

# Visitor Research

Tweed Regional Gallery  
& Margaret Olley Art Centre

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28 April 2015



**DESTINATION  
RESEARCH**  

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know your potential

## Executive Summary

The purpose of this report is to provide a summary of the research conducted at the Tweed Regional Gallery and Margaret Olley Art Centre in March/April 2015. The research has been commissioned by the Tweed Regional Gallery Foundation Ltd to provide a research study describing the potential economic impact of the Gallery to the Tweed Shire and to assess the market segments attracted to the area by the Gallery. The report also reviews their perceptions of travel options in Murwillumbah, and provides an assessment of the tourism value of the Gallery to the Tweed Shire.

Data for the study was primarily collected using paper-based surveys at the Gallery from a substantial sample of 600 visitors in an estimated audience of 127,000. This was analysed by the qualified staff at Destination Research in combination with recent data from Tourism Australia and Museums and Galleries NSW to provide an assessment of the key market segments to the Gallery.

Significant increases in the numbers of cultural tourists visiting the Tweed Shire were noted from 2013 to 2014 in data from Tourism Research Australia - which include visitors undertaking arts/heritage activities, but also a corresponding increase in 'social' activities which include visiting friends/relatives and dining.

The survey results highlight the attraction of the Gallery to both locals and visitors who came for the cultural and arts experience, and the existence of three distinct market segments, those being; day trippers, locals and overnight visitors. While 25% of visitors are locals, over 50% of visitors came for a day visit and 23% came as tourists from over 50kms away, to stay overnight or longer. The majority (70%) were either arts enthusiasts or passionate about art, and enjoy the Margaret Olley Art Centre as well as the changing variety of the exhibitions.

Using a scenario approach, the results from the study suggest that cultural tourists visiting the Gallery from outside the Tweed Shire contributed an estimated \$7.38 million into the local economy through their expenditure on dining, retail, accommodation and transport.

The success of the Gallery is evident with over 70% of patrons returning each year and 98% feeling the Gallery met their expectations. In summary, this research has demonstrated that the Gallery provides important cultural and social opportunities to residents and visitors to the Tweed Shire, and that the potential to leverage this success to other tourism businesses in Murwillumbah and beyond is substantial.



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### *Disclaimer and Copyright*

This report has been compiled by researchers from Destination Research. The visitation statistics contained in this report are based on the sample data collected and therefore provide an indication of visitor trends rather than actual performance measures. The information presented in this report is accurate at the time of printing. Whilst all care is taken to ensure its accuracy, no liability is accepted for loss or damage as a result of its content. Findings and recommendations are based on the data of the current study; further research may be required in some areas to validate the findings of this study.

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# Section One

## Study Background



## 1] Background

The Tweed Regional Gallery & Margaret Olley Art Centre (hereto referred to as 'the Gallery') was created in its new location in 2004, establishing six exhibition rooms, a retail shop and cafe. The Gallery welcomed 50,000 visitors in its first year of operation and over the next few years it attracted a steadily increasing audience.

**Table 1: Gallery visitor numbers**

Year	Visitors
2006/7	69,395
2007/8	54,588
2008/9	58,248
2009/10	56,717
2010/11	55,673
2011/12	79,728
2012/13	71,276
2013/14	85,910

The Margaret Olley Art Centre (MOAC) opened on 15 March 2014<sup>1</sup>, featuring a new purpose-built wing of the Gallery building to house a total re-creation of rooms from artist Margaret Olley's home studio in Paddington, Sydney. The new wing also includes additional exhibition space and multimedia areas. The MOAC was an instant success, attracting **122,746** people to the Gallery in its first full year of operation, significantly boosting visitor numbers.

In 2015 independent researchers at Destination Research were appointed by the Tweed Regional Gallery Foundation Ltd to undertake an economic impact assessment for the Gallery. The overall purpose of the study was to assess the visitor patterns and expenditure of visitors to the Gallery into the Tweed Shire. More specifically, it was to:

1. provide market research data on the current profile and tourist patterns of visitors to the Gallery
2. assess current awareness of destination attributes and travel options in Murwillumbah
3. provide an assessment of the economic and tourism value of the Gallery to the Tweed Shire.

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<sup>1</sup> <http://artgallery.tweed.nsw.gov.au/History>

## 1.1 Research methods

The research collected responses from 600 visitors on-site during March/April 2015 to provide analysis of visitors to the Gallery. This data was compared to and supplemented with extant data from the Gallery, Tourism Research Australia (TRA) and Museums and Galleries NSW (MGNSW), as shown in this report.

## 1.2 Survey design, sampling and collection

The design of the survey was intended to gather data to address the research areas described above from visitors while they were on-site in the Gallery. The required sample size was determined using the visitor numbers collected by Gallery staff for 2014/15 of 127,000 visitors. A total of **600 questionnaires** were collected to achieve a 4% margin of error and a 95% confidence rating<sup>2</sup>.

The questionnaire was designed to be 16 questions long, and take approximately 2-4 minutes to complete (see Appendix 1), kept short so as not to impede on the visitor experience. A mixture of statistical and open-ended questions were used, in order to allow respondents the opportunity to comment on multiple aspects of the Gallery. Members of the Murwillumbah business community were offered an opportunity to discuss the survey, and provided suggestions toward the question design.

The questionnaires were transferred onto **surveycards** shown in the example below, which provided easy distribution and collection. The unique design of the cards allowed them to be administered face-to-face, as well as to be left in the Gallery Cafe for self-completion if desired. This allowed maximum distribution throughout the Gallery site over the entire duration of the study. The survey was administered by volunteers throughout the Gallery over four weeks from 11 March to 11 April 2015 - a period which included weekdays, weekends, Easter and the school holidays.



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<sup>2</sup> See details at <http://www.custominsight.com/articles/random-sample-calculator.asp>



Are you attending this event as a (pls tick a box)  
 spectator  participant  other .....

How did you hear about the event this year?  
 Radio  TV  
 ABC Coast FM  TV NBN Television

How did you get here?  
 car  shuttle  plane  walk  bike  other..

What is your residential postcode?  
 \_\_\_\_\_

Did you come to the Gold Coast especially for this event?  
 yes  no -  on holidays  live/work here  other

On a scale of 1 to 5, please rate the following:  
 E.g low 1 2 3 4 5 excellent

Children: \_\_\_ under 12 \_\_\_ 12-17 yrs  
 Adults: \_\_\_ 18-25 \_\_\_ 26-39 \_\_\_ 40-5

How many people does this pay for? # \_\_\_\_\_

Is this a day trip  or longer stay for \_\_\_nigh

How many hours will you spend here today? \_\_\_ hours

Are you staying in  your own home  hotel/motel  
 caravan  rented house/apt  with friends  other

What % of the total of these amounts were spent in the following locations:

Currumbin>Tugun Coolangatta> Kirra>	Surfers Paradise > other Gold Coast
%	%

How can we improve the event?  
 Yes! I would like to receive the Swell E-news, here is my email address ...

In which area?  
 Coolangatta  Kirra  Currumbin  Bilinga/Tugun  
 Tweed Shire  Other Gold Coast & Surfers Paradise  
 Other .....

How many times have you been to the event?  
 1st time or # \_\_\_\_\_ times

What did you like best about this event?

**SAMPLE ONLY**

On a scale of 1 to 5, please rate the following:  
 Sculpture 1 2 3 4 5  
 Cultural value 1 2 3 4 5  
 Event value 1 2 3 4 5  
 Atmosphere 1 2 3 4 5  
 Value for money 1 2 3 4 5  
 Printed program 1 2 3 4 5  
 Overall experience 1 2 3 4 5

Why is the Swell Sculpture Festival important for the Gold Coast?

### 1.3 Data analysis

Once collected, data was processed by the staff at Destination Research using analysis programs to import the Surveycard data to Excel files. These were then tabulated to create tables and charts depicting the information required. Analysis of the economic impact data was made using the **direct visitor expenditure** method, a method developed by the Sustainable Tourism Cooperative Research Centre<sup>3</sup> in 2006. This has been utilised in the tourism industry as an accurate method of determining the economic value of venues and events generated specifically from visitors who are bringing ‘new money’ to the region. It does not include visitors to the Gallery who reside in the local shire, as that money was assumed to exist in the local economy. It separately considers the expenditure of holiday-makers who are not in the area specifically for the Gallery. The methods used in the study comply with the needs of Destination NSW, where Destination Research has been used many times to assist in funding applications and acquittals. It is important to note that **the model assesses the direct visitor impact and does not use industry multipliers in the calculations.**

<sup>3</sup> The Sustainable Tourism Cooperative Research Centre - <http://www.crctourism.com.au/>

## 1.4 Report structure

The report is presented in the following sections:

1. Background to the study
2. Visitors to art galleries in Australia
3. The Gallery experience
4. Tourism in Tweed Shire
5. Research findings
6. Summary and recommendations.

The report begins with a contextual background to the study, to coalesce the knowledge and information from various government and academic sources into a visitor profile of art gallery visitors that is relevant to the regional context in which the Gallery is situated. Statistics have been sourced from:

- Tourism Research Australia (TRA)
- Australian Bureau of Statistics (ABS)
- Museums and Galleries NSW (MGNSW)
- Destination Tweed (DT)
- Tweed Regional Gallery and Margaret Olley Art Centre (TRG)

These statistics can then be compared to the current data from the study to examine commonalities and differences to the wider gallery environment in NSW and Australia. The results are then presented from the survey findings to provide market research data on the current profile and tourist patterns of visitors to the Gallery and to assess the economic and tourism value of the Gallery to the Tweed Shire.



