

National User Survey at the National and Government-approved Museums in Denmark

2009

English summary





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Preface



This is an English summary of the results and recommendations of the National User Survey

You can read more about the survey at Heritage Agency of Denmark's website at www.kulturarv.dk

For almost two hundred years, Danish museums have made a significant contribution to Denmark's social and cultural development.

However, the consequences of globalisation in the form of increased social complexity and a demand for adaptability have altered the relationship between individual and society. The citizens' conditions and needs are changing, and with new media and communication forms, our approach to knowledge is undergoing rapid transformation. This also applies to the museums.

Development at museums in recent years has tended towards more dialogue-based and interactive dissemination, where the dissemination of knowledge has become a joint project between the museums and the surrounding society. Today, the museums manage their knowledge and experience in the entire range between Worm's Wunderkammer and My-Space.

If the museums are to continue to occupy a central place in society in future, it is therefore essential that they strengthen their position as open and accessible cultural institutions, which work professionally with dissemination and communication.

For this to happen, the museums need to know their users.

Many museums have carried out user surveys and in this way gained valuable knowledge of their users.

As something new, Heritage Agency of Denmark's national user survey includes all of the national and government-approved museums in Denmark, and it therefore provides a comprehensive and systematic insight into who use – or do not use – the museums.

The national user survey makes it easier for the museums to compare themselves to each other and thus identify interesting differences and similarities. This may inspire the museums to increase collaboration and knowledge sharing.

The national user survey gives us knowledge about the museums' users. It is our joint responsibility to realise this knowledge in the form of professional and diverse dissemination of cultural heritage at the museums in Denmark.

I hope that the museums will see the national user survey as a strong tool for them to work strategically with dissemination of knowledge and communication, enabling them to comply with our joint objective of offering quality experiences to all citizens in Denmark.

April 2010

Steen Hvass, Director, Heritage Agency of Denmark





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1 Introduction



This report presents the results of the national user survey at the national and government-approved museums for 2009.

The user survey offers insight into whom use the museums, how they use them and the users' assessments of the museums.

The survey's objective is to provide national and government-approved museums with tools and knowledge to professionalise their dissemination and communication. The user survey contributes to a high quality discussion of the museums' dissemination based on facts rather than preconceived ideas, and it makes it possible for the museums to learn from each others' experience with a focus on results, follow-up and own objectives as regards the user composition.

The survey provides the museums with a tool that will help them work strategically to target exhibitions, activities and events at the user groups who visit the museums. The results can also be used to launch initiatives aimed at new user groups.

The survey is a central part of the Ministry of Culture's Dissemination Plan 2007-10, which is to contribute to improving the quality of the museums' dissemination and to developing this through the following focus areas:

- Development of the museums' dissemination
- Research in dissemination
- Education and competence development
- Museums and teaching
- User surveys
- Knowledge sharing

The national user survey is an example of the Danish museums' ability to collaborate, and both in Danish and international contexts it is quite unique. It is the first time that any country carries out a national user survey with the participation of all national and government-

approved museums. Heritage Agency of Denmark is supplementing the survey with a non-user survey and a web user survey.

User survey method

The survey is a questionnaire survey, which will be completed over three years in the period 2009-2011. This makes it possible to compare results over a number of years, and the museums have the opportunity of following up on objectives and strategies in keeping with the user survey's results.

The survey has been developed in collaboration between Heritage Agency of Denmark, the museums and TNS Gallup. An advisory committee composed of representatives from the museums have contributed to the development of the survey. 10 museums have tested the survey in a pilot phase.

The survey has been carried out at all national and government-approved museums in Denmark and at those of their branches that have more than 7,000 registered users. The second appendix in chapter 11 shows which museums and branches are included in the survey.

The museums have typically collected between 100 and 800 questionnaires, based on an individually calculated frequency and depending on their numbers of visitors. In order to make allowance for seasonal variations, the museums have distributed questionnaires one day a week throughout the year. The collection days have changed from one week to another.

The target group for the survey is all users aged 14 or above who are able to complete a questionnaire in Danish, English or German.

A 'user' is a visitor to a museum or someone who has participated in an event at or outside the museum. The survey does not include users of the museums' digital offers on the Internet.

Geographic distribution of museums

The survey includes the 124 national and government-approved museums with a total of 186 branches. When the report says 'museums', this includes all 186 branches of the museums.

The museums are divided into three categories: museums of art, cultural history museums

and natural history museums. Table 1.1 shows the regional distribution of the museums in the survey and the distribution across the three museum categories.

