SHARE Museums East
a network of know how

christina lister comms

Cohort report

Survey findings on digital audiences, part of the IDEA programme

2021-22

A report by Christina Lister, 11 February 2022

Contents

1. Introduction

This is a report about the findings from the IDEA programme (Insight from Digitally Engaged Audiences) run by SHARE Museums East in 2021-22. The aim of the programme was to help museums:

- understand who their digital audiences are
- understand what their digital audiences value and want
- identify any differences between their digital and in-person audiences
- and therefore feed into plans for future digital engagement and marketing.

Participating museums

Eight museums in the East of England took part based in Cambridgeshire, Essex, Hertfordshire and Suffolk:

- 5 independent museums
- 2 local authority museums and 1 multisite local authority service.

The research

An online survey was created on www.smartsurvey.co.uk for digital audiences to self-complete. Each museum had the same core 16 questions, with the option of adding additional questions tailored to their museum. Two museums added two additional questions, one set about awareness of the museum's events programme and where audiences found out about them; and one set about awareness and use of the museum's online collections database.

The questions related to digital audiences':

- Demographics
- Behaviours and preferences
- In-person engagement.

Please see the Appendix for the full list of survey questions.

Responses were anonymous and there was no prize draw, with the exception of one museum that chose to run a prize draw for respondents that entered their email address via a Microsoft Office Form at the end of the survey. Of the 28 respondents to that survey, 17 entered the prize draw.

A total of 394 surveys were completed by digital audiences aged 16 and over. Six respondents answered that they were under 16 years old, so the survey routed them to a close page.

The surveys were open between 18 October 2021 and 21 January 2022. The majority of museums promoted the survey across this time period through:

- Twitter
- Facebook
- Their e-newsletters
- Their websites
- And in some cases, Instagram.

Report and data

The report below sets out the quantitative findings of the survey for the cohort group as a whole, as well as including additional benchmarking and contextual data where relevant and available:

- The Audience Agency's Digital Audience Survey findings for Museums & Heritage, December 2020
- Where a breakdown for museums was not available, the Audience Agency's Digital Audience Survey findings from June 2021 are included (also cover performing arts)
- The Audience Agency's Museums Audience report on in-person visitors, 2018
- Census data for England or England & Wales, 2011.

Results for digital audiences below are percentages of those that answered the question, rather than of all those that were asked. The base figure is given below each graph to indicate the number of respondents for each question.

Limitations

The survey was self-selective so may not be representative of the museums' digital audiences as a whole. For example, respondents that have a strong connection to the museum, or on the other hand feel aggrieved and want to voice their concerns may be over-represented. However, for 30% of respondents it was their first time engaging with or visiting the participating museum's digital channel or platform, so the survey did not just interest long-time supporters.

Since there is likely to be a great deal of overlap between each museum's digital audiences from different channels (e.g. many Facebook followers will also visit the website and receive the e-newsletter), it's not possible to work out the population size of the cohort's total digital audiences. Therefore the margin of error cannot be worked out accurately.

Two of the participating museums' data dominates the results, accounting for 49% and 27% of responses respectively, whilst the other six museums make up the remaining 24%. Three museums received less than 10 responses to their survey (between 1-2% of the total cohort's responses each).

The breakdown of responses to the survey was:

Museum	No. of responses
1	196
2	109
3	34
4	28
5	14
6	8
7	6
8	5

Reasons for this, challenges with the research project and alternatives to online surveys of digital audiences for smaller museums are made in the report's conclusion.

2. Findings at a glance

Digital audiences and in-person attendance

- 41% of digital audiences have visited the museum in the last 12 months (in line with 43% for the museums and heritage sector's digital audiences as a whole from the Audience Agency) whilst 24% have never visited
- 65% are likely to visit the museum in the next 12 months.

Digital visits: behaviours and preferences

- The top two motivations for watching or reading digital content on the museums' digital channels are: to learn something (74%) and to discover something new/out of the ordinary (52%)
- The cohort's digital audiences' motivations were fairly comparable with data from the sector as a whole, with the biggest difference being a smaller proportion citing "to be inspired" as a motivation (31%) compared to 52% in the Audience Agency's survey. A larger proportion of the cohort's responses cited educating/stimulating children and entertaining children as a motivation, than in the sector's research
- The most common activities digital audiences have done through the museums' digital platforms are practical information finding: 44% said planning an upcoming visit, 38% getting information on digital events/content, 32% getting information on in-person events; whilst around 1 in 5 wanted to browse digital collections and 1 in 5 wanted to view a video, live steam, talk or workshop
- For 30% of survey respondents, it was their first time visiting the museums' digital platforms, whilst 25% visit at least once a week
- 76% of digital audiences expect to engage more or the same amount with the museum's digital content in the next 12 months.

