	.2	1.2	100.0
	Total	85	15.5	100.0	
Missing	Total	465	84.5		
Grand Total		550	100.0		

Although 23% of magazine readers were unable to recall specific titles, it is clear that tourist magazines such as in-flight and frequent flyer magazines represent important sources. Collectively these account for 22% of magazine readers. The RACV's *Royalauto* magazine emerged as one of the principal sources with 15% of all magazine readers locating information about Rembrandt in it.

Table 5.12

Magazine Source By Age

Count		Magazine		Total
		Not Used	Used	
Age	18-29	42	12	54
	30-39	24	14	38
	40-49	12	5	17
	50-59	8	11	19
	60 plus	4	3	7
Total		90	45	135

Magazine usage was cross-tabulated against age. As table 5.12 suggests respondents over the age of 50 were more likely to obtain information about the Rembrandt exhibition from magazines than other age groups.

Table 5.13

Type of Television Source

	Television Source	
	Count	%
TV news/ Current Affairs	5	3%
ABC	20	11%
ABC & SBS	2	1%
Channel 10	3	2%
Channel 9	3	2%
Channel 7	1	1%
Unable to Recall	151	80%

Of the 32% of total respondents who consulted television, the majority (80%) were unable to recall the station name. Table 5.13 shows the breakdown by station.

Table 5.14**Television Source By Age**

Count

		Television		Total
		Not Used	Used	
Age	18-29	29	8	37
	30-39	20	6	26
	40-49	5	9	14
	50-59	9	4	13
	60 plus	4	4	8
Total		67	31	98

Table 5.14 indicates that television was a principal source for older age groups. Those aged 40-49 were twice as likely to use television as the rest of the sample. In addition, those aged over 60 were more likely to use television. Those aged 50-59 were average in their television usage while those aged under 39 were below average.

Brochures

Although only a small percentage of respondents used brochures, the variety of sources is interesting.

Table 5.15

		Brochure Source			
		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Ballarat Art Gallery	3	.5	7.7	7.7
	Frequent Flyer	1	.2	2.6	10.3
	RACV	6	1.1	15.4	25.6
	Victorian Government	1	.2	2.6	28.2
	VAC	2	.4	5.1	33.3
	Plane	2	.4	5.1	38.5
	What's On In Melbourne	4	.7	10.3	48.7
	Poster In Cafe	1	.2	2.6	51.3
	Ticketmaster	1	.2	2.6	53.8
	NGV	6	1.1	15.4	69.2
	Radio Station	2	.4	5.1	74.4
	Newspaper Insert	1	.2	2.6	76.9
	Airport	1	.2	2.6	79.5
	Citibank	1	.2	2.6	82.1
	University	1	.2	2.6	84.6
	MCMB	1	.2	2.6	87.2
	Hotel/Motel	3	.5	7.7	94.9
	Other Gallery	2	.4	5.1	100.0
	Sub Total	39	7.1	100.0	
Missing	Total	511	92.9		
Total		550	100.0		

Table 5.15 illustrates that the two most important sources for distributing brochures was the NGV itself and the RACV. Other art galleries were also an important source of information, most notably the Ballarat Art Gallery which distributed 7.5% of all brochures. Collectively tourist operators, including hotels, airlines, airports and dedicated tourist publications account for almost one third of all brochures. The breadth of distribution indicates that the NGV has good relationships with a range of tourist and cultural service providers.

5.4. Personal Sources of Information

Personal recommendations are treated as a highly credible recommendation, providing a strong influence on purchase intent.

Thirty nine percent of respondents in this survey said that they had received some information about the Rembrandt exhibition from friends or relatives. When asked about other sources of information, some respondents (10%) volunteered that a teacher at their university had provided the recommendation. It is not entirely clear, from the data, whether the teacher is classified as a 'friend' or whether this represents an additional source.

Table 5.16

Recommended by Friend or Relative By Age

Count		Friend or relative		Total
		No	Yes	
Age	18-29	84	79	163
	30-39	71	43	114
	40-49	49	26	75
	50-59	60	26	86
	60 plus	43	20	63
Total		307	194	501

A simple cross tabulation of age and personal recommendations reveals that the under 29s were more likely to act on recommendations from friends and relatives. The age group 30-39 also indicated marginally higher than average usage of personal recommendations.

The range of sources consulted reveals much about the quality of the target market. As a generalisation, the NGV visitor shows a clear preference for printed materials such as newspapers, magazines and brochures. Older age groups are more inclined to obtain information from television and radio. The data also suggests that respondent visitors actively engage in searching out information prior to their visit.

The range of sources also reveals much about the effectiveness of the marketing effort. Individually the sources of information consulted by respondents should assist with measuring the effectiveness of the NGV's promotional activities. Taken collectively, however, the range of sources consulted indicates the breadth and depth of media exposure generated by the Rembrandt exhibition. In particular, it underlines the NGV's ability to obtain inexpensive promotional support such as publicity.

Part Six: Sponsor Recall

Respondents were asked to recall from memory the names of sponsors. This test is known as ***unaided recall***. When respondents were not able to elicit a name from memory, interviewers were instructed to prompt them by mentioning names in a predetermined sequence, beginning with the major sponsor. The latter test is known as ***aided recall***.

It should be noted that the interviews, which were conducted at the entrance to the NGV were situated so that external signage containing the sponsors' names and logos was clearly visible to the alert respondent.

It is worthwhile noting that a dummy variable, Faberge, was used as a control to measure the reliability of responses. It is only relevant in the aided recall test where only 6 respondents (less than 1% of the sample) incorrectly named Faberge as a sponsor. This suggests that the quality of responses was high.

Table 6.1.
An Overview of Sponsor Recall

Sponsor	Unaided Recall (count)	Aided Recall (count)	Combined Recall Count (%)
Shell	225	133	358 (65%)
Singapore Airlines	19	72	91 (17%)
Sofitel	15	49	64 (12%)
Novotel	4	48	52 (10%)
Ansett	16	104	120 (22%)
Channel 7	20	79	99 (18%)
Tourism Victoria	4	101	105 (19%)
RACV	16	83	99 (18%)
Sunday Herald-Sun	6	81	87 (16%)
Art Indemnity Australia	2	51	53 (10%)
Triple M	1	42	43 (8%)
Faberge (Dummy)		6	6 (1%)

The results of both aided and unaided sponsor recall are summarised in this section.

6.1 An overview of Recall

Forty one percent (41%) of all respondents were able to recall the major sponsor without prompting. A total of 225 respondents correctly named Shell as a major sponsor in the unaided recall test.

Table 6.1
Comparison of Unaided and Aided Recall

	Unaided Recall n=550		Aided Recall n=550	
	Count	%	Count	%
Shell	225	41.0%	133	24.2%
Art Indemnity Australia	2	.4%	51	9.3%
Triple M	4	.7%	42	7.6%
Singapore Airlines	19	3.5%	72	13.1%
Sofitel	15	2.7%	49	8.9%
Novotel	4	.7%	48	8.7%
Ansett	22	4.0%	104	18.9%
Channel 7	19	3.5%	79	14.4%
Tourism Victoria	4	.7%	101	18.4%
RACV	17	3.1%	83	15.1%
Sunday Herald- Sun	6	1.1%	81	14.7%
Other	16	2.9%	.	.
Faberge (Dummy)	.	.	6	1.1%
Total	353	64.3%	849	154.4%

Results of the unaided recall were predictable. Shell, the major sponsor, enjoyed the highest level of recall. Minor sponsors with relatively high levels of recall were Ansett, Tourism Victoria and the RACV. Aided recall of sponsors was generally disappointing. This is partially explained by the relatively high rates of unaided recall. However, feedback from interviewers suggested that respondent fatigue may also have contributed to the lower ratings.

6.2 Unaided Sponsor Recall

Table 6.2

Unaided Sponsor Recall

	1st Recall	2nd Recall	3rd Recall	4th Recall	5th Recall
	Count	Count	Count	Count	Count
Shell	218	4	2		1
Singapore airlines	7	10	1	1	
Sofitel	6	8	1		
Novotel	2	2			
Ansett	6	10	6		
Channel 7	11	5	2	1	
Tourism Vicoria	1		1	2	
RACV	7	8	1		1
Sunday Herald Sun	2	3	1		
Art Indemnity Australia	1		1		
Triple M	2	2			
Faberge					

Table 6.2 indicates that 97% (or 218 respondents) nominated Shell as their first recall. Because the first recall is relatively high, second and subsequent

recall drops away sharply. Less than 2% of respondents nominated Shell as their second recall and only 1% of this group nominated Shell as their third recall. The results clearly indicate that Shell was top of mind for most visitors. Few other sponsors matched this level of recall.

