Users & Non-Users of Museums, Libraries and Archives
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Scope of the Paper

1.1 Scope of this Paper
This paper has been prepared by PLB Consulting Ltd, who were commissioned by Resource: The Council for Museums, Archives and Libraries to collate and review baseline data on public engagement across these three domains.

The document:

- Summarises the study methodology
- Presents the data collected across each domain, and comments on its validity and reliability
- Summarises the main audiences for each domain and the non-user groups, as established from this available data
- Identifies common under-represented groups for each domain within the sector, and seeks to identify elements and trends shared by museums, archives and libraries
- Reviews current data collection procedures and their value to Resource
- Presents an assessment of gaps in research and provides an initial indicator of future research needs

1.2 Report Objectives
The study brief required consultants to undertake a programme of research to develop Resource’s knowledge and understanding of the users and non-users of museums, archives and libraries. The findings will be used by Resource to inform forthcoming negotiations with DCMS regarding its Funding Agreement, and to assist with the identification of priorities for action and suitable monitoring procedures. The research will also inform future initiatives designed to encourage greater participation across the three domains, and to increase the benefits that the whole sector can bring to the lives of UK citizens.

The focus of this ground clearing exercise has been on large scale, relevant and statistically reliable sources, rather than smaller, site-specific surveys that may be limited in their scope and remit. However, some local and regional level surveys have been reviewed where the user profile information supports or strengthens national level findings, and where the data is statistically robust.

1.3 Method of Working
The data collection exercise undertaken has essentially been a desk-based review, drawing together existing published and other available material to gain an overview of the audience segments currently being catered for by museums, libraries and archives, and of those groups under-represented in the audience mix or not currently engaging at all with these domains. The principal aim has been to collect all available information on users and non-users for the calendar years 1997 - 2001 and also any reports that have been published during 2002/ early 2003 that include data for the calendar year 2002. The consultants have sought to secure complete data coverage in terms of spatial, sectoral and time series dimensions. The bibliography appended to this interim report provides an indication of the level of documentation available of relevance to the study topic.

In order to ensure that sufficient coverage was achieved across all domains, and across the whole of the UK, a letter requesting information on user survey activities across the sector was sent to more than 60 professionals working in the relevant domains, and in related industry sectors. A full list of organisations from which information was sought is appended.

To support the review of primary and secondary data, a two-phase programme of consultations with key professionals working in the sector was undertaken, with the focus in the early consultations being on securing access to relevant documentation held by national and regional organisations, and on canvassing opinion as to the validity and relevance of the
information currently available. The second phase of consultations explored this latter issue in more detail in order to advise future research priorities. A list of consultees is appended.
2 The Policy Context

2.1 Resource: The Council for Museums, Archives & Libraries

Resource became operational in April 2000, replacing the Library and Information Commission and the Museums and Galleries Commission and taking on strategic leadership and policy responsibilities for the museums, libraries and archives domains. It is a Non-Departmental Public Body (NDPB) receiving core funding from the Department for Culture, Media and Sport (DCMS). Resource advises Government on policy and priorities for all aspects of the sector. Its corporate objectives are to:

a. Develop the organisational support and funding infrastructure that will support the sector’s development
b. Encourage the development of accessible and inclusive collections and services that provide learning, inspiration and enjoyment for everyone
c. Demonstrate the impact of the sector on society and the economy
d. Determine the strategic needs and priorities of the sector
e. Ensure Resource’s increasing operational effectiveness

Supporting Resource in the regions is a network of Regional Agencies – the regional Museums, Libraries and Archives Councils (MLACs). At the time of writing, eight have been constituted and four (NEMLAC, SEMLAC, EMMHLAC and SWMLAC) are fully operational. The whole network of nine MLACs will be complete by April 2004 when the Regional Agency for London is established. Each Regional Agency will have its own corporate plan that reflects not only the national agenda for the sector, but also regional priorities for action. This of course brings with it a requirement for useful and appropriate region-specific evidence upon which strategies and policies can be based. This paper reviews the current availability of regional data for each domain to provide some initial guidance on where future actions in terms of data collection should be targeted.

By collating and publishing baseline data on users and non-users across the domains, Resource will be able to contribute to the evaluation of the impact of additional government funding for the sector at both national and regional levels. The information collated for this report goes some way towards securing this target.

An element of the third objective listed above is the preparation, later in 2003, of the first annual digest of statistics for the sector. Again, the data presented in this document present a suitable source from which relevant information can be quarried.

Thus this study, to collate and review existing information on users and non-users of museums, archives and libraries, is playing an important supporting role as Resource seeks to deliver its current action plan for the sector.

However, it is also important to note the broader context within which museums, archives and libraries are operating. For the many public sector organisations in the three domains, the key driver is DCMS policy, which may or may not be directed through Resource. However, there are other factors being brought to bear on the domains, where Resource and the MLACs are seeking to achieve a common approach to the direction and quality of service delivery and facility provision across the public, private and voluntary sector institutions in the three domains. Current policy initiatives across the three domains that are of relevance to the collection, collation and dissemination of user and non-user information are briefly reviewed below.
2.2 Museums

The key strategic policy initiative currently affecting museums in England is **Renaissance in the Regions**, launched by Resource in October 2001. This initiative provides a new, integrated framework for museums, based on a network of regional ‘hubs’. Regional hubs are made up of one lead museum service and up to three partners, and will be developed to become centres of excellence, championing regional museum practice. Partners with Resource in **Renaissance in the Regions** include:

- Museums Association
- Regional MLACs
- Association of Independent Museums
- Individual regional museums

A key objective for the regional hubs is to increase the level of visitor activity at museums, and to play a greater role within the community through enhanced outreach programmes, for instance. To achieve this, a total of £70 million has been allocated to the initiative over four years. The hubs are:

**East Midlands Hub**
- Leicester Museums Service - lead partner
- Derby Museums and Art Gallery
- Leicestershire Museums Service
- Lincolnshire Museums Service
- Nottingham City Museums and Galleries

**East Of England Hub**
- Norfolk Museums and Archaeology Service - lead partner
- Colchester Museums
- Luton Museums Service
- Fitzwilliam Museum, University of Cambridge

**London Hub**
- Museum of London - lead partner
- Geffrye Museum Trust
- Horniman Public Museum and Public Park Trust
- London's Transport Museum

**North East Hub**
- Tyne and Wear Museums - lead partner
- Beamish, the North of England Open Air Museum
- Hartlepool Museums
- The Bowes Museum, County Durham

**North West Hub**
- Manchester City Galleries - lead partner (Museum of Science and Industry in Manchester, People's History Museum as ‘First Partners’)
- Bolton Museum and Art Gallery
- Harris Museum and Art Gallery, Preston (with Lancashire County Museums Service as ‘First Partner’)
- Tullie House Museum and Art Gallery, Carlisle
- University of Manchester Museums and Galleries

**South East Hub**
- Hampshire County Museums Service - lead partner
- Chatham Historic Dockyard Trust
- Oxford University Museums
- The Royal Pavilion, Libraries & Museums, Brighton & Hove

**South West Hub**
- Bristol Museums and Art Gallery - lead partner
- Plymouth City Museum and Art Gallery
- Royal Albert Memorial Museum and Art Gallery, Exeter
- Royal Cornwall Museum, Truro
- Russell-Cotes Art Gallery, Bournemouth

**West Midlands Hub**
- Birmingham Museums and Art Gallery - lead partner
- Herbert Art Gallery and Museum, Coventry
- Ironbridge Gorge Museum Trust, Telford
Resource intends hubs to work with regional agencies, which should become more focused and lean organisations operating on a cross-sector basis. In this instance, cross-sectoral is to include libraries and archives, designated and university museums and national museums and galleries. Smaller museums will benefit, as hubs will disseminate information on best practice so that services can be improved. They will also become involved in regional schemes and will be able to obtain free or low cost assistance. There will be learning, training and inclusion initiatives as well as increased funding opportunities.

In terms of performance indicators, DCMS has indicated that regional museums should deliver, by the end financial year 2005/06, 500,000 visits by new users, predominantly from social classes C2DE and ethnic minorities.

Scotland’s museums are currently responding to the challenges laid down in the Scottish Executive Cultural Strategy, which seeks to deliver access to cultural facilities for all Scottish residents and to embed cultural provision within local community learning plans. Responding to this, the Scottish Museums Council prepared policy guidelines that encourage museums and galleries in Scotland to place social justice at the centre of policy and practice.

### 2.3 Archives

Resource is currently conducting an in-depth analysis and review of the state of the UK’s unique and diverse archives. The Archives Task Force is undertaking a detailed investigation and analysis of the state of the UK’s archives. It is intended that the study will bring to the fore the capacity of archives to change lives, and make a real difference and impact on individuals and communities. Through the Archives Task Force, Resource aims to ‘throw a searchlight on our archives to demonstrate how this rich inheritance can be better understood, looked after and used.’ The group is due to report to government and funding agencies in the summer of 2003.

The Archives Task Force aims to raise the profile of UK archives, investigating current users needs, and barriers to access. Members hope to identify how the potential of the UK’s archives can be harnessed. A major concern of the Task Force is to assess how the return on the investment in archives can be maximised. A further line of investigation is to analyse how technology can be used to increase and improve access to collections and information. It is anticipated that outcomes from the Task Force will include:

- Wider public access - encouraging a broader and more culturally diverse audience
- Re-orientation of archives in the public consciousness as a valuable community resource
- Development of creative partnerships to provide better public services

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• Changed professional attitudes

Again, therefore, it is essential to have a set of baseline data that clearly illustrates the existing reach of archives into the wider community in order to gauge the success of moves to introduce a broader and more culturally diverse audience to archives.

2.4 Libraries

Under the Public Libraries and Museums Act 1964, all library authorities are required to “provide a comprehensive and efficient library service for all persons desiring to make use thereof”. Since 1988, all library authorities in England have been required to produce Annual Library Plans. Such plans include reviews of past performance (and hence have a requirement for sound statistical data) as well as strategies and targets for the current and future years.

In May 2000, DCMS put forward public library standards that were designed to guide authorities towards what constitutes ‘a comprehensive and efficient library service’. Following a period of consultation, agreed national library standards were introduced in April 2001.

The DCMS strategy document ‘Framework for the Future: Libraries, Learning and Information in the Next Decade’, has indicated that libraries need a modern mission, which should be constantly renewed and communicated to the communities they serve. This modern mission should be based on:

• Evolution: building on libraries’ traditional core skills in promoting reading, informal learning and self-help
• Public value: focusing on areas where public intervention will deliver the largest benefits to society including support for adult literacy and pre-school learning
• Distinctiveness: building on libraries’ open, neutral and self-help culture. They should complement the efforts of other public and private sector providers through partnership working
• Local interpretations of national programmes: developing national programmes which will raise the profile of the public library service as a whole but which are sufficiently flexible to be adapted to local needs.

Framework for the Future highlights that three specific areas of activity meet these criteria and should be at the heart of libraries’ modern mission:

• The promotion of reading and informal learning
• Access to digital skills and services including e-government
• Measures to tackle social exclusion, build community identity and develop citizenship.

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Recommendations for a future strategy for public libraries in Northern Ireland are contained in the recent DCAL document ‘Tomorrow’s Libraries’. Aspirations for the public library service in Northern Ireland are for it to be:

- Customer focussed with service development and delivery relevant to the needs of users
- Well resourced with stock, staff and estate appropriate to the core needs of the service
- Well managed and accountable
- Supporting government policy and delivering modern public services:
  - Promoting social inclusion and targeting social need
  - Supporting learning
  - Delivering online and e-government services
- Recognised and valued for its contribution to individual and community development

Another recent initiative affecting the library domain is the People’s Network. The People’s Network is a £170 million lottery-funded project to connect all public libraries to the internet. The objective is to increase public access to the resources available on the web, not just for learning but also for fun and relaxation. To date, more than 30,000 computer terminals have been installed in more than 4,000 libraries. This capital investment has been supported by the creation of new websites, software development and library staff training in the use of ICT.

Through the creation of the Wider Information and Library Issues Project (WILIP), Resource has sought to investigate the role the libraries sector plays in the economic, social and cultural well-being of the country. This has required consultation with policy makers, key practitioners and professional associations. This has involved the whole of the library and information community, ranging from school, further and higher education libraries, through health, prison and workplace libraries to the book trade and internet providers.

The primary emphasis of WILIP has been to listen to what consultees need so that Resource can be more effective in making the information society a reality.