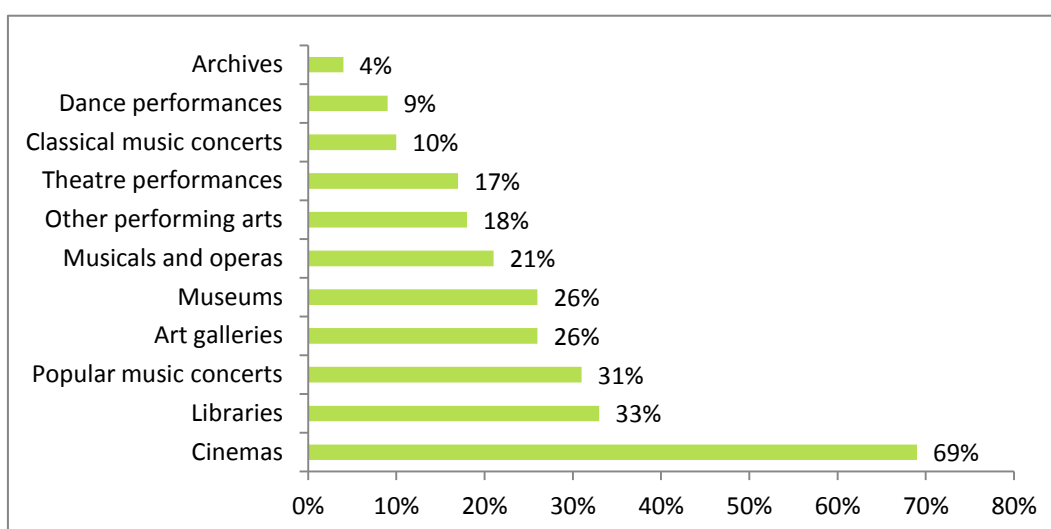
## Section Two

### Art Gallery Research

## 2] Visitors to art galleries in Australia

Australians have a high propensity to attend cultural venues and events, with around 86% of the Australian population attending at least one of the cultural venues or events per year shown in Figure 1 below. According to the Australian Bureau of Statistics approximately 1 in 5 Australians attended an art gallery in 2013-14, a figure that has stayed consistent since 2005 [2] [3]<sub>(a,b)</sub>. This is about the same ratio as those who visit museums, and only slightly less than those who go to popular music concerts. The statistics remain similar between categories in all of the eastern states (NSW 26%, QLD 25%, VIC 28%).

**Figure 1: New South Wales cultural venue attendance**



Source: ABS (2015)

(a) In the 12-months before interview. (b) Persons aged 15 years and over.

### 2.1 Demographic profile of those attending art galleries

The demographic profile of people attending galleries can be compared across the data for Australia, NSW and the Northern Rivers region. Statistics in this section compare existing results from Tourism Research Australia (TRA), Australian Bureau of Statistics (ABS) and Museums and Galleries NSW (MGNSW).

In 2010 MGNSW undertook a survey of many public galleries in NSW, including the TRG, providing sound results which assist us in building a visitor profile and allowing comparison with other regional galleries. MGNSW data includes state-wide data (MGNSW), north coast region data (MGREG) and locally collected data at the Gallery (MGTRG).



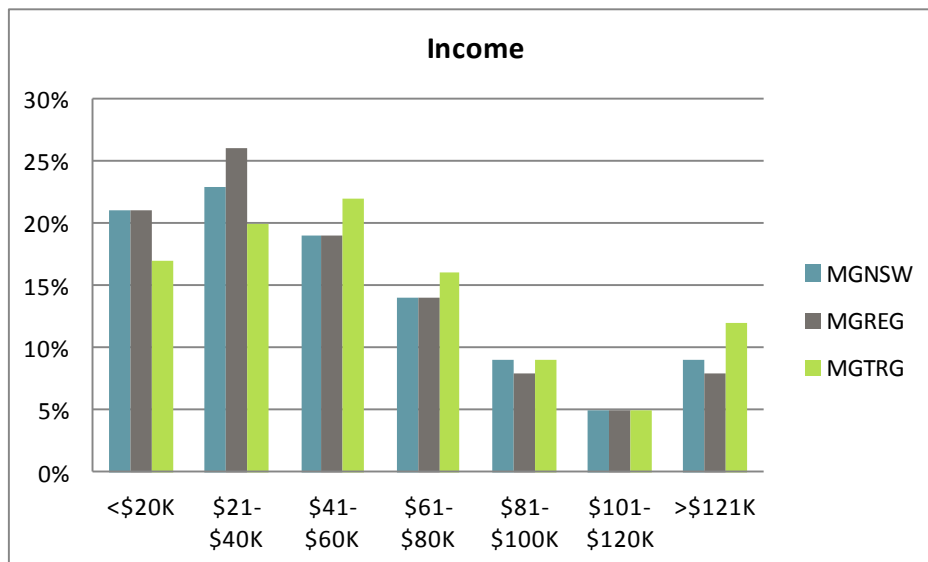
## Gender

All studies indicate a higher ratio of female visitors to males where 2 in 3 visitors are female. The ABS suggest that the ratio of males to females is 43% to 57% [3], MGNSW suggest a similar ratio in NSW, 31% to 69% [1], and MGTRG suggest 33% to 67%.

## Income groups

The income of visitors is not high, where around 40% of visitors to NSW galleries have an income less than \$40,000. As shown, this overall trend is consistent for north coast galleries and supports the view that public galleries are an accessible cultural activity for all socio-economic levels. In NSW only 1 in 10 visitors have a gross household income over \$100,000 (MGNSW); however, the TRG has a slightly higher ratio with 12% over \$121,000.

Figure 2: Income groups of gallery visitors

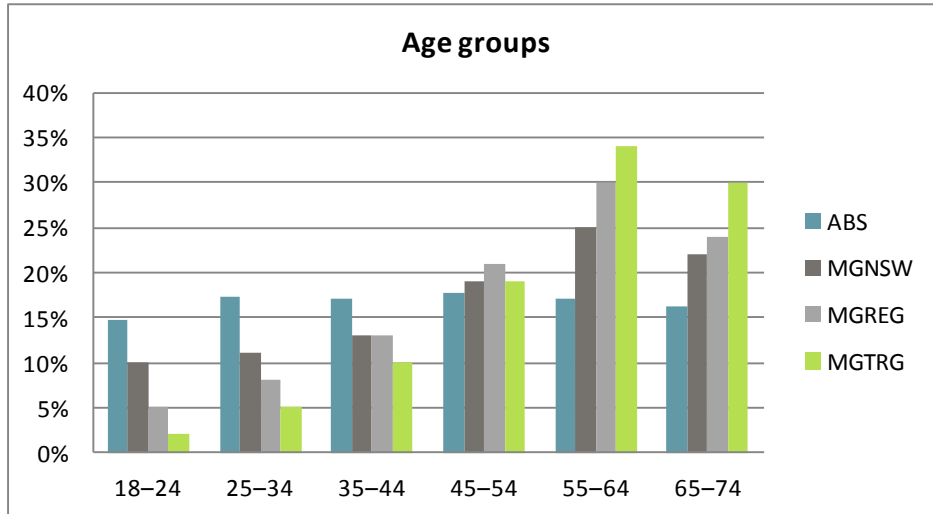


Source: MGNSW (2010)

## Age of visitors

As shown in Figure 3, there are some differences in the age segments at national, state and local level. According to ABS data, art galleries around Australia attract a very even mix of age groups, where around half of visitors to Australian galleries were between 25 and 55 years (52%), and a third (34%) over 55 years [3]. Figures from MGNSW suggest a larger proportion of visitors to the north coast region galleries are over 55 (54%) [1], and figures from the MGTRG suggest an even greater ratio of people in this older age group (64%) [4]. It is also noted that 1 in 3 were retired (36%).

**Figure 3: Age groups of gallery visitors**

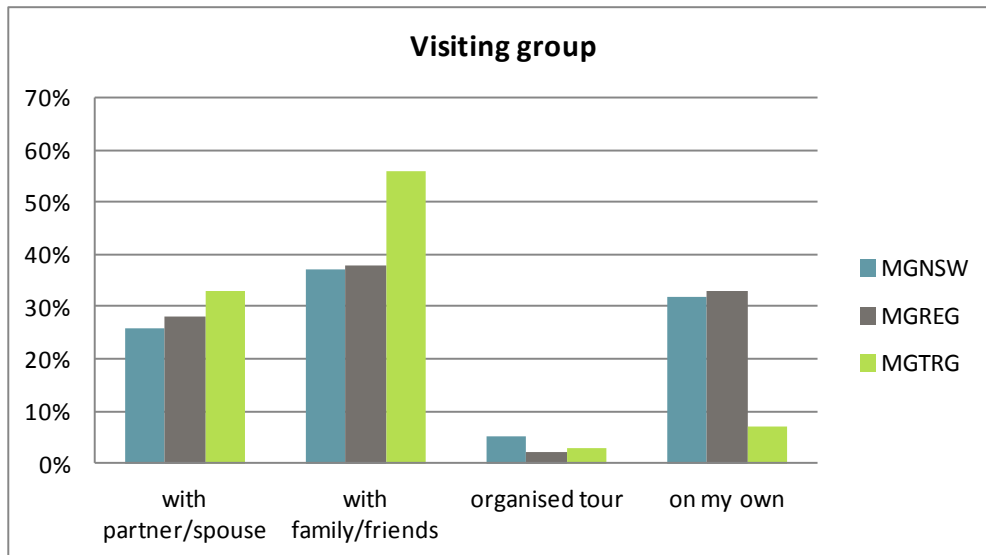


Source: ABS (2015), MGNSW (2010)

### Visitor group

In NSW and on the North Coast most visitors attend in a small group of family or friends (38%) or with a spouse or partner (28%), although a significant proportion are on their own (33%). For the TRG, however, more come with friends and family and far less on their own. Around 20% come with children.

**Figure 4: Visitor groups**




Source: MGNSW (2010)





## GALLERY VISITOR PROFILE

- ❖ 2 in 3 visitors are female
  - ❖ more than half of visitors to the north coast galleries are over 55 (54-64%)
  - ❖ 40% of visitors have an income less than \$40,000, 75% under \$80,000
  - ❖ 1 in 3 are retired (36%)
  - ❖ Travel in a small group of family or friends (38%) or with a spouse or partner (28%)
  - ❖ Around 20% come with children.
- 

### 3] The gallery experience

Australian galleries offer both a leisure and learning experience, but not all visitors seek the same experiences. As with all leisure consumers, visitors to art galleries can be segmented into groups either by their age and lifestyle, or by their experience preferences [5]. Recently, researchers suggested that visitors to cultural attractions (e.g. museums, galleries etc.) could be segmented into five interrelated groups based on the primary *experience* they were seeking [6]. The five segments included:

1. *Learning and discovery* (the desire to discover new things, expand knowledge, be better informed and experience something new or unusual)
2. *Passive enjoyment* (the desire to enjoy oneself, to be pleasantly occupied and to feel happy and satisfied)
3. *Restoration* (the desire to relax mentally and physically, to have a change from routine and recover from stress and tension)
4. *Social interaction* (the desire to spend time with friends or family, interact with others and build relationships)
5. *Self-fulfilment* (the desire to make things more meaningful, challenge abilities, feel a sense of achievement and develop self-worth) [6].