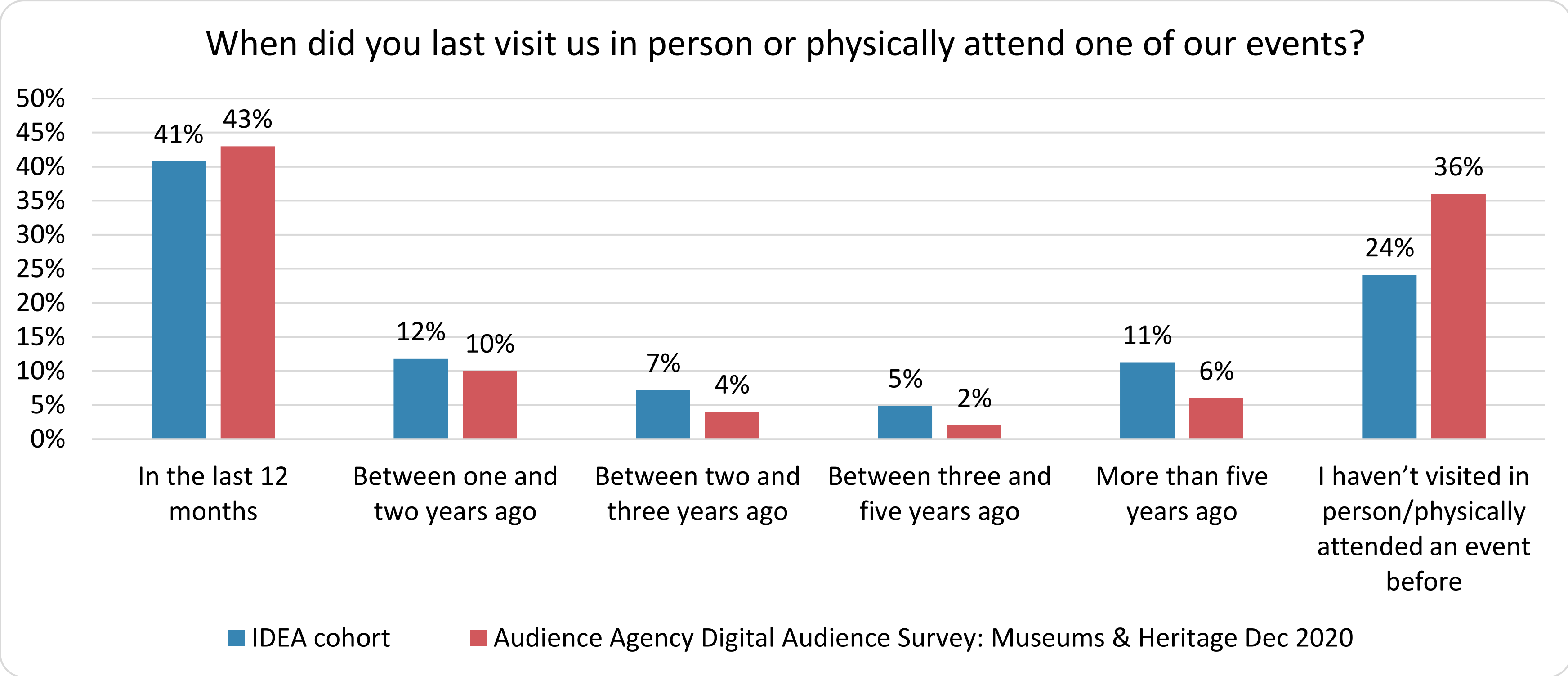
Profile of digital audiences

- The age breakdowns of the cohort's digital audiences are relatively similar to the sector's digital audiences as a whole, but with a slightly higher proportion of 25-34 year olds
- However 16-34 year olds are under-represented as digital audiences compared to in-person museum audiences (Audience Agency report, 2018) and census data on the population of England and Wales
- 26% of digital audiences are aged 65 and older
- 94% of digital audiences live in the UK
- 16% of the cohort's digital audiences identify as a D/deaf or disabled person, or have a long-term health condition. This is almost in line with the population of England and Wales (18%) and the sector's digital audiences (18%), and higher than the sector's in-person museum audiences as a whole (10%)

- 91% of digital audiences are White, an over-representation compared to the population of England and Wales (86% White)
- 67% digital audiences identify as female (an over-representation compared to the broader population, but the same as the museum sector's digital audiences as a whole, also 67%).

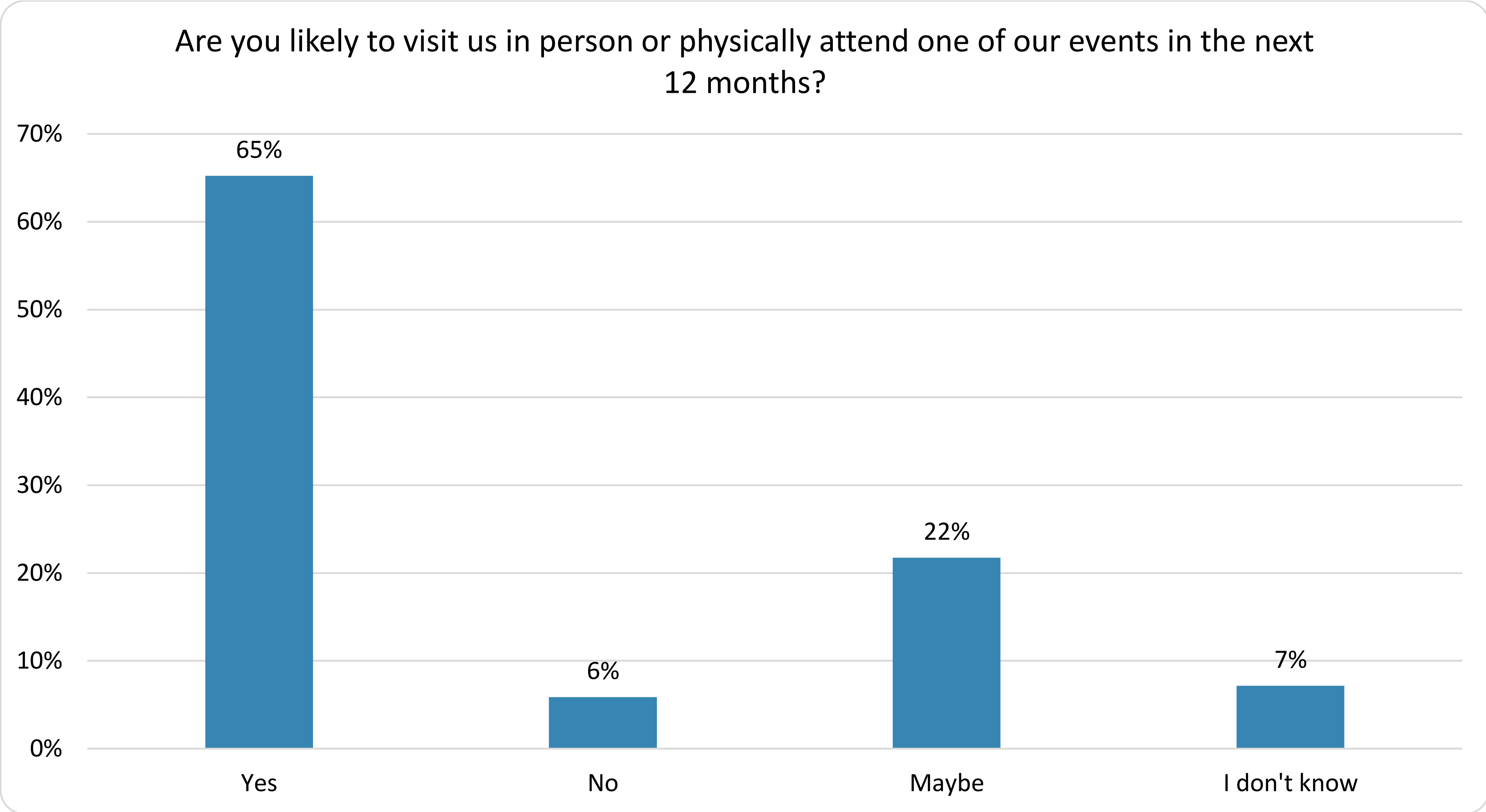
3. Digital audiences and in-person attendance