The objectives of WILIP have been to:

- Map the library and information domain and adjacent areas
- Identify the issues that currently confront libraries and information providers
- Identify where and how Resource might add value in helping to resolve these issues
- Communicate the conclusions to all Resource’s stakeholders

### 2.5 Best Value and Performance Indicators

#### 2.5.1 What are performance indicators?

Performance indicators are meant to be a means of enabling practical management of services by setting defined standards and targets. They are a form of measurement developed, adopted and reported in order to assess and guide performance relating to functions and meeting objectives. Performance indicators are designed to set standards and are a primary mechanism for driving improvement, providing details of service delivery and performance.

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11 Department of Culture, Arts & Leisure (2003) Tomorrows Libraries. Use of the Public Library Sector
12 Resource (2003c) The People’s Network (leaflet)
Through measuring activities against Performance Indicators, it should be possible to:

- Measure progress towards achieving objectives
- Highlight priorities
- Increase accountability
- Manage and improve service
- Increase internal accountability
- Inform policy decisions and resource allocation

2.5.2 ODPM and Best Value Performance Indicators

As far as the Office of the Deputy Prime Minister (ODPM) is concerned, Best Value is a key element of the Government’s programme to modernise local government. Best Value places on ‘best value authorities’ a duty to seek continuous improvement in the way in which they exercise their functions. Legislative framework for this was set out in the 1999 Local Government Act, and local authorities are required to report progress towards a range of performance indicators covering every aspect of service delivery.

This statutory performance management framework is central to the government’s concept of best value. It provides for annual reporting by best value authorities of a set of national performance indicators and standards set by the Government. These are intended to reflect the broad range of local services and, in particular, headline policy priorities that are consistent with existing and emerging Public Service Agreements. Best Value Performance Indicators (BVPIs) are of two types:

- Best Value Corporate Health indicators provide a snapshot of how well the authority is performing overall. These indicators are designed to reflect the underlying capacity and performance of local authorities and others as democratic or locally accountable institutions and bodies responsible for managing public expenditure.

- Best Value Service Delivery indicators reflect achievement in the delivery of local services. These indicators are designed to enable comparisons to be made between the performance of different authorities and within an authority over time. Authorities also need to set targets against the indicators that are relevant to the services they provide.

In order to ensure the best value performance indicators give a ‘balanced view of performance’, the government has adopted five ‘dimensions’ of performance:

- Strategic objectives – why the service exists and what it seeks to achieve
- Cost/efficiency – the resources committed to a service and what it seeks to achieve
- Service delivery outcomes – How well the service is being operated to achieve strategic objectives
- Quality – quality of services delivered, reflecting users’ experience of services
- Fair access – ease and equality of access to services.

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2.5.3 Audit Commission Performance Indicators

Under Sections 44 and 46 of the 1998 Audit Commission Act, the Audit Commission has a duty to specify performance indicators for local authorities as it thinks fit. Although the Commission specified statutory performance indicators for local authorities up to 2000/01, it has not specified any for 2003/04.

2.5.4 Local Performance Indicators

Local Authorities have been encouraged to develop and use local performance indicators, further to those specified by the Government. The government considers these to be an important measure of local performance and of the responsiveness of the authority to meeting local needs as they allow local priorities to be reflected and can help tailor best value to suit local circumstances. They also provide service managers with necessary performance information.

The Audit Commission and Improvement and Development Agency (IDEA) have established a library of definitions of local performance indicators. It is intended that local authorities select and use quality approved performance indicators appropriate to local circumstances.

The extent to which Local Performance Indicators are used appears to be extremely variable as many authorities attach greater emphasis on measuring and reporting statutory indicators rather than local performance indicators which, because of their optional nature, may be viewed by some as being of secondary importance.

2.5.5 Benchmarking within Domains

Some groups within domains such as the Group of Larger Local Authority Museums (GLLAM) collect and share performance indicator information in order to assist with benchmarking exercises. Similarly, museums services in smaller local authorities may be involved in benchmarking groups, as may library services.

In some instances, this is linked to the adoption and monitoring of Local Cultural Strategies. The existence of such strategies is included as one of the seven Cultural Services, Best Value Performance Indicators for local authorities. The DCMS is working with the Local Government Association, sponsored bodies, professional institutes and some of pilot authorities to share information and monitor the implementation of Best Value. This is undertaken through the LGA Cultural Services Best Value Network.

2.5.6 Cultural and Related Services Best Value Performance Indicators 2003/04

2.5.6.1 Introduction

The government recognises that the current indicators pertaining to the museums, libraries and archives domains reproduced below require some further development to provide a more comprehensive assessment of the cultural sector.

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It is already known that after 2003-4 Local Cultural Strategies will be subsumed within community strategies, and thus the requirement to report against BV 114 (see below) will, therefore, cease.\footnote{ODPM (2003b) ‘Office of the Deputy Prime Minister | Best Value Performance Indicators for 2003/04’ \url{http://www.local-regions.odpm.gov.uk/bestvalue/indicators/pi2003-04/10.htm}. Page consulted 2/4/03}

2.5.6.2 Cultural and related services BVPIs\footnote{The following BVPI’s are taken from ODPM (2003b) ‘Office of the Deputy Prime Minister | Best Value Performance Indicators for 2003/04’ \url{http://www.local-regions.odpm.gov.uk/bestvalue/indicators/pi2003-04/10.htm}. Page consulted 2/4/03}

**Strategic objectives**

BV 114: The adoption by the authority of a Local Cultural Strategy.

- Is the strategy widely scoped, including:
  - Arts (including libraries where applicable);
  - Heritage (including museums where applicable);
  - Sport;
  - Tourism;
  - Outdoor recreation (parks, countryside, play, carnivals and other events).

- Have all of the following been involved in drawing up the strategy?
  - Other public agencies including tiers of local government;
  - The voluntary sector;
  - The private sector.

- Was consultation on the strategy both:
  - Inclusive\footnote{‘Inclusive’ is taken to mean that the authority must have obtained views from a cross section of the community including young people, black and ethnic minority populations, older people, and those with disabilities.}
  - Active\footnote{‘Active’ is taken to mean that the authority must have a number of different methods to consult, and have tried to obtain a wide range of representative responses, by following up any deficiencies.}

- Is the strategy linked to:
  - Other corporate strategies and plans.
  - Other relevant local documents.

- Is there an action plan for the Council as described in DCMS guidance?

- Are arrangements in place to:
  - Monitor implementation;
  - Review the strategy.

To be undertaken by: Metropolitan Authorities, London Boroughs, Unitary Authorities, County Councils, District Councils, Council of the Isles of Scilly, Common Council of the City of London.

**Service delivery outcome**

BV 117: The number of physical visits per 1,000 population to public library premises.
To be undertaken by: Metropolitan Authorities, London Boroughs, Unitary Authorities, County Councils, Council of the Isles of Scilly, Common Council of the City of London.

**User Satisfaction Surveys**

BV 118: The percentage of library users who found the book/information they wanted or reserved it and were satisfied with that outcome.

To be undertaken as part of PLUS survey by Metropolitan Councils, County Councils, Unitary Councils, London Boroughs, Council of the Isles of Scilly

BV 119: The percentage of residents satisfied with the Local Authority Cultural services:

- Sports and leisure facilities
- Libraries
- Museums
- Arts activities and venues
- Parks and open spaces.

To be undertaken by: Metropolitan Authorities, London Boroughs, Unitary Authorities, County Councils, Common Council of the City of London.

**Services delivery outcome**

BV 170:

a. The number of visits to/usage's of museums per 1,000 population.

b. The number of those visits that were in person per 1,000 population.

c. The number of pupils visiting museums and galleries in organised school groups (this does not include visits by sixth form colleges or adult education institutions’)

Visit/usage to museum(s) is classified as:

- Visits by a member of the public
- Enquiries by email, post or telephone for research purposes (not including enquiries about opening hours, tickets, how to get there, or media enquiries, briefings and interviews)
- Website hits for research
- Presentations by museum staff to specific audiences
- Number of pupils visiting in organised school groups

To be undertaken by: Metropolitan Authorities, London Boroughs, Unitary Authorities, County Councils, District Councils, Council of the Isles of Scilly, Common Council of the City of London.

2.5.7 DCMS Performance Indicators for National Museums & Galleries

The DCMS also produces performance indicators as part of funding agreements with individual national museums and galleries. The indicators are voluntary for all other (i.e. non-national) institutions. The funding agreements are designed to outline targets for performance for each of the three years of the duration of the agreement.  

The areas covered by the performance indicators are:

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• User numbers (total visitor numbers, participants in off-site programmes, web-site usage, user numbers-queries)
• Loan venues
• Quality of environment: quality of environment for collections; condition of collections
• Public image of National museums and galleries
• Quality of collection documentation
• Electronic access
• Rate of exhibition renewal
• Percentage of time open
• Publication output
• Visual access
• Evaluation of user satisfaction
• Uptake of educational programmes
• Collaborative educational projects
• Social inclusion-impact and strategy
• Grant in aid per visitor and per user
• Proportion of spend on administration
• Proportion of spend: security and facilities management/buildings maintenance
• Self-sufficiency indicator
• Annual savings achieved
• Grant in aid as a proportion of total operating spend
• Percentage of time lost through sickness
• Energy costs

Those marked in bold are directly relevant to this study.

The performance indicators were developed by DCMS in collaboration with the National Museums and Galleries and the National Museum Directors' Conference. The PIs advocate the involvement of user stakeholders via participatory programmes or user surveys. The Performance Indicators and the targets set are 'selected and tailored to suit the individual organisations.'

2.6 Social Inclusion in the Cultural Sector

2.6.1 Introduction

According to the Government’s Social Exclusion Unit, social exclusion is ‘a shorthand term for what can happen when people or areas suffer from a combination of linked problems, such as unemployment, poor skills, low incomes, poor housing, high crime environments, bad health, poverty and family breakdown’. The DCMS definition sees social exclusion as ‘a condition involving poor awareness of, and access to, the economic, cultural and social networks of society’.

2.6.2 Overview of current government policy and legislation

This section provides a brief overview of current public policy relating to social inclusion as it relates to the museums, archives and library domains. The text in Section 2.6.2 draws on a

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38 Department for Culture, Media & Sport (2000) *Centres for Social Change: Museums, Galleries and Archives for All*
review previously prepared by the consultants for the Heritage Lottery Fund, and we acknowledge the permission granted to us by HLF to reproduce much of that text here.

There are a number of recent policy and legislative instruments that set the broad framework for access, audience development and social inclusion activities across the sector. One is the Equality Statement, released by the Cabinet Office in November 1999, which requires every statutory agency in the UK and, by implication, the organisations that they support, to develop mechanisms to address:

- Race Relations
- Sex Discrimination
- Disability Discrimination

The 1999 Cabinet Office equality statement pulls together the main points of the relevant government legislation in order to clarify what an organisation’s responsibilities are in the field of equal opportunities.

All of the above points are already covered in Northern Ireland under the Equality Legislation enshrined in the Northern Ireland Act 1998, which requires all public authorities and Non-Departmental Public Bodies to promote equality of opportunity:

- between persons of different religious belief, political opinion, racial group, age, marital status, sexual orientation
- between men and women generally
- between persons with a disability and those without
- between persons with dependants and those without

The implication of this for the sector is quite clear: it requires all organisations working in the sector to have sufficient information or baseline data on their clients and beneficiaries so that they can be quite sure they are:

- promoting equality of opportunity, in terms of access to resources and services
- not inadvertently discriminating against any specific group

Another important piece of legislation is the Disability Discrimination Act (1999) that calls for much greater attention to be paid to the needs of disabled people. In particular, it requires all new buildings to be fully accessible and for every attempt to be made to improve the accessibility of existing structures, including libraries, archives, museums, galleries and other public buildings. The Act will fully come into force in 2004 and considerable pressure will be placed on heritage organisations of all sizes to ensure that their own facilities meet the requirements of the legislation.

Also important is the Human Rights Act passed in 2000. Some commentators in the cultural and heritage sectors argue that this now allows individuals to claim access to culture or heritage as a right. Although this opinion is yet to be tested in the courts, the philosophy behind this concept of social justice is becoming widespread in the heritage sector and leads some organisations, such as the Scottish Museums Council, to suggest that social justice, and thus social inclusion, should be at the core of everything that a heritage organisation does.

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40 Scottish Museums Council (2001) Museums and Social Justice: How museums and galleries can work for their whole communities
The PAT 10 Report ‘Arts & Sport’, published in June 1999, provides a strategic policy framework for all bodies involved in arts, sport and regeneration\(^{41}\). The document argues that cultural and other recreational activity can contribute to neighbourhood renewal and make a real difference to health, crime, employment and education in deprived communities. It also argues that ‘special and systematic arrangements need to be made’ to involve ethnic minority groups and disabled people in cultural life. Such arrangements should include capacity building, targeted initiatives and action plans tailored to their particular needs. A progress report published in February 2001\(^{42}\) examines how different agencies have been able to achieve the objectives of the original document.

