documenta 14
First results of a representative survey
18. September 2017
Prof. Dr. Gerd-Michael Hellstern
Prof. Dr. Joanna Ożga
Systematic survey of individual visitors

- Analysis (among others) of:
  - Profiles (origin, coverage, socio-demographic characteristics)
  - Attitude towards art and culture, motives
  - Behaviour: perception and information, duration, bonding,

- Basis:
  - Survey of visitors, N =8725 (valid interviews)
  - Pre-Test-Analysis, N= 280 (valid interviews)
  - Survey method – standardized questions with personal contact
Attractiveness of documenta

Reason for visiting Kassel: documenta 14

- 94% Mainly because of documenta 14
- 6% Mainly because of other reasons

Source: visitor dialogue d14, N = 8725
Global attractiveness increases

- Visitors from Germany: 55.5%
- Foreigners: 34.7%
- City and region of Kassel: 9.8%

Source: visitor dialogue d14, N = 8725
Origin of foreign visitors

Europe 84.47%

Of these from Europe:
- Countries in Europe
  - Strongly under average
  - Under average
  - Average
  - Above average
  - Strongly above average

North America 3.92%

Latin America 1.22%

Africa 0.17%

Asia 8.71%

Australia, New Zealand 1.21%

Near/Middle East 0.30%

Source: visitor dialogue d14, N = 8725

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Top countries of origin

Percentage of international visitors

1. Netherlands 12.20%
2. China and Hong Kong 9.09%
3. USA 8.43%
4. South Korea 5.75%
5. United Kingdom 5.75%
6. France 5.61%
7. Belgium 5.51%
8. Switzerland 5.26%
9. Italy 4.29%
10. Japan 3.62%

Source: visitor dialogue d14, N = 8725
Visitors from Germany

Source: visitor dialogue d14, N = 8725

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Share of Federal States
Federal Republik of Germany 2010

Legend:
- Red: Strongly above average
- Orange: Above average
- Yellow: Average
- Green: Under average
- Light blue: Strongly under average
## Penetration index

<table>
<thead>
<tr>
<th>Origin of German visitors by Federal States</th>
<th>Per cent</th>
<th>Penetration index</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hesse</td>
<td>27,3</td>
<td>364,0</td>
</tr>
<tr>
<td>Northrhine-Westphalia</td>
<td>16,5</td>
<td>76,0</td>
</tr>
<tr>
<td>Lower Saxony</td>
<td>10,8</td>
<td>112,5</td>
</tr>
<tr>
<td>Bavaria</td>
<td>9,60</td>
<td>61,5</td>
</tr>
<tr>
<td>Berlin</td>
<td>9,30</td>
<td>217,0</td>
</tr>
<tr>
<td>Baden-Wurttemberg</td>
<td>8,50</td>
<td>64,0</td>
</tr>
<tr>
<td>Hamburg</td>
<td>4,90</td>
<td>226,0</td>
</tr>
<tr>
<td>Rhineland Palatinate</td>
<td>2,90</td>
<td>59,0</td>
</tr>
<tr>
<td>Schleswig-Holstein</td>
<td>2,80</td>
<td>80,7</td>
</tr>
<tr>
<td>Saxony</td>
<td>2,30</td>
<td>46,4</td>
</tr>
<tr>
<td>Bremen</td>
<td>1,40</td>
<td>175,0</td>
</tr>
<tr>
<td>Thuringia</td>
<td>1,30</td>
<td>50,0</td>
</tr>
<tr>
<td>Brandenburg</td>
<td>0,80</td>
<td>26,0</td>
</tr>
<tr>
<td>Saxony-Anhalt</td>
<td>0,70</td>
<td>25,9</td>
</tr>
<tr>
<td>Mecklenburg-Western Pomerania</td>
<td>0,50</td>
<td>25,5</td>
</tr>
<tr>
<td>Saarland</td>
<td>0,40</td>
<td>33,0</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>100,0</td>
<td></td>
</tr>
</tbody>
</table>

**Question No. 25:** Where do you have your main residence? Either post code or for visitors from abroad: country and city.