Last in-person visit



Cohort base: 390

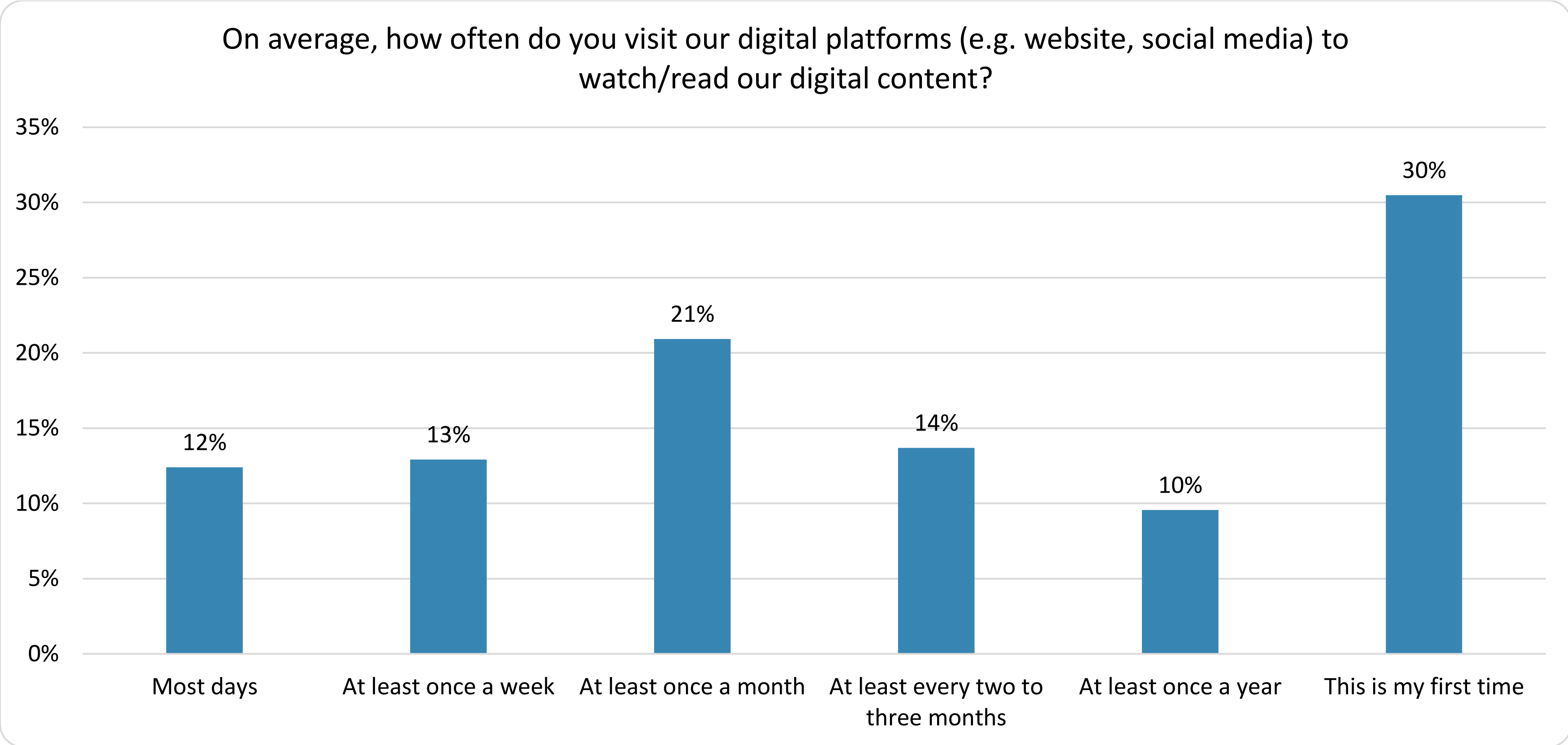
Likely in-person visits in next 12 months



Cohort base: 391

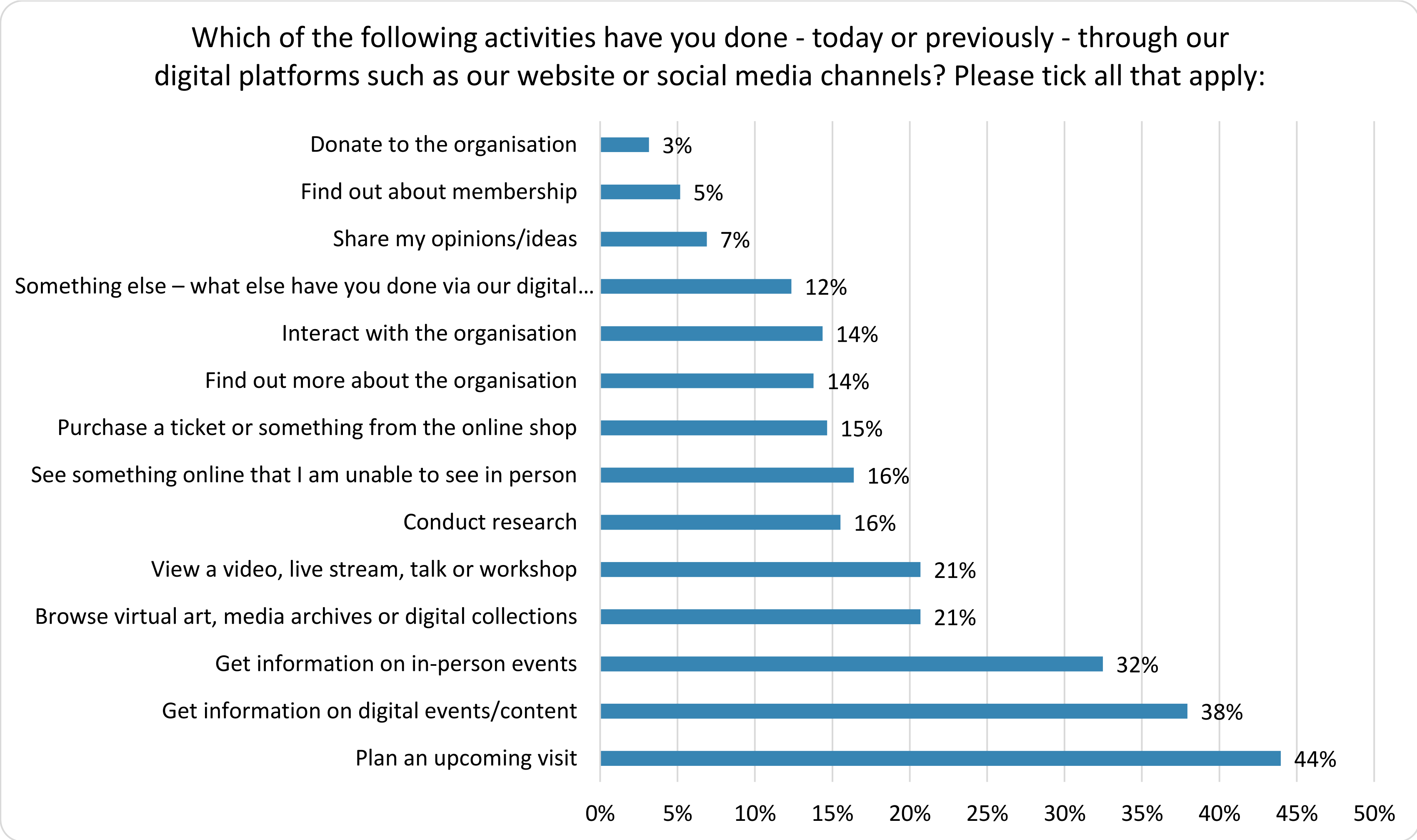
4. Digital visits: behaviours and preferences