Of interest is the positive benefits these aspects provide to visitors, especially as restorative energy [7] to facilitate recovery from mental fatigue and the stress of city living. While people often choose natural environments for this, research suggests that museums and galleries are

also chosen for this purpose [8]. Regional galleries provide perfect short escapes from city and suburban life to access these restorative spaces. The location, landscape and layout of the Gallery also appeal to this element. Researchers suggest this may require a balance of elements within a Gallery to provide a ‘humanistic form or “warm” space for the central desired adult object-related transformation experience, complemented by “cool” space to allow reflection, consideration and relaxation’ [9].

### 3.1 Cultural tourism

Gallery tourists are also considered part of a larger group of ‘cultural tourists’ and are defined as international and domestic visitors who participate in at least one of the following activities during their trip:

- attend theatre or performing arts
- visit museums or galleries
- visit art, craft workshops/studios
- attend festivals or cultural events
- experience Aboriginal art craft or displays
- visit historical/heritage buildings [10].

**Visiting art galleries is one of the primary cultural tourist activities for domestic tourists.**

According to Tourism Research Australia there were 18 million domestic overnight and day visitors in 2009 who participated in cultural and heritage activities. The majority of these tourists (80%) only participated in one cultural activity and the top two activities for cultural and heritage visitors were **visiting art galleries/museums** and visiting heritage buildings/monuments [10].

As shown in the table below, **visiting art galleries is also one of the primary cultural tourist activities for international tourists**, where international cultural and heritage visitors comprised more than half (57%) of international visitors in 2009 at 2.7 million. Visitors from European countries such as Italy, Switzerland and France were more likely to visit cultural sites than other international visitors [10].

**Table 2: Cultural tourists in Australia**

Activity	International	Domestic Overnight	Domestic Day
Visit art galleries or museums	57%	43%	36%





Researchers suggest that cultural tourists vary in the depth of experience they are looking for and the centrality of the interest (e.g. art or history) to their usual lives [11,12]. They further suggest that cultural tourists in galleries have both similar and different characteristics to locals, mainly in their attitude and behavioural profile.

#### GALLERY TOURIST BEHAVIOUR [1].

- ❖ vary in the depth of experience sought
- ❖ vary in their experiences in art and galleries
- ❖ first-time visitors
- ❖ attend with a spouse/partner
- ❖ spend longer in the gallery on average
- ❖ motivated by the general collection rather than the special exhibition
- ❖ uptake tourist fliers and hear about the gallery by simply 'passing by'

### **3.2 Gallery locals**

Local residents are often a key segment for Galleries in NSW, with some galleries attracting over 60% of their audience from the local population (under 5kms). They return often throughout the year to changing exhibitions, and feel a sense of ownership to "their Gallery". They are observed providing their own guided tour to attendant friends and relatives and can be a useful resource as a 'friend of the gallery'.

#### GALLERY LOCALS BEHAVIOUR [1].

- ❖ attend more often
- ❖ attend alone
- ❖ bring visitors with them to the gallery
- ❖ feel a sense of ownership to the gallery as 'our Gallery'
- ❖ respond well to emails and e-newsletters

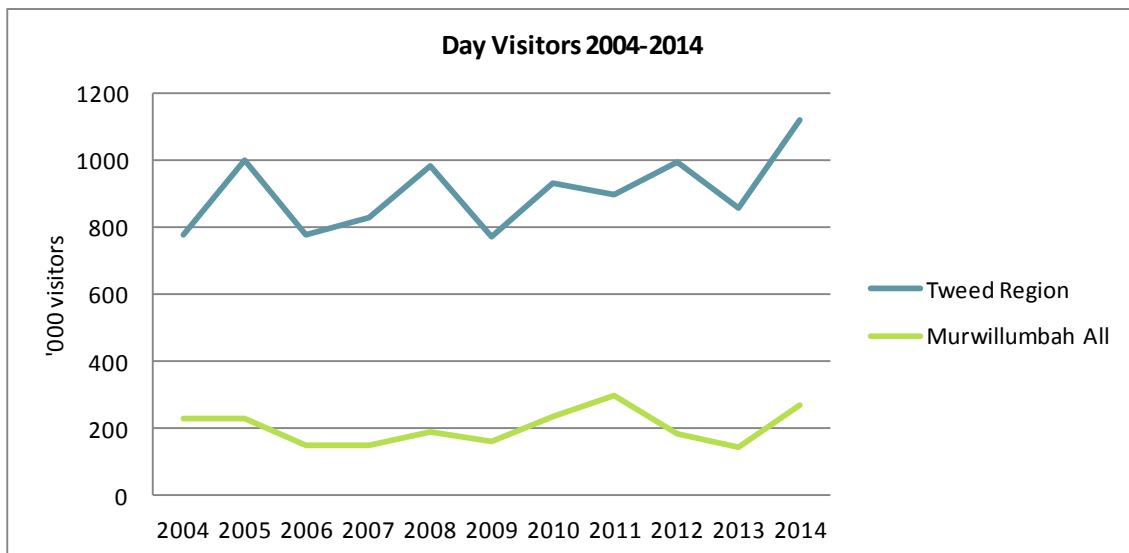
## 4] Tourism in Tweed Shire

Over the past five years tourist numbers have averaged 1.4 million in the Tweed Shire<sup>4</sup>, and yet in the 2014 calendar year there have been significant increases, as explored further in the next section. Visitor numbers to the Tweed Shire have been analysed in segments of 'domestic day visitors', 'domestic overnight visitors' and 'international visitors' using data from Tourism Research Australia. Murwillumbah's share of these visitors is also separately analysed for the same period and includes the town of Murwillumbah as well as surrounding villages of Uki, Chillingham and others.

### 4.1 Day visitors

In the year ending 2014 'day visitors' to the Tweed Shire exceeded 1 million for the first time in ten years, growing to 1.1 million [13]. As shown below, a similar rise was also seen in Murwillumbah, where Murwillumbah and its surrounding villages was in the top six in the North Coast region with 269,000 day visitors. In 2014 Murwillumbah had a 24% share of the Tweed day visitor market. Visiting friends/relatives (VFR) represents around 27% of this activity.

Figure 5: Day visitors to Tweed Shire 2004-2014



\* Murwillumbah includes surrounding villages Uki, Chillingham etc.

Source: TRA (2014)

Table 3: North coast region - day visitors '000



<sup>4</sup> [http://tra.gov.au/Tourism\\_in\\_Local\\_Government\\_Areas/pdfs/index.html](http://tra.gov.au/Tourism_in_Local_Government_Areas/pdfs/index.html)

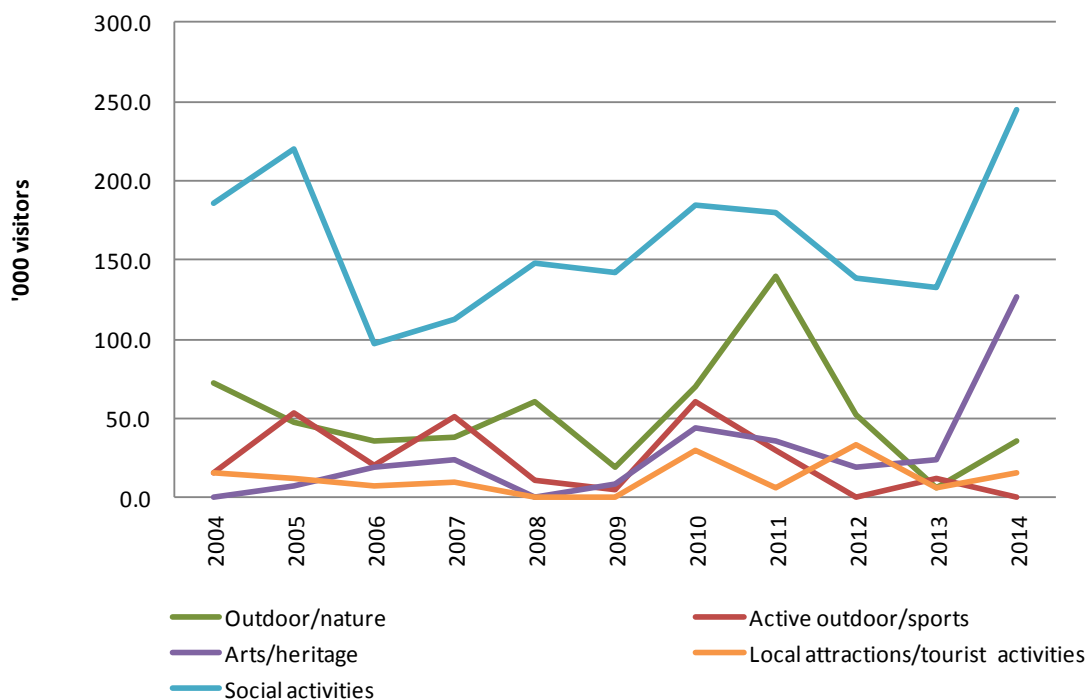
#	North Coast Region - Top Ten	2013	2014
1	Coffs Harbour	643.6	635.9
2	Byron Bay	461.1	633.5
3	Port Macquarie	557.4	545.0
4	Tweed Heads	453.9	498.1
5	Lismore	291.9	370.4
6	<b>Murwillumbah</b>	<b>144.4</b>	<b>269.3</b>
7	Pottsville	106.1	201.8
8	Ballina	217.2	200.8
9	Taree	259.1	175.6
10	Grafton	327.2	146.5

\*North Coast region extends from Tweed Heads to Taree.

Source: TRA (2014)

The activities undertaken in 2014 have also changed significantly, with a significant increase of around 100,000 in both arts/heritage and social activities (which include dining and VFR).