In November 1999, the Department for Culture, Media & Sport published its own Access Policy that expects all Lottery Distributors (including HLF) and all museums and galleries receiving funding direct from the Department to prepare their own access policies that reflect the main DCMS concerns of:

- increasing actual participation in culture and leisure activity across the whole area of DCMS responsibilities
- breaking down barriers to participation
- increasing access by targeting particular groups within the population who are currently under-represented amongst participants in the activity in question

This again requires museums, archives and libraries to consider their own access policies and the outcomes of their activities, in terms of increasing levels of participation by different audiences.

A significant document guiding cultural policy in Scotland is the Scottish Executive Cultural Strategy\(^{43}\). The strategy aims to deliver access for all, and argues that real and perceived barriers to access and participation must be overcome. In particular, there is an emphasis on recognising the needs of different age groups on the grounds that ‘cultural activity is enriched by contributions from every generation’. The strategy confirms that the Scottish Executive will measure and report progress in reducing cultural exclusion because of disability, location, age, ethnicity, economic or educational factors, and report on progress in meeting new standards, although it does not say what these standards are.

The strategy also seeks to embed cultural strategies within the local community planning process and within community learning plans, forming links with key local agencies.

There is a commitment to monitor and review continuously the balance between ‘project’ and ‘revenue’ funding of cultural provision, to promote long-term sustainability within the sector. Reacting to this, the Scottish Museums Council has just produced its own policy guidelines that encourage museums and galleries in Scotland to place social justice at the centre of policy and practice\(^{44}\).

The National Assembly for Wales’ strategic plan ‘Better Wales’ and its successor, Plan for Wales 2001\(^{45}\), set out a long-term vision for society within Wales. The Plan for Wales 2001 is based around the three guiding themes of:

- sustainable development
- tackling social disadvantage
- equal opportunities

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\(^{41}\) Department of Culture, Media & Sport (1999): Arts and Sport – Policy Action Team 10, A Report to the Social Exclusion Unit


\(^{43}\) Scottish Executive (2000) Creating Our Future, Minding Our Past; Scotland’s National Cultural Strategy

\(^{44}\) Scottish Museums Council (2001) Museums and Social Justice: How museums and galleries can work for their whole communities

\(^{45}\) The Government of the National Assembly for Wales (20010 Plan for Wales 2001
It contains some specific access and inclusion targets for the domains, including:

- increasing the number of remote users of the National Library to 151,000
- ensuring that all public libraries are online by 2002 (through the People’s Network initiative)
- undertaking a major redevelopment initiative at Big Pit, Blaenavon
- Maintaining the increase in visitor numbers at museums, through a programme of exhibitions
- Supporting the development of the National Library’s new visitors centre
- Making the treasures of Welsh museums and libraries accessible in digital form on the internet
- Displaying the National Museum’s collections at local museums
- Setting service standards for public libraries, in particular to assist disadvantaged groups and lifelong learners
- Rationalising the advisory structure for museums, archives and libraries

The Department of Culture, Arts and Leisure in Northern Ireland has produced a strategic framework document ‘Unlocking our Creative Potential’ for arts and culture in Northern Ireland. The document addresses what has happened to arts and culture in Northern Ireland in the past, what is happening in the present, what the ideal scenarios and common grounds should be for the future and how these should be achieved.

Although primarily arts orientated, the document identifies access and social inclusion as a priority area and states that ‘cultural minority groups need to be represented’ and stresses key tasks as education, presentation, involvement, collaboration and celebration. The framework also provides both short and long term actions.

All of the above policy and strategy documents require a sound level of understanding as to the profile of existing service users, the impacts that the particular service has on them and the opportunities that exist to introduce new users, and particularly the socially excluded, to that domain. As the PLB report for the Heritage Lottery Fund found, without such baseline information, it becomes very problematic for museums, archives and libraries organisations to undertake any marketing, audience development or social inclusion initiatives.

Thus robust information on who is and who is not engaging with a particular type of cultural asset or service is essential, to ensure that the organisation managing access to that asset is not in danger of breaching its statutory obligations towards social inclusion and equality.

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46 Department of Culture, Arts and Leisure (2000) *Unlocking our Creative Potential*
2.7 Summary: Factors Governing Information Requirements

The above review of the policy context within which museums, archives and galleries operate in the UK reveals a number of key reasons for collecting data on users and non-users:

- To support Best Value reviews (primarily publicly funded museum, archive and library services)
- To demonstrate to stakeholders, including funding agencies, competence in the delivery of services (particularly national institutions receiving core funding from DCMS)
- To track trends in performance over time (all agencies/ institutions)
- To enable cross-domain comparisons in activity

A further reason, not necessarily evident from policy guidance but essential nonetheless, is to advise robust marketing plans and audience development strategies.
3 Audiences for Museums

3.1 Introduction to the Domain

It is sometimes suggested that there are as many as 2,500 museums in the UK although, as has been observed, there is still no single authoritative listing of all UK museums, and thus this figure remains at best an informed estimate. More than 1,860 museums are currently part of the voluntary Museum Registration Scheme managed by Resource. An appropriate breakdown of the population of UK museums into a number of sub-domains could be as follows:

<table>
<thead>
<tr>
<th>Sub-domain</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>National museums</td>
<td>Receives core funding from Central Government</td>
</tr>
<tr>
<td>Local authority museums</td>
<td>Receives core funding from one or more local authorities. These museums may be managed by the local authority, or by another organisation on its behalf</td>
</tr>
<tr>
<td>Government agency</td>
<td>Receives core funding from a government agency e.g. English Heritage, Historic Scotland</td>
</tr>
<tr>
<td>Higher Education</td>
<td>Associated with the UK’s universities, university departments or other higher education institutions</td>
</tr>
<tr>
<td>Independent museums owned by charitable trusts</td>
<td>(includes National Trust)</td>
</tr>
<tr>
<td>Private museums</td>
<td>Owned by a private individual or for-profit company</td>
</tr>
</tbody>
</table>

Source: PLB Consulting Ltd

The above breakdown of the domain reflects governance issues as this, to a large extent, will influence the type of information collected on users and other management issues, as well as the uses to which these data are put. However, as will be demonstrated later, there are only a limited number of census-style data collection exercises within specific sub-domains, such as the Nationals providing figures directly to DCMS and CIPFA’s work with local authority museums. Most major data collection and collation exercises on user statistics are generic across the whole domain and rarely break down data sets into sub-domains although some regional analysis may be undertaken. This is not to deny the value of a breakdown of data by sub-domains, merely a reflection of current data collection practice.

3.2 Mapping the Museum Domain

3.2.1 National Mapping Exercises

Unlike the Archives domain (see Section 4), the domain in England has not been the subject of a recent, national mapping exercise. The most recent national mapping exercise in England was in 1999 when the last data set for the Digest of Museum Statistics (DOMUS) was collected (see Section 3.4.2).

Scotland’s museums were recently the subject of a major national audit, with the survey covering some 192 organisations across a range of museum and gallery types, or 86% of the survey population. Excluded from the survey were:

- Private collections
- Country houses which do not consider themselves to be museums
- Religious institutions
- Commercial galleries

Issues covered by the audit included:

- Collections
- Funding
- Visitor Numbers And Economic Performance
- Staff And Volunteers
- Collections Documentation
- Learning
- Access
- Premises
- Standards

Key findings relating to existing and potential audiences are summarised below.

### Data collection by Scotland’s museums

<table>
<thead>
<tr>
<th>Museum type</th>
<th>Visitor survey in the last 3 years</th>
<th>Identified target groups in the local community</th>
<th>Socio-economic profile of the local community</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Number</td>
<td>%</td>
<td>Number</td>
</tr>
<tr>
<td>National</td>
<td>12</td>
<td>43</td>
<td>7</td>
</tr>
<tr>
<td>Local Authority</td>
<td>79</td>
<td>56</td>
<td>69</td>
</tr>
<tr>
<td>Independent</td>
<td>107</td>
<td>70</td>
<td>65</td>
</tr>
<tr>
<td>Military</td>
<td>6</td>
<td>86</td>
<td>1</td>
</tr>
<tr>
<td>University</td>
<td>6</td>
<td>20</td>
<td>6</td>
</tr>
<tr>
<td>Other</td>
<td>1</td>
<td>50</td>
<td>0</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>211</strong></td>
<td><strong>58</strong></td>
<td><strong>148</strong></td>
</tr>
</tbody>
</table>

Source: A Collective Insight: Scotland’s National Audit. Full Findings Report

No information appears to have been collected on visitor profile, or on virtual usage which, given recent investment in SCRAN (Scottish Cultural Resources Access Network) is somewhat surprising.

A mapping exercise for Northern Ireland’s 38 registered museums has recently been completed and will be launched during May 2003. No national mapping exercise of museums in Wales in recent years.

### 3.2.2 Regional Mapping Exercises across England

In order to better understand the provision and current state of museum services across the country, several of the new Museums, Libraries and Archives Councils (MLACs) have undertaken mapping exercises. Such information is invaluable in that it begins to fill some of the basic data gaps in the domain, such as how many museums there are and what their information requirements are. The figure below summarises progress to date by the MLACs on mapping the domain in their region.
3.3 Data Collection Activity Across the Domain

3.3.1 Supply-side Research

A recent survey carried out on behalf of Resource found that, on average, museums receive more than 10 request for information per annum. Up to thirty difference organisations regularly make requests for information on a regular basis including:

- Local authorities
- Resource
- Area Museums Councils
- Heritage Lottery Fund
- National and regional tourist boards
- Peer groups & umbrella organisations such as AIM, GLLAM

However, the majority of requests are made by independent researchers or students. Data collected from museums is used for a number of purposes including:

- Research
- Annual returns
- Performance indicators
- Publications
- Benchmarking
- Advising funding agreements

The majority of museums participating in the aforementioned research felt that there is too much duplication in requests for information and that there is a need to rationalise data collection and collation across the sector. Key recommendations arising from the research are that future data collection and dissemination in the domain should:

- Focus upon visitor profiling and market data
- Ensure that data are comparable between similar subsets of museums
- Standardise data to facilitate planning and research

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3.3.2 Demand Side Research

Unlike the other two domains, museums are able to draw on a corpus of demand-side research that collects information on engagement with the domain by the general public. The principal sources of this information are:

- the **Target Group Index** (TGI) surveys managed by the British Market Research Bureau (BMRB), a commercial organisation that sells the findings to the public and private sector. Resource has recently purchased TGI data from BMRB and its potential value has been assessed on behalf of Resource by LISU.\(^{52}\)

- other **omnibus surveys** carried out by the Office for National Statistics (ONS) or by commercial companies such as MORI.

The TGI research on engagement with museums effectively fills a gap caused by the withdrawal of such questions from the General Household Survey (GHS), managed by the Office for National Statistics (ONS). In the past, the GHS has collected information on trips made to museums and libraries by individuals but this has not been gathered since 1987.\(^{53}\) A review of demand-side information on audiences for museums and galleries is presented in Section 3.5, following a review of the supply-side data.

3.4 Supply-side Research

3.4.1 Introduction

Unlike the other two domains, where a breakdown by governance provides a mutually exclusive set of sub-domains that also reflects data collection activities, the museums sector is covered by a number of broad studies that seek to be as comprehensive as possible in terms of the survey population. There are of course specific data collection activities at the National museums, and for local authority museums. These are considered in Section 3.6.2 after a review of the more general studies.

3.4.2 Digest of Museum Statistics (DOMUS)

This was the primary source of information on the activities of UK museums for the period 1994 to 1999.

The DOMUS survey did collect information on the number of visits recorded although there is concern over the validity of much of the data.\(^{54,55}\) In particular, there was no guidance provided on how visitor numbers should be collected and only once, in 1999, were participants asked to indicate the method used for counting. Information was also gathered on the number of children and students visiting museums in organised educational groups, although again caution is required when reviewing these data because of the poor quality of some returns.\(^{56}\) Given reported concerns over the overall quality of the data gathered by DOMUS on visits to museums in the UK, the best use that it can be put to is to establish trends at the national and regional level (although with the survey population changing each year, even this cannot be guaranteed as being totally accurate).