Frequency of digital visits / engagement



Cohort base: 387

Digital activities done



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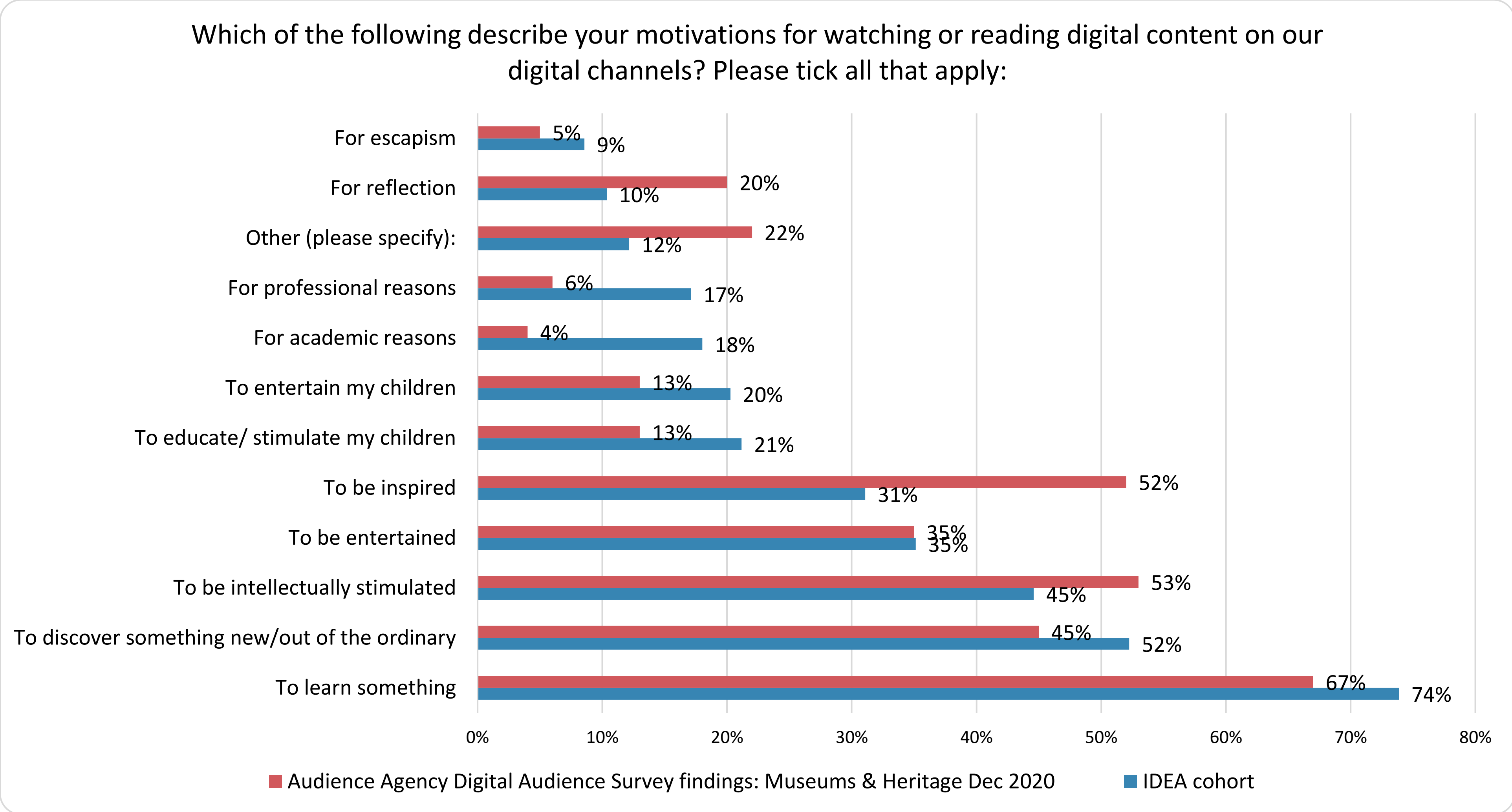
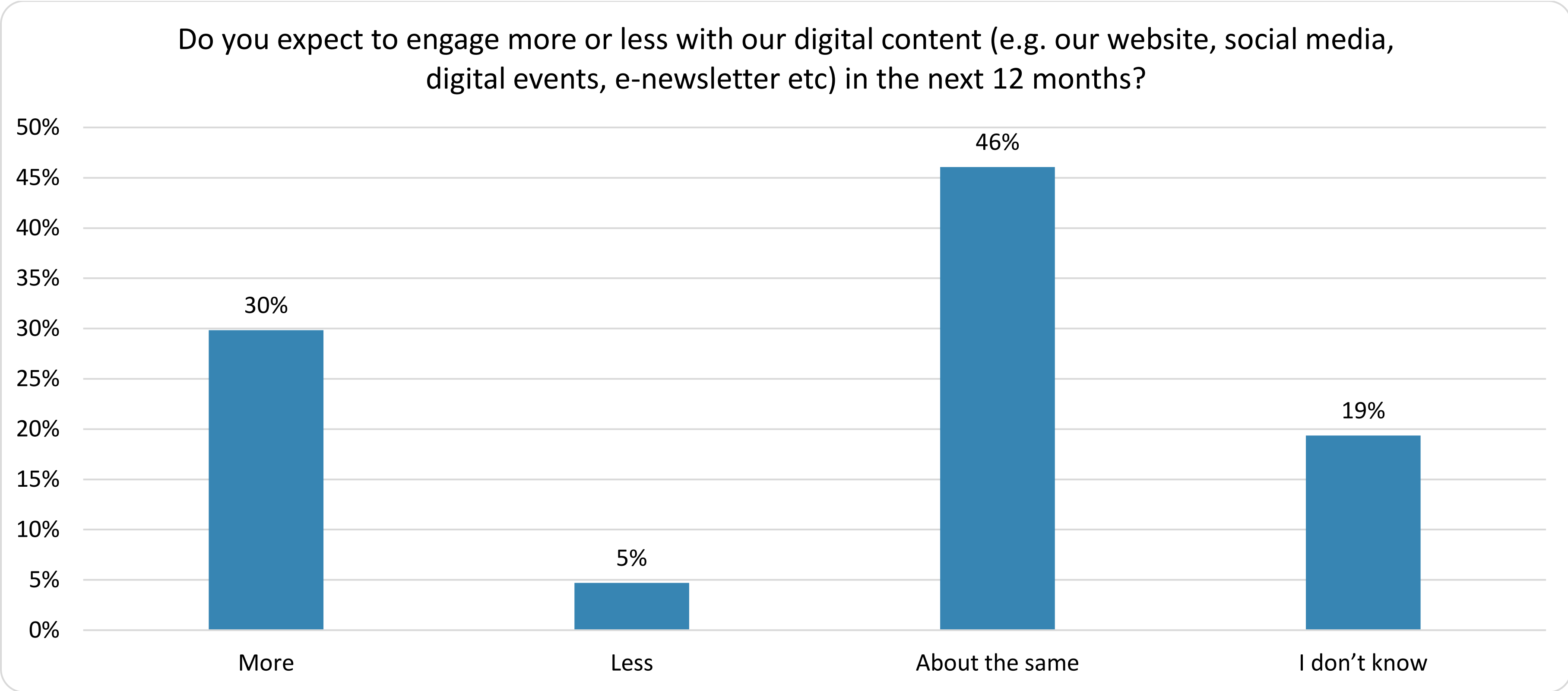
Motivations for digital visits / engagement