Figure 1.1 shows the distribution of museums in the three museum categories in each of the five regions.

Figure 1.2 shows where in Denmark the museums are located in relation to the distribution

Table 1.1 Regional distribution of museums in the survey

	TOTAL	ART	CULTURAL HISTORY	NATURAL HISTORY
Denmark, total	186	38	142	6
Capital Region of Denmark	46	13	31	2
Region Zealand	24	4	19	1
Region of Southern Denmark	50	10	38	2
Central Denmark Region	44	8	34	2
North Denmark Region	22	3	19	0

Figure 1.1 Distribution of museums across the three museum categories by region

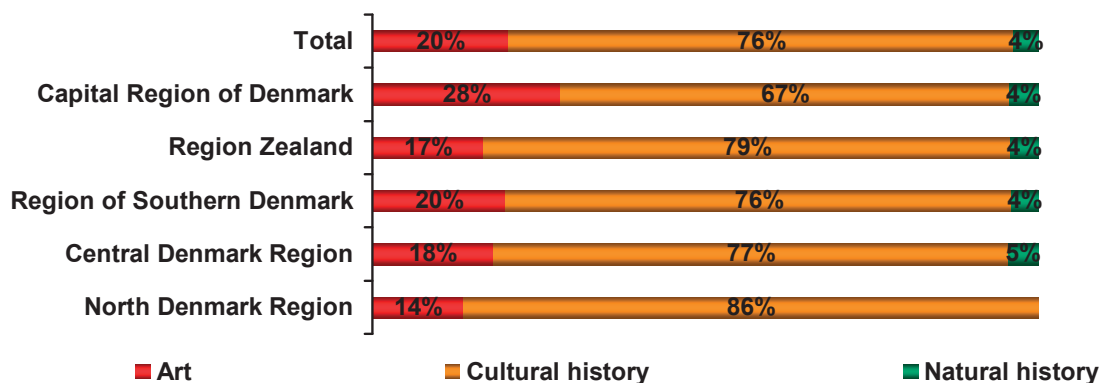


Figure 1.2 Museums distributed across regions compared to the distribution of the population of Denmark