6.2.1. Aided Recall of Major Sponsor

The following tables provides a more detailed picture of the major sponsor, Shell's recall. Of all respondents, 133 were correctly able to recognise Shell as a major sponsor when prompted by interviewers. Shell's combined recall, incorporating both aided and unaided recall was 65%. As a point of comparison, it is worthwhile mentioning Shell's performance during the Van Gogh exhibition (1993-4) where total recall was 95%. In research carried out during the Van Gogh exhibition, unaided recall was 85% while aided recall was 10%.⁶

Table 6.3

Shell

	Frequency	Percent
Valid Aided Recall	133	24.2
Unaided Recall	225	41.0
Combined Aided & Unaided Recall	358	65.2
Total Cases	550	100.0

Shell- Unaided Recall

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid 1st Recall	218	39.6	96.9	96.9
2nd Recall	4	.7	1.8	98.7
3rd Recall	2	.4	.9	99.6
5th Recall	1	.2	.4	100.0
Total	225	40.9	100.0	
Missing	325	59.1		
Total	550	100.0		

⁶ D. Giblin, *An Investigation into Factors Affecting the Success of A Major Art Exhibition Focusing of the Case of Van Gogh 1995*, Masters Thesis, Victoria University, p. 78

RACV

Although the RACV did not score particularly high ratings on the unaided recall test, it performed reasonably on aided recall. Beyond recall tests, the RACV was frequently mentioned in a variety of different contexts. For this reason, the RACV is worthy of special mention.

Table 6.4 Comparison of RACV Aided and Unaided Recall

RACV					
		Frequency	Percent		
Valid	Aided Recall	83	15.1		
	Unaided Recall	17	3.1		
	Combined Aided & Unaided Recall	467	18.2		
Total Cases		550	100.0		

RACV- Unaided Recall					
		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1st Recall	7	1.3	41.2	41.2
	2nd Recall	8	1.5	47.1	88.2
	3rd Recall	1	.2	5.9	94.1
	5th Recall	1	.2	5.9	100.0
	Total	17	3.1	100.0	
Missing		533	96.9		
Total		550	100.0		

Although relatively small numbers of respondents were able to recall the RACV without prompting, a total of 83 respondents (15%) correctly named the RACV as a sponsor.

In addition, the RACV was one of the most frequently cited sources of both personal and impersonal information. The RACV's magazine, *Royalauto*, was named as a source by 6% of all magazine readers.

Both the RACV and the NGV shared the honour of principal brochure source, with 15% of all those using brochures naming these sources. No other single organisation came close to matching this level. The only other organisation to come close to the RACV's performance was the Ballarat Art Gallery distributing material to 7.5% of brochure users.

Of all respondents using travel agents to obtain information, 92% named the RACV. Collectively these results are impressive and suggest that the RACV provided a level of support and commitment not paralleled by other sponsors.

Part Seven: Visitor Expectations

Visitors were asked a number of questions designed to elicit data about expectations of both the **core service** and the **peripheral services** that support it.

The core service is defined as the exhibition itself and includes the number of works, the type of works, interpretive signs and the manner in which works are displayed. **Peripheral services** facilitate the core either by adding value to it or by making it more accessible. For the NGV, peripheral services that augment the core might include; the authenticity display, the educational videos and gift shop purchases. Peripheral services contributing to accessibility include; booking facilities, ticket counters and traffic management systems.

7.1. Expectations of the Core Service

Respondents were asked to consider what constituted an ideal MAEs using a scale of 1 to 10, where one equals 'not very important' and 10 equals 'very important.' This question was only delivered to the entry group, because it was believed that visitors' actual impressions after having visited might colour their expectations.

Table 7.1

	Extremely Unimportant	Moderately Unimportant	Neutral	Moderately Important	Extremely Important
	%	%	%	%	%
Illustrates Relationships Among Artists	12%	14%	31%	30%	12%
Locates Works Into Historical Context	3%	6%	14%	40%	36%
Contains Works of Great Beauty	3%	2%	12%	32%	50%
Works are Correctly Attributed	4%	3%	14%	25%	54%
Exhibition Provides Opportunities for Enhanced Learning	0%	1%	5%	27%	66%
Rare Opportunity to View	0%	1%	2%	15%	82%
Exhibitions Evoke Strong Emotions	3%	3%	17%	26%	41%

The most highly valued feature of a MAE represents the rarity of the event. A total of 82% of respondents believed that a rare opportunity to view works was extremely important. Two thirds of all respondents (66%) rated the opportunity for enhanced learning as the second most important attribute of an ideal exhibition. An additional 27% believed that rarity was moderately important. Half of the respondents considered that an ideal exhibition would contain works of great beauty. It is interesting to note that the feature highly prized by curators and specialists was the least valued attribute of an ideal exhibition: that it illustrates a network of relationships among artists. A relatively small percentage of respondents (12%), however rated this as extremely important.

It is important to recognise that the NGV serves a number of different markets, each with different needs and expectations. While the public are motivated by the rarity and aesthetics of works displayed, other segments are motivated by entirely different factors. Visual arts industry workers, representing about 14% of all visitors, are much more likely to be motivated by the opportunity to locate an artist into a network of relationships with other artists, including pupils.

One test that indicates relationships between two samples is the Chi Square Statistic (χ^2). The data shows that there is a statistically significant difference between visual arts workers and the general population with respect to their motivations to attend the NGV. Table 7.2 indicates that there was a statistical association between visual arts industry workers and the opportunity to compare Rembrandt's works with his pupils. On the other hand, Tables 7.3 indicates that there was a statistical association between the general population and a variety of motivations.

Table 7.2
Relationship Between Visual Arts Industry Workers and Motivations to Attend

Comment	Importance (count)		χ^2	df	significant
	<i>Expected</i>	<i>Observed</i>			
Always Admire Rembrandt	26	36	8.075	4	*
Comparing Rembrandt with Pupils' Works	33	43	13.739	4	***

* = $p < .10$, *** = $p < 0.01$

Table 7.3
Relationship Between General Public and Motivations to Attend

Comment	Importance (count)		χ^2	df	significant
	<i>Expected</i>	<i>Observed</i>			
Attending All Major Arts Exhibitions	275	277	9.931	4	**
Seeing Priceless Art	385	392	19.106	4	***
Locating the Artist in an Historical Context	192	193	14.912	9	*
Seeing Works of Great Beauty	201	205	17.295	9	**
Opportunities for Enhanced Learning	228	232	23.426	9	***

* = $p < .10$, ** = $p < .05$, *** = $p < 0.01$

While not conclusive, this analysis suggests that visual arts industry workers have more global motivations. Whereas arts industry workers are interested in learning more about the individual artist, the general public is more motivated by the beauty of the works displayed and the rarity of the opportunity to view a collection. Balancing the differences in motivations for the two major segments represents a major challenge for the NGV.

7.2. Expectations of Peripheral Services

Entry and exit questionnaires elicited data about visitors' expectations in terms of pricing and queuing.

7.2.1. Respondents' Price Expectations

Respondents in the *entry group* only were asked if they knew the dollar amount of admission fees for both the NGV generally as well as for the Rembrandt exhibition. These questions were only directed at the entry group because it was necessary to elicit the data before visitors had actually paid.

NGV Admission Charges

Given that the NGV had recently removed admissions charges for its general collection, we were interested to learn about the public's awareness. Respondents were asked if they knew the admission price. Those who said 'yes' were then asked to nominate the dollar amount. A total of 142 out of 298 (49%) said that they knew the admission charges. The table below summarises the admission estimates given by this group.

Table 7.4

Estimates of Admission Fee to NGV

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid \$ 0	131	44.0	89.1	89.1
2	1	.3	.7	89.8
3	3	1.0	2.0	91.8
4	2	.7	1.4	93.2
5	3	1.0	2.0	95.2
6	1	.3	.7	95.9
7	2	.7	1.4	97.3
10	2	.7	1.4	98.6
14	1	.3	.7	99.3
15	1	.3	.7	100.0
Sub Total	147	49.3	100.0	
Missing	151	50.7		
Total	298	100.0		

The majority of respondents (89%) correctly selected free admission as their choice. However, a further 11 % of respondents incorrectly nominated prices ranging from \$2.00 up to a total of \$15.00. Certainly those respondents who believed that an admission fee was charged tended to cluster around prices ranging from \$2.00 to \$5.00. Nevertheless, it needs to be stressed that of the total sample of 298, more than half (56%) either did not know the admission or incorrectly nominated the admission.