Cohort base: 222

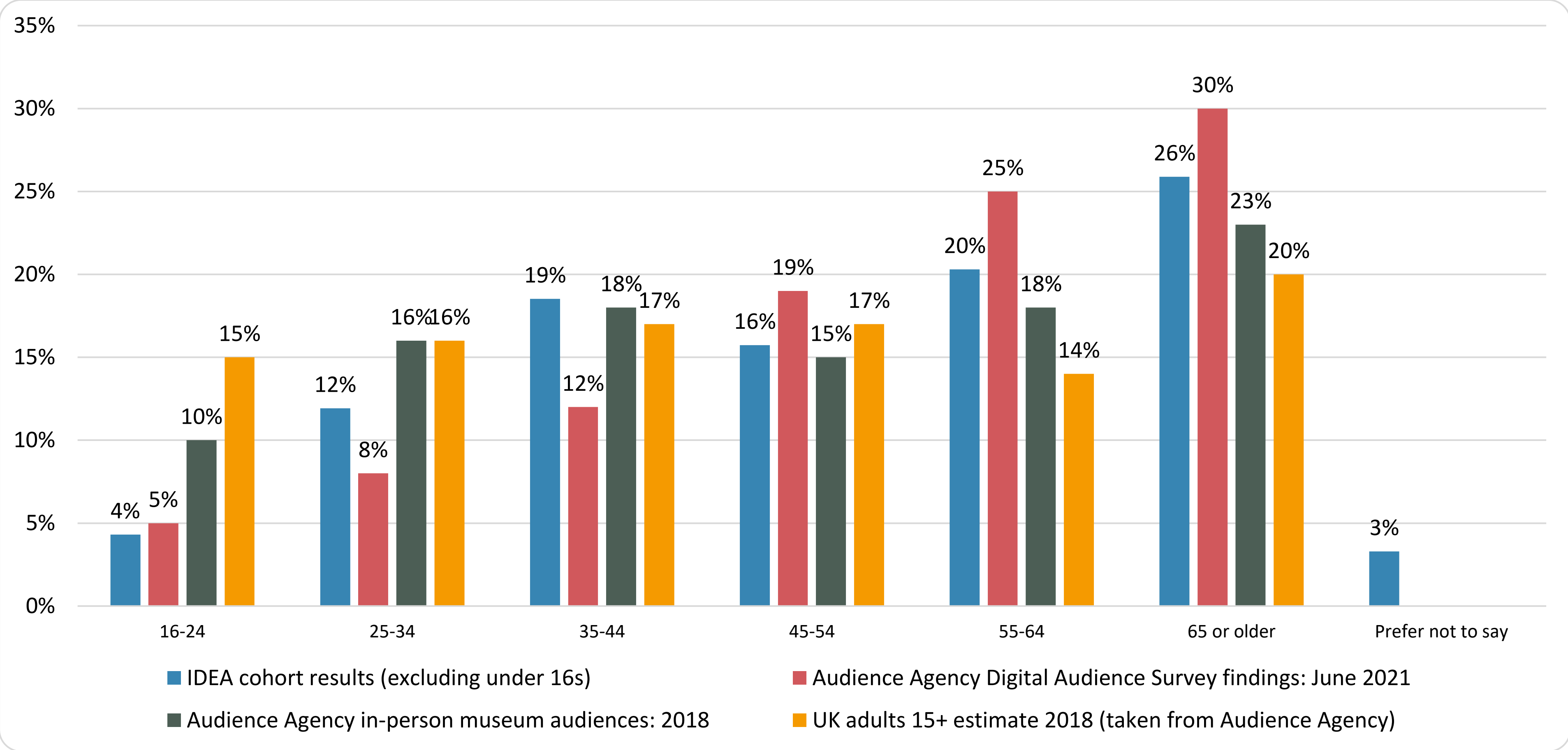
Likely digital engagement in the next 12 months