\(^{53}\) Office for National Statistics (2001) Living in Britain: Results from the 2000 General Household Survey p.262

London: HMSO

\(^{54}\) Wright, M; Selwood, S; Creaser, C & Davies, JE (2001) UK Museums Retrospective Statistics Projects

Loughborough: LISU


\(^{56}\) Wright, M; Selwood, S; Creaser, C & Davies, JE (2001) UK Museums Retrospective Statistics Projects p.39

Loughborough: LISU
Total visits to Museums by Area Museum Council and by year

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>'000 visits</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>London</td>
<td>15,415</td>
<td>10,816</td>
<td>13,490</td>
<td>17,044</td>
<td>17,366</td>
<td>16,072</td>
</tr>
<tr>
<td>South East</td>
<td>3,192</td>
<td>2,692</td>
<td>2,635</td>
<td>3,576</td>
<td>3,499</td>
<td>3,823</td>
</tr>
<tr>
<td>Southern</td>
<td>4,150</td>
<td>3,100</td>
<td>1,880</td>
<td>3,362</td>
<td>3,611</td>
<td>4,278</td>
</tr>
<tr>
<td>South West</td>
<td>4,750</td>
<td>4,393</td>
<td>3,962</td>
<td>4,179</td>
<td>5,162</td>
<td>4,846</td>
</tr>
<tr>
<td>Eastern</td>
<td>2,600</td>
<td>1,213</td>
<td>2,043</td>
<td>2,672</td>
<td>2,783</td>
<td>3,037</td>
</tr>
<tr>
<td>East Midlands</td>
<td>3,617</td>
<td>3,776</td>
<td>2,772</td>
<td>3,255</td>
<td>2,933</td>
<td>2,018</td>
</tr>
<tr>
<td>West Midlands</td>
<td>5,664</td>
<td>4,556</td>
<td>2,962</td>
<td>4,481</td>
<td>4,583</td>
<td>2,925</td>
</tr>
<tr>
<td>Yorkshire</td>
<td>7,467</td>
<td>5,239</td>
<td>7,027</td>
<td>5,645</td>
<td>5,951</td>
<td>5,279</td>
</tr>
<tr>
<td>North West</td>
<td>6,403</td>
<td>3,912</td>
<td>3,837</td>
<td>5,100</td>
<td>3,360</td>
<td>4,741</td>
</tr>
<tr>
<td>North East</td>
<td>3,117</td>
<td>2,395</td>
<td>2,161</td>
<td>3,303</td>
<td>2,596</td>
<td>2,786</td>
</tr>
<tr>
<td>Wales</td>
<td>1,733</td>
<td>1,583</td>
<td>2,278</td>
<td>2,959</td>
<td>1,080</td>
<td>1,113</td>
</tr>
<tr>
<td>Scotland</td>
<td>10,425</td>
<td>9,080</td>
<td>7,271</td>
<td>8,002</td>
<td>8,543</td>
<td>8,335</td>
</tr>
<tr>
<td>N Ireland</td>
<td>818</td>
<td>663</td>
<td>727</td>
<td>843</td>
<td>557</td>
<td>364</td>
</tr>
<tr>
<td>TOTAL UK</td>
<td>69,410</td>
<td>53,417</td>
<td>53,047</td>
<td>64,420</td>
<td>62,025</td>
<td>59,617</td>
</tr>
</tbody>
</table>

Source: Wright, M; Selwood, S; Creaser, C & Davies, JE (2001) UK Museums Retrospective Statistics Projects p.40

3.4.3 Sightseeing in the UK

This annual digest of statistics has, in recent years, been prepared by the Moffat Centre at Glasgow Caledonian University on behalf of the four National Tourist Boards and draws on the findings of the annual Survey of Visits to Visitor Attractions. The survey forms are distributed by the National Tourist Boards to their country’s attractions, with the Moffat Centre providing data entry, analytical and reporting inputs to the study. The survey report is published anything up to a year or more after the end of the calendar year to which the data refer, making it useful for reference and research, but of less value for informing management decision making at the operational level. At the time of writing (March 2003), the future of Survey of Visits to Visitor Attractions is under review and is likely to be re-tendered later this year.

Museums and Art Galleries are one of 19 discrete categories of visitor attraction covered by the survey, and the guidance notes indicate that the category includes industrial, Mining, Science, Transport Museums and Galleries of Modern Art. Thus the scope of the attractions in this category extends beyond those of relevance to the work of Resource, most notably with the inclusion of art galleries. Historic Houses and Palaces are a separate category, again blurring the issue somewhat given that some Historic Houses will have a registered museum collection.

A key benefit of this publication is the relatively long period of time that it has been running and hence the opportunity it brings to prepare trend analyses across the various attractions sectors although the total sample is not constant year on year and thus such comparisons should always be made with an element of caution.

The most recent report does present trend data for visits to attractions for the period 1989 – 2001, using a constant year-on-year sample.
Trends in number of visits to UK attractions 1989 – 2001 (1989 = 100)

<table>
<thead>
<tr>
<th>Year</th>
<th>Museums &amp; Art Galleries</th>
<th>All UK attractions</th>
</tr>
</thead>
<tbody>
<tr>
<td>1989</td>
<td>100</td>
<td>100</td>
</tr>
<tr>
<td>1990</td>
<td>106</td>
<td>103</td>
</tr>
<tr>
<td>1991</td>
<td>107</td>
<td>102</td>
</tr>
<tr>
<td>1992</td>
<td>110</td>
<td>102</td>
</tr>
<tr>
<td>1993</td>
<td>109</td>
<td>104</td>
</tr>
<tr>
<td>1994</td>
<td>110</td>
<td>105</td>
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<tr>
<td>1995</td>
<td>108</td>
<td>107</td>
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<td>1996</td>
<td>111</td>
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<td>1997</td>
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<td>1999</td>
<td>111</td>
<td>111</td>
</tr>
<tr>
<td>2000</td>
<td>108</td>
<td>109</td>
</tr>
<tr>
<td>2001</td>
<td>110</td>
<td>107</td>
</tr>
</tbody>
</table>

Source: Sightseeing in the UK 2001

As well as gathering basic throughput information (i.e. annual and monthly visitor numbers), the surveys also collect some basic profile information and also data on revenue generated onsite from visitors and other trading activities, employment and capital investment.

Data are broken down at the national and regional level, as well as by sector. Throughput figures for the busiest ten sites in the 19 different categories are also published. One of the main problems with the data provided is that it is based on a self-selecting sample. For instance, of the 6,415 UK visitor attractions invited to participate in the 2001 survey, only 3,387 provided information, an effective response rate of 53%. For the museums and galleries sector the response rate was slightly higher at 57% (1,046 returns from 1,828 forms distributed)\(^57\).

Findings from the 2001 survey revealed a poor year for the UK’s visitor attractions with 49% reporting a decline in visits on the previous year and an average decline in throughput of 2%. The museums and galleries sector, however, showed a slight increase of 1% with paid-entry museums recording, on average, a 6% increase compared to a 1% fall in throughput at free-entry museums and galleries.

In all, the 1,046 responding museums and galleries recorded a combined 66.4 million visits during 2001, or around 26% of all visits to attractions in the UK. This is by far the busiest sector in terms of market share, with Country Parks (41.6 million) and Historic Houses and Castles (29.3 million) being the next two busiest categories.

A breakdown of throughput at museums and galleries by ownership type reveals that nationally funded museums account for nearly half of all visits to the sector, as represented by the survey returns.

Visits to UK museums and galleries 2001, by ownership type

<table>
<thead>
<tr>
<th>Attractions</th>
<th>Sample</th>
<th>Gov't</th>
<th>EH/ Cadw/ Historic Scotland</th>
<th>Local Authority</th>
<th>Private</th>
<th>National Trust/ NTS</th>
<th>Other Trust/ Charity</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visits</td>
<td>1,046</td>
<td>7%</td>
<td>*</td>
<td>37%</td>
<td>14%</td>
<td>1%</td>
<td>33%</td>
<td>7%</td>
</tr>
<tr>
<td></td>
<td>66.4 million</td>
<td>46%</td>
<td>*</td>
<td>25%</td>
<td>7%</td>
<td>1%</td>
<td>17%</td>
<td>4%</td>
</tr>
</tbody>
</table>

* Less than 0.5%

Source: Sightseeing in the UK 2001

Seasonality issues are also illustrated in the report, with monthly throughput at participating museums and galleries appearing to be less seasonal than for the attractions sector as a whole.

Seasonal spread of visits to museums & galleries, 2001

<table>
<thead>
<tr>
<th>Month</th>
<th>Museums and Galleries</th>
<th>UK attractions</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>% of visits</td>
<td></td>
</tr>
<tr>
<td>January</td>
<td>6</td>
<td>4</td>
</tr>
<tr>
<td>February</td>
<td>7</td>
<td>5</td>
</tr>
<tr>
<td>March</td>
<td>7</td>
<td>5</td>
</tr>
<tr>
<td>April</td>
<td>10</td>
<td>9</td>
</tr>
<tr>
<td>May</td>
<td>8</td>
<td>10</td>
</tr>
<tr>
<td>June</td>
<td>9</td>
<td>11</td>
</tr>
<tr>
<td>July</td>
<td>11</td>
<td>13</td>
</tr>
<tr>
<td>August</td>
<td>14</td>
<td>16</td>
</tr>
<tr>
<td>September</td>
<td>8</td>
<td>9</td>
</tr>
<tr>
<td>October</td>
<td>8</td>
<td>8</td>
</tr>
<tr>
<td>November</td>
<td>6</td>
<td>5</td>
</tr>
<tr>
<td>December</td>
<td>5</td>
<td>5</td>
</tr>
</tbody>
</table>

Source: Sightseeing in the UK 2001

Basic profile information is available from the report, although this only covers:

- Proportions of adult and child admissions
- Proportion of visits by school children

Of concern is that not all survey participants provide the data needed to establish these indicators, and thus the figures may not reflect the true state of play across the domain. Nonetheless, the information is of some value as it allows one to compare the museums and galleries domain with other types of visitor attraction.

Proportion of adult and child visits to museums and galleries, 2001

<table>
<thead>
<tr>
<th></th>
<th>Adults</th>
<th>Children</th>
</tr>
</thead>
<tbody>
<tr>
<td>Museums and Galleries</td>
<td>70%</td>
<td>30%</td>
</tr>
<tr>
<td>All UK attractions</td>
<td>69%</td>
<td>31%</td>
</tr>
</tbody>
</table>

Source: Sightseeing in the UK 2001

Proportion of visits by schoolchildren, 2001

<table>
<thead>
<tr>
<th></th>
<th>School visits</th>
</tr>
</thead>
<tbody>
<tr>
<td>Museums and Galleries</td>
<td>9%</td>
</tr>
<tr>
<td>All UK attractions</td>
<td>5%</td>
</tr>
</tbody>
</table>

Source: Sightseeing in the UK 2001
To summarise, the principle value of this survey is the opportunity it affords to compare basic performance figures for museums and galleries with those for a wide range of other visitor attractions. However, the fact that the findings are drawn from a self-selecting sample, and that there is no auditing of returns, means that the validity of individual responses can always be drawn into question. It is thus best used as an indication of trend data and as a source of comparative information rather than as a major tool for policymaking. As will be seen later when reviewing the CIPFA data for local authority museums in England and Wales (Section 3.4.8.2) the self-selecting nature of the sample in the annual Sightseeing in the UK report and the response rate of around 50% leads to a massive under-representation of the true number of visits to museums across the UK.

3.4.4 Visits to Visitor Attractions

This report, published annually by the English Tourism Council and prepared on behalf of the four NTBs by the Moffat Centre, provides basic throughput data and topline trends from those attractions (including museums and galleries) responding to the annual survey of visitor attractions. In effect, it provides advance data that is then followed up in the Sightseeing in the UK report (see above). Museums and Art Galleries constitute one of 12 categories for which the following information is published:

- Visit figures for the year in question and the previous year
- An indication of whether these are reported as actuals or estimates
- % change on the previous year
- Whether admission is free or paid
- Whether the attraction is seasonal (i.e. closed for 3 months or more during the year)

As indicated above, participation is voluntary and not all respondents permit their figures to be published (although they may allow the information to be included in the Sightseeing in the UK analysis). The 2001 report contains basic information for several hundred individual museums and galleries across the UK. Data for the home countries are published separately in the following reports:

- The 2001 Visitor Attraction Monitor (Visit Scotland/ Moffat Centre)
- Visits to Tourist Attractions in Wales 2001 (Wales Tourist Board)
- Survey of Visitor Attractions 2001 (Northern Ireland Tourist Board)

The same caveats apply as for the Survey of Visits to Visitor Attractions/ Sightseeing in the UK.

3.4.5 Heritage Monitor

This annual review of the historic environment is currently prepared by the Moffat Centre under a commission from the English Tourism Council and English Heritage. It presents selected data collected from the annual Survey of Visits to Visitor Attractions but focuses on historic properties rather than museums and galleries. Although some historic properties may contain museum collections, there is no way of determining this information from the data provided. Thus its value to Resource is extremely limited as far as gathering or disseminating information on usage and non-usage of museums and galleries is concerned.