**Figure 6: Murwillumbah day visitor activities 2004-2014**



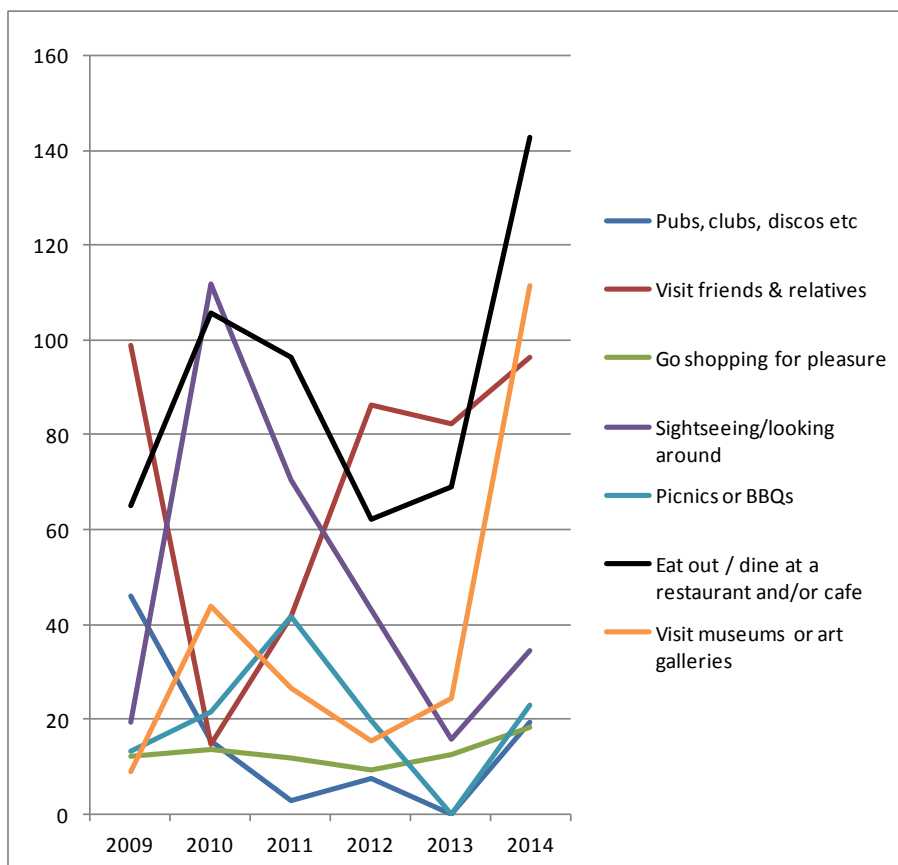
Source: TRA (2014)

To explain this further, the TRA groups the following activities under 'social activities'.

- Pubs, clubs, discos etc
- Visit friends & relatives
- Go shopping for pleasure
- Sightseeing/looking around
- Picnics or BBQs
- Eat out / dine at a restaurant and/or cafe
- Visit museums or art galleries.

As shown in Figure 7, since the opening of the MOAC and the increase in visitor numbers, there has been a corresponding increase in 'eating out at restaurants and cafes', and 'visiting friends and relatives'. However the same proportional increase has not been seen in shopping, sightseeing, picnics or pub activities.

**Figure 7: Social activities by day visitors 2009-2014**



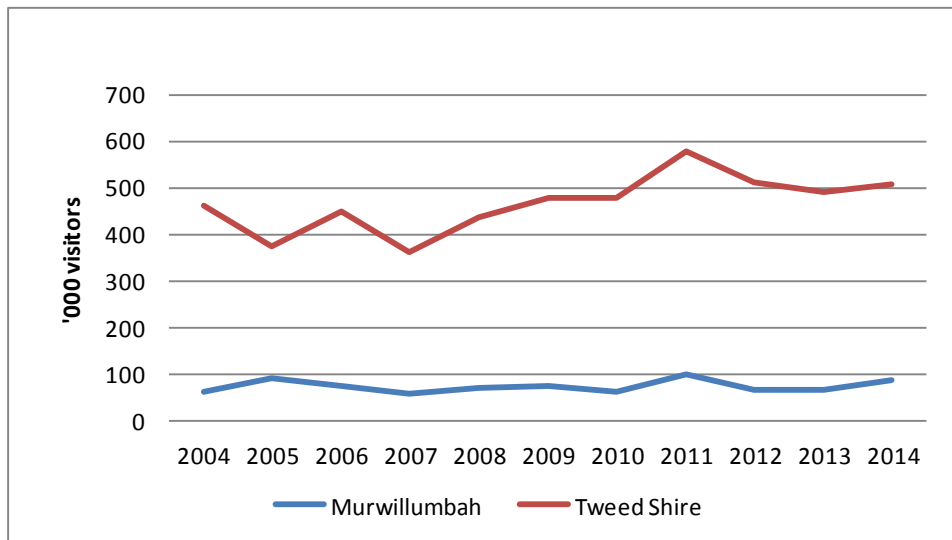
Source: TRA (2014)



## 4.2 Overnight visitors

The number of overnight visitors in the Tweed Shire is also up in 2014 from the previous year to 507,000. Overnight visitors to Murwillumbah followed the trend to 86,000 visitors, or 17% of the Tweed overnight market. Visiting friends/relatives represents around 36% of this activity.

Figure 8: Murwillumbah overnight visitors: 2004-2014



Source: TRA (2014)

## 4.3 International

International visitors to the Tweed Shire remained around the five year average of 21,000, with 20,500 in 2014. International visitors to Murwillumbah were up slightly on the average with 4,130, for a 20% share of the international market. Visiting friends/relatives (VFR) represents around 38% of this activity.

## 4.4 Visitor summary

Table 4: Tweed Shire visitor summary

Summary Table	Tweed visitors 2014	VFR %	Murwillumbah visitors 2014	Murwillumbah % share
Day visitors	1,100,000	27%	269,000	24%
Overnight visitors	507,000	36%	86,000	17%
International visitors	20,500	38%	4,130	20%
<b>Total</b>	<b>1,627,500</b>	<b>28%</b>	<b>359,130</b>	<b>22%</b>

Source: TRA (2014)

## Section Three Survey Results



## 5] Visitor profile

The results from the survey of 600 visitors at the Gallery are presented in this section, along with analysis that is based on the research reviewed in Sections 1 and 2. The visitor profile indicates that visitors come from local and distant regions and include day trippers, locals and those that stay overnight or longer. Many undertake a variety of other activities while in the Tweed Shire including dining and visiting friends and relatives.

Analysis of respondent postcodes indicate that visitors came from 20 regions throughout Australia, including QLD, NSW, VIC, SA, WA, TAS and the ACT, to see the Gallery. Specifically, the following was found:

- 75% came from outside the Tweed Shire
- Brisbane, Gold Coast, the Northern Rivers and Sydney were the top four geographic markets, providing 47% of visitors
- Interstate visitors accounted for 48% of visitors
- 75% resided more than 50kms from the Gallery, 40% between 50-200kms and 21% from over 800kms away
- International visitors comprised 2.7% of all visitors (UK, NZ and Canada). This is slightly higher than the average for the Tweed Shire (1.4%).

**Table 5: Region of origin**

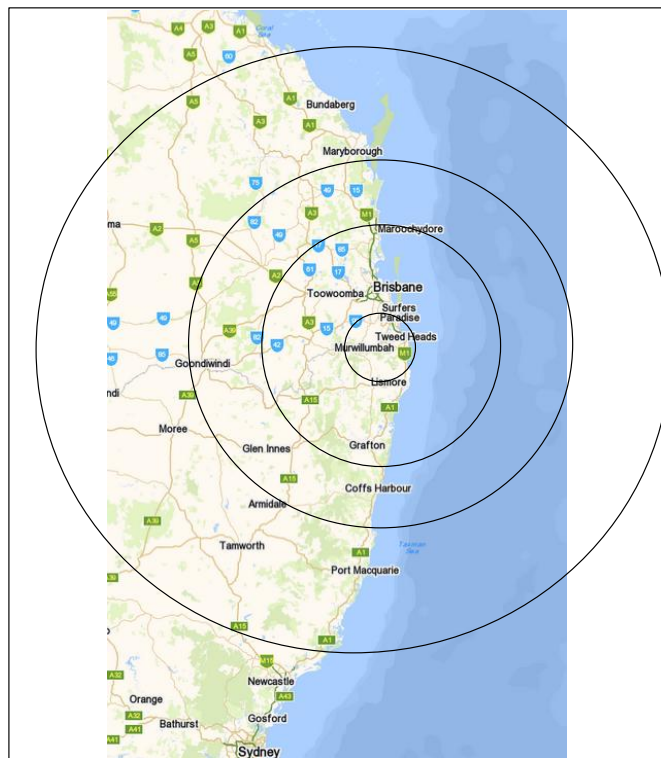
State	Region	% Response
<b>NSW</b>		<b>48.5%</b>
	Tweed Shire	25.1%
	Northern Rivers	8.5%
	Sydney	7.4%
	Hunter Region	1.2%
	Central Coast	1.3%
	Coffs Coast	1.3%
	North Coast NSW	0.5%
	South Coast NSW	0.7%
	Other NSW	1.1%
<b>QLD</b>		<b>40.6%</b>
	Brisbane	18.7%
	Gold Coast	12.7%
	Sunshine Coast	3.8%
	Toowoomba	2.7%
	Central & Nth QLD	2.3%
	Ipswich	0.3%
<b>VIC</b>		<b>3.8%</b>
<b>SA</b>		<b>1.0%</b>
<b>ACT</b>		<b>1.2%</b>
<b>TAS</b>		<b>0.2%</b>
<b>WA</b>		<b>1.0%</b>
<b>OS</b>	Overseas	<b>2.7%</b>
	Unknown	<b>1.3%</b>
<b>Total</b>		<b>100.0%</b>

## 5.1 Annular regions

An annular region analysis determines the distances visitors have travelled to the Gallery, by plotting their postcodes on an annular map. The results suggest that approximately 75% of the audience resided more than 50 kilometres from the Gallery. Interestingly, 21.2% resided from more than 800kms away, including Sydney and Canberra, the Southern Highlands, Albury and Victoria.