Cohort base: 382

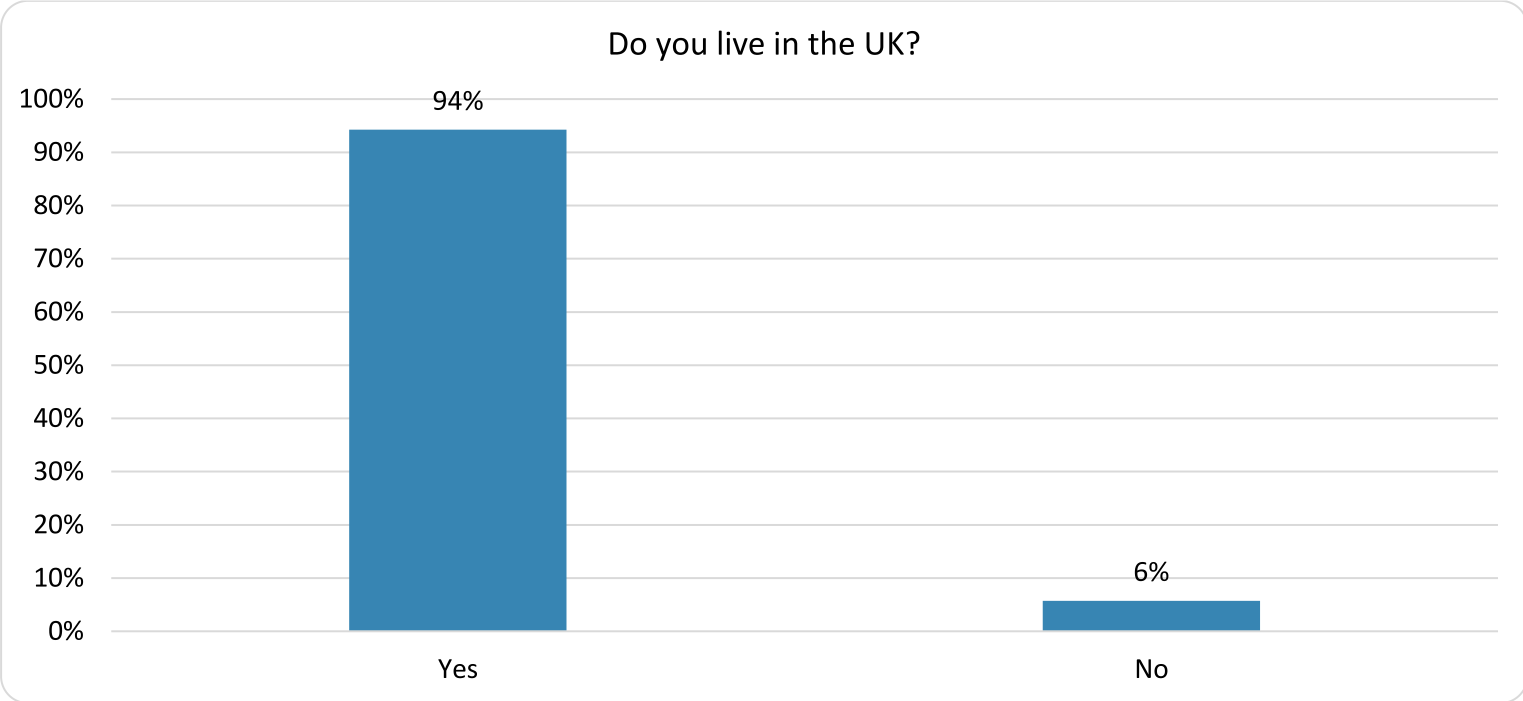
5. Profile of digital audiences

Age of digital audiences



Cohort base: 394

Where digital audiences live

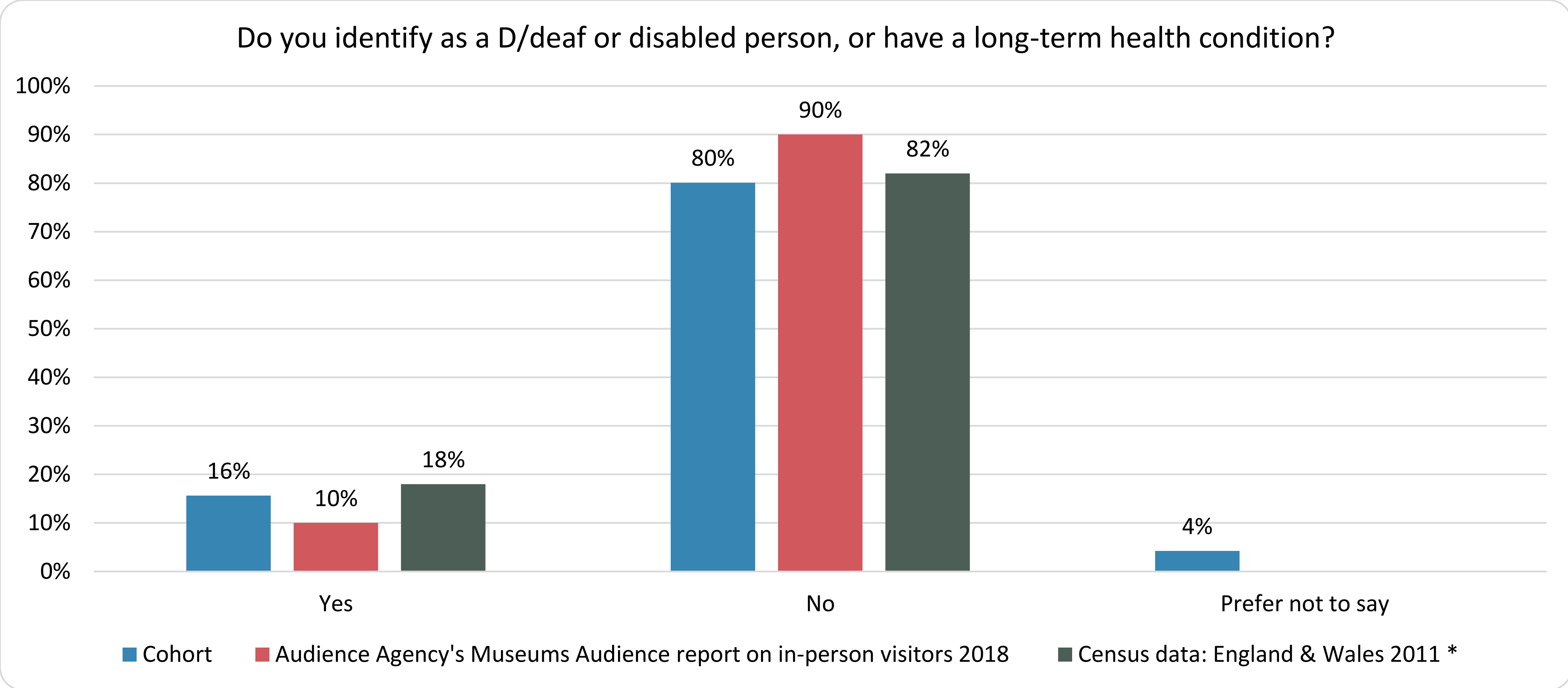


Cohort base: 383

Country if not UK:

- USA – 10 responses
- Canada – 5 responses
- Australia – 5 responses
- Germany – 1 response
- Indonesia – 1 response
- Luxembourg – 1 response
- Malaysia – 1 response

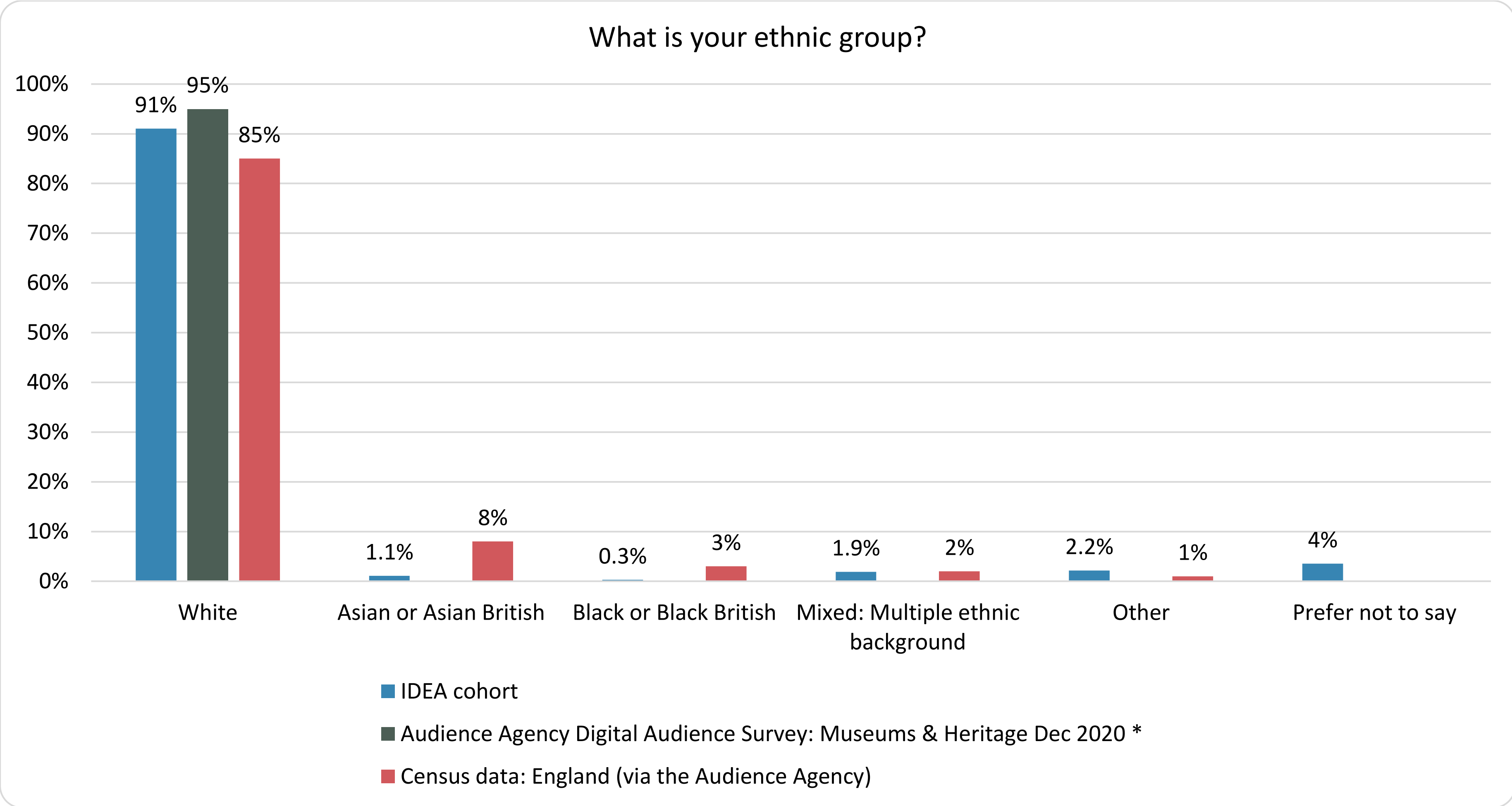
Disability / long-term health conditions



Cohort base: 377

* Question in 2011 census was worded: “Are your day-to-day activities limited because of a health problem or disability which has lasted, or is expected to last, at least 12 months?” "Yes" above includes answers to "Yes, limited a lot" and "Yes, limited a little".