3.4.6 Scotland’s National Audit

Although only a one-off report, this snapshot study nonetheless contains some valuable information on activity at Scotland’s museums. The report revealed that there were over 13.5 million visits to 435 sites in Scotland during 2000-01 (see below).
Visitor numbers to Scotland’s museums, 2000-01

<table>
<thead>
<tr>
<th>Type</th>
<th>Visitors</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>National</td>
<td>4,078,537</td>
<td>30%</td>
</tr>
<tr>
<td>Local authority</td>
<td>5,538,592</td>
<td>41%</td>
</tr>
<tr>
<td>Independent</td>
<td>2,555,516</td>
<td>19%</td>
</tr>
<tr>
<td>Military</td>
<td>1,026,573</td>
<td>8%</td>
</tr>
<tr>
<td>University</td>
<td>305,066</td>
<td>2%</td>
</tr>
<tr>
<td>Other</td>
<td>1,500</td>
<td>0%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>13,505,784</strong></td>
<td><strong>100%</strong></td>
</tr>
</tbody>
</table>

Source: A Collective Insight: Scotland’s National Audit. Full Findings Report

It is interesting to note that the total estimated throughput of 13.5 million is more than 60% higher than the DOMUS figure for the previous year. It is unlikely that engagement with the domain would have increased so considerably in 12 months, and thus one must view the findings with some concern. Which data set is more reliable cannot, however, be identified at this time and requires further investigation.

3.4.7 Data Collection at the National Museums

All of the National Museums and Galleries receiving core funding from DCMS collect a range of data relating to usage of their facilities and services. A summary of visits to the national museums over the last five years is presented below and illustrates, amongst other issues, the impact that the abolition of entrance charges for all visitors at the beginning of 2002 had on overall attendances.

Visits to National Museums, 1998 - 2002

<table>
<thead>
<tr>
<th>Museum</th>
<th>1998</th>
<th>1999</th>
<th>2000</th>
<th>2001</th>
<th>2002</th>
</tr>
</thead>
<tbody>
<tr>
<td>British Museum</td>
<td>6,100,000</td>
<td>4,500,000</td>
<td>4,500,000</td>
<td>4,600,000</td>
<td>n/a</td>
</tr>
<tr>
<td>Imperial War Museum</td>
<td>472,078</td>
<td>483,464</td>
<td>575,651</td>
<td>633,498</td>
<td>702,385</td>
</tr>
<tr>
<td>Museum of London</td>
<td>280,000</td>
<td>349,623</td>
<td>356,557</td>
<td>303,305</td>
<td>389,277</td>
</tr>
<tr>
<td>M of Science &amp; Industry, M'cer</td>
<td>256,746</td>
<td>301,244</td>
<td>289,679</td>
<td>292,952</td>
<td>476,830</td>
</tr>
<tr>
<td>National Maritime Museum</td>
<td>480,000</td>
<td>831,048</td>
<td>794,741</td>
<td>907,337</td>
<td>1,215,277</td>
</tr>
<tr>
<td>NMGM</td>
<td>630,000</td>
<td>700,000</td>
<td>660,000</td>
<td>694,197</td>
<td>1,239,392</td>
</tr>
<tr>
<td>National Railway Museum</td>
<td>430,332</td>
<td>461,050</td>
<td>485,785</td>
<td>543,359</td>
<td>740,955</td>
</tr>
<tr>
<td>Natural History Museum</td>
<td>1,800,000</td>
<td>1,696,725</td>
<td>1,577,044</td>
<td>1,657,124</td>
<td>2,993,581</td>
</tr>
<tr>
<td>Royal Armouries, Fort Nelson, n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>475,08</td>
<td>73,158</td>
</tr>
<tr>
<td>Royal Armouries, Leeds n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>249,146</td>
<td>308,822</td>
</tr>
<tr>
<td>Science Museum</td>
<td>n/a</td>
<td>1,483,234</td>
<td>1,337,432</td>
<td>1,308,763</td>
<td>2,630,079</td>
</tr>
<tr>
<td>Victoria &amp; Albert Museum</td>
<td>1,450,000</td>
<td>1,251,396</td>
<td>1,344,113</td>
<td>1,117,336</td>
<td>2,363,010</td>
</tr>
</tbody>
</table>

Sources: DCMS (2001 and 2002 data)
Sightseeing in the UK (some 1998 – 2000 data)

Consultations with representatives of some of our National Museums indicated that the key driver for data collection is the Funding Agreement between the institution and DCMS. Funding Agreements were introduced in 1995 to fill a gap in the control mechanisms that existed between the DCMS (then the Department for National Heritage) and its sponsored bodies58. Funding agreements adopt a two-tiered approach to performance measurement:

- Key Performance Indicators that demonstrate progress towards strategic priorities, many of which are currently based around access and inclusion
- Secondary Performance Indicators that reflect management and decision-making processes within the institution

58 QUEST (2000) Modernising the Relationship: A New Approach to Funding Agreements
Indicators have been changed in recent years to reflect changing Government priorities and the ability (or otherwise) of the institutions to meet targets identified in their individual funding agreements. For instance, there was some controversy in 2000 when some of the Nationals were required by DCMS to develop strategies that would ensure that up to 12% of their visitors were from ethnic minorities. These targets did not appear in the 2001 funding agreements partly, it is reported, because of senior management resistance to "the level of bureaucracy museums are required to undertake".

Some of the audience-relevant targets contained in current DCMS funding agreements for those National Museums publishing their funding agreements are summarised below:

<table>
<thead>
<tr>
<th>Key Performance Targets to be Monitored by National Museums</th>
</tr>
</thead>
<tbody>
<tr>
<td>Institution</td>
</tr>
<tr>
<td>-------------</td>
</tr>
<tr>
<td>National Gallery (2001-02)</td>
</tr>
<tr>
<td>National Museum of Science &amp; Industry (2001-02)</td>
</tr>
<tr>
<td>National Museums &amp; Galleries on Merseyside (2003-04)</td>
</tr>
<tr>
<td>National Portrait Gallery (2001-02)</td>
</tr>
<tr>
<td>Natural History Museum (2001-02)</td>
</tr>
<tr>
<td>V&amp;A Museum (2003 – 04)</td>
</tr>
</tbody>
</table>

Source: Data collated by PLB Consulting Ltd

In order to measure performance against these indicators, therefore, museums are required to undertake data collection across a number of areas including:

- Absolute user numbers
- Visitor profiles (particularly socio-economic group, age, ethnic background)
- Usage of different aspects of the service/ facility

Some of the Nationals are also required to monitor and report on user satisfaction with different aspects of the service/ facility.

59 “Museums angry over order to increase ethnic visitors” Daily Telegraph 21 May 2000
60 “Galleries’ relief as ethnic quota rule is dropped” Daily Telegraph 25 March 2001
Consultations revealed some problems in data gathering such as the requirement by DCMS for institutions to report on the number of visits by school children from different ethnic backgrounds. Such data is extremely hard to collect, particularly in London where the multicultural nature of the population means that there can be several different ethnic groups represented in one group of pupils.

To address these DCMS-imposed data requirements, most of the Nationals commission regular visitor surveys from MORI or other MRS-registered companies. Such surveys are also used to collect other information that can be used to guide marketing and service and product development initiatives. The findings are of course specific to the institution concerned and reflect differences in programming, marketing activity and the profile of the population in the catchment area.

### 3.4.8 Data Collection at Local Authority Museums

#### 3.4.8.1 Best Value Performance Indicators
Section 2.5 has reviewed the role of BVPIs in local authority museums services. Experience indicates that the nature and intensity of data collection procedures vary considerably, although many local authorities provide basic information on usage of their museums services to the Chartered Institute of Public Finance and Accountancy (CIPFA).

#### 3.4.8.2 CIPFA Survey of Leisure and Recreation Statistics
The Institute of Public Finance (IPF), a subsidiary of CIPFA, collects estimated attendances at local authority-run museums and galleries in England and Wales as part of a wider survey of Leisure and Recreation activity in this sphere. The CIPFA survey of Leisure and Recreation Statistics is in its 27th year. The survey currently covers the following local authority groupings:

- London Boroughs
- Metropolitan Districts
- Unitary Authorities in England
- English Counties
- English Districts
- Wales

The CIPFA Leisure and Recreation survey generally achieves a lower response rate than those of archives and libraries - the 2002-2003 estimates secured a 75% response rate overall. As with the other CIPFA surveys of local government services, participation is voluntary although it is reported that an element of peer pressure is used to secure as high a response rate as possible. In order to allow more meaningful comparisons to be made with previous years, and between authorities, figures for non-respondents are ‘grossed-up’ from previous returns.

The table below summarises response rates in the 2002-03 estimates to two areas of questioning that are of interest to Resource and confirms the partial data that is contained within the CIPFA reports, in contrast to the perception that they are a definitive guide to expenditure and activity across all local authority leisure and recreation services.
Response rates, 2002-03 CIPFA estimates

<table>
<thead>
<tr>
<th>Authority type</th>
<th>Number in survey</th>
<th>Expenditure on museums service provided</th>
<th>User Information (2001 – 02 data)</th>
<th>Usage data reported as not available</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>n</td>
<td>n %</td>
<td>n %</td>
<td>n %</td>
</tr>
<tr>
<td>London Boroughs (inc. Corporation of London)</td>
<td>33</td>
<td>21 64%</td>
<td>17 52%</td>
<td>7 21%</td>
</tr>
<tr>
<td>Metropolitan Districts</td>
<td>36</td>
<td>28 78%</td>
<td>22 61%</td>
<td>6 17%</td>
</tr>
<tr>
<td>English Unitaries</td>
<td>46</td>
<td>34 74%</td>
<td>28 61%</td>
<td>7 15%</td>
</tr>
<tr>
<td>English Counties</td>
<td>34</td>
<td>26 76%</td>
<td>14 41%</td>
<td>12 35%</td>
</tr>
<tr>
<td>English Districts</td>
<td>239</td>
<td>99 41%</td>
<td>69 29%</td>
<td>32 13%</td>
</tr>
<tr>
<td>Welsh Unitaries</td>
<td>22</td>
<td>13 59%</td>
<td>8 36%</td>
<td>5 23%</td>
</tr>
<tr>
<td>Total</td>
<td>410</td>
<td>221 54%</td>
<td>158 39%</td>
<td>69 17%</td>
</tr>
</tbody>
</table>

Source: CIPFA returns, analysis of response rates by PLB Consulting Ltd

As with every CIPFA survey of local authority spending, there is a working group or advisory group made up of senior officers with responsibility for the sector or domain in question. The role of these groups is to guide data collection procedures towards those areas that are of most value to the authorities themselves. Recently, this has been informed by the introduction of Best Value and Audit Commission inspections.

Unlike the libraries domain (see Section 5), the CIPFA Leisure and Recreation Working Group is reportedly happy with the estimates as published, and sees no virtue in conducting a second survey at the end of the financial year to determine actual levels of spend and activity.

In all, there were estimated to be more than 27 million visits to local authority museums and galleries in England and Wales during 2002-03. The figure below summarises the CIPFA data on museum and gallery usage by local authority type over the last five financial years. In the future, regional breakdowns of the data will also be provided. Individual figures for participating local authorities are available in the relevant CIPFA report.

Attendances at local authority museums, England & Wales, 2001-02

<table>
<thead>
<tr>
<th>Authority Type</th>
<th>Estimated attendances/ visitors 2001-02 n</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Greater London</td>
<td>886,821</td>
<td>3%</td>
</tr>
<tr>
<td>Metropolitan Districts</td>
<td>4,837,134</td>
<td>18%</td>
</tr>
<tr>
<td>English Unitaries</td>
<td>7,739,750</td>
<td>28%</td>
</tr>
<tr>
<td>English Counties</td>
<td>3,014,255</td>
<td>11%</td>
</tr>
<tr>
<td>Non-Met Districts</td>
<td>8,924,334</td>
<td>33%</td>
</tr>
<tr>
<td>Wales</td>
<td>1,861,325</td>
<td>7%</td>
</tr>
<tr>
<td>Total</td>
<td>27,263,619</td>
<td>100%</td>
</tr>
</tbody>
</table>


Trend data for the last five financial years indicates that attendances at museums managed by participating authorities have increased by around 20% overall, or almost 5 million visits. Whether this reflects an overall increase in activity in the domain, or changes in the composition of the participating sample, is unclear.