**Table 6: Annular region**

Region	% of responses
Less than 50kms	25.1%
51 -200km	40.3%
201-400km	7.9%
401-600km	0.7%
601-800km	1.2%
800+km	21.2%
International	2.7%
Unknown	1.0%



*Figure is for illustrative purposes and is not to exact scale.*

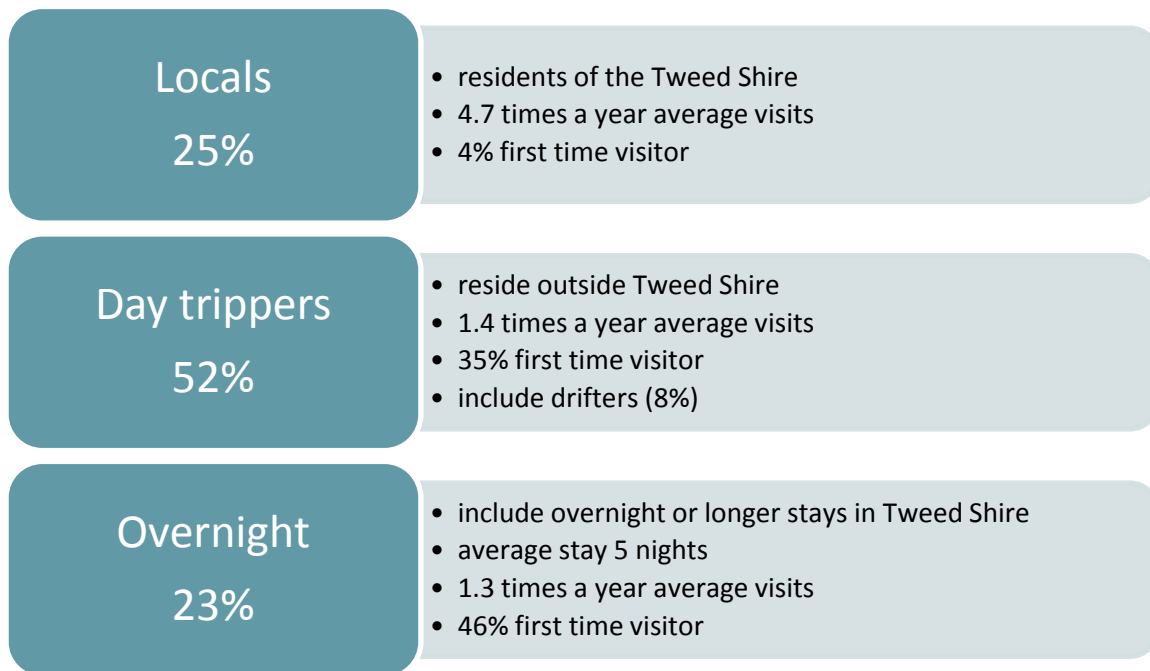




## 5.2 Region by visitor type

The visitor profile suggests that although there are similarities across all visitors, three key visitor groups (or segments) exist as illustrated in the Figure 9 below, with day trippers being the largest segment of visitors.

Figure 9: Visitor Segments



Day trippers include those who are residing in another region and are *visiting for the day*. They also include travellers (drifters 8%) who are either staying in an adjacent region and visit for the day, or are driving the Pacific Touring Route, or other driving routes through the Tweed Shire, and are accommodated elsewhere.

The following table highlights the key geographical markets for both the 'day visitor' and 'overnight' markets, suggesting that Brisbane, Sydney and the Sunshine Coast are key markets for overnight visitors, while Brisbane, Gold Coast and the Northern Rivers are key markets for the day trippers. International visitors fell into both day tripper and overnight categories.

**Table 7: Key geographic markets**

State	Region	Overnight	Day Trip	Total
<b>NSW</b>	Tweed Shire		25.1%	25.1%
	Northern Rivers	1.2%	7.4%	8.5%
	Sydney	3.5%	3.8%	7.4%
	Central Coast	0.7%	0.7%	1.3%
	Coffs Coast	0.7%	0.7%	1.3%
	Albury/Wodonga	0.7%	0.7%	1.3%
	Hunter	0.2%	1.0%	1.2%
	Southern Highlands		0.7%	0.7%
	South Coast	0.7%		0.7%
	North Coast		0.5%	0.5%
	Blue Mountains	0.2%	0.2%	0.4%
	New England	0.2%		0.2%
	<b>NSW Total</b>		<b>7.9%</b>	<b>40.6%</b>
<b>QLD</b>	Brisbane	5.0%	13.7%	18.7%
	Gold Coast	0.7%	12.0%	12.7%
	Sunshine Coast	1.7%	2.2%	3.8%
	Toowoomba	1.2%	1.5%	2.7%
	Nth Qld	1.0%	1.3%	2.3%
	Ipswich		0.3%	0.3%
<b>QLD Total</b>		<b>9.5%</b>	<b>31.1%</b>	<b>40.6%</b>
<b>VIC</b>	Other Vic	1.0%	1.0%	2.0%
	Melbourne	0.8%	1.0%	1.8%
<b>OVERSEAS</b>		1.3%	1.3%	2.6%
<b>ACT</b>		0.3%	0.8%	1.2%
<b>WA</b>		0.5%	0.5%	1.0%
<b>SA</b>		0.3%	0.7%	1.0%
<b>TAS</b>		0.2%		0.2%
<b>Unknown</b>		0.7%	0.3%	1.0%
<b>Total</b>		<b>22.1%</b>	<b>77.9%</b>	<b>100.0%</b>



### 5.3 Accommodation

While the majority of local and day trip visitors returned home (71%) after their visit, overnight visitors utilised both commercial and free accommodation, with the majority staying with friends and family (11%) or hotel/motel/resort (9.7%). It was noted that local residents accommodate both day visitors and overnight visitors and bring them to the Gallery. This is an important element of visitation that can be leveraged in marketing strategies.

**Table 8: Accommodation**

Accommodation type	
Returned home	70.9%
With friends/family	11.2%
Resort/hotel/motel	9.7%
Caravan/camping	3.5%
Rented house/apartment	2.7%
Other	1.5%
Hostel	0.2%
Farmstay	0.2%
Time share	0.2%

For those who did stay overnight or longer the following was found:

- The average night stay was 5 nights
- Stays ranged from 1 night to 60 nights
- Most people chose 3 nights (mode = 3).

A total of 21.4% stayed in the Tweed Shire (8% of visitors stayed in Murwillumbah, 4% in Kingscliff and 9% in other parts of the Tweed Shire, such as Pottsville, Tweed Heads and Uki). As shown in the table below, the majority of overnight visitors stayed in the Tweed Shire, while others stayed in adjacent Shires (these people were counted as 'drifters' in the day trip segment).

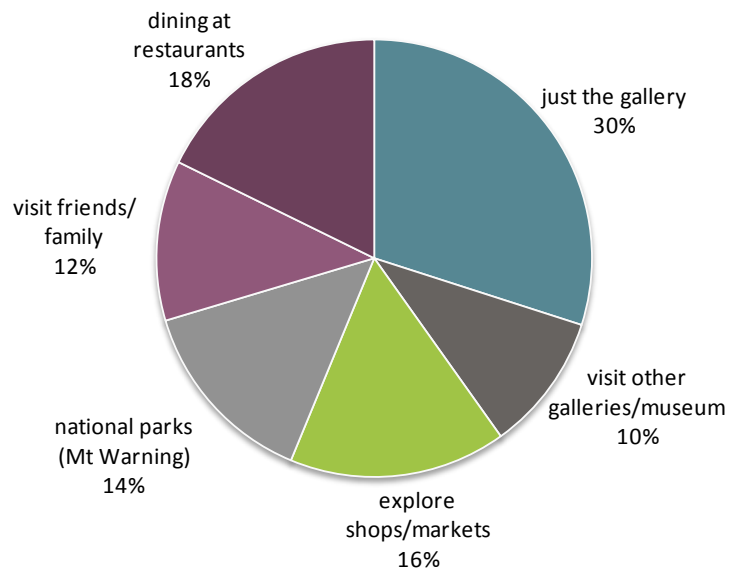
**Table 9: Accommodation locations**

Accommodation	Tweed Shire	Byron Shire	Gold Coast	Lismore	Ballina	Casino	Kyogle
With friends/family	7.0%	2.0%	1.2%	0.3%	0.3%	0.3%	
Resort/hotel	7.9%	0.5%	1.2%	0.2%			
Caravan/camping	2.8%	0.3%	0.3%				
Rented House/apt	2.0%	0.3%	0.2%				0.2%
Other	1.2%		0.3%				
Farmstay	0.2%						
Hostel	0.2%						
Time share	0.2%						
<b>Total</b>	<b>21.4%</b>	<b>3.2%</b>	<b>3.2%</b>	<b>0.5%</b>	<b>0.3%</b>	<b>0.3%</b>	<b>0.2%</b>

### 5.4 Other activities in Tweed Shire (excluding Tweed residents)

Most visitors travel to the Tweed Shire just for the Gallery (30%), highlighting the attraction of the Gallery itself. Other visitors combine the visit with dining (18%), shopping (16%), national parks (14%) or visiting friend/relatives (VFR, 12%). This pattern is consistent for both day and overnight visitors - although overnight visitors show a tendency to include more activities, such as national parks. It is noted that the 12% of VFR visitors is consistent with accommodation choice; however, it is thought that a large proportion of day visitors *attend with* local friends and relatives, as per the TRA figures in Section 1.

Figure 10: Other activities undertaken during this visit



### 5.5 Repeat visitation

The overall average of visitors coming to the Gallery is **2.1 times each year**, with some locals visiting up to 20 times a year. First time visitors represent 31% of all visitors, and this increases to 46% of overnight tourists. This is in line with the statistics provided by MGNSW, who suggest a 36% return rate.