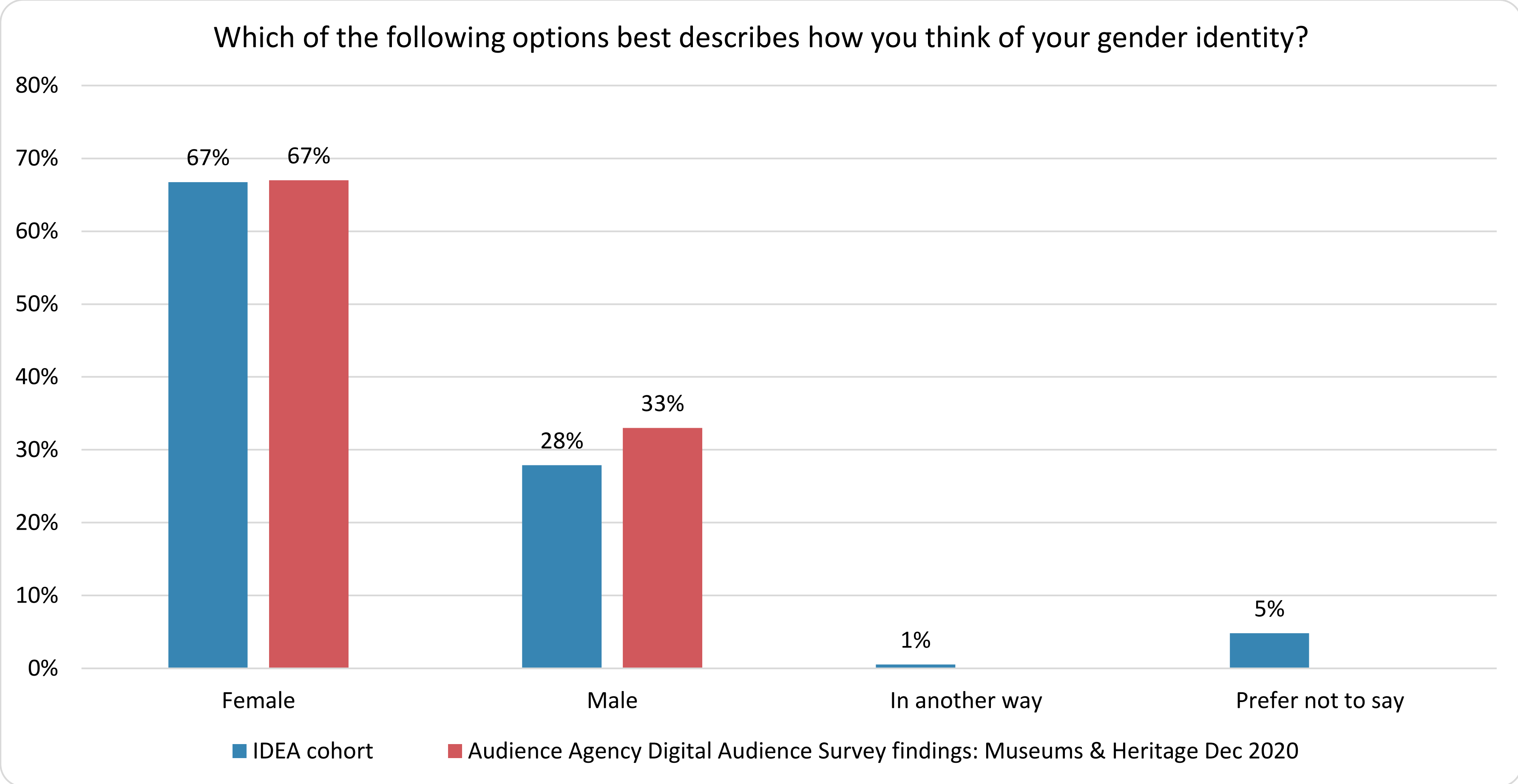
Digital audiences' ethnicities



Cohort base: 368

* Rest of ethnic groups not published.

Digital audiences' gender identities



Cohort base: 373

6. Conclusion

Questions for museums to consider prompted by the findings

- What is the purpose of museums' digital engagement?
- How can museums balance potentially competing or conflicting digital audience demands such as:
  - those who want information on upcoming in-person events and exhibitions, without alienating interested audiences who will/can never visit
  - sharing more in-depth vs lighter content
  - providing content on the different subject interests audiences have?
- What can museums do to broaden out the appeal of their digital content to further diversify their audiences? Which platforms are most appropriate and relevant?
- How can museums ensure their content provides value to audiences?
- What can museums do to ensure their digital content is accessible and inclusive?
- How do digital audiences differ from in-person audiences and what are the implications?
- Can and should any digital events and engagement be monetised? How?

Research challenges

Only two museums met or exceeded the target of 100 responses for their surveys. Three museums received less than 10 responses to their survey (between 1-2% of the total cohort's responses each).

Whilst the size of the museums' digital audiences are likely to have been a contributing factor (and certainly the museums service that received 49% of the responses has the largest digital audiences), the museum that received 27% of responses highlighted that other factors were also at play (Museum A). Four other participating museums have larger social media followings than Museum A but received only a fraction of the number of survey completions (in one case three times as many followers on Facebook and Twitter but receiving only 13% of the number of survey responses of Museum A). The proportion of survey respondents that completed Museum A's survey and also took the time to provide comments and explanations indicates that the museum's digital audiences are more engaged and invested than for some of the other museums. Museum A's feedback was also overwhelmingly positive.

Museum A had a survey champion, and was persistent in sharing the survey in a range of light-hearted ways (see examples below).

Other reasons for the lack of survey completions identified with participating museums were:

- Several museums struggled with staff/volunteer capacity to create digital content encouraging survey completion

- A couple of participating museums had recently shared other online surveys with their audiences so there may have been survey fatigue
- Two museums had difficulties with the technical side of creating pop-ups on their website and sharing content on their digital platforms.

Tips for undertaking online surveys of digital audiences

- Focus on what is really important to you to find out and make the survey as compact as possible
- Multiple choice questions are less onerous for people to complete and for you to analyse, but valuable insights can also be gleaned from answers to open questions (just use them sparingly)
- Share and promote the survey on all of your digital platforms and channels
- Invest time in sharing the survey and encouraging audiences to complete it
- Be persistent in promoting the survey, but avoid tipping the balance too far (e.g. a pop-up on a website shouldn't keep popping up once people have clicked it away)
- Have a survey champion who spearheads the project and encourages others in the museum to share it
- Ensure the museum's team is aware of why you are doing the survey and its value
- Use a light tone and try a range of approaches – explaining why it's important to you, fun/irreverent, use images/gifs, plead (see examples below)
- Leave the survey open several weeks / months (at least on your website) to allow for sufficient responses
- Consider a prize draw as an incentive. Around 60% of respondents entered the prize draw for the museum that ran it, although it's not clear what difference this made in people's decision whether to take and complete the survey
- Monitor survey completion numbers and keep the team updated on progress
- Where relevant and possible, compare your results with other data available – from your in-person audience data, from other museums, museum development organisations, sector research and/or population data (national and/or local)
- Share the findings with the team
- Act on the findings and if appropriate, share any developments you have made as a result of the survey with your digital audiences.

Museum A case study

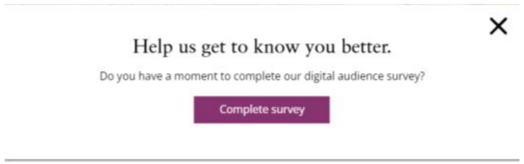
Museum A received 27% of the cohort’s survey responses (109 responses), despite not having the largest digital audiences (ca. 1,500 followers on each social media channel).