Admission Charges to Rembrandt

The entry group was also asked to nominate the prices for the Rembrandt exhibition. A total of 167 respondents, representing 56% of the sample, were able to nominate a price. The range of prices nominated varied somewhat and is set out in table 7.3 below.

Table 7.5

Estimates of Admission for Rembrandt Exhibition

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	\$0-9	10	3.4	6.0	6.0
	\$10-15	73	24.5	43.7	49.7
	\$16-20	78	26.2	46.7	96.4
	\$20 and over	6	2.0	3.6	100.0
	Sub Total	167	56.0	100.0	
Missing		131	44.0		
Total		298	100.0		

The majority of respondents (51%) correctly nominated the price range as falling between \$10 and \$20. Detailed analysis of this data suggests that responses were clustered around three price points; namely \$10, \$14-5 and \$18. Each point corresponds approximately to the actual admission rates for concession rates, senior citizens and standard charges. This suggests that visitors tend to encode price information in ways that are meaningful to them. A total of 12% believed that the correct price was \$10, a total of 23% believed it to be \$14-15 and a total of 40% believed it to be \$18. (Detailed breakdowns of this data may be found in Appendix Two)

All respondents were asked to think about the most recent MAE that they may have visited at the NGV and state how they expected the admission charges at Rembrandt would compare. A total of 536 respondents answered this question.

Table 7.6**Comparative Admission Expectations**

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	More expensive	195	35.5	36.4	36.4
	Less expensive	19	3.5	3.5	39.9
	About same	185	33.6	34.5	74.4
	Don't know	137	24.9	25.6	100.0
	Sub Total	536	97.5	100.0	
Missing		14	2.5		
Total		550	100.0		

From the data about price expectations, it is clear that 36% believed that admission charges to the Rembrandt exhibition would be higher than for previous MAEs. In addition, 35% believed that charges would be about the same.

7.2.2. Queue Expectations

Respondents were also asked to think about their expectations in relation to ticket counter queues at the Rembrandt exhibition. A total of 534 respondents answered this question.

Table 7.7**Comparative Queue expectations**

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Longer queues	121	22.0	22.7	22.7
	Shorter queues	122	22.2	22.8	45.5
	About same	188	34.2	35.2	80.7
	Not applicable/ Don't Know	103	18.7	19.3	100.0
	Sub Total	534	97.1	100.0	
Missing		16	2.9		
Total		550	100.0		

The majority of respondents (34%) expected queue length to be about the same as their previous visit. A further 23% expected queue lengths to have increased.

Qualitative observations carried out by the researchers found that queuing time at ticket counters was minimal. Observations carried on three different dates, including the last day as a peak time, indicated that no visitor queued for more than three minutes. At all times queues moved quickly and appeared streamlined.

Given visitors' expectations for lengthy queues it was hypothesised that there should be a negative correlation between queues and satisfaction. The logic for this was that visitors, who generally expected lengthy queues, would be pleased that when actual queue time was less than expected. The NGV's ability to exceed expectations should be partially reflected in higher satisfaction ratings. However, when queue length and satisfaction ratings were analysed, no significant correlation was found. Moreover, customer satisfaction with waiting times was generally poor despite our qualitative observations that queues were efficiently managed and that staff respected the customer's time. This finding hints at a perceptual problem.

Part Eight: The Service Experience and Customer Satisfaction Ratings

Respondents interviewed on departure from the NGV were asked to which NGV services, other than the Rembrandt exhibition they had visited. As only the exit group was asked this question, the sample size at 251 respondents is smaller than for most other questions. Nevertheless, it is a statistically valid sample so that the reported results should be indicative of the population of visitors.

8.1 NGV Services Visited

Respondents were asked to nominate other NGV services visited while attending the Rembrandt exhibition. The results are summarised below.

Table 8.1
Gallery Services Visited

		Visited
Rembrandt giftshop	%	65%
Educational video	%	26%
Authenticity display	%	57%
Coffee shop	%	38%

As table 8.1 suggests, the majority of respondents (65%) visited the Rembrandt gift shop. More than half of respondents also visited the authenticity display. More than one third (38%) of all respondents also visited the coffee shop. However, only one quarter (26%) of respondents visited the video display.

This data indicates that most visitors to the NGV will visit a range of other services as part of their total experience. The average visitor will attend at least two other services during their visit. These findings suggest that visitors are searching for a package of related benefits to enhance their appreciation of the exhibition itself. Benefits include educational opportunities as well as tangibles (souvenirs, food and beverage.)

Purchases of gifts and souvenirs perform two important functions. Not only do they enable visitors to acquire lasting reminders of their service experience, but they also enable visitors to learn more about the artist and the collection.

The authenticity display also enhanced opportunities for learning, a need that is highly valued by the NGV's market. In addition to providing for sensory enjoyment, the coffee shop may also provide time and space where visitors can reflect on the exhibition.

Given the desire for a total experience and the desire for enhanced learning, it was surprising that video display was poorly patronised. Our qualitative observations of this use of this area suggest that many visitors found the lengthy duration of the videos daunting. The time and intellectual effort needed to view the videos thus acted as a disincentive.

8.2. Visitor Satisfaction Ratings

The questionnaires included a number of questions asking respondents about their satisfaction with the Rembrandt exhibition. Respondents were asked to rate their satisfaction with 19 specific attributes which classified into five broad groups, namely;

1. **tangibles** (facilities, lighting, souvenirs, food and beverage);
2. **reliability** (display of advertised works, availability at promised times, authenticity of works),
3. **responsiveness** (prompt service, willingness to help),
4. **assurance** (feelings of safety, monitor traffic movement)
5. **empathy** (minimise waiting times, understand specific needs of visitors).

To confirm the dependability of these measurement criteria, respondents were also asked to rate their overall satisfaction. In this section the main findings are summarised.

8.2.1. An Overview of Visitor Satisfaction

In general, the NGV was given relatively high ratings along all attributes. Most of these scores would be the envy of other similar service organisations.

Table 8.2

Summary of Satisfaction Ratings For Selected Criteria

	N		Mean	Std. Deviation	Variance
	Valid	Missing			
Facilities visually appealing	444	106	3.65	.95	.91
Employees neat	445	105	4.08	.75	.56
Range food beverage	438	112	3.52	.84	.70
Good souvenirs	442	108	3.80	.86	.73
Appropriate lighting	442	108	3.89	1.03	1.05
NGV problem solve	435	115	3.63	.80	.64
Services on time	436	114	3.94	.84	.71
Display advertised works	433	117	4.05	.90	.81
Authenticity documented	430	120	4.26	.77	.59
Prompt service	438	112	4.03	.79	.63
Willing to help	434	116	3.98	.84	.70
Instil confidence	438	112	3.78	.87	.77
Feel safe	441	109	4.30	.83	.70
Monitor visitor movement	437	113	3.58	.99	.98
Provide Background information	443	107	4.37	.80	.64
Convenient operating hours	442	108	3.99	.99	.98
Understand visitor needs	433	117	3.64	.83	.69
Minimise waiting times	441	109	3.72	.96	.92
Appropriate interpretation	445	105	4.24	.88	.77

Overall these results indicate that the NGV scored very high ratings on all attributes. The range of scores was impressive. The lowest mean score was 3.5 out of a possible rating of 5. The highest score was 4.37 out of 5. In other words, respondents, on average, believed that the NGV's standard of delivery on a given attribute fell between neutral and very good. In addition, the level of variance between respondents was narrow, indicating a high degree of congruence between respondents' judgments.

NGV strengths uncovered by this data include: provision of background information (with a mean score of 4.37), feeling safe (4.3), documentation of authenticity (4.26), appropriate interpretation of works (4.24), appearance of employees (4.08) and display of advertised works (4.05).

8.2.2. Satisfaction With Selected Attributes

Although overall satisfaction was high, there was wide variation among the responses to selected attributes. This section provides a more detailed outline of visitor satisfaction ratings.