Table 10: Repeat visitation by segment

	All visitors	Day (ex Tweed)	Overnight	Local
First time	31%	35%	46%	4%
Once a year	34%	41%	38%	17%
2-3 times	20%	19%	13%	30%
4-5 times	7%	4%	2%	21%
>5 times	8%	1%	1%	28%
	100%	100%	100%	100%
Average #	2.1	1.4	1.3	4.7

Again it is noted that locals return bringing other visitors to the area, often with a sense of ownership and pride, as noted by this survey respondent:

*'It is thoroughly wonderful. I love bringing my visitors here.'*



### 5.6 Visits to Murwillumbah

Visitors were asked, ‘Will you go to the town of Murwillumbah during your visit?’. Currently, 54.7% of all visitors (from outside the Tweed Shire) indicated they would be going to Murwillumbah during their visit. There is a fairly even result between day trippers and overnight - i.e. each is equally likely to visit Murwillumbah. Around 12% are unsure - this could mean a) they don't have a plan for the day, 2) they don't know what is there, or 3) they don't have time.

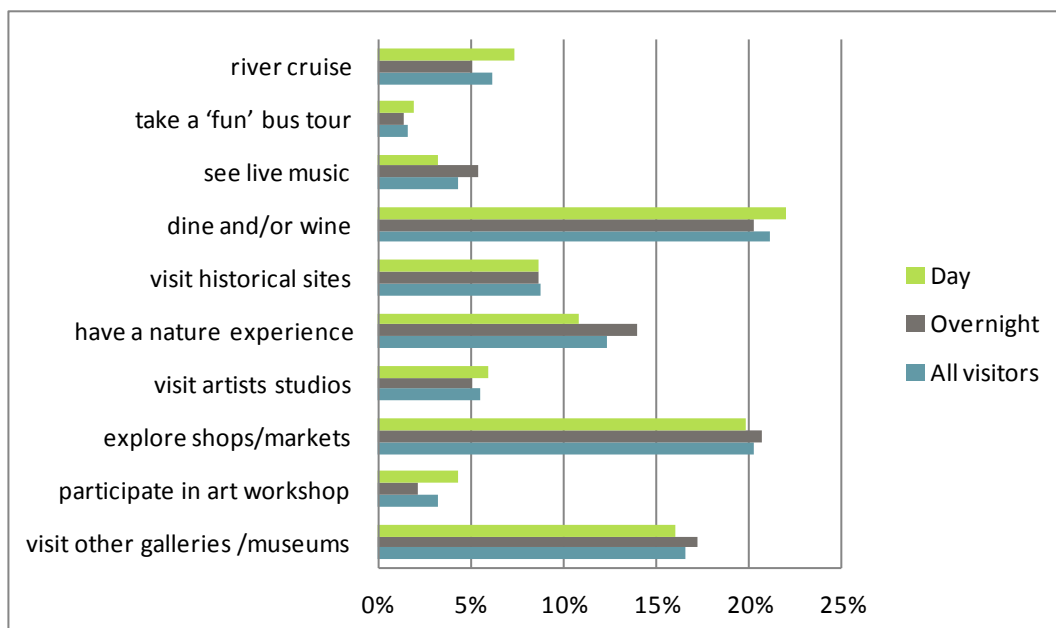
**Table 11: Visitors to Murwillumbah**

Visit Murwillumbah	Overnight	Day trip	Total	
Yes	22.9%	31.8%	54.7%	(n.=246)
No	4.0%	29.3%	33.3%	(n.=150)
Unsure	2.4%	9.6%	12.0%	(n.=54)
Total	29.3%	70.7%	100.0%	(n.=450)

### 5.7 Activity preference in Murwillumbah

Visitors (from outside the Tweed Shire) were asked what they would like to do in Murwillumbah. The top four responses were to 1) dine and/or wine, 2) explore shops and markets, 3) visit other galleries/museums and 4) have a nature experience. These are very similar to the results of their current activities in the Tweed Shire (above). It is noted however that shops/markets is an activity that would interest future visitors, but is not currently undertaken.

**Figure 11: Activity preferences in Murwillumbah**



## 5.8 Art interests

The Gallery attracted a targeted audience of art enthusiasts, with 70% rating themselves as either an art enthusiast or being passionate about art. The proportions were very similar for day trippers and overnight visitors.

**Table 12: Interest in art**

How would you rate your interest in art?	Total
Casual	31%
Enthusiast	44%
Passionate	26%

The levels of interest did vary by region where 'locals' were of all interests, Brisbane had a greater proportion of enthusiasts to casuals (42:25), as did other adjacent regions and the Northern Rivers (51:28). The most passionate visitors came from North Queensland (67%) .

**Table 13: Level of interest by region**

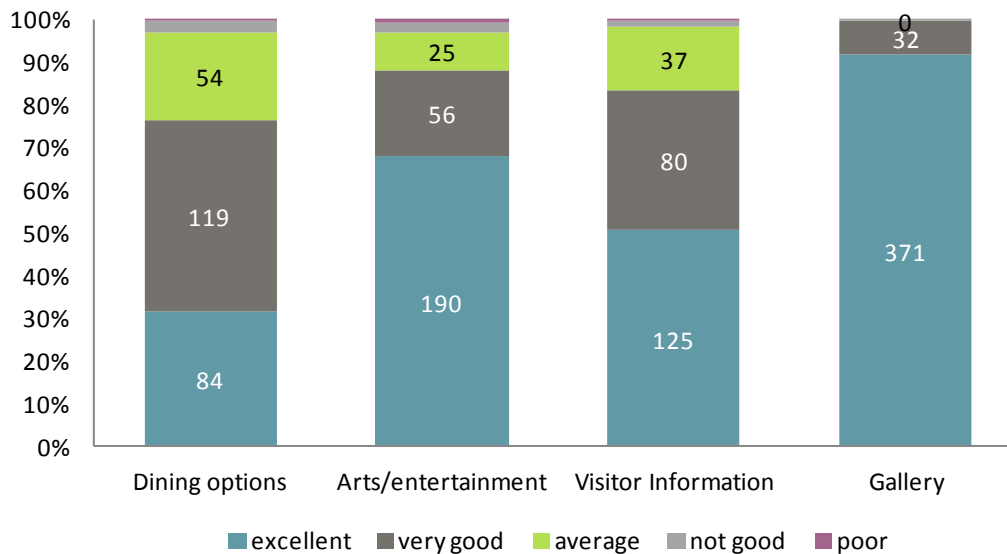
Region	Casual	Enthusiast	Passionate	Total
Tweed Shire	39%	40%	21%	100%
Brisbane	25%	42%	33%	100%
Gold Coast	22%	53%	25%	100%
Northern Rivers	28%	51%	21%	100%
Sydney	49%	38%	14%	100%
Sunshine Coast	32%	45%	23%	100%
Toowoomba	29%	43%	29%	100%
Overseas	15%	62%	23%	100%
Nth Qld	17%	17%	67%	100%
Melbourne	0%	56%	44%	100%
Other Vic	33%	22%	44%	100%
Albury/Wodonga	75%	0%	25%	100%
Central Coast	43%	43%	14%	100%
Canberra	14%	71%	14%	100%
Hunter	57%	14%	29%	100%
Coffs Coast	0%	67%	33%	100%



### 5.9 Ratings of the gallery experience

Respondents were asked to rate a number of aspects of their visit to the Tweed Shire from 1 to 5, with 1 being 'poor' and 5 being 'excellent'. As can be seen below, the Gallery rated well, receiving the most 'very good' and 'excellent' responses; however, other aspects did not rate as well, receiving more 'average' and 'not good' responses.

Figure 12: Experience ratings



### 5.10 Visitor expectations

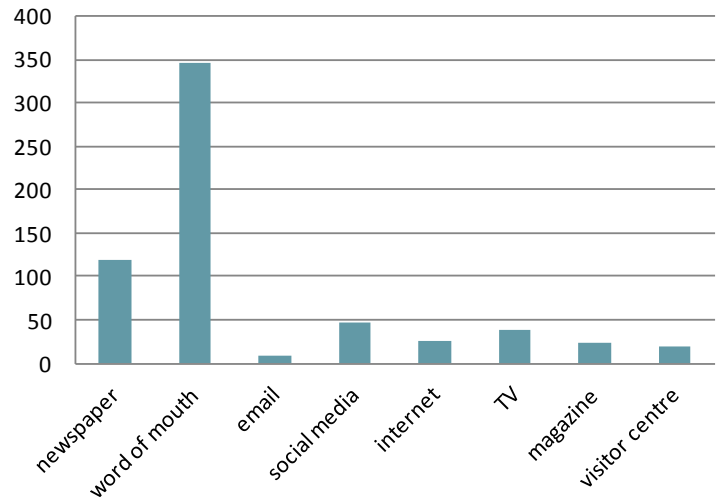
When asked if the Gallery met their expectations, an overwhelming 98.3% suggested it did, with 1.3% unsure and 0.5% suggesting it didn't. Many commented that the Gallery exceeded their expectations, as shown in the comments below.

'Don't think you can improve.'  
 'Fantastic as is.'  
 'Exceeded expectations.'  
 'Excellent as far as I can see.'  
 'Excellent as it is.'  
 'It is excellent in every respect.'

### 5.11 Marketing effectiveness

The high rating and reputation of the Gallery is reflected in the way in which visitors found out about the Gallery - through word of mouth (64% of respondents). At this stage visitors utilise traditional forms of media (newspaper, TV, word of mouth) rather than new media (social media and internet) to become aware of the Gallery.

Figure 13: Marketing effectiveness



As shown in Table 14 below, local visitors respond well to newspaper and 'word of mouth' promotion. Yet it is interesting to see that those residing over 800kms from the Gallery (mainly Sydney and the Southern Highlands) respond to newspaper (possibly Sydney Morning Herald) and 'word of mouth', as do visitors from Brisbane. In fact, 'word of mouth' promotion extends to Melbourne, Albury, Canberra, SA and VIC, among many others.