**Source:** visitor dialogue d14, N = 8725
### Top areas of origin in Germany

**Cities of origin of German visitors:**

1. Kassel  \(13.3\%\)
2. Berlin  \(11.0\%\)
3. Hamburg  \(5.7\%\)
4. Region of Kassel  \(4.9\%\)
5. Munich  \(4.0\%\)
6. Cologne  \(3.2\%\)
7. Frankfurt am Main  \(3.1\%\)
8. Hannover  \(2.1\%\)
9. Bremen  \(1.6\%\)
10. Stuttgart  \(1.4\%\)
Age groups: young people

- Population of Germany, 2015, age groups 15 and older
- Visitors of documenta 14

Approximate representative distribution of visitors

15 – 20 years:
- Population: 5.90%
- Visitors: 6.7%

20 – 40 years:
- Population: 28.57%
- Visitors: 37.8%

40 – 60 years:
- Population: 34.75%
- Visitors: 32.9%

60 – 80 years:
- Population: 25.19%
- Visitors: 21.6%

80 – 90 years:
- Population: 5.60%
- Visitors: 0.9%

Source: visitor dialogue d14, N = 8725
Educational degree: well educated

- University degree: 69.9%
- College: 17.5%
- Intermediate high school/technical college: 6.2%
- Elementary school: 5.4%
- Others: 1.0%

But: Increasingly from all educational levels

Source: visitor dialogue d14, N = 8725
### Occupational groups

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academic professions</td>
<td>23.1%</td>
</tr>
<tr>
<td>Students</td>
<td>16.2%</td>
</tr>
<tr>
<td>Other employees and civil servants</td>
<td>13.1%</td>
</tr>
<tr>
<td>Artists</td>
<td>11.0%</td>
</tr>
<tr>
<td>Retired, pensioners</td>
<td>9.5%</td>
</tr>
<tr>
<td>Executive positions</td>
<td>9.0%</td>
</tr>
<tr>
<td>Self-employed, business owners</td>
<td>6.5%</td>
</tr>
<tr>
<td>Pupils, apprentices, trainees, National Service</td>
<td>4.5%</td>
</tr>
<tr>
<td>Journalists</td>
<td>2.0%</td>
</tr>
<tr>
<td>Skilled workers / workers</td>
<td>1.5%</td>
</tr>
<tr>
<td>Housewives/ househusbands</td>
<td>1.0%</td>
</tr>
<tr>
<td>Other</td>
<td>2.6%</td>
</tr>
</tbody>
</table>

Skilled labour and executive staff overrepresented

Source: visitor dialogue d14, N = 8725
Motivation for a documenta visit

Percentage of answers of all visitors

| Event            | Cultural Event Entertainment | 72.56%  
|------------------|-----------------------------|---------|
|                  |                             | 33.93%  

**Cognitive**

| Overview of contemporary art | 57.68%  
| Professional interest       | 19.16%  
| School, study interest      | 16.68%  

Question 3: Which are the two most important reasons for your visit today?

Source: visitor dialogue d14, N = 8725

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Prof. Dr. Joanna Ożga
Regular visitors

First-time visitors 22,9%

Regular visitors 77,1%

Source: visitor dialogue d14, N = 8725
Share of previous documenta visits among regular visitors

Source: visitor dialogue d14, N = 8725

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Prof. Dr. Joanna Ożga
# Satisfaction

## Evaluation of documenta 14

<table>
<thead>
<tr>
<th></th>
<th>Average</th>
<th>Variance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total satisfaction</td>
<td>2.16</td>
<td>0.914</td>
</tr>
<tr>
<td>Selection of artists</td>
<td>2.46</td>
<td>0.910</td>
</tr>
<tr>
<td>International composition</td>
<td>2.16</td>
<td>0.935</td>
</tr>
<tr>
<td>Presentation</td>
<td>2.33</td>
<td>1.012</td>
</tr>
<tr>
<td>Atmosphere</td>
<td>2.04</td>
<td>0.932</td>
</tr>
<tr>
<td>Mediation of education and knowledge</td>
<td>2.85</td>
<td>1.128</td>
</tr>
</tbody>
</table>

**Question 14**: How do you like documenta 14?

1 = very good, 2 = good, 3 = neither / nor, 4 = sufficient, 5 = very bad

Source: visitor dialogue d14, N = 8725
Satisfaction by origin

International visitors more satisfied

Mean value for satisfaction

Question 14: How do you like documenta 14?
1 = very good, 2 = good, 3 = neither/nor, 4 = satisfactory, 5 = very bad

Source: visitor dialogue d14, N = 8725
Use and evaluation of range of information

Source: visitor dialogue d14, N = 8725

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Prof. Dr. Joanna Ożga
Use and evaluation of events

Source: visitor dialogue d14, N = 8725

Prof. Dr. Gerd-Michael Hellstern
Prof. Dr. Joanna Ożga
Share of visitors of the Athenian exhibition among the visitors in Kassel and their evaluation of the exhibition in Athens

Did you visit documenta 14 in Athens?