Table 8.3

Satisfaction Ratings With Selected Criteria

	Agree		Strongly agree	
	Count	%	Count	%
Facilities visually appealing	193	43.5%	79	17.8%
Employees neat	236	53.0%	128	28.8%
Range food beverage	141	32.2%	59	13.5%
Good souvenirs	174	39.4%	102	23.1%
Appropriate lighting	184	41.6%	136	30.8%
NGV problem solve	125	28.7%	79	18.2%
Services on time	149	34.2%	134	30.7%
Display advertised works	157	36.3%	159	36.7%
Authenticity documented	158	36.7%	194	45.1%
Prompt service	180	41.1%	138	31.5%
Willing to help	169	38.9%	135	31.1%
Instil confidence	151	34.5%	106	24.2%
Feel safe	164	37.2%	214	48.5%
Monitor visitor movement	160	36.6%	80	18.3%
Provide Background information	167	37.7%	229	51.7%
Convenient operating hours	164	37.1%	159	36.0%
Understand visitor needs	148	34.2%	76	17.6%
Minimise waiting times	169	38.3%	98	22.2%
Appropriate interpretation	176	39.6%	198	44.5%

Table 8.3 provides a detailed summary of satisfaction ratings for selected attributes. For convenience, only those who agreed or strongly agreed with the statements have been included. Given that each attribute is mutually exclusive, rows must be treated separately. Consequently, percentage figures for each attribute must add up to 100%. For example, the first row, indicates that 43.5% of respondents agreed with the statement that the NGV has visually appealing facilities. A further 17.8% strongly agreed with this statement. By implication, 38.7% were neutral, disagreed or strongly disagreed with this statement. Detailed charts outlining the full range of feelings about selected attributes may be found on the following pages.

Figure 8.1

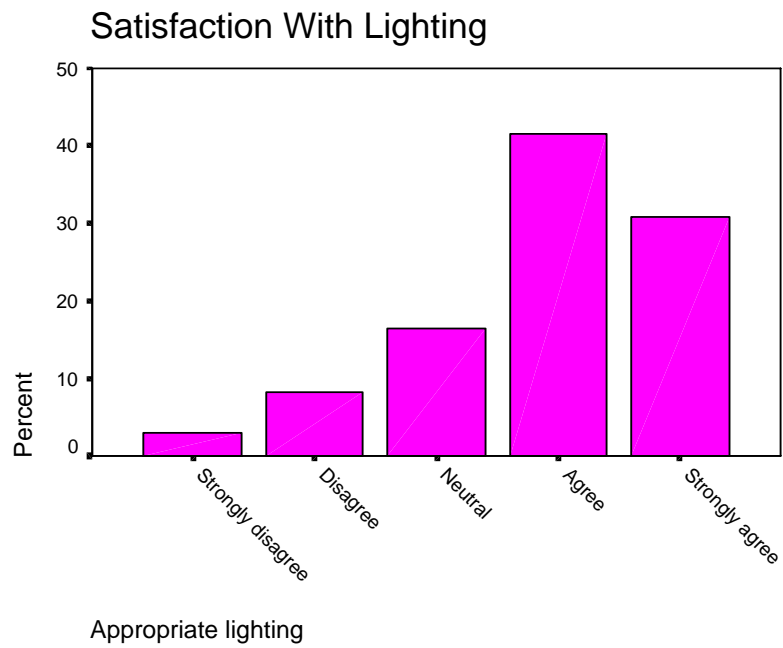


Figure 8.2

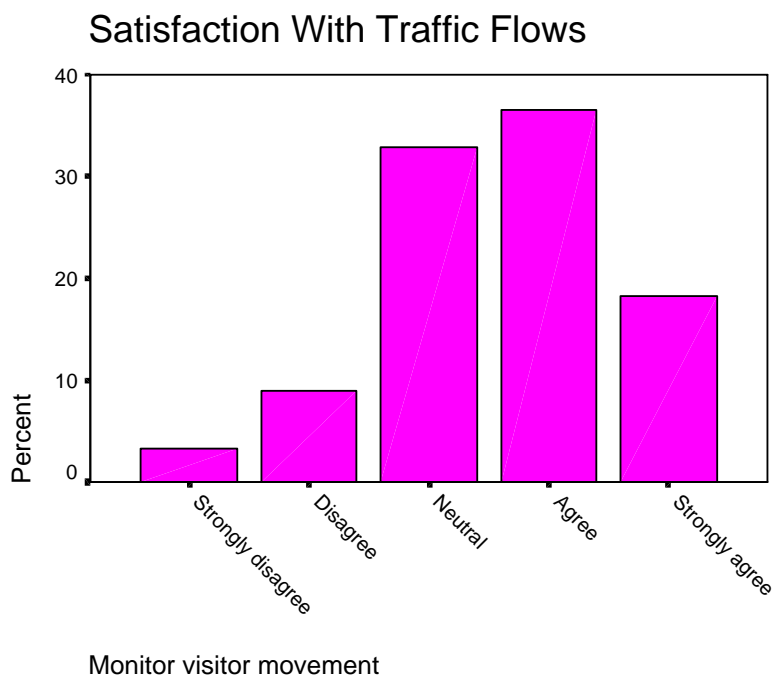


Figure 8.3

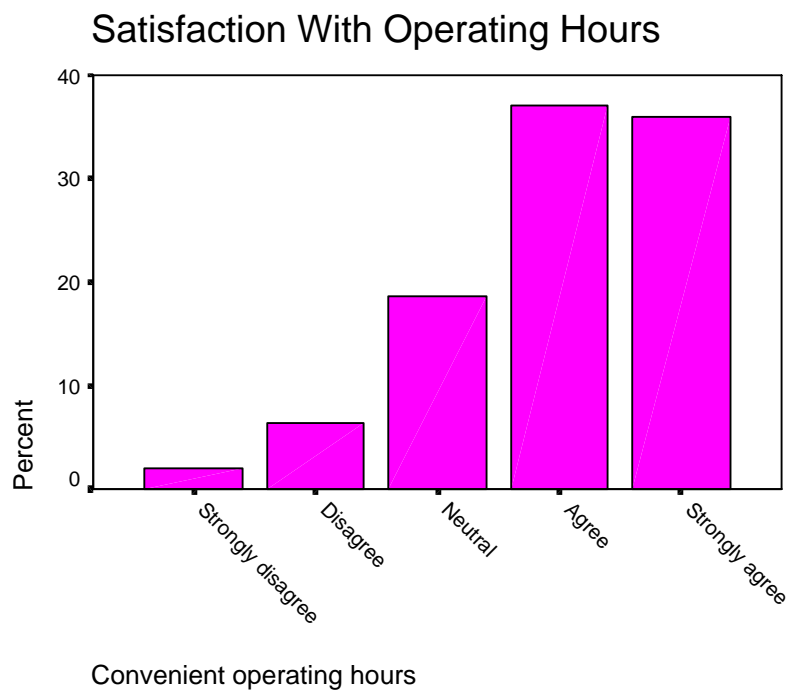
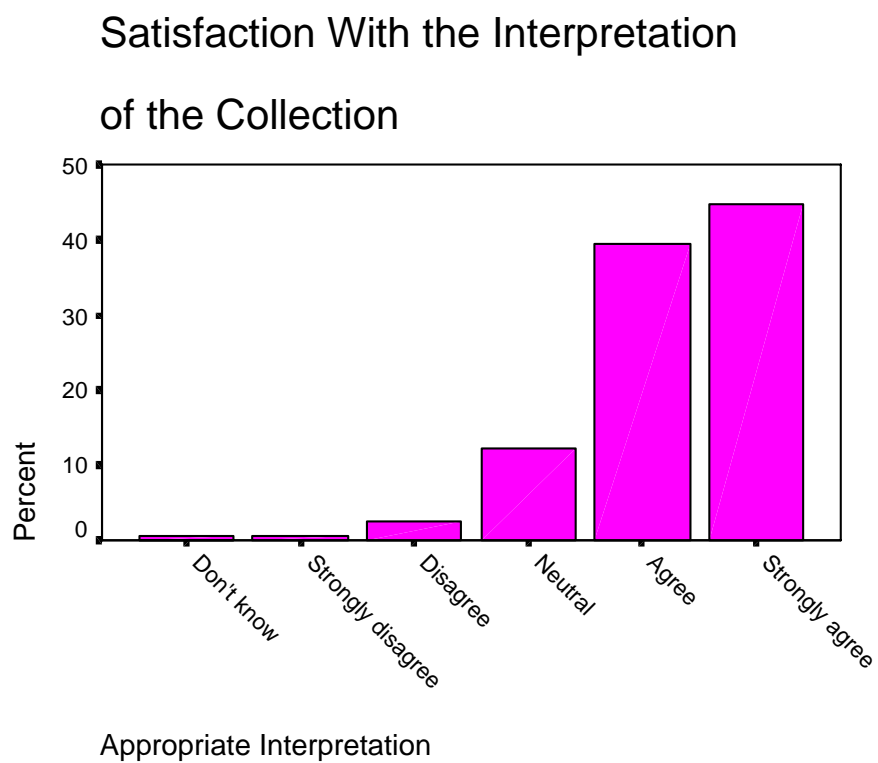


Figure 8.4



Tables 8.1 through to 8.7 indicate that visitor responses are skewed towards the right of the scale indicating high levels of satisfaction with each attribute. These tables also indicate the strong congruence between different visitors' attitudes.