Table 14: Marketing effectiveness by annular region

Annular region	magazine	visitor centre	TV	internet	social media	email	word of mouth	newspaper
<50kms	1.4%	1.7%	0.8%	0.5%	2.2%	0.5%	16.0%	7.3%
50-200kms	1.4%	0.7%	3.4%	1.4%	3.4%	0.7%	22.6%	6.4%
200-400kms	0.3%		1.0%	0.7%	0.5%		3.9%	1.2%
400-600kms		0.2%		0.2%			0.7%	0.2%
600-800kms	0.2%	0.2%		0.2%			0.8%	0.7%
800+kms	0.7%	0.3%	1.2%	1.4%	1.4%	0.2%	12.5%	4.4%*
Overseas	0.2%				0.2%		1.4%	
	<b>4.1%</b>	<b>3.0%</b>	<b>6.4%</b>	<b>4.2%</b>	<b>7.6%</b>	<b>1.4%</b>	<b>57.9%</b>	<b>20.1%</b>







## 6] Direct visitor expenditure

Direct visitor expenditure is calculated on visitors to the Gallery who are bringing ‘new money’ to the region, including both overnight visitors and day trippers who have come to the area to visit the Gallery. It does not include visitors to the Gallery who reside in the local Tweed Shire region as that money was assumed to exist in the local economy.

The total audience to the Gallery for 2014/15 is estimated at **122,746 visits** based on daily visitor counts recorded at the Gallery. The survey data indicates the average expenditure of each visitor segment varies significantly, and therefore their expenditure is calculated separately, as shown in the tables below.

**Table 16: Average expenditure by segment**

	All visitors	Overnight visitors	Day trippers
Average expenditure per person during their stay in the Tweed Shire	\$132	\$345	\$40

**Table 17: Direct Visitor Expenditure**

<b>Visitor numbers</b>	122,746
Overnight %	23%
<b>Overnight visitor numbers</b>	28,232
<b>Average expenditure</b>	\$345
<b>Overnight visitor expenditure</b>	\$9,739,895
<b>Visitor numbers</b>	122,746
Day trip %	52%
<b>Day trip visitor numbers</b>	63,828
<b>Average expenditure</b>	\$40
<b>Day trip expenditure</b>	\$2,553,117
<b>All visitor expenditure</b>	<b>\$12,293,012</b>

This calculation assumes all visitor expenditure in the Tweed Shire occurred as a result of the visitor's decision to attend the Gallery. However, as the survey data has shown (Section 5.5), visitors come to the Gallery both as a sole activity, and as a mixed activity along with dining, shopping and visiting friends/relatives (VFR) etc. Accordingly, a range of economic assessments are provided to account for these variations in activity in the four scenarios shown below.



## 6.1 Direct visitor expenditure scenarios

**Scenario 1 Gallery only visitors:** Visitors indicated they would *only* go to the Gallery in that visit (30%). This scenario presumes that only the economic spending of visitors whose sole activity is to visit the Gallery are included in the assessment.

**Scenario 2 Gallery and VFR visitors:** Visitors indicated they would go to the Gallery and undertake VFR activity (42%). This scenario presumes that only the economic spending of visitors whose activities include VFR and visiting the Gallery are included in the assessment.

**Scenario 3 Gallery, VFR and dining:** Visitors indicated they would also undertake VFR and dining activities on this visit to the Tweed Shire (60%). This scenario presumes that economic spending by this segment has occurred in conjunction with, and as a result of their decision to visit the Gallery. ***This is the preferred scenario.*** Support for using this assumption comes from the TRA data, which demonstrates a direct increase in the arts/heritage visitor activity with social activity which includes VFR and dining since the opening of the MOAC in 2014 (see Figures 6 & 7). This suggests these are highly complementary activities that are driving economic activity in the area.

**Scenario 4 Gallery and all-activity visitors:** - Visitors indicated they will undertake three or more other activities (dining, shopping, national parks, other galleries) in the Tweed Shire. This scenario presumes that all economic spending in the Tweed Shire has occurred as a result of their decision to visit the Gallery.

Using these scenarios a range of economic values can be considered dependent on the assumptions as shown in the Table below.

**Table 18: Scenario Expenditure**

Scenario	Inclusions	% of visitors	Economic impact
<b>Scenario 4</b>	Gallery & all activities	100%	\$12,293,012
<b>Scenario 3</b>	Gallery VFR and dining	60%	\$7,375,807
<b>Scenario 2</b>	Gallery visitors & VFR	42%	\$5,163,065
<b>Scenario 1</b>	Gallery visitors only	30%	\$3,687,904

**Using scenario 3, the total economic impact to the Tweed Shire from Gallery visitor expenditure is estimated to be \$7.38 million per year.**

## Section Four

### Summary and Recommendations



## 7] Research Summary

The research has demonstrated the strong attraction of the Tweed Regional Gallery & MOAC to visitors from a range of markets and destinations. As a cultural tourist attraction, the Gallery attracts both day visitors and overnight visitors to the region, and provides them with a very highly regarded cultural experience. The high ratings given to the Gallery and its ability to meet the expectations of 98% of visitors is testimony to this fact.

The Gallery visitor profile, derived from previous Gallery related research, suggests that although the Gallery attracts all ages and life stages, more than half of the visitors are aged over 55, travelling in small groups of friends or partners, with lower than average income (40% less than \$40k). Most visitors (70%) have either an enthusiastic or passionate interest in art.

The visitor survey indicates the presence of three distinct market segments, those being day trippers, overnight visitors and local residents. Day trippers are the largest segment of visitors (52%), predominantly from Brisbane, the Gold Coast and other parts of the Northern Rivers. Day trippers undertake between one and two other activities during their visit - mostly dining in restaurants and shopping/exploring markets. Research from Tourism Research Australia (TRA) indicates a pronounced rise in day visitors to the Tweed Shire in 2014, which coincides with the rise in visitor numbers recorded at the Gallery since the opening of the MOAC. The increase in arts/heritage visitors is also well documented by TRA, but also coincides with a similar rise in social activities which are shown to primarily include VFR and dining.

Visitors who are staying overnight or longer are also a key segment, representing 23% of visitors. Overnight visitors have a higher propensity to undertake two to three other activities, such as dining and shopping, but also to visit national parks. The majority of overnight visitors stay an average of five nights with friends and family, or in resorts/hotels and spend around \$345 during their visit. More than half of the overnight visitors are repeat visitors.

The economic impact of the Gallery to the Tweed Shire economy is estimated to be \$7.37 million per year, drawn from the expenditure of day and overnight visitors (from outside the Tweed Shire) whose activities include visiting the Gallery, VFR and dining.

As a local attraction, residents of the Tweed Shire are also drawn to the Gallery for its exceptional art work, the variety and changing exhibitions, and as a place to bring visitors. Local residents represent around a quarter of all visitors and are important ambassadors for the

Gallery, promoting it to visitors and other locals. Locals return to the Gallery often - around four times a year.

In every segment there are some who are visiting the Gallery for the first time (average 31%). This is an important distinction, as first time visitors to any cultural attraction need information, interpretation and directions, which can be provided by guides, volunteers and visual materials (maps). In this respect the high standards of service and hospitality provided by volunteers and guides were recognised by visitors in the survey. First time visitors are also more likely to need regional tourist information to help keep them in the area longer for the benefit of local businesses. The development of better signage and information was raised by a small number of visitors (2%), but is a consideration for future tourism leverage strategies.

A substantial proportion of visitors (54%= 49,815) are currently including Murwillumbah in their visit, with indications that they would like to undertake extra activities, such as dining, visiting other galleries and exploring shops/markets. It was noted that these are particularly similar to current activities undertaken in the Tweed Shire, and therefore Murwillumbah has opportunities to extend visitors' current activities in this area to capture more of the Tweed Shire market share. The attraction to nature experiences is also noted as an interest to visit Murwillumbah (12%) - but also as a current activity of Gallery visitors (14%), reflecting the previous research to suggest a link to desirable restorative experiences in cultural tourism.

The research highlights the ongoing success of the development of the Gallery, and in particular the MOAC which has generated substantial visitation from cultural tourists. The research also reveals areas which can be developed to leverage visitation from new and existing visitors into Murwillumbah.



## 7.1 Visitor segment summary

Based on the results above and analysis of 122,746 visitors to the Gallery each year, the following summaries can be made of each visitor segment.

**Table 19: Visitor segment summary**

Domestic day visitors	
# of visitors	63,828 per year 52% of total visitation
Return visits	1.6 times per year
Spend per trip	\$40
Preferred activities	1. Dining, 2. Shops & markets, 3. National parks
Source region	1. Brisbane 12%, 2. Gold Coast 12%, 3. Northern Rivers 7%

Overnight visitors	
# of visitors	28,232 per year 23% of total visitation
Return visits	1.3 times per year
Spend per trip	\$345
Spend per night	\$60
Average nights	5.0
# nights per year	184,120
Preferred Activities	1. Dining, 2. Shops & markets, 3. National parks
Source region	1. Brisbane 6.5%, 2. Sydney 5%, 3. Sunshine Coast 2%

Local visitors	
# of visitors	30,686 per year 25% of total visitation
Return visit	4.7 per year

## 8] Recommendations

The following recommendations are based on the suggestions and ideas of visitors gathered in this study, and may merit further investigation toward the development of tourism leverage strategies.

### 1. Marketing segmentation

Based on the three visitor segments described herein, various marketing and leveraging strategies can be developed to *extend the stays of existing overnight visitors*, and influence the large day trip segment to stay overnight or longer. The research has shown that each geographic market responds to different promotions and marketing strategies and that these can now be developed further to attract specific segments and influence their decisions to stay longer in the Tweed Shire.

### 2. Experience development

Within the visitor segments it is also possible to *develop packages and promotions* that appeal to the interests of current visitors, again appealing to art, dining and shopping activities. Alternatively, packages relating to *restorative experiences* may appeal to the motivations of some visitors to the Tweed Shire. The combination of visiting national parks and nature experiences with art galleries as part of a restorative experience may be an area worth developing further in cooperation with other matching tourism businesses, such as rainforest or yoga retreats. Sculpture gardens or outside gardens to contemplate Gallery experiences may also assist with visitors' restorative experiences.

### 3. Return visitation

The potential for visitors to return to the Gallery (and therefore the Tweed Shire) every year is very high across both day and overnight visitors. This presents excellent opportunities for local business networks (such as Chamber of Commerce and Destination Tweed) to distribute information on other tourist services and attractions for future visits while visitors are at the Gallery. Similarly, they can develop Incentive promotions to visit other attractions on the next visit, or extend the stay to a weekend may work well in this regard. The development of small, but distinct, visitor information kiosk within the Gallery, or its carpark may also assist with providing enough information to visitors.