- yes: 7%
- no: 93%

If yes, how do you like documenta 14 in Athens?

- very good: 46.00%
- good: 29%
- neither/nor: 15.80%
- sufficient: 5.20%
- very bad: 3.90%

Source: visitor dialogue d14, N = 8725
Evaluation of Athens as a second location of documenta 14 according to visitors’ origins

<table>
<thead>
<tr>
<th></th>
<th>City of Kassel</th>
<th>Region of Kassel</th>
<th>Rest of Germany</th>
<th>Europe</th>
<th>Non-European countries</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>28,0%</td>
<td>21,1%</td>
<td>44,6%</td>
<td>49,5%</td>
<td>50,3%</td>
</tr>
<tr>
<td>Good</td>
<td>25,8%</td>
<td>23,3%</td>
<td>26,3%</td>
<td>22,5%</td>
<td>23,0%</td>
</tr>
<tr>
<td>Neither/nor</td>
<td>19,6%</td>
<td>20,6%</td>
<td>15,4%</td>
<td>14,3%</td>
<td>16,5%</td>
</tr>
<tr>
<td>Sufficient</td>
<td>11,9%</td>
<td>17,2%</td>
<td>7,5%</td>
<td>8,0%</td>
<td>6,8%</td>
</tr>
<tr>
<td>Very bad</td>
<td>14,7%</td>
<td>17,8%</td>
<td>6,3%</td>
<td>5,7%</td>
<td>3,4%</td>
</tr>
</tbody>
</table>

Source: visitor dialogue d14, N = 8725

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Prof. Dr. Joanna Ożga
Length of stay at documenta 14
(all visitors)

- 1 day: 28.0%
- 2 days: 34.3%
- 3 days: 20.2%
- max. 1 week: 11.9%
- more than 1 week: 5.6%

Length of stay
(foreign visitors)

- 1 day: 19.6%
- 2 days: 25.5%
- 3 days: 26.0%
- max. 1 week: 23.0%
- more than 1 week: 5.8%

Source: visitor dialogue d14, N = 8725
Place of accommodation

Where did you stay?

- in Kassel: 81%
- outside of Kassel: 19%

Source: visitor dialogue d14, N = 8725
Visitors of the outdoor art works

Why did you come here?

- documenta 14 visit: 53%
- documenta flair / curiosity: 31%
- Coincidence/ other: 16%

Motivation for visit to outdoor art works

Resting time of non-visitors at outdoor artworks between 5 and 15 minutes (mean value)

Source: visitor dialogue d14, N = 280

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Prof. Dr. Joanna Ożga
documenta 14 strollers

Do you like it here?

- 85% like it
- 13% do not know yet
- 2% do not like it

Visitors of the outdoor art works

Source: Pre-Test-Survey d14, N = 280
Visitors of outdoor art works

Are you going to eat, drink or shop in Kassel?

- yes: 75%
- no: 16%
- maybe: 9%

Source: Pre-Test-Survey d14, N = 280

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Effect relationship

Innovative impulses (growth, structural change, creative scene...)

Innovation, image, „soft“ location factors

Taxes, outgoings, ...

Donations, sponsoring

Public funds

Income

Input for other productions

Economy State Society

documenta

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Effect relationship

Direct effects*

Staffing expenditures

Material expenses

Visitor spending

Indirect effects

Primary effects/
First-round-effects

* Not taking staffing and material expenses into account and only comprising primary effects.
Indirect effects

Daily spending*
- d14 visitors
- Non-d14 visitors

+ Accommodation expenses (in Kassel and surroundings)

Total spending of visitors and non-visitors at documenta 14

* In this calculation ticket purchases are not included.
Assumptions

• Average **daily spending** on day trips (Federal Association of the German Tourism Industry (BTW), 2017): 32,00 €

• Average tourism spending (BTW), 2017:
  – 89€ Accommodation
  – 31€ Transport
  – 37€ Catering
  – 19€ Other expenses

• Average tourism spending (Own study by Cats Mannheim, 2011):
  – 93€ Accommodation
  – 48€ Transport
  – 34€ Catering
  – 123€ Shopping
  – 86€ Other expenses

• Accommodation costs according to Booking.com and trivago.de for Kassel during documenta 14:
  – 80€ Hotel
  – 40€ Private room, Pension
  – 30€ Youth Hostel
  – 22€ Camping