8.2.3 Overall Satisfaction Ratings

Current thinking about service quality suggests that consumers' overall satisfaction ratings are a holistic representation of ratings along specific attributes. Thus, to confirm the satisfaction scores for specific attribute, a question asking respondents for their overall satisfaction ratings was included. The question took the form of a scale of 1 to 10, where 1 equals 'very poor' and 10 equals 'excellent.' A total of 443 respondents answered this question.

Table 8.4

Overall Satisfaction Ratings - A Summary

	N		Mean	Std. Deviation	Variance
	Valid	Missing			
Satisfaction	443	107	8.12	1.55	2.41

In general, respondents were very satisfied with the Rembrandt exhibition. The mean satisfaction score was 8 out of a possible 10. The standard deviation was relatively narrow at 1.5 indicating very low levels of variation amongst respondents. The data, however, is not normally distributed. Rather it is skewed towards the higher end of the scale.

Table 8.5

Overall Satisfaction Ratings

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1 Very poor	1	.2	.2	.2
	2	1	.2	.2	.5
	3	3	.5	.7	1.1
	4	9	1.6	2.0	3.2
	5	13	2.4	2.9	6.1
	6	25	4.5	5.6	11.7
	7	78	14.2	17.6	29.3
	8	125	22.7	28.2	57.6
	9	93	16.9	21.0	78.6
	10 Excellent	95	17.3	21.4	100.0
Sub Total		443	80.5	100.0	
Missing		107	19.5		
Total		550	100.0		

Table 8.5 provides a more detailed summary of overall satisfaction ratings. Only 14 out of 443 respondents gave the Rembrandt exhibition a poor rating (less than 4 out of 10). This means that only 3% of respondents were dissatisfied. On the other hand, 93% of respondents gave scores of 'good' (more than 5 out of 10). A total of 78% gave scores of 7 or higher, indicating that most respondents were moderately to very satisfied with their visit.

Part Nine: Behavioural Intentions

Respondents were asked about their intentions to recommend the NGV to their friends and revisit in the short term.

9.1. Predisposition to Recommend the Rembrandt Exhibition

Respondents were asked about their predisposition to recommend the Rembrandt exhibition to their friends and relatives following their visit. The question asked respondents to rate their intentions to recommend the Rembrandt exhibition to a friend or relative on a scale of 1 to 10, where 1 equals 'would not recommend' and 10 equals 'would recommend.'

Table 9.1

Predisposition to Recommend

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid 1 Would Not recommend	4	.7	.9	.9
2	4	.7	.9	1.8
3	5	.9	1.1	2.9
4	10	1.8	2.3	5.2
5	25	4.5	5.6	10.8
6	35	6.4	7.9	18.7
7	56	10.2	12.6	31.4
8	93	16.9	21.0	52.4
9	69	12.5	15.6	67.9
10 Would Recommend	142	25.8	32.1	100.0
Sub Total	443	80.5	100.0	
Missing	107	19.5		
Total	550	100.0		

Table 9.1 indicates that approximately half of those who answered this question, were moderately to very predisposed to recommend the Rembrandt exhibition. This data should be interpreted with the knowledge that the survey was carried out in the last weeks of the Rembrandt exhibition. It is possible that respondents' answers may have been tempered by the limited time available for friends and relatives to act on any such recommendations.

9.2 Predisposition to Revisit Other MAEs

Respondents were also asked about their predisposition to visit other MAEs at the NGV within the next year. Answers were rated on a scale of 1 to 10, where 1 equals 'not visit at all' and 10 equals 'very frequent visitation.'

Table 9.2

Predisposition to Revisit Major Art Exhibitions at NGV

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid 1. Not at all	25	4.5	5.8	5.8
2	20	3.6	4.6	10.4
3	25	4.5	5.8	16.2
4	23	4.2	5.3	21.6
5	50	9.1	11.6	33.2
6	66	12.0	15.3	48.5
7	65	11.8	15.1	63.6
8	67	12.2	15.5	79.1
9	38	6.9	8.8	87.9
10 Very Frequent	52	9.5	12.1	100.0
Sub Total	431	78.4	100.0	
Missing	119	21.6		
Total	550	100.0		

Table 9.2 indicates that 41% of those who answered this question were moderately to very predisposed to revisit within the next twelve months. More than 50%, however, were not predisposed to revisit. This finding is surprising in light of the very high satisfaction ratings and in light of the high propensity to make recommendations given by the majority of respondents. Given that most respondents indicated a desire to see exhibitions containing priceless or rare artworks, it may be assumed that the predisposition to revisit entirely depends on the nature of future MAEs. It may be inferred that visitors' predispositions will be converted to actual intentions once the NGV announces new exhibitions of high status artists.

Part Ten: Matching Expectations and Perceptions

A central design feature of our survey was the inclusion of questions about expectations and actual perceptions along nineteen attributes. Although some general observations on expectations and perceptions have been discussed elsewhere in this report, a comparison of both should enable the NGV to identify potential problem areas. In this section, we identify those areas where the NGV is delivering on visitor expectations as well as where it falls short of expectations.

The table below summarises respondents' average expectations, perceptions and the difference scores. The difference score is calculated by subtracting expectations from perceptions for each case. The mean difference score is an average of all cases.

Note that the mean difference score cannot be obtained by simply adding together expectations and perceptions. The mean score for expectations and perceptions is calculated by including all valid observations. The mean difference score, on the other hand, ignores cases where a missing value occurs in either dimension. In spite of the subtle difference deriving the three scores, the mean difference score will always approximate an arithmetic value obtained by adding expectations and perceptions.

Where expectations are higher than perceptions, perceived quality is less than satisfactory. In such cases, there is said to be a **quality gap**. The size of the difference provides an indication of the size of the gap. If the difference is high then service delivery is tending towards unacceptable.

Where expectations and perceptions are approximately equal then the standard of delivery is acceptable or satisfactory.

Where expectations are lower than perceptions, perceived quality has exceeded visitor expectations and perceived quality is more than satisfactory and will tend towards ideal quality.

The data also reveals the size of any discrepancy and should assist management to set priorities for quality improvement programs.

Table 10.1**Expectations and Perceptions: A Comparative Table**

	Mean Scores		Mean Difference Score	Std. Deviation of Mean Difference
	Expectations	Perceptions		
Physical facilities will be/are visually appealing	4.10	3.65	-.51	1.19
Employees will be/are of neat appearance	4.00	4.08	9.00E-02	1.04
NGV will have/has a good range of food & beverages	3.53	3.52	3.00E-02	1.09
NGV will have/has a good range of souvenirs	3.55	3.80	.31	1.13
NGV will have/has appropriate lighting levels	4.67	3.89	-.82	1.10
NGV will show/shows a sincere interest in solving visitor's problems	4.41	3.63	-.84	.99
NGV will provide/provides services at time promised	4.47	3.94	-.58	1.02
NGV will display/ displays all advertised works	4.58	4.05	-.55	1.06
NGV will make/makes every effort to display works where authenticity has been documented	4.50	4.26	-.24	.89
NGV employees will give/give prompt service	4.35	4.03	-.36	.92
NGV employees are always willing to help visitors	4.44	3.98	-.50	.95
NGV employees instil confidence in visitors	4.17	3.78	-.41	1.02
Visitors to the NGV will feel/ feel safe in the environment	4.45	4.30	-.14	.98
NGV will monitor/monitors visitors' ease of movement	4.25	3.58	-.69	1.16
NGV will provides/provides appropriate background information on the artist	4.56	4.37	-.24	.92
NGV will have/ has convenient operating hours	4.42	3.99	-.50	1.07
Employees at the NGV will understand/understand specific visitor needs	4.13	3.64	-.54	1.03
The NGV will minimise/ minimses waiting times	4.29	3.72	-.64	1.13
The NGV will provide/ provides an appropriate interpretation of the collection	4.43	4.24	-.19	1.04

To interpret table 10.1, consider the values in the mean difference column. Each numeric value represents a perceived quality gap in the dimension indicated. Perceived quality that is less than satisfactory is indicated by a negative value. Perceived quality that is more than satisfactory is indicated by a positive value. Where the value approximates zero, perceived quality is deemed to be acceptable.