---

61 CIPFA Statistical Information Service (2002c) Leisure and Recreation Service Statistics 2001-02 Estimates
### Estimated attendances at local authority museums in England & Wales, 1997 - 2002

<table>
<thead>
<tr>
<th>Authority Type</th>
<th>Estimated attendances</th>
<th>1997-98</th>
<th>1998 - 99</th>
<th>1999 - 00</th>
<th>2000 - 01</th>
<th>2001 - 02</th>
</tr>
</thead>
<tbody>
<tr>
<td>Greater London</td>
<td></td>
<td>1,065,594</td>
<td>955,583</td>
<td>1,022,221</td>
<td>804,483</td>
<td>886,821</td>
</tr>
<tr>
<td>Met. Districts</td>
<td></td>
<td>4,224,797</td>
<td>4,576,193</td>
<td>4,803,775</td>
<td>5,017,152</td>
<td>4,837,134</td>
</tr>
<tr>
<td>English Unitaries</td>
<td></td>
<td>8,328,861</td>
<td>6,672,611</td>
<td>6,391,068</td>
<td>8,059,267</td>
<td>7,739,750</td>
</tr>
<tr>
<td>English Counties</td>
<td></td>
<td>2,360,867</td>
<td>2,177,816</td>
<td>2,361,503</td>
<td>2,960,570</td>
<td>3,014,255</td>
</tr>
<tr>
<td>Non-Met Districts</td>
<td></td>
<td>5,355,560</td>
<td>5,957,365</td>
<td>6,387,929</td>
<td>6,205,393</td>
<td>8,924,334</td>
</tr>
<tr>
<td>Wales</td>
<td></td>
<td>954,338</td>
<td>920,176</td>
<td>1,452,810</td>
<td>1,718,286</td>
<td>1,861,325</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td>22,290,017</td>
<td>21,259,744</td>
<td>22,419,306</td>
<td>24,765,151</td>
<td>27,263,619</td>
</tr>
</tbody>
</table>


We understand that CIPFA is currently discussing the future of cultural statistics in Scotland with the relative agencies there and that in the future a data gathering exercise similar to that undertaken in England and Wales might be launched. Less progress has been made towards this issue in Northern Ireland.

CIPFA is also in the early stages of developing a survey toolkit similar to the PLUS surveys for public libraries, to allow local authorities to determine the profile of users of their cultural facilities.

#### 3.4.8.3 GLLAM Benchmarking Survey

The Group for Large Local Authority Museums (GLLAM) collects a variety of data from a self-selecting group of 22 museum services in England and Scotland which is then used for internal benchmarking purposes. Information collected includes:

- Expenditure totals of different elements of the service
- Revenue including grant aid, earned income etc.
- Total visitor numbers, broken down as:
  - Visits in person
  - Phone enquiries
  - Website hits
- Number of educational visitors
- Origin of visitors (local, regional, rest of UK, international)

This information is then used to calculate a number of Standard Performance Indicators (SPIs) such as the number of visits per 1,000 population (a fairly meaningless indicator since it bears no relation to the catchment area for a particular museum or to the level of tourism and day visitor activity in that town or city), and cost per visit/usage (a useful if basic measure of operational efficiency).

At the Museums Association conference in October 2003, five full year’s worth of benchmarking data will be presented by GLLAM in a paper that will review prospects for enhancing the quality and nature of service delivery based on evidence collected through benchmarking exercises.
3.4.9 *Museums Association Yearbook*

The Museums Association (MA), a membership organisation for the domain, collects audience figures from members as part of their annual returns to the association. The attendance data is presented in the annual yearbook under the entry for each museum or service, and no further attempts are currently made by the MA to collate or interpret the information. Other information presented includes the governing body of each museum, which would allow some secondary analysis of the data to be undertaken, collating attendances across the various sub-sectors (national, local authority, HE, charitable trust, private museum or collection).

Unfortunately, provision of this information is not a requirement of membership and thus returns are partial. The Yearbook for 2003 contains entries for some 620 museums and museum services, representing an estimated total of between 1,300 and 1,500 separate museums and galleries.

As with most other membership schemes, no independent auditing is undertaken of the returns, many of which appear to be estimates rather than absolute figures. Thus, the value to Resource of the attendance data collated by the MA is likely to be limited. Discussions with the Association revealed no intention in the near future to develop its presentation of attendance data for members.

3.4.10 *Association of Independent Museums (AIM)*

The Association of Independent Museums (AIM) undertakes an annual trading survey that collects data from 16 independent museums across the spectrum of AIM membership in terms of subject matter, type etc, although it is restricted to museums receiving more than 50,000 visitors per annum. Broad trend information derived from the survey is published in the organisation’s newsletter. Its small sample size means that it is of limited value except to provide some trend information that can be compared with the experience of public sector museums.

3.4.11 *Museums in Institutions of Higher Education*

The Arts & Humanities Research Board (AHRB) collects data from museums in HE institutions in England that receive core funding from it. At present, the AHRB funds 32 university museums and galleries in England through its core funding scheme, which guarantees funding for five years.

Performance indicators that are monitored by AHRB and that cover usage of the university museum are presented below:

- Number of visitors
- Number of visiting academics and researchers
- Number of organized group visits:
  - Schools
  - FE
  - HE
  - Other
- Number of public lectures
  - Number of attendances
- Number of enquiries handled
  - Post
  - Email
  - Other
- Number of unique users accessing the website

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62 Source: Mike Wright, MA, pers. comm., 04.04.03
63 Source: Kezia Parry, AHRB, pers. comm. 02.04.03
Such information is not published formally either for individual institutions or for the combined set of museums receiving core funding from AHRB. Moreover, given that these 32 museums represent only a small proportion of the total population of university museums in the UK, the findings are unlikely to represent a statistically robust picture of the performance of university museums as a whole.

### 3.5 Levels of Engagement with, and Usage of, Museums: Demand-side Research

#### 3.5.1 General Household Survey (GHS)

As indicated in Section 2.3.2, in the past the GHS collected information on trips made to museums and libraries by individuals. However, this has not been gathered since 1987\(^{64}\) although we have been advised that a trailer exercise is currently looking at the possibilities of re-introducing cultural questions into the GHS. The majority of the questioning on leisure participation at present relates to either in-home activities such as TV viewing, radio & other audio listening, entertaining, DIY and gardening, or to participation in sports and informal countryside recreation.

Nonetheless, as the government agency responsible for gathering information to inform future policy across the broad field of social and economic issues, it is important to note the opportunities that could accrue to Resource should there be an increase in the level of GHS questioning regarding cultural participation.

#### 3.5.2 BMRB Target Group Index Data

The main omnibus survey collecting information on visits to museums by UK residents is the Great Britain TGI, an annual survey of around 24,000 adults. The survey collects demographic profile data, information on consumer activity and details of participation in a range of leisure activities, including trips to museums.

Included in the GB TGI for the last 15 years or so has been information on propensity to visit museums in general whilst, on occasion, visitation to specific Museums (e.g. the Natural History Museum and the Science Museum) has also been monitored. However, usage of libraries and archives is not covered by the TGI surveys of adults.

The other TGI survey of interest is the Youth TGI, which does collect some information on usage of libraries, and also trips to museums, although in neither case are these data as detailed as they might be\(^ {65} \).

The TGI data recently acquired by Resource indicates that around 22% of the UK adult population visits a museum at least once a year, although it is not clear whether this covers only visits to UK museums or whether it also includes museums overseas. The percentage of adults visiting museums has, according to the TGI research, slowly declined from 29% in 1987-88 to this current level of 22%\(^ {66} \). One feature of the TGI research is that it breaks down participation rates by social grouping and thus begins to indicate the propensity of different groups within the UK population to visit museums (see figure below).


Users & Non-Users of Museums, Libraries and Archives: Review of Available Data

### UK Museum visitors by social grade

<table>
<thead>
<tr>
<th>Social grade</th>
<th>A</th>
<th>B</th>
<th>C1</th>
<th>C2</th>
<th>D</th>
<th>E</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sample</td>
<td>166</td>
<td>1,048</td>
<td>1,683</td>
<td>923</td>
<td>474</td>
<td>452</td>
</tr>
<tr>
<td>Population</td>
<td>567,000</td>
<td>3,205,000</td>
<td>2,976,000</td>
<td>1,660,000</td>
<td>1,127,000</td>
<td>509,000</td>
</tr>
<tr>
<td>% of museum visitors</td>
<td>6%</td>
<td>32%</td>
<td>30%</td>
<td>17%</td>
<td>11%</td>
<td>5%</td>
</tr>
<tr>
<td>% of social grade</td>
<td>38%</td>
<td>33%</td>
<td>23%</td>
<td>17%</td>
<td>14%</td>
<td>11%</td>
</tr>
<tr>
<td>Index</td>
<td>176</td>
<td>155</td>
<td>107</td>
<td>79</td>
<td>64</td>
<td>51</td>
</tr>
</tbody>
</table>

Source: Target Group Index GB 2002 Autumn

What this information confirms is that adults in the higher socio-economic groupings are far more likely to visit museums that those in groups C2, D and E.

Unfortunately the GB TGI survey does not collect two pieces of information which, if used to produce cross-tabulations with details on museum-going, could provide valuable information to advise policy work by Resource and its partners in terms of social inclusion and the museums sector. This missing information covers:

- Disability
- Ethnicity

These omissions present a major barrier to the effective use of TGI reports to monitor the effect nationally or indeed regionally of attempts to increase engagement with the museums domain by these target groups.

The Youth TGI survey also gathers some information on visits to museums, as follows:

### Visits by UK youth to museums (percentage of age group)

<table>
<thead>
<tr>
<th>Age group</th>
<th>7-10</th>
<th>11-14</th>
<th>15-19</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visited museum/exhibition in last six months</td>
<td>n/a</td>
<td>37%</td>
<td>29%</td>
</tr>
<tr>
<td>Visited museum in last year</td>
<td>72%</td>
<td>41%</td>
<td>22%</td>
</tr>
</tbody>
</table>

Source: Target Group Index Youth 2002 Autumn

Unfortunately, the questioning does not discriminate between museums visits made independently, visits made on family outings and visits made with the school or visits made with other organised groups. Such information must therefore be gathered from service providers themselves.

3.5.3 *UK Day Visits, UK Tourism and International Passenger Surveys*

A further source of demand-side research on visits to museums is contained within the surveys of day visitors, domestic and international tourists conducted on behalf of the National Tourist Boards and other government agencies working in the broad cultural sector.

The UK Day Visits Survey is an occasional survey of participation in a wide range of recreational and other activities by UK residents on a day trip from home. The study is funded by DCMS and relevant agencies, and contracted out to a commercial market research company. The most recent results cover the 1998 survey, with previous surveys occurring in 1994 and 1996. It is anticipated that topline data for 2002, the most recent data gathering exercise, will become available in early summer, with a final publication date of October 2003. Unfortunately, museums are not currently identified as a discrete category of attraction and are combined with many other types of cultural and leisure facility under the heading 'leisure attraction'. If the information gathered by the UK Day Visits Survey is to be of value to Resource in the future then some disaggregation of the 'leisure attraction' category will be required.

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68 National Centre for Social Research (date) Day Visits Survey 1998
The United Kingdom Tourism Survey is an annual survey, running since 1989, that gathers information on, *inter alia*, activities undertaken on holiday by UK tourists holidaying in the four home countries. The results are presented both as an absolute figure (i.e. total number of holiday trips on which a particular activity took place) and as a percentage of all trips involving such an activity. Sample size is 50,000 respondents per annum who are contacted by telephone by a commercial company (currently BMRB) under contract to the National Tourist Boards.

Findings for the 2001 survey, the most recent for which data are publicly available, reveal that 16.6 million holiday trips made by UK tourists in England included a visit to an ‘artistic or heritage centre’, a grouping that includes museums and art galleries but also heritage centres, a facility type that falls outwith the remit of Resource. This equated to around 21% of all holiday trips. There were quite significant regional differences, as indicated below, with holidays in London far more likely than those in any other region to include a trip to a museum or other cultural or artistic venue.

Cross-tabulations that are not provided but that could prove useful to Resource would be a breakdown of visits to ‘artistic and heritage centres’ by age and by socio-economic grouping, in order to assess whether engagement patterns with the domain (in its broadest sense) differ on holiday in the UK than when people are at home. It would also be valuable to know the total number of museum visits made by tourists on each holiday in the UK, and whether there are any regional or other differences in the level of engagement.