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Prof. Dr. Joanna Ożga
## Estimation of tourism effects

<table>
<thead>
<tr>
<th>Type of accommodation</th>
<th>Visitors with overnight stays in Stadt and region of Kassel</th>
<th>Ø length of stay</th>
</tr>
</thead>
<tbody>
<tr>
<td>Friends and relatives</td>
<td>15,2%</td>
<td>4,27</td>
</tr>
<tr>
<td>Pension/ Private room</td>
<td>27,5%</td>
<td>3,91</td>
</tr>
<tr>
<td>Hotels</td>
<td>46,7%</td>
<td>3,69</td>
</tr>
<tr>
<td>Youth hostel</td>
<td>4,8%</td>
<td>3,49</td>
</tr>
<tr>
<td>Mobile home/ Camping/ etc.</td>
<td>4,0%</td>
<td>3,84</td>
</tr>
<tr>
<td>Other</td>
<td>1,8%</td>
<td>3,64</td>
</tr>
<tr>
<td><strong>Total</strong>*</td>
<td><strong>265.950</strong></td>
<td><strong>3,93 days with overnight stays in Kassel</strong></td>
</tr>
</tbody>
</table>

* Assumed number of visitors: 900,000 visits. 59,1% Visitors from abroad and from Germany but not from the region of Kassel (thus 531,900 visits) stayed overnight in Kassel or in the region of Kassel. As we can expect that multiple visits took place, a total of **265.950 visitors** can be assumed. 11% of them stayed in the region of Kassel.
Estimation of spending for accommodation

<table>
<thead>
<tr>
<th>Type of accommodation*</th>
<th>Number of overnight stays</th>
<th>Costs in Euro</th>
<th>Accommodation spending in Euro</th>
</tr>
</thead>
<tbody>
<tr>
<td>Friends and relatives</td>
<td>40.424</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Pension/ Private room</td>
<td>73.136</td>
<td>40</td>
<td>2.925.440</td>
</tr>
<tr>
<td>Hotel</td>
<td>124.199</td>
<td>80</td>
<td>9.935.920</td>
</tr>
<tr>
<td>Youth hostel</td>
<td>12.766</td>
<td>30</td>
<td>382.980</td>
</tr>
<tr>
<td>Mobile home/ Camping/etc.</td>
<td>10.638</td>
<td>22</td>
<td>234.036</td>
</tr>
<tr>
<td>Other</td>
<td>4.787</td>
<td>30</td>
<td>143.610</td>
</tr>
<tr>
<td><strong>Total:</strong></td>
<td></td>
<td></td>
<td><strong>13.621.986</strong></td>
</tr>
</tbody>
</table>

*Average price per person and night including breakfast. For the accommodation category „Other“ an average price of all types of accommodation of 30€ was calculated.
Preliminary (conservative) estimation of daily spending

<table>
<thead>
<tr>
<th></th>
<th>Number</th>
<th>Daily rate</th>
<th>Daily spending</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visitors*</td>
<td>900.000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>One-day visitors</td>
<td>634.050</td>
<td>32€</td>
<td>20.289.600 €</td>
</tr>
<tr>
<td>Multiple-day visitors</td>
<td>265.950</td>
<td>87€</td>
<td>23.137.650 €</td>
</tr>
<tr>
<td>Non-visitors**</td>
<td>2.500.000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sundays</td>
<td>500.000</td>
<td>10€</td>
<td>5.000.000 €</td>
</tr>
<tr>
<td>Weekdays</td>
<td>2.000.000</td>
<td>32€</td>
<td>64.000.000 €</td>
</tr>
</tbody>
</table>

* Calculation of the average daily spending according to BTW 2017 and accommodation costs according to Booking.com and trivago.de for Kassel during documenta 14

** Assumption for the number of non-visitors: conservative estimation on the basis of the pre-test – 47% non-visitors with an average length of stay of 5 to 15 minutes.
Preliminary estimation of expenditure of d14 guests

<table>
<thead>
<tr>
<th>Type of expenditure</th>
<th>Total in Euro</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accommodation of visitors</td>
<td>13,621,986</td>
</tr>
<tr>
<td>Daily spending of visitors</td>
<td>43,427,250</td>
</tr>
<tr>
<td>Daily spending of non-visitors</td>
<td>69,000,000</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>126,049,236</strong></td>
</tr>
</tbody>
</table>