The size of the difference indicates the size of potential quality gaps. Where the difference is higher than -0.5 then the standard of delivery is tending towards unacceptable levels.

As the table suggests, a total of 17 out of a possible 19 quality dimensions received a negative score, indicating that the NGV failed to live up to visitor expectations. However, of the negative scores, ten are very close to zero. For

instance, the value in the row corresponding to the range of food and beverages is extremely low at 0.03 and is not a significant value. On the other hand, nine of the negative values are higher than 0.5. These values could signal potential problem areas. If left unmanaged, these areas could lead to some deterioration in overall quality.

Particular problems identified by this analysis include:

- the appearance of physical facilities
- the lighting levels
- employees ability to solve problems
- provision of services at advertised times
- display of all advertised works
- willingness of employees to help
- movement of traffic through the facility
- understanding the specific needs of visitors
- waiting lines.

Although the NGV scored high satisfaction ratings on all dimensions, it is clear that such scores alone, reveal only part of the picture. By comparing visitor perceptions with expectations, it is possible to identify areas where emerging problems may occur. This diagnosis should enable management to remedy any problems before they become acute.

Part Eleven: Conclusions and Recommendations

Type of Visitor

The elite nature of the visitors attending the gallery has a number of implications. That respondents are heavy consumers of cultural products, arriving with significant cultural capital means that they can be demanding. Most were experienced gallery visitors who were well prepared for the MAE through reading newspapers and magazines. This is a knowledgeable market that has formed realistic yet high expectations about quality. In short, this is a fickle and demanding market.

The exhibition drew an impressive proportion of highly educated, younger visitors in the 18-29 age group. The relative youth of the market means that the NGV can expect to maintain long-term relationships with this group for many years to come.

Relatively few visitors were first time visitors to a MAE. It will be a challenge for the NGV to reach this segment.

Affiliations

Although a small proportion of respondents were working in the visual arts industry, it is an important segment due to its ability to influence public decision making. The data indicates that a mutually beneficial relationship exists between the gallery and the arts community. It will be vital for the NGV to maintain this relationship in the future.

Motivations to Attend

The drawing power of the Rembrandt exhibition was such that one quarter of all respondents were first time visitors to any MAE. High status artists of Rembrandt's calibre represent an ideal opportunity to stimulate demand from inexperienced gallery visitors.

It was significant that almost one third of visits to the Rembrandt exhibition were unplanned. The high level was due in part to the quality of the NGV's external signage and the proximity of Southbank.

Given the high numbers of visitors who combine their attendance at the Gallery with other activities in the city centre and Southbank, there are clear opportunities for the NGV to build strategic alliances.

Sources of Information Consulted

Visitors' high education levels combined with preparedness for the Rembrandt exhibition means that they will favour the quality press and non-commercial electronic media. Although this audience can be difficult and costly to reach, the NGV has capitalised on opportunities for publicity and low cost promotions.

Respondents were a reading audience, preferring quality press and magazines. For this group of respondents the *Age* was the preferred source of information in spite of the *Herald-Sun* sponsorship.

An under-utilised source of promotion identified by the research was the cinema. The NGV's market are heavy consumers of cinema and poor consumers of sporting attractions. Whereas the NGV's promotional mix included sports-related activities, a notable omission was cinemas.

In spite of such omissions, data revealed effectiveness of the NGV's marketing communications across a broad range of promotional devices. In addition to the standard communications channels the gallery also maximised opportunities for publicity and public relations. This underlines the breadth and depth of the promotional effort.

Sponsors

While Shell as the major sponsor could be satisfied with the level of respondent recall, there is considerable room for improvement. Interesting lessons can be drawn from the minor sponsors: the RACV in particular. Although the RACV's level of recall may not have been as high on individual distribution sources, there was an impressive consistency of recall across a range of distribution channels. The RACV's ability to capitalise on their sponsorship could provide insights for future sponsors.

Expectations

Consistent with their high education levels, prior experience and cultural knowledge, visitors came with very high expectations of the quality of delivery. This has important implications for measuring overall quality perceptions. Of the nineteen dimensions identified in the research, the data reveals that most respondents expect the NGV to deliver five out of a possible five. In short, the market expects the very best from the NGV.

The data identified some misperceptions. Although the majority of respondents were price aware, a small group of respondents mistakenly believed that there was an admission charge for the main collection. It is vital that the NGV correct this miscommunication if it is to market the main collection as a first contact point for first-time visitors.

Customer Satisfaction Ratings

Customer satisfaction ratings revealed a certain disparity between the tangible and intangible elements that comprise the service experience. Respondents were almost universal in their satisfaction with a range of curatorial roles including: the appropriateness of the interpretation, the interpretive frameworks and documentation of authenticity. In addition, visitors were generally satisfied with tangibles including the provision of food and beverage and souvenirs. In contrast, the human dimension received lower satisfaction scores.

While the data reveals that the NGV delivers very high standards on most dimensions of quality, it must be noted that the standards expected by the target market are exceedingly high. While the NGV's standards would be the envy of many other service organisations, its delivery does not always meet the expectations of a demanding and knowledgeable market. The data revealed a number of quality gaps.

Quality Gaps

Although satisfaction scores were high, any interpretation must be tempered with the very high expectations brought by this informed and knowledgeable market. The analysis on quality gaps revealed that the NGV performed below expectations in a number of areas, notably on operational issues and employee contact.

Specifically, problems were identified in queuing and traffic management. It is worthwhile noting that there is a clear discrepancy between customer perceptions and reality in relation to queues. Objectively, our research indicated that queues were streamlined and that only minimal waits were encountered even at peak times. Nevertheless respondents perceived queues to be a major problem, possibly due to the clutter created at the ticketing area and the bunching of visitors within the exhibition. To reduce the mismatch between perceptions and reality, the NGV will need to experiment with alternative queuing systems.

Recommendations

- (1) Maintain and develop relationships with the existing market segment.
- (2) Capitalise on the drawing power of MAEs exhibiting high status artists to entice the first time user segment.
- (3) Maintain and develop effective distribution strategies and relationship marketing within the visual arts segment.
- (4) Develop a range of brochures targeted at different audiences including the:
 - a) arts community: emphasising the artist and his or her influences and other relationships
 - b) first time exhibition attender: emphasising ways of interpreting works for educational purposes
 - c) experienced attenders: similar to existing brochures produced by the NGV
- (5) Develop a range of package deals with service providers in the vicinity, particularly in the Southbank and City precincts.
- (6) Maintain the general thrust of the promotional mix. However, the NGV could consider adding cinema advertising to its repertoire as a low cost alternative.
- (7) Develop partnerships with sponsors and provide timely advice throughout the process to assist sponsors to capitalise on the promotion.
- (8) Seek out sponsorship arrangements with publishers of quality media, such as the *Age*.
- (9) Manage visitors' impressions of important quality dimensions and communicate with consumers to ensure that their quality expectations are realistic and achievable.
 - a) Where possible, improve lighting levels. Where this is not possible, communicate to visitors that low lighting levels are necessary to preserve artworks.
 - b) Manage visitor impressions of queue length by experimenting with different ticket counter layout.
 - c) Experiment with font sizes in interpretative signs and with other modes of delivering information to minimise bunching that forms around major works and lengthy text.
 - d) Experiment with different dispersion of the master's works and his pupil's works to minimise bunching around major works.
- (10) Develop strategies to capture more 'impulse consumers' such as the provision of ATMs or other flexible and accessible credit facilities.
- (11) Extend the educational program currently offered to school groups to the general public.