### Visits to ‘artistic and heritage centres’ by UK tourists, 2001

<table>
<thead>
<tr>
<th>Region of visit</th>
<th>Number of trips</th>
<th>% of trips</th>
</tr>
</thead>
<tbody>
<tr>
<td>England</td>
<td>16.6</td>
<td>21</td>
</tr>
<tr>
<td>Cumbria</td>
<td>0.9</td>
<td>25</td>
</tr>
<tr>
<td>Northumbria</td>
<td>0.5</td>
<td>19</td>
</tr>
<tr>
<td>North West</td>
<td>1.3</td>
<td>17</td>
</tr>
<tr>
<td>Yorkshire</td>
<td>1.5</td>
<td>22</td>
</tr>
<tr>
<td>Heart of England</td>
<td>2.2</td>
<td>17</td>
</tr>
<tr>
<td>East of England</td>
<td>1.3</td>
<td>16</td>
</tr>
<tr>
<td>London</td>
<td>2.7</td>
<td>33</td>
</tr>
<tr>
<td>South West</td>
<td>3.0</td>
<td>21</td>
</tr>
<tr>
<td>Southern</td>
<td>1.7</td>
<td>22</td>
</tr>
<tr>
<td>South East</td>
<td>1.8</td>
<td>22</td>
</tr>
<tr>
<td>England (unspecified)</td>
<td>0.7</td>
<td>23</td>
</tr>
</tbody>
</table>

Source: UKTS 2001

Again, if the information gathered by the UK Tourism Survey is to be of value to Resource in the future then some disaggregation of the ‘leisure attraction’ category will be required.

The International Passenger Survey is a sample survey carried out by the Office of National Statistics (ONS). Around 250,000 interviews are carried out per year, representing 0.2% of all travellers as they enter or leave the UK. Basic information on activities undertaken is collected. The level of detail does not however indicate level of museum visitation by overseas residents.

### 3.5.4 Time Use Data

The Office for National Statistics commissions periodic surveys of how people use their time, with the most recent being undertaken during 2001. The survey is designed to achieve a representative sample of the population of households and individuals in the UK. Selected household heads or their partners complete a household questionnaire, and all individuals aged 8 or over are required to complete individual questionnaires, two one-day diaries and a one week work and education time sheet.

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The household and individual questionnaires are mainly used to gather background information and demographics. The diaries record primary and secondary activities as well as information on the respondent's location, and whom they were with at the time. The one week worksheet records time spent in work and full time education over the week the diaries were completed in.

<table>
<thead>
<tr>
<th>Survey element</th>
<th>Number sampled</th>
<th>Number achieved</th>
<th>Response rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Household questionnaire</td>
<td>10,500</td>
<td>6,500</td>
<td>61%</td>
</tr>
<tr>
<td>Individual questionnaire</td>
<td>14,400</td>
<td>11,700</td>
<td>81%</td>
</tr>
<tr>
<td>Diaries</td>
<td>28,800</td>
<td>21,000</td>
<td>73%</td>
</tr>
</tbody>
</table>

The findings are analysed according to a number of demographic attributes (age, gender, lifestage) and provide a broad indication of the amount of time spent participating in a range of activities. Unfortunately for the purposes of this study, available reporting on engagement with museums, archives and libraries is subsumed into a broad heading of ‘culture’ which also includes performing arts and other disciplines or domains outwith the remit of Resource. The most recent findings suggest that men spend slightly longer than women on cultural activities in the course of the average day.

The questionnaire does, however, have separate questions on use of libraries and museums and galleries and its potential value to Resource is currently being explored under a separate commission. Also of interest is the fact that the survey collects information on disabilities and other impairments to leisure and employment activity making it a potentially useful source of information on levels of engagement with the domain by people whose health problems or disabilities “limit their ability to carry out normal day to day activities”70.

The survey data has been deposited at the UK Data Archive at the University of Essex71, which means that anyone, including Resource, can access the data with a view to conducting their own analysis. To use the information for research purposes is free, but for commercial purposes incurs a charge. Service fees for Government departments and agencies to access the data are waived.

3.5.5 MORI

One of several market research companies managing regular omnibus surveys of the UK population72, MORI has been responsible for carrying out many of the high profile research studies of engagement with museums and galleries.

For instance, two surveys investigating visits to museums and art galleries in the UK73,74 carried out in February and November/ December 1999 on behalf of the Museums & Galleries Commission, provide a wealth of information on propensity to visit museums and galleries by adults resident in the UK. Like the TGI research, MORI report a slow decline in visits to museums by UK adults, although the participation rates are somewhat higher (28% in 12/99 compared to a TGI figure of only 22%). Why this should be remains open to question and it would be worthwhile Resource reviewing the survey methods, sample sizes and analytical procedures of the various surveys in more detail to try and establish whether the differences are merely down to sampling error or are due to more fundamental differences in approach.

71 archive@essex.ac.uk
72 The Market Research Society reports the existence of around 20 omnibus surveys covering the whole of the UK, and a further 11 covering the home countries (3 in Wales, 4 in Scotland and 4 in Northern Ireland). Source: www.mrons.com/omni/om-con-htm Consulted 13/11/02
74 MORI (2001b) Visitors to Museums & Art Galleries in the UK. Report for Resource
Users & Non-Users of Museums, Libraries and Archives: Review of Available Data

Percentage of UK adults visiting museums and galleries, 1989 - 1999

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>% of UK adults visiting a museum or gallery</td>
<td>32%</td>
<td>42%</td>
<td>38%</td>
<td>37%</td>
<td>35%</td>
<td>28%</td>
</tr>
</tbody>
</table>

Source: MORI

The MORI research provides some valuable breakdowns of participation in museum and gallery visiting by a range of socio-demographic and other variables including:

- Lifestage (age, family circumstances)
- Social class
- Ethnicity
- Country/ Government Office Region

Age profile of UK museum & gallery visitors, 2001

<table>
<thead>
<tr>
<th>Age Group</th>
<th>% UK population</th>
<th>% visitors to museums and galleries</th>
<th>Average frequency of visitors p.a.</th>
<th>Estimated % of all visits</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adults 65+</td>
<td>19</td>
<td>15</td>
<td>2.97</td>
<td>16</td>
</tr>
<tr>
<td>Adults 55-64</td>
<td>11</td>
<td>14</td>
<td>3.10</td>
<td>15</td>
</tr>
<tr>
<td>Adults 45-54</td>
<td>11</td>
<td>13</td>
<td>3.22</td>
<td>14</td>
</tr>
<tr>
<td>Adults 25-44 (with children aged 5-10)</td>
<td>14</td>
<td>14</td>
<td>2.59</td>
<td>13</td>
</tr>
<tr>
<td>Adults 25-34</td>
<td>9</td>
<td>10</td>
<td>3.00</td>
<td>11</td>
</tr>
<tr>
<td>Adults 25-44 (with children aged -4)</td>
<td>12</td>
<td>9</td>
<td>2.55</td>
<td>8</td>
</tr>
<tr>
<td>Adults 35-44</td>
<td>5</td>
<td>7</td>
<td>3.20</td>
<td>7</td>
</tr>
<tr>
<td>Young adults 16-24</td>
<td>9</td>
<td>9</td>
<td>2.46</td>
<td>7</td>
</tr>
<tr>
<td>Adults 25-44 (with children aged 10+)</td>
<td>8</td>
<td>7</td>
<td>2.42</td>
<td>6</td>
</tr>
<tr>
<td>Students</td>
<td>4</td>
<td>6</td>
<td>2.49</td>
<td>5</td>
</tr>
<tr>
<td>Young adults 16-24 (with children)</td>
<td>7</td>
<td>4</td>
<td>2.53</td>
<td>4</td>
</tr>
</tbody>
</table>

(Base: All 4,461) Source: MORI

Socio-economic profile of UK museum & gallery visitors, 2001

<table>
<thead>
<tr>
<th>Social class</th>
<th>% UK population</th>
<th>% visitors to museums and galleries</th>
<th>Average frequency of visitors p.a.</th>
<th>Estimated % of all visits</th>
</tr>
</thead>
<tbody>
<tr>
<td>AB</td>
<td>22</td>
<td>36</td>
<td>3.19</td>
<td>40</td>
</tr>
<tr>
<td>C1</td>
<td>27</td>
<td>30</td>
<td>2.95</td>
<td>30</td>
</tr>
<tr>
<td>C2</td>
<td>23</td>
<td>18</td>
<td>2.46</td>
<td>16</td>
</tr>
<tr>
<td>DE</td>
<td>29</td>
<td>16</td>
<td>2.62</td>
<td>14</td>
</tr>
</tbody>
</table>

(Base: All 4,461) Source: MORI

Ethnic origin of UK museum & gallery visitors, 2001

<table>
<thead>
<tr>
<th>Ethnic origin</th>
<th>% UK population</th>
<th>% visitors to museums and galleries</th>
<th>Average frequency of visitors p.a.</th>
<th>Estimated % of all visits</th>
</tr>
</thead>
<tbody>
<tr>
<td>White- European</td>
<td>92</td>
<td>94</td>
<td>2.92</td>
<td>95</td>
</tr>
<tr>
<td>Black - African/Caribbean</td>
<td>1</td>
<td>*</td>
<td>1.80</td>
<td>*</td>
</tr>
<tr>
<td>Asian</td>
<td>2</td>
<td>2</td>
<td>1.42</td>
<td>1</td>
</tr>
</tbody>
</table>

(Base: All 4,461) Source: MORI
Regional variations in visits to museums, 2001

<table>
<thead>
<tr>
<th>Region</th>
<th>% UK population</th>
<th>% visitors to museums and galleries</th>
<th>Average frequency of visitors p.a</th>
<th>Estimated % of all visits</th>
</tr>
</thead>
<tbody>
<tr>
<td>South East (exc. London)</td>
<td>13</td>
<td>17</td>
<td>2.66</td>
<td>15</td>
</tr>
<tr>
<td>London</td>
<td>12</td>
<td>13</td>
<td>2.88</td>
<td>13</td>
</tr>
<tr>
<td>Eastern</td>
<td>9</td>
<td>11</td>
<td>3.14</td>
<td>12</td>
</tr>
<tr>
<td>North West</td>
<td>12</td>
<td>10</td>
<td>2.96</td>
<td>11</td>
</tr>
<tr>
<td>Yorkshire and Humberside</td>
<td>8</td>
<td>10</td>
<td>3.24</td>
<td>11</td>
</tr>
<tr>
<td>West Midlands</td>
<td>9</td>
<td>10</td>
<td>2.76</td>
<td>9</td>
</tr>
<tr>
<td>East Midlands</td>
<td>7</td>
<td>7</td>
<td>2.77</td>
<td>6</td>
</tr>
<tr>
<td>South West</td>
<td>8</td>
<td>6</td>
<td>2.36</td>
<td>5</td>
</tr>
<tr>
<td>North East</td>
<td>4</td>
<td>4</td>
<td>3.05</td>
<td>4</td>
</tr>
<tr>
<td>England</td>
<td>83</td>
<td>88</td>
<td>2.87</td>
<td>88</td>
</tr>
<tr>
<td>Scotland</td>
<td>9</td>
<td>7</td>
<td>3.24</td>
<td>8</td>
</tr>
<tr>
<td>Wales</td>
<td>5</td>
<td>3</td>
<td>2.84</td>
<td>3</td>
</tr>
<tr>
<td>N. Ireland</td>
<td>3</td>
<td>1</td>
<td>2.46</td>
<td>1</td>
</tr>
</tbody>
</table>

(Base: All 4,461) Source: MORI

In response to the scrapping of entrance charges to the national museums and galleries in 2000 and 2001, MORI undertook some research as part of its GB Omnibus survey into museum-going habits. This found that some 37% of adult respondents had made at least one visit to a museum in the preceding 12 months and 31% had visited an art gallery. Some 45% of the public had been to at least one of either facility type.

This represented a rise of around one-third on previous visitation rates to museums and galleries of around 33%, and MORI contends that this increase was partly due to the opening of major new facilities such as Tate Modern, but also because of the abolition of entrance charges to the nationals. A breakdown of visits by socio-economic group found that all socio-economic groups reported an increase in museum visiting in the period 1999 – 2002 (see below), although further questioning found that 40% of respondents were not even aware of free entry and a further 41% knew about it but said that it had made no difference to the number of museum and gallery visits that they had made.

The House of Commons Culture, Media and Sport Committee also believe that free admission is unlikely to be effective in attracting significant numbers of new visitors from the widest range of socio-economic and ethnic groups. Investigating the impact of free admission to our national museums and galleries, the House of Commons Culture, Media and Sport Committee concluded that:

"we whole-heartedly support the principle of free admission to the nation’s key artistic, cultural and scientific storehouses but more specific work needs to be done to achieve the objective of broadened access."

Thus it is essential that further monitoring work is undertaken to assess the longer-term impact of free admissions on attendances at museums and galleries on the one hand, whilst also reviewing the success of specific initiatives designed to increase engagement by under-represented groups.