The survey champion from the museum said:

> "We've thrown a lot into it, where do I start? We've pushed it out fairly consistently across our social channels, utilising Instagram Story, adding it as a link on our profile and pinning the survey to the top of our Facebook & Twitter profiles. We've created our own graphic to promote it, and also utilised GiFs on Twitter. We've sent it out to our mailing list, and I also sent it to the volunteers, asking them to share it with any friends and family they know who interact with us online. We've also added it to a website as a pop-up when people land anywhere on the site. [...] We've just tried to get it out there regularly, and kept the tone very lighthearted."

Below are examples of the communication they shared:

Website pop-up:



Facebook post:

Twitter post:

Alternatives to online surveys of digital audiences

For museums with small digital audiences or a lack of time and/or resources to undertake a survey, consider these alternatives as ways of understanding digital audiences:

- Use free embedded analytics tools on your digital media platforms (e.g. Google Analytics for your website, social media analytics, and email software analytics to a lesser extent), to understand as much as you can about the profile of your digital audiences and their preferences and behaviours. For example, which website pages and what types of social media content is the most popular, what days of the week are most popular for digital audiences to engage
- Use the Audience Agency's Digital Audience Survey findings for museum and heritage audiences to understand broad themes and trends in the sector
- Create mini monthly polls on digital platforms asking a different question each time
- Set up a mystery shopper swap with colleagues from another museum to feed back on each other's digital platforms
- Ask audiences one or two questions as part of an online booking form for events
- Create user personas and look at your digital platforms and content through their eyes, for example:
    - A busy parent looking for half-term activities to entertain their children
    - A teacher looking for information about school visits
    - Someone researching their family history in the local town
- Consider more in-depth research with a smaller number of people e.g. one to one interviews or a focus group. This can also explore some of the findings from the online survey or mini polls that emerge.

7. Appendix

Digital audiences survey questions

Introduction to our survey

We are carrying out this survey to understand who our digital audiences are, how they engage with us and what they'd like from our digital content. Your contribution will help shape our future work and develop content and programmes that meet our audiences' needs.

Please only complete this survey if you have read, watched or interacted with one or more of our digital platforms such as our website, social media or e-newsletter. Responses are anonymous.

This survey should take around 5 minutes to complete. We thank you in advance for your time.

Before we begin

1. Before we begin the survey, please can you tell us your age?

- [ ] Under 16
- [ ] 16-19
- [ ] 20-24
- [ ] 25-29
- [ ] 30-34
- [ ] 35-39
- [ ] 40-44
- [ ] 45-49
- [ ] 50-54
- [ ] 55-59
- [ ] 60-64
- [ ] 65-69
- [ ] 70-74
- [ ] 75-79
- [ ] 80-84
- [ ] 85 or older
- [ ] Prefer not to say

Digital and in-person audiences

2. When did you last visit us in person or physically attend one of our events?

- [ ] In the last 12 months
- [ ] Between one and two years ago
- [ ] Between two and three years ago
- [ ] Between three and five years ago
- [ ] More than five years ago
- [ ] I haven't visited in person/physically attended an event before

3. Are you likely to visit us in person or physically attend one of our events in the next 12 months?

- [ ] Yes
- [ ] No
- [ ] Maybe
- [ ] I don't know

Please explain your answer:

How and why our digital audiences interact with us

4. On average, how often do you visit our digital platforms (e.g. website, social media) to watch/read our digital content?

- ☐ Most days
- ☐ At least once a week
- ☐ At least once a month
- ☐ At least every two to three months
- ☐ At least once a year
- ☐ This is my first time

5. Which of the following activities have you done - today or previously - through our digital platforms such as our website or social media channels? Please tick all that apply:

- ☐ View a video, live stream, talk or workshop
- ☐ Get information on digital events/content
- ☐ Browse virtual art / media archives / digital collections
- ☐ See something online that I am unable to see in person
- ☐ Conduct research
- ☐ Interact with the organisation
- ☐ Share my opinions/ideas
- ☐ Plan an upcoming visit
- ☐ Get information on in-person events
- ☐ Find out more about the organisation
- ☐ Find out about membership
- ☐ Donate to the organisation
- ☐ Purchase a ticket or something from the online shop
- ☐ Something else – what else have you done via our digital channels today?

6. Which of the following describe your motivations for watching or reading digital content on our digital channels? Please tick all that apply:

- ☐ To be intellectually stimulated
- ☐ To be entertained
- ☐ To be inspired
- ☐ To discover something new/out of the ordinary
- ☐ To learn something
- ☐ For reflection
- ☐ For escapism
- ☐ For academic reasons
- ☐ For professional reasons
- ☐ To entertain my children
- ☐ To educate/ stimulate my children
- ☐ Other (please specify):

7. Have you ever visited our online catalogue / online collections database (https://cimuseums.org.uk/collections/)?

- [ ] Yes
- [ ] No
- [ ] I don't know

8. What best describes the purpose of your visit to our online catalogue / online collections database (https://cimuseums.org.uk/collections/)? Please tick all that apply:

- [ ] Just browsing
- [ ] Looking for creative inspiration
- [ ] To better understand my heritage
- [ ] To comment on, or share knowledge about an object
- [ ] For general research
- [ ] For academic or professional research
- [ ] Other (please specify):

10. Looking ahead

9. Do you expect to engage more or less with our digital content (e.g. our website, social media, digital events, e-newsletter etc) in the next 12 months?

- [ ] More
- [ ] Less
- [ ] About the same
- [ ] I don't know

Please explain your answer:

10. What subject matters and/or type of digital content do you enjoy us sharing?

11. What subject matters and/or type of digital content would you like to see more of from us?

12. About you

This final section is about you. It's a little more personal but is really useful to us.
The questions have been designed to align with the way the UK Government collects Census data. This enables us to compare our audiences to the general population and helps us to see the extent to which we're serving everyone in our community.
If there are any questions that you'd rather not answer, please select "Prefer not to say" or skip to the next question.

12. Do you live in the UK?

- [ ] Yes
- [ ] No

13. What is your full postcode? (This information will only be used for research)

14. What is your country of residence?

15. Do you identify as a D/deaf or disabled person, or have a long-term health condition?

- [ ] Yes
- [ ] No
- [ ] Prefer not to say

16. What is your ethnic group?

Asian or Asian British

- [ ] Bangladeshi
- [ ] Chinese
- [ ] Indian
- [ ] Pakistani

Black or Black British

- [ ] African
- [ ] Caribbean
- [ ] Other Black / African / Caribbean background *

Mixed

- [ ] Asian and White
- [ ] Black African and White
- [ ] Black Caribbean and White
- [ ] Other Mixed / multiple ethnic background *

White

- [ ] British/English/ Northern Irish /Scottish/Welsh
- [ ] Gypsy or Irish Traveller
- [ ] Irish
- [ ] Other White background *

Other

- [ ] Arab
- [ ] Prefer not to say
- [ ] Any other ethnic group *

* Please describe:

17. Which of the following options best describes how you think of your gender identity?

- [ ] Female
- [ ] Male
- [ ] In another way *
- [ ] Prefer not to say

* How would you describe your gender?

18. Do you have any further comments about your experience of our digital channels and content? (Please describe below)