## 4. Leveraging local support

The high levels of visitation and support given by local residents is important to recognise, and to leverage. Locals visiting the Gallery have an opportunity to provide information, maps, recommendations, vouchers and brochures to visiting friends and relatives which they can use during their stay. Regular information provided in local newspapers, magazines and websites on the changing exhibitions is also important to maintain in order to filter through to visitors.

## 5. New visitors

Currently, 1 in 3 visitors are new to the Gallery and therefore need more information and guidance than repeat visitors, not just within the Gallery, but also in how they might be able to access local dining and shopping activities. Gallery volunteers may be able to determine this as visitors enter, and tailor the information they provide based on this question.

## 6. Building a social media network

Currently, visitors to the Gallery rely on word of mouth and traditional sources of media, such as newspapers, to find out about the Gallery. It is recommended that this be supported by the development of a social media strategy that can not only highlight the positive experiences of visitors, but can also provide links to other tourism-based businesses in the area, especially to dining and shop/market experiences. While most visitors are over 55, there is growing evidence that many of these visitors are starting to use social media and on-line travel planners such as trip advisor.

**Tweed Regional Gallery & Margaret Olley Art Centre**  
4.5 stars 153 Reviews | #1 of 11 things to do in Murwillumbah | Certificate of Excellence  
Art Galleries, Museums, Shopping

Overview | **Reviews (153)** | Q&A (1) | Location

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Address: 2 Mistral Road (Cnr Tweed Valley Way), Murwillumbah, New South Wales 2484, Australia  
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153 Reviews from our TripAdvisor Community

Write a Review | Add Photo

Rating	Count
Excellent	124
Very good	25
Average	3
Poor	1
Terrible	0

*"Unique, authentic, brilliant."*  
The replicated rooms from Olley's Sydney home are amazing. And the collections are certainly worth looking at too. Café has nice food, but service can be extremely slow. The view... read more  
Reviewed 26 April 2015  
NathanP\_11, Melbourne, Australia

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# Appendix 1: Questionnaire

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Date: \_\_\_\_\_

Do you live locally (Tweed shire) ?  NO  YES go to \_\_\_\_\_ here...

What is your residential postcode? .....

**How long will you stay in Tweed Shire?**  
 day trip or longer stay for \_\_\_\_\_ nights

**Are you staying in**  resort/hotel  caravan/camp  
 house/apt  friends/family

**In which area?**  Murwillumbah  Kingscliff  
 Tweed Heads  Other Tweed  
 Coolangatta  Gold Coast  
 Other .....

**Will you go to the town of Murwillumbah during your visit?**  yes  no  unsure

**What else would you like to do in Murwillumbah?**  
 visit other galleries /museums  visit historical sites  
 participate in art workshops  dine and/or wine  
 explore shops/markets  see live music  
 visit artists studios  take a 'fun' bus tour  
 have a nature experience  river cruise

**What other activities will you undertake in the Tweed?**  
 nothing - just the gallery  
 visit other galleries/museum  visit friends/family  
 explore shops/markets  dining at restaurants  
 national parks (Mt Warning)  other .....

**How much will you spend in Tweed shire in this visit ?**  
 Accommodation \$..... Entertainment \$.....  
 Food/beverages \$..... Transport/petrol \$.....  
 Retail \$..... Other.....\$.....

**How many people does this pay for?** # \_\_\_\_\_

**On a scale of 1 to 5, please rate your visit to the Tweed:**

	poor		excellent		
	1	2	3	4	5
Dining options	1	2	3	4	5
Arts/Entertainment	1	2	3	4	5
Visitor information	1	2	3	4	5
Gallery	1	2	3	4	5

*Please continue to the next column*

**How did you hear about the gallery ?**  
*(more than one choice OK)*  
 newspaper  word of mouth  email  
 social media  internet  TV  magazine  
 visitor centre  other.....

**Did the gallery meet your expectations?**  
 yes  no  unsure

**How often do you come here? # \_\_\_\_\_ / year**

**How would you rate your interest in art?**  
 casual  enthusiast  passionate

**What did you enjoy most at the Gallery?**

**How could we improve your Gallery experience?**

Yes! I would like e-news from the Gallery.  
 Name: \_\_\_\_\_  
 Email: \_\_\_\_\_

## Appendix 2 - Best Aspects

<i>Best aspect</i>	<i># responses</i>	<i>Best aspect</i>	<i># responses</i>
Everything	19	Rod McNicol	1
Variety of exhibitions	12	War exhibition	1
All of it	10	Cafe	1
ALL	10	World class	1
Cream	9	Cafe, staff, exhibitions	1
Barb Suttie	7	Memento Mori	1
Rockhampton collection	7	Changing displays	1
Moya Dyring	6	Nice staff	1
View	4	Changing exhibitions	1
Photography	2	Overall presentation	1
All excellent	2	Changing exhibitions, always something new	1
Landscape	2	Paintings	1
Exhibitions	2	Changing exhibitions and equality and the environments	1
Layout	2	Photographic exhibition	1
Set-up	1	Changing exhibitions and the setting	1
Olley display was excellent	1	Picture in yellow frame	1
View and art	1	Changing exhibits	1
Architecture	1	Portraiture	1
Portraits	1	Coffee	1
Architecture and exhibits	1	Quality of building, surrounds, thrills, setting, atmosphere	1
Staff and all	1	Collections, cafe, tour	1
Art, beautiful position of building	1	Regular display	1
MOAC	1	Commitment for regional gallery	1
Art, food, volunteers, variety of exhibitions	1	Seeing Australian art	1
Photo exhibit	1	Comparison art in the hallway	1
Art gallery itself, location	1	Setting	1
Quality of works, staff	1	All very good	1
Art works	1	Setting: good guide	1
Shows	1	Cream, Moyà exhibition	1
Atmosphere	1	Space art	1
The collection	1	Cream exhibition	1
Australian art of last 50 years	1	Space setting	1
Whole thing	1	Design setting	1
Australian artists	1	Taking time to enjoy	1
New exhibition	1	Design, space, setting windows	1
Australian artists' work	1	The building, view, art, food	1
Painting and drawing	1	Different exhibitions	1
Australian paintings	1	The house	1
Ambience art	1	Diversity	1



<i>Best aspect</i>	<i># responses</i>	<i>Best aspect</i>	<i># responses</i>
All included	1	The rooms are so very special.	1
Professional displays/open spaces/staff	1	Diversity of exhibits, view from gallery	1
Beautiful art, building and scenery	1	Viking	1
Anthony Gallery portraits	1	Drysdale, Olley, Lloyd Rees	1
Blend of 'views' and exhibits	1	Whole experience	1
Setting, involvement of the community	1	Ease of viewing	1
Rod McNichol photos	1	Wholeness of it	1
Space view from windows	1	Eavesdropping on tour guides	1
Bring child here	1	New exhibitions	1
The architecture of the gallery and presentation of the exhibits	1	Everything, beauty, calm, joy	1
Browsing good views	1	Objects of War - excellent	1
The range of quality and artists	1	Everything - friendly, warm	1
Yellow room	1	Outside pieces	1
Every aspect - architecture, cafe	1	Everything, layout, intimacy	1
Momento Mori, Caldera, Barb Suttie	1	Paintings, artists	1
Every exhibition	1	Everything - so well done	1
Ambience	1	Paintings and information	1
All!	1	Excellent scones	1
Interactive screens	1	Paintings, stunning artwork	1
Setting of gallery, variety re. exhibitions	1	Exhibition of etchings	1
Interactive tablet	1	Photo portraits	1
Show from Rocky	1	All - buildings, exhibitions, view	1
Interactive technology	1	Photographic portraits	1
Space	1	Extent of the art	1
Interactivity, wide range of Australian artists	1	Photography exhibition	1
Space exhibitions	1	Fantastic	1
Ipad	1	Pleasant, relaxed yet invigorating atmosphere	1
Space, connection with the environment/locality	1	General presentation	1
Ipads/books for kids as I have 2 young children	1	Portraits	1
Spec exhib./food	1	Great	1
It is all excellent	1	Presentation	1
Stuff for kids	1	Changing exhibitions	1
Always like gift shop	1	Quality of artists	1
Temporary exhibitions	1	Guided tour, all of it	1
The view	1	Quality of exhibits, great staff	1
The art	1	Guided tour of MO home, guide extremely knowledgeable, very well wrth the visit thanks	1
The whole thing	1	Quality, different exhibitions	1
The changing exhibits	1	Her rooms are fabulous, what a wonderful homage to a wonderful woman	1
Tour and information about the paintings	1	Renewal of exhibitions	1
The excellent way in which the exhibition	1	HSC exhibition	1

is presented			
<i>Best aspect</i>	<i>#</i>	<i>Best aspect</i>	<i># responses</i>
	<i>responses</i>		
Travelling exhibition Cream	1	Rod McNichol's photos and the exhibit from Rockhampton gallery	1
The library, also Moya Dyring	1	I am fascinated by others' talents	1
Variety, location	1	Serenity of the area	1
The re-creation of the rooms and the art	1	I like to experience art styles	1
All beautiful	1	Set up of the house	1
Anzac display	1	I love the windows framing the Tweed Valley, changing exhibitions	1
Ambience, everything, art works	1	Setting, collections	1
Total quality and enthusiasm	1	Travels with my art	1
Layout, art, style of gallery	1	Layout and pleasant staff. Reconstruction of M.O. house	1
Tour guide - Trish !!	1	Variety, photography	1
Layout and exhibits	1	Variety and range of artists on display	1
Video, her work	1	Very emotive and exciting	1
Local and beyond artists featured	1	Layout unexpectedly good	1
View, environment	1		
Local artists, curating style	1		
Viewing rooms and painting	1		
Location, beautiful view	1		
War	1		
Location, diversity	1		
War gallery	1		
Location and use of windows onto the valley	1		
Whole gallery	1		
Lovely staff, view	1		
Whole visit, resident art space	1		
M.O and Nolans	1		
Wonderful and interesting	1		
MOAC, changing exhibits	1		
WW1 exhibition	1		
MOAC recreated house	1		
A woman being highlighted - usually it's men	1		
MOAC touring shows, cafe views	1		