Appendix One: Summary Comparison of Two Questionnaires Used in the Research

Brief Description of Question	No. of Items		Comment
	Entry	Exit	
Gallery Services visited	n.a.	4	
Neighbouring Attractions Visited	n.a.	6	
Cultural and Sporting Attractions Visited (12mths and 3 years)	n.a.	17	
Affiliations with Arts/Gallery	5	5	
Motivations to Attend	7	7	
Past MAE experience	7	7	
Expectations re 'ideal' exhibitions	7	n.a.	
Sources of Information Consulted	13	13	
Serrano – impact on decision	1	n.a.	
Price awareness	4	n.a.	
Price expectations	4	4	
Queue expectations	4	4	
Service Level expectations	19	19	Modified wording used in the entry questionnaire
Service Level perceptions	19	19	
Sponsor Recall unprompted	13	13	
Prompted	1	1	
Overall Satisfaction Ratings	1	1	
Disposition to Recommend	1	1	
Disposition to Revisit			
Demographics – family status	1	1	
Demographics- age group	1	1	
Demographics- education	1	1	
Demographics- gender	1	1	
Geo-demographic- postcode	1	1	

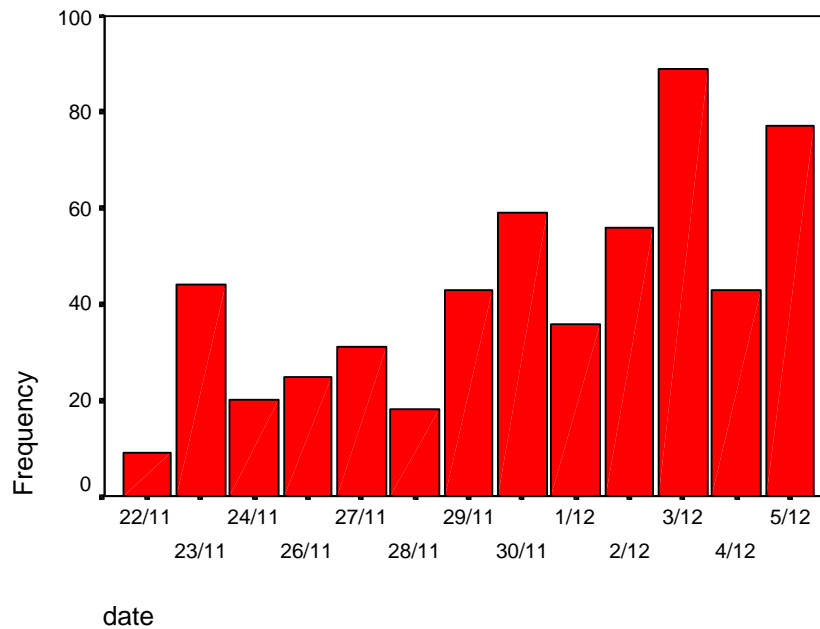
As the table indicates two questions were unique to the entry questionnaire while three questions were unique to the exit questionnaire. In addition, one question was used in a slightly modified form in the entry questionnaire. With these exceptions, the two questionnaires were identical.

Appendix Two: Population and Sampling: Respondent Numbers Per Day

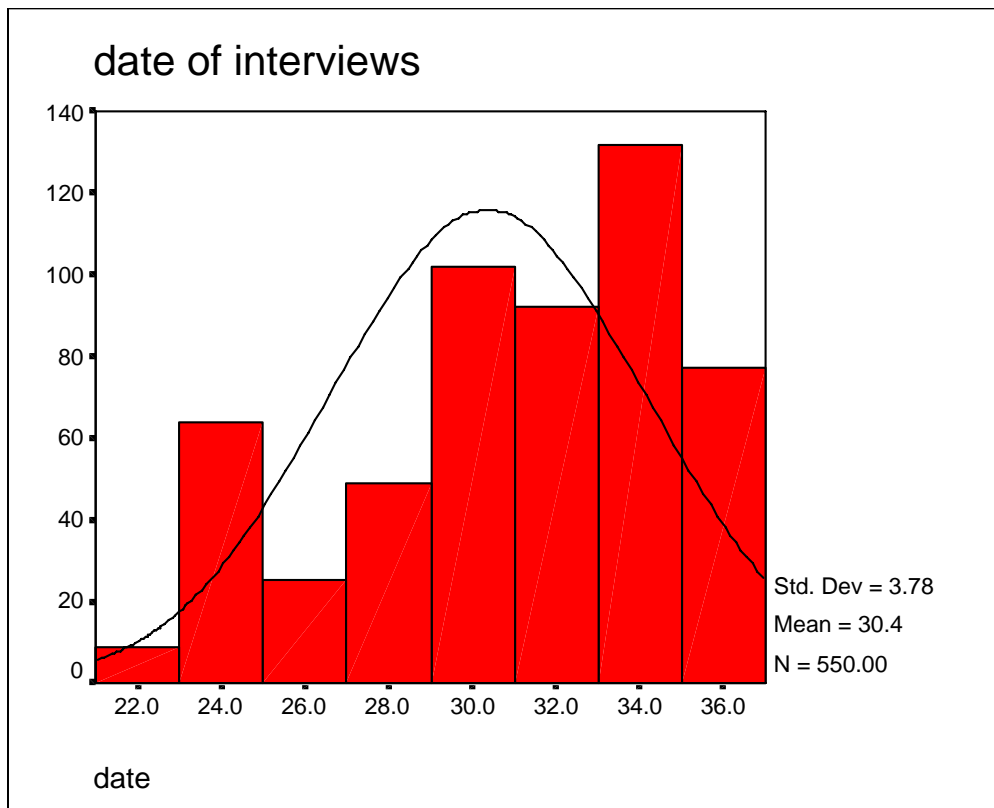
Date of interviews

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid 22/11	9	1.6	1.6	1.6
23/11	44	8.0	8.0	9.6
24/11	20	3.6	3.6	13.3
26/11	25	4.5	4.5	17.8
27/11	31	5.6	5.6	23.5
28/11	18	3.3	3.3	26.7
29/11	43	7.8	7.8	34.5
30/11	59	10.7	10.7	45.3
1/12	36	6.5	6.5	51.8
2/12	56	10.2	10.2	62.0
3/12	89	16.2	16.2	78.2
4/12	43	7.8	7.8	86.0
5/12	77	14.0	14.0	100.0
Total	550	100.0	100.0	
Total	550	100.0		

Date of Interview



Appendix Two: Population and Sampling Methodology cont...



Appendix Three: Detailed Analysis of Price Expectations

Number of Respondents Able to Nominate Admission Charges for Rembrandt

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	No	125	41.9	43.0	43.0
	Yes	166	55.7	57.0	100.0
	Sub Total	291	97.7	100.0	
Missing		7	2.3		
Total		298	100.0		

Estimates of Admission to Rembrandt Exhibition

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	\$ 0	1	.3	.6	.6
	2	1	.3	.6	1.2
	4	2	.7	1.2	2.4
	5	2	.7	1.2	3.6
	6	1	.3	.6	4.2
	7	2	.7	1.2	5.4
	9	1	.3	.6	6.0
	10	20	6.7	12.0	18.0
	11	1	.3	.6	18.6
	12	11	3.7	6.6	25.1
	13	2	.7	1.2	26.3
	14	22	7.4	13.2	39.5
	15	17	5.7	10.2	49.7
	16	5	1.7	3.0	52.7
	17	2	.7	1.2	53.9
	18	67	22.5	40.1	94.0
	20	4	1.3	2.4	96.4
	23	1	.3	.6	97.0
	24	3	1.0	1.8	98.8
	25	2	.7	1.2	100.0
	Sub Total	167	56.0	100.0	
Missing		131	44.0		
Total		298	100.0		

Appendix Four: Factor Analysis

Factor Analysis: Rotated Component Matrix

	Dimension			
	Pers. Service	Exhibition	Process	Physical Facilities
Willing to help	.795	.136	.163	.189
Prompt service	.781	.149	.142	.168
Instil confidence	.710	.136	.269	.179
NGV problem solve	.689	7.738E-02	.213	5.502E-02
Services on time	.502	.410	9.761E-02	.210
Facilities visually appealing	.377	.150	2.963E-02	.355
Authenticity documented	.398	.660	.101	2.087E-03
Appropriate interpretation	2.963E-03	.655	.442	.116
Provide Background information	-3.9E-02	.653	.372	.236
Display advertised works	.429	.639	5.485E-02	7.765E-02
Feel safe	.312	.469	9.837E-02	.411
Minimise waiting times	.275	9.701E-02	.769	.121
Monitor visitor movement	.327	.105	.637	.258
Convenient operating hours	4.351E-02	.333	.629	.142
Understand visitor needs	.435	.220	.609	.184
Good souvenirs	.108	2.488E-02	.171	.684
Range food beverage	.105	2.718E-02	.186	.683
Appropriate lighting	7.710E-02	.329	6.654E-02	.552
Employees neat	.379	.106	.125	.512

Extraction Method: Principal Component Analysis.