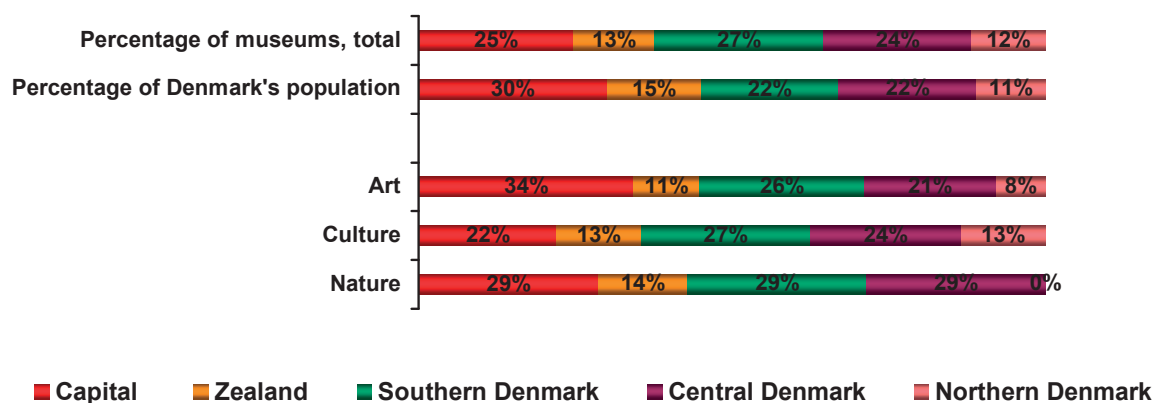


Figure 1.3 Danish and foreign users distributed by residence

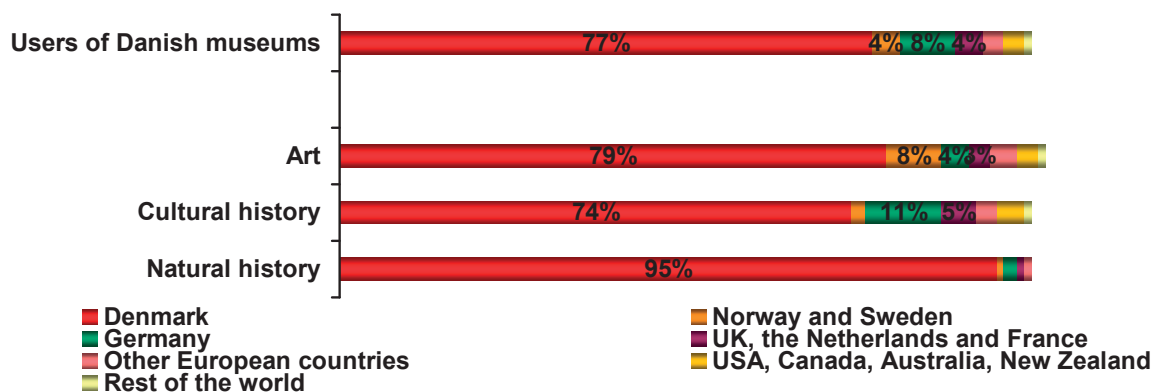
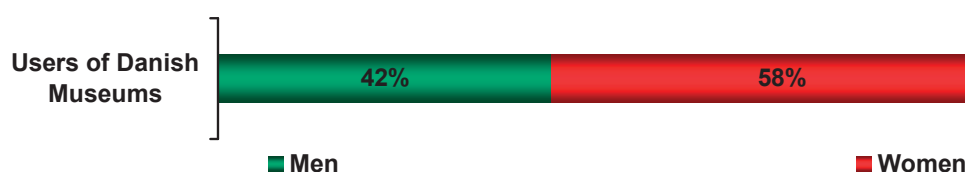


Figure 1.4 Distribution of users by gender



of citizens. The figure also shows the geographic distribution of the museums in each of the three museum categories.

The figure shows that 25 % of the 186 museums are located in the Capital Region of Denmark, while 12 % of the museums are found in the North Denmark Region.

The figure also describes the distribution of the population of Denmark across regions. The figure indicates that the distribution of museums corresponds more or less to the distribution of citizens in Denmark.

The Capital Region of Denmark has more than one third of all the museums of art and thus the greatest percentage of museums of art across the regions. Region Southern Denmark has 38 cultural history museums, corresponding to a 27 % share, which makes it the region with most cultural history museums.

Presentation of the entire data basis

This section contains a brief presentation of the data material, where all users are included – both users who live in Denmark and users who live abroad.

A total of 34,666 questionnaires were collected at the national and government-approved museums for the survey. 81 % of the users who have received a questionnaire have completed it.

Out of these, 77 % were completed by users who live in Denmark. The remaining 23 % were completed by users who live abroad. The following section presents the data material based on the following parameters: residence, gender, age and education.

Residence

Figure 1.3 shows the distribution between users with residence in Denmark and users with residence abroad.

The figure shows that 77 % of the users of the national and government-approved museums live in Denmark. 23 % of the users live abroad.

Gender

Figure 1.4 shows the distribution of users according to gender.

The figure shows that women make up 58 % of the museum users, while 42 % of the users are men.

Figure 1.5 Distribution of users by age categories

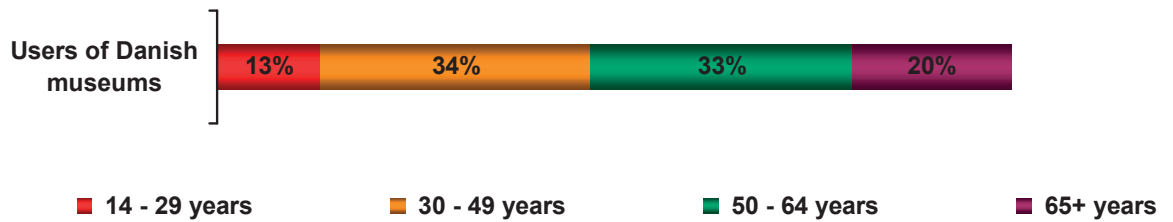
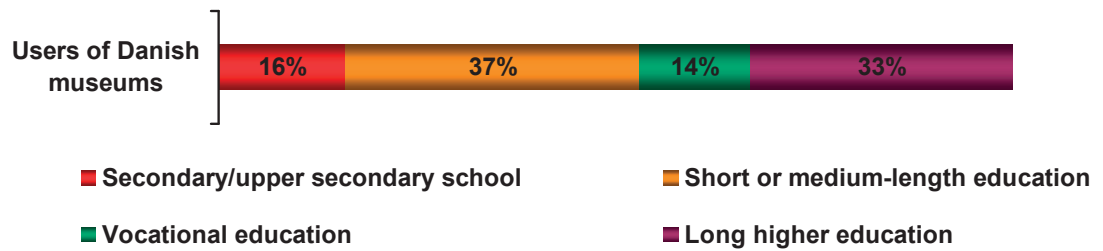


Figure 1.6 Distribution of users by level of education



Age

Figure 1.5 shows the distribution of users according to age categories.

The figure shows that 34 % of all users are aged between 30 and 49. Those aged 14-29 make up 13 % of the museums' users and are thus the smallest user group. 33 % of the users are between 50 and 64 years of age, and 20 % of the users are aged 65 or above.

Education

When the report refers to the users' level of education, the individual educational levels include both users who have completed their education and users who are currently studying for the relevant education.

The four levels of education are shown in random order in the figures throughout the report. Short and medium-length higher education has been abbreviated to 'Short or medium-length education' in the figures.

Figure 1.6 shows the distribution of users according to level of education.

The figure shows that the largest group of users of the Danish museums are users with a short or medium-length higher education (37 %). This is followed by the group of users who

have a long higher education (33 %). There are least users with a secondary/upper secondary educational background (16 %) and a vocational education (14 %).

Dissemination of the survey results

The results of the national user survey are presented in three different ways:

- In a national report each year that presents the national result for all national and government-approved museums.
- In individual reports with each of the participating museums' own results for each collection year.
- On an online portal where the museums can find more detailed results and compare themselves to each other.

Additionally, Heritage Agency of Denmark and TNS Gallup are holding five workshops in the spring of 2010, where the survey's results will be presented and the participants will have the opportunity to discuss the report's results and recommendations.

Target groups for the national report

The results in the national report are primarily aimed at three target groups:

- Museums
- Political decision-makers
- Citizens and journalists

The target group at the museums are museum managers and inspectors, press and communication staff and dissemination staff.

The museums can use the results in the national report to gain a better understanding of how each museum is positioned in the overall Danish museum landscape. The recommendations in the national report also supplement the results in the museums' individual reports.

The results of the national user survey can provide relevant background knowledge for political decision-makers. The report's results can therefore give rise to municipal, regional and national initiatives that will improve the quality of the museums' dissemination.

Citizens and journalists can gain insight into the relationship between users and the national and government-approved museums.

It is the intention that the report should form the foundation for the creation of joint dedication to and responsibility for professional development of museum dissemination.

Reading guide

The report is designed so that it can be read in its entirety, but also selectively, depending on which target group the reader belongs to or which results are of particular interest. —

Please note that chapters 2-6 only refer to Danish users.

Chapter 2: 'Main conclusions and recommendations' summarises the survey's conclusions and Heritage Agency of Denmark's recommendations to the museums.

The chapter describes what characterises the users of Danish museums and the users' visiting patterns and assessments of the museums. The second part of the chapter presents the conclusions of the Kompas analysis, which divides the museums' users into nine different segments based on views, values and lifestyles.

This is followed by Heritage Agency of Denmark's recommendations to the museums.



2 Main conclusions and recommendations



This chapter contains a summary of who the users of Danish museums are and the users' visiting patterns and assessments of the museums.

Satisfaction with the overall museum experience

The users have assessed their overall museum experience on a scale from 1 to 10.

The overall assessment of Danish museums is at a high level. On average, the users have rated their overall museum experience at 8.2.

The museums of art and the cultural history museums are rated highest with a score of 8.2. The natural history museums are right behind with a score of 8.0.

The women in the survey give an average rating of 8.3 and are slightly more satisfied than the men who rate the museums at 8.1.

The users' satisfaction with the museums increases according to age. Those aged 14-29 are the least satisfied, giving a rating of 7.5, while users aged 65 and above are the most satisfied, giving a total rating of 8.5.

The satisfaction is greatest among the users who often visit museums, i.e. four museum visits or more per year. Their average satisfaction is at 8.3 against 7.5 for those who rarely visit museums, i.e. less than one museum visit on average per year.

Furthermore, the overall satisfaction with the museums is greatest among the users who spend a long time at the museum, i.e. more than two hours, as compared to users who spend a short time at the museum, i.e. less than one hour.

Satisfaction with the museums' core services

The users have assessed the following core services at the museums on a scale from 1 to 10.

- Atmosphere/ambience at the museum
- Museum exhibitions
- Exhibition set-up/presentation
- Exhibition themes/subjects
- The possibility of learning something new
- Museum events
- Space for reflection and contemplation
- Variation in the museum's dissemination
- Suitability for children
- The possibility of participating actively

The users assess all of the museums' core services to be clearly above average.