Rotation Method: Varimax with Kaiser Normalization.

a. Rotation converged in 11 iterations.

Appendix Five: Unsolicited Qualitative Comments

The following comments were written in the margins of the self-administered questionnaire.

1. Comments Relating to Physical Facilities

A number of comments relating to physical facilities, including seating, the overall space, lighting and general observations were noted in the margins of the questionnaire.

1.1. General Comments about Facilities

Respondent number 179: *When asked if the NGV facilities were visually appealing, written comments noted that “They are the art of their time. Don’t change them.”*

Respondent 81: “ But don’t like Coke machines.”

Respondent 177: “Larger signs and numbers wanted.” [Age group 60+]

1.2 Lighting

Respondent Number 143

When asked if the NGV has appropriate lighting levels, written comments noted that “more light in public areas please and use of natural light. Light increases the sense of security noted in Question H13 [elsewhere in the questionnaire]”

Respondent number 239: “terrible lighting reflecting off paintings”

Respondent Number 119

In several places on the questionnaire, this respondent [aged 60+] complained about the lack of seating.

Respondent Number 209

When asked if the NGV has a good range of food and beverage written comments “It was closed before the exhibition.” [The time of the interview was 6.10 p.m.]

Respondent number 33 “Didn’t look because coffee was off (Closed)” [Time of day was 2.30 p.m.]

Respondent number 156: “Gloomy” lighting

Respondent number 006: “Lights shone on painting. Not easy to see detail.”

1.3 Comments about the water wall

Respondent 218 : “ I know that this is not the purpose of this survey to obtain general views about the NGV, but I would like to state in the strongest possible terms,

- a) my desire to see the water wall retained in its current position, and the other water features likewise and,
- b) my hope that a floating kiosk is NOT installed in the moat outside the NGV

Respondent 251: “I do not want to change the front of the NGV!!!!”

Respondent 112: “ Water wall it features. Keep It!!”

Respondent 201 “ Please leave French ceiling and water wall !!”

Respondent 152: “Please retain the water wall!!” (followed by two signatures: M.J. Fisher and Kirstie)

Respondent number 156: “Keep the water wall.”

Respondent 172: “Don’t remove water wall please.”

2. Pricing

Respondent Number 251: When asked to recall the admission charges, the respondent noted that the NGV was “overpriced!!!”

Respondent number 156: “Too dear.”

Respondent 178: “Student prices should be \$10 or less!!!”

3. Quality of the Display

Respondent number 251: When asked to rate the overall quality out of 10, written comments note “good display of drawings, poor representations of paintings, expensive for content.”

Respondent number 142: “We always want more [information] but it was good.”

Respondent number 33: “I went to see the art. It was good.”

Respondent 149: “Good [background information] for Rembrandt but permanent collection could have more. [Interpretation] could be more historical interpretation of permanent displays.”

Respondent 247: The background information was excellent “especially for Rembrandt.”

Respondent 136: “Glad Serrano exhibition is gone due to attitude of artist.”

4. Crowding, Traffic and Queuing

When asked how well the NGV monitor’s ease of movement there were a number of comments:

Respondent 106 “too many people in Rembrandt exhibition”

Respondent 199 “it depends on the time of day”

Respondent 142 “I didn’t wait.” and “ I moved with ease.”

Respondent 82 “Rembrandt was overcrowded” and elsewhere in the questionnaire “ exhibition was too crowded.”

Respondent 83 “It was far too crowded.”

Respondent 183 “ Major exhibitions are sometimes difficult to see and ‘000s of people cram around one painting.”

Respondent 152: “Shorter queues due to early birds.”

Respondent 153: Rembrandt queues were shorter because “Early RACV entry.”

Respondent 166: “Came early” to avoid queues.

5. Comments about employees

Respondent number 121: When asked whether the employees were of neat appearance, respondent wrote “girl had colour in her hair and looked bored and tired.”

Respondent number 226 noted that employees have “attitude” in response to two questions.

Respondent 139: “A set uniform [for employees] is a must.”

6. The Serrano Exhibition

Respondent 35 “Good decision re Serrano”

Respondent 201: When asked whether the NGV displays all advertised works, the respondent rated it at 2 out of 5 because of “Andres Serrano cancellation!” Elsewhere in the questionnaire, this respondent noted that “would have visited Serrano if stayed open.”

Respondent 203: As for respondent 201, this respondent rated display of advertised works poorly at 1 out of 10 with a notation “Serrano” in the margins. Elsewhere this respondent noted that “wanted to go [to Serrano] but it was closed.”

Respondent 222: Noted that the Serrano exhibition “would have stopped” from visiting

Respondent 242: “Would have gone [to Serrano] if possible.”

Respondent 247: When asked whether visitors feel safe in the environment, this respondent posed the question “Ask Serrano!”

6. Other comments

6.1. Feelings of Safety

Respondent 82: When asked whether customers felt safe in the NGV, written comments note “ You would have a paranoid personality disorder to feel personally unsafe in or about the gallery.”

6.2. Ungrouped Comments

Respondent 35 “Reminded on ABC Radio (Tonya Roberts) this an [sic] when discussing the success of Rembrandt exhibition. I think follow up is also important. People like to be reminded of things they have enjoyed, reminded me to fill in this questionnaire (limited time on day) and will encourage me to visit again soon and of what’s on ie: Drysdale exhibition. 19/12 which I shall visit.

Respondent 81: “Early bird viewing good idea!”

Respondent 192: “Early morning very good!!”

Respondent 194: “ Early entry excellent”

And finally, one **respondent (004)** commented “I’ll get withdrawal

Respondent no. 218

To obtain general views about the NGV, but I would like to state, in the strongest possible terms:

- a) my desire to see the water wall retained in its current position, and the other water features likewise; and
- b) my hope that a floating kiosk is NOT installed in the moat outside the NGV

Respondent no. 239

Terrible lighting reflecting off the paintings

Respondent no. 218

Overpriced
Expensive for content
Good display of drawings etc
Poor representation of paintings

Respondent no. 143

Research on artists does not appear to have connected with the inspiration of the artists with sufficient depth and scope

Interviewer Feedback

All interviewers commented on the large numbers of visitors who expressed a desire to retain the water wall.

Appendix Six

Weekly Attendance for Rembrandt Exhibition

Week No.	Dates (October – December, 1997)	Total Attendance
1	1 October – 6 October	2,067
2	7 October – 13 October	1,762
3	14 October – 20 October	1,973
4	21 October – 27 October	1,935
5	28 October – 3 November	2,552
6	4 November – 10 November	1,613
7	11 November – 17 November	2,553
8	18 November – 24 November	2,270
9	25 November – 1 December	2,163
10	2 December – 7 December	5,680
Total		169,141
	Daily Average	2,340

Source: NGV Archives

References

- ABS, Census Data, 1996
- A.C. Nielsen, *Radio Survey Number 1*, 1998, www.acnielsen.com.au
- Giblin, D., *An Investigation into Factors Affecting the Success of A Major Art Exhibition Focusing of the Case of Van Gogh* 1995, Masters Thesis, Victoria University
- National Gallery of Victoria Archives, *Attendances at Rembrandt Exhibition*
- Zeithaml, V., Berry, L.L. and Parasurman, A., "Communication and Control Processes in The Delivery of Service Quality," *Journal of Marketing*, vol. 52, April, 1988, pp 35-48
- Zeithaml, V., Parasuraman, A. and Berry, L.L., *Delivering Service Quality*, Free Press, N.Y., 1990.
- Zikmund, W.G. *Business Research Methods*, 4th ed., Dryden, 1994