The users generally assess 'atmosphere/ambience at the museum' highest among all core services with an overall rating of 8.7.

The users give 'possibility of participating actively' the worst assessment for all three categories of museums. In this respect, the museums of art receive the lowest assessment with an average rating of 6.0, while the natural history museums score relatively high at 7.1.

Users of the museums of art assess 'atmosphere/ambience at the museum' and 'museum exhibitions' highest (8.6 and 8.5, respectively), while 'suitability for children' and 'possibility of participating actively' are rated lowest (6.7 and 6.0, respectively). The last two are also scored notably lower at the museums of art as compared to the cultural history and natural history museums.



The natural history museums' users assess the museums' core services on a par with the average for all museums. The users assess 'atmosphere/ambience at the museum' and 'museum exhibitions' highest (8.7 and 8.5, respectively), while 'variation in the museums' dissemination' and 'possibility of participating actively' are rated lowest (7.6 and 6.6, respectively).

The natural history museums' users assess 'possibility of learning something new', 'exhibition themes/subjects' and 'suitability for children' very positively (8.4-8.7), while 'variation in the museums' dissemination', 'space for reflection and contemplation' and 'possibility of participating actively' are rated between 7.1 and 7.4. The users assess 'possibility of learning something new' and in particular 'suitability for children' notably higher at the natural history museums than at the museums of art and the cultural history museums.

Gender

The museums have more female than male users.

The difference in the percentage of men and women is greatest at the museums of art – with a notable overrepresentation of women – and least at the natural history museums, which to a higher degree attract both men and women.

Men aged 65 and above are overrepresented among museum users in relation to their share of the entire population of Denmark.

Age

Young people aged 14-29 are underrepresented at the Danish museums in comparison to the entire population of Denmark, while those aged 50-64 are overrepresented.

Users of the museums of art are generally significantly older than users of the cultural history museums. The natural history museums have the youngest users.

Education

Museum users typically have longer education than the population in general. The percentage of users who have a long higher education is significantly higher at the museums than in the population in general. The percentage of museum users whose educational background is secondary/upper secondary school is significantly lower than in the population as a whole.

The museums of art attract highly educated people to a particularly high degree as compared to the other museum categories. The cultural history museums have the lowest percentage of highly educated users among the three museum categories and the relatively highest percentage of users with secondary/upper secondary educational backgrounds.

Reasons for visiting the museum

In most cases, users indicate 'to see the museum' as the most important reason for visiting a museum.

At the museums of art, a relatively large percentage come 'to see a particular special exhibition' as compared to the cultural history and natural history museums. Users with a long higher education also stress relatively often that they come 'to see a particular special exhibition'.

Users during the off-peak season, i.e. January-April and September-December, relatively often stress that they come 'to see a particular special exhibition'.

Museum visits are social events

A museum visit is to a very high degree a social event.

Less than one in every 10 users visit museums alone. The majority of the users visit the museums as part of a group, and about half of the users visit the museums with family, friends or acquaintances. One third of the users visit museums with a companion. The percentage of users who visit museums with a companion is higher in the older age groups.



The museums of art have the relatively highest percentage of users who come alone or with a companion. The natural history museums have a notably higher percentage of users who visit museums with friends, family or acquaintances than the other two museum categories.

Many first-time users

More than six out of 10 users in the survey indicate that this is the first time they have visited the museum.

The cultural history museums have relatively most first-time users.

The museums of art have a lower percentage of first-time visitors compared to the other two museum categories and far more users who have visited the museum before.

Users' knowledge of museums

Almost half of all museum users state that they know the museum from previous visits.

It is a clear trend that young users to a higher degree have heard about the museum at school or via their education, while older users to a higher degree know about the museum from previous visits.

The young users also indicate that they have heard about the museum from friends, family and acquaintances to a far higher degree than the other age groups.

The museums of art have a relatively large percentage of users who have visited the museum before, and therefore they also have a relatively high percentage of users who know the museum from previous visits. One fourth of the users state that they have heard about the museum from friends, acquaintances or family. The museums of art also have a relatively high percentage of users who have heard about the museum through newspapers, radio or TV.

In contrast, the natural history museums have a relatively high percentage of users who have heard about the museum from the Internet. The cultural history museums have relatively most users who have heard about the museum through tourist information.



GallupKompas: Users and 'super users' at the museums

Based on the users' responses to a number of statements about general society conditions, each user is placed in one of GallupKompas' nine segments. GallupKompas is a tool for dividing the entire population into segments according to views, values and lifestyles. This makes it possible to compare the segment composition at the museums to the segment composition for the entire population of Denmark.

The typical and atypical museum user

The typical museum user is a woman aged 55 who lives in the Capital Region of Denmark. She is qualified as a primary school teacher. When she visits a museum, most often this will be a museum of art in the Capital Region of Denmark. She visits museums relatively often – more than four times a year. She has gained information about the museums she visits from her previous visits, and most often, she visits museums accompanied by family, friends or acquaintances. She belongs to the *modern community-orientated* segment.

The atypical museum user is a man aged 22 who lives in the North Denmark Region. He is qualified as a carpenter. He visits a museum a maximum of once per year, and when he does, it is typically because he is participating in a family event planned by his parents. He belongs to the *traditional individual-orientated* segment.

The museums' 'super users'

Four segments are overrepresented at the museums in relation to the entire population of Denmark:

- The modern community-orientated (10 percentage points more than in the population as a whole)
- The community-orientated (8 percentage points more than in the population as a whole)
- The traditional community-orientated (4 percentage points more than in the population as a whole)
- The modern (4 percentage points more than in the population as a whole).

Underrepresented segments

Five segments are underrepresented at the Danish museums in relation to the entire population of Denmark:

- The traditional (7 percentage points less than in the population as a whole)
- The traditional individual-orientated (6 percentage points less than in the population as a whole)
- The individual-orientated (5 percentage points less than in the population as a whole)
- The modern individual-orientated (5 percentage points less than in the population as a whole)
- The centre group (3 percentage points less than in the population as a whole).

Detailed conclusions from the Kompas analysis may be found in chapter 6.



Users with residence outside Denmark

23 % of the users of the national and government-approved museums in Denmark reside abroad.

8 % of all users are from Germany, 4 % are from Norway or Sweden, and 4 % are from the UK, the Netherlands or France.

About one in every three of the foreign users of Danish museums are from Germany. At the cultural history and natural history museums, more than four out of 10 foreign users are from Germany.

Users who live abroad are distributed equally between men and women in contrast to users who live in Denmark, where almost six out of 10 are women.

Almost half of the foreign users have a long higher education as compared to less than a third among the users who live in Denmark.

Over half of the foreign users visit museums in the Capital Region of Denmark, and more than half of the foreign users visit the museums during the period May-August.

The foreign users' satisfaction with the museums equals the Danish users' satisfaction.

Heritage Agency of Denmark's recommendations

Heritage Agency of Denmark recommends that the museums use the results of the national user survey and the museums' own reports to work strategically with the museums' dissemination and communication.

Are there target groups that the museum does not reach? This may be one or more of the nine segments in GallupKompas, specific age groups or users with a particular level of education. The user survey gives the museums knowledge about their target groups, which makes it possible to target dissemination and communication at the user groups the museums wish to address.

Have we chosen to communicate with our users on the right platforms? The user survey gives answers to where and how different segments and groups of users hear about the museum, e.g. the young users aged 14-29 or users with a vocational education.

Should we be changing any conditions relating to the museum's core services? This could be e.g. variation in the museum's dissemination, possibility of participating actively or dissemination activities for children and young people. How do the users assess the museum's practical facilities? The user survey indicates,



among other things, how users perceive different facilities related to the museum.

Many of the above-mentioned questions may give rise to more general deliberations about what kind of museum you are, as seen in relation to what kind of museum you wish to be.

Therefore, it is important that all parts of the museum organisation are given the opportunity to consider the survey's results.

Do we make our knowledge an active resource in society to a sufficient degree?

Should we be phrasing special objectives for particular target groups?

Do we take into consideration that to the great majority of users the museum visit is a social event?

Have we prioritised our dissemination resources in an appropriate way?

Should we enter into collaboration with other types of museum than our own to fulfil our objectives?

Heritage Agency of Denmark encourages the museums to apply the results to the development of their dissemination strategies. Danish museums are different, and each museum has its own way of relating to the survey's results.



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English summary

Heritage Agency of Denmark's national user survey includes all national and government-approved museums in Denmark. The user survey provides comprehensive and systematic insight into who use the Danish museums.

The national user survey gives us knowledge about the museums' users. It is our joint responsibility to realise this knowledge in the form of professional and diverse dissemination of cultural heritage at the museums in Denmark.

If the museums are to continue to occupy a central place in society in future, it is essential that they strengthen their position as open and accessible cultural institutions, which work professionally with dissemination and communication.

For this to happen, the museums need to know their users.

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