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3.5.6 Northern Ireland Omnibus Survey

In May 2000, as part of their regular omnibus survey, the Northern Ireland Statistics and Research Agency investigated visits to museums, art galleries, stately homes, historic buildings, monuments and castles, heritage centres, designated areas of natural heritage, the public record office and other archive centres by the adult (over 16) population of Northern Ireland. An analytical sample of more than 1,200 individuals was achieved. Unfortunately, the report does not distinguish between the various types of cultural heritage attraction covered in the broad definition given to respondents and thus the findings are of limited use to Resource as far as providing baseline data on engagement with the cultural heritage sector.

3.5.7 Arts in England, 2001

Two years ago Resource joined the Arts Council of England (ACE) to commission a major survey of attendances at, participation in and attitudes to the arts. The purpose of the research was to “understand and articulate the detailed and complex picture of how people in England are engaging with the arts in the early 21st Century”.

This survey of more than 6,000 adults resident in England found that 35% of respondents had visited a museum in the 12 months prior to interview, with Londoners far more likely than residents of any other region in England to do so. Residents of the North East, North West and the East and West Midlands were least likely to have visited a museum.

Interestingly, this participation rate is somewhat higher than the most recent figure provided by the TGI surveys which survey the whole of the UK population (see Section 3.5.2), the implication being that adult residents in England are far more likely than those resident in Wales, Scotland and Northern Ireland to visit museums. One problem with this table is that it does not say where the museum visit took place, and thus the data does not reflect the true distribution of museum attendances on a regional basis. Such information would of course have to come from a regional-analysis of supply-side data.

Visits to museums, by Government Office Region

<table>
<thead>
<tr>
<th>Region of residence</th>
<th>% visiting a museum in previous 12 months</th>
<th>n</th>
</tr>
</thead>
<tbody>
<tr>
<td>North East</td>
<td>30%</td>
<td>343</td>
</tr>
<tr>
<td>North West</td>
<td>30%</td>
<td>845</td>
</tr>
<tr>
<td>Yorkshire &amp; Humberside</td>
<td>36%</td>
<td>628</td>
</tr>
<tr>
<td>East Midlands</td>
<td>31%</td>
<td>559</td>
</tr>
<tr>
<td>West Midlands</td>
<td>32%</td>
<td>595</td>
</tr>
<tr>
<td>Eastern</td>
<td>35%</td>
<td>656</td>
</tr>
<tr>
<td>London</td>
<td>48%</td>
<td>751</td>
</tr>
<tr>
<td>South East</td>
<td>37%</td>
<td>990</td>
</tr>
<tr>
<td>South West</td>
<td>34%</td>
<td>675</td>
</tr>
<tr>
<td>Total</td>
<td>35%</td>
<td>6,042</td>
</tr>
</tbody>
</table>


This survey also broke down participation rates by a number of key demographic factors, as follows.

---

Profile of museum visitors, 2001

<table>
<thead>
<tr>
<th>Age Group</th>
<th>% visiting a museum at least once in previous 12 months</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td>36</td>
</tr>
<tr>
<td>Female</td>
<td>34</td>
</tr>
<tr>
<td>16-24</td>
<td>28</td>
</tr>
<tr>
<td>25-34</td>
<td>36</td>
</tr>
<tr>
<td>35-44</td>
<td>41</td>
</tr>
<tr>
<td>45-54</td>
<td>40</td>
</tr>
<tr>
<td>55-64</td>
<td>39</td>
</tr>
<tr>
<td>65-74</td>
<td>32</td>
</tr>
<tr>
<td>75+</td>
<td>21</td>
</tr>
<tr>
<td>Managerial/ professional</td>
<td>54</td>
</tr>
<tr>
<td>Intermediate</td>
<td>35</td>
</tr>
<tr>
<td>Small employers and own account workers</td>
<td>30</td>
</tr>
<tr>
<td>Lower supervisory &amp; technical</td>
<td>22</td>
</tr>
<tr>
<td>Semi-routine and routine</td>
<td>21</td>
</tr>
</tbody>
</table>


3.5.8 The Arts in Scotland

The Scottish Arts Council carried out a major survey in 2001 of more than 2,000 Scots to determine their attendance at, participation in and attitudes towards the arts. This updated similar surveys undertaken in 1991, 1994 and 1998, making it possible to track trends in engagement with the sector and changes in attitudes towards the arts over time. Key findings included:

- 48% of Scots visit a museum at least once a year
- 26% of Scots visit a museum twice a year or more
- 8% of Scots visit museums on four or more occasions per year
- People in socio-economic groups AB (73%), with a higher degree (70%), resident in Glasgow (58%) and aged between 35 and 44 (58%) are more likely to visit museums

3.6 Profile of Museum Visitors

3.6.1 National Level Research

It is not always easy to characterise a typical museum / gallery user, as research suggests that these facilities appeal to people from all walks of life. The core market for museums and galleries, as identified by research carried out on behalf of the MGC by MORI, is defined by the following:

- A quarter of visitors are ‘frequent users’, who go at least five times a year to a museum or gallery
- The majority (53%) are:
  - over 45 years old
  - have a higher education (32% Bachelors degree, 11% Masters or PhD)
  - work full time (55%)
  - do not have / live with children (71%)
  - more likely to live in or around greater London (44% are from the Eastern region, London and the South East)
  - as likely to be male as female

Scottish Arts Council (2002) Attendance at, Participation in and Attitudes towards the Arts in Scotland
• They are twice as likely as average to visit museums and galleries on their own; 30% do so compared to just 16% of visitors overall, although the majority do go with their partner (56%)

• They tend to go to all types of museums and galleries. For instance, in the 12 months prior to interview, more than half had been to see a national collection (60%), a museum of social/local history (59%), a natural history museum (58%) and a museum about archaeology (56%)

• They also visit for a variety of reasons. Special exhibitions / lectures / events are responsible for the largest number of visits (69%), followed by sheer curiosity, while 65% say they try to visit different museums / galleries near where they live. They will also visit while on holiday in the UK (60%) or abroad (53%)

• Overall, their levels of satisfaction are higher, with 63% feeling they got ‘very good’ value for money on their last visit and 75% saying they are ‘certain’ or ‘very likely’ to recommend to a friend the museum or gallery they last visited

Information obtained through MORI’s 2001 study for Resource indicates that older adults, visiting after their children have left home, still account for the largest proportion of visits to museums and galleries (16%) with people aged 45-64 accounting for a further 14-15%. The results highlighted that although visitation remained constant for those from the South East, regions, such as the South West, Wales and North West experienced a marked decline. ABC1’s continue to account for the majority (70%) of museum and gallery visitors.

A major study on the attitudes of members of ethnic minority groups towards museums and galleries\(^2\) notes that the profile of museum visitors and non-visitors among ethnic minority groups mirrored that of the general population. More frequent visitors were:

• Better educated
• In professional jobs
• Likely to take an active interest in their children’s education
• Interested in culture and history generally

In other words, there appears to be little difference between the socio-economic make up of white audiences and those from ethnic minorities. The main additional factor for ethnic minority groups was that those who spoke little or no English were consistently less likely to visit museums and galleries than those who were fluent in English.

The division between children (aged 7 - 11) that attend museums and galleries and those that do not also tends to correlate with socio-economic groupings. In a 1997 study of children as an audience for museums and galleries, attending children tended to come from ‘more affluent, middle-class and / or “arty” families (where parents or grandparents had an interest in art)”… Non-attending children seemed to come from slightly less middle-class families.’\(^3\)

As indicated in the review of TGI data (Section 2.6.2), the reality appears to be that people from the highest socio-economic grouping A, although far more likely than those in group E to visit museums, in reality constitute much the same size audience as do those in group E. Where opinions about museums and galleries catering for a so-called elite audience appear to hold ground is in the upper and lower-middle class groupings B and C, which together provide nearly two-thirds of all museum visitors.


\(^3\) Harris Qualitative (1997): Children as an Audience for Museums and Galleries. Report for The Arts Council & Museums and Galleries Commission
Barriers to visiting museums and galleries have been categorised as:

- Time
- Cost
- Lack of interest
- Fear of not understanding (especially due to language)
- Effort required to visit

Respondents have suggested that a core barrier to museums and galleries is the perception that exhibits will not relate to their cultural background and that any displays that deal with their community do so inappropriately.

### 3.6.2 Regional, Local and Site-Specific Differences

Although not within the main scope of this study, we have gathered visitor information from a number of museum services and individual museums and galleries to illustrate the variations in profile around the country.

To advise development work across the service, the National Museums and Galleries on Merseyside commissioned a survey of non-users of the service. Information was gathered through five group discussions, street interviews and self-completion questionnaires. There appear to have been some resistance among respondents to visiting attractions in Liverpool partly due to its proximity to home. Areas of concern were seen to be responding to those with different educational and cultural backgrounds and ensuring that areas of interest to non-visitors are included. Responses from traditionally excluded minority groups, such as Afro-Caribbean communities, indicated that they need to feel integrated rather than marginalized and have their contribution to society recognised. Respondents commented that museums should adopt a more exciting approach, ensure that subject matter includes both permanent and temporary exhibitions that are linked to school subjects.

Market research undertaken for the National Portrait Gallery in 2001 looked at visitor profiles, use and satisfaction levels. Daytime visitors were shown to be adult parties with older visitors representing a higher proportion during the autumn and winter. Approximately half of all visitors come from the South East and overseas visitors accounted for 22% of users in October and November, although this rose to 38% in August/September. Some 93% of visitors are of white ethnic origin, but this does mirror the British population in general.

A substantial proportion (64%) of visitors to the Gallery are repeat visitors. Evening visitors have a higher proportion of London residents and USA nationals. Younger people comprise a larger proportion of evening visitors than during the daytime. Although evening audiences

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87 Creative Research (1997) NMGM 2001 Non-Visitor Research p.8
89 Creative Research (1997) NMGM 2001 Non-Visitor Research p.9
90 Creative Research (1997) NMGM 2001 Non-Visitor Research p.25
91 MORI (2001a) *National Portrait Gallery Visitor Research 2001* p.4
92 MORI (2001a) *National Portrait Gallery Visitor Research 2001* p.4
93 MORI (2001a) *National Portrait Gallery Visitor Research 2001* p.4
94 MORI (2001a) *National Portrait Gallery Visitor Research 2001* p.4
to the NPG seem to attract a similar gender profile, i.e. slightly more women than men, there is a slightly broader social class mix than during the day.\(^{97}\)

Although ABC1’s still dominate, the proportion of socio-economic group ‘A’ visitors, with 4\%, is significantly lower than the MORI norm of 10\%.\(^{98}\) The proportion of ethnic minority visitors is fairly high at 9\%, which broadly mirrors the situation in Britain as a whole, with recent census information indicating that 8% of the population describe themselves as coming from a minority ethnic group.\(^{99}\)

As with daytime visitors, around 35\% of attendees are first time visitors, although this does rise to 40\% on a Friday evening.\(^{100}\) Research into evening visitation indicates that 30\% of visitors were ‘just passing’, whilst a further 27\% were at work during the day or did not have enough time during the day.\(^{101}\)

**Tyne and Wear Museums** has evolved a strong commitment to broadening audiences and has undertaken studies to analyse the socio-economic breakdown of its visitors\(^ {102}\). In 1989, between 67\% and 80\% of visitors to the museums and galleries in the service came from ABC1 social groupings, compared with just 20\% to 33\% of C2DEs. This was despite the fact that only 41\% of the national population fell into the more prosperous socio-economic groups. The 1997 figures showed a considerable change in visitor patterns, particularly at the Museum of Science and Engineering (now the Discovery Museum). These figures also demonstrate that, while the activities of the various museums during the 1990s have begun to redress the imbalance between visitors from different socio-economic groups, this and other work carried out by TVMS is having a much less dramatic effect at the region’s art galleries\(^ {103}\), despite the service’s principles having been applied equally across the board.

It is valuable to note at this point that the figures quoted above are not supported by information indicating whether or not visitor numbers to these various sites have increased. It will be important to explore this further to establish whether or not some of the ABC1 visitors to TWMS museums and galleries are being replaced by C2DE visitors, which would suggest that ‘traditional’ audiences are being displaced by the new audiences rather than being supplemented by them.

The **Victoria and Albert Museum** (V&A) has also conducted research into its visitor profile and their behaviour. The majority of visitors to the museum are from London or the South East, with over 60\% being repeat visitors. As with other major museums, the results indicated that 80\% of all visitors are categorised as being from BC1 social class backgrounds and 55\% of respondents were classed as working. There appears to be a broad range of ages represented among visitors, although unlike most other museums for which data is available the majority (72\%) of visitors to the V&A are female.

\(^{97}\) MORI (2001a) *National Portrait Gallery Visitor Research 2001* p.9  
\(^{98}\) MORI (2001a) *National Portrait Gallery Visitor Research 2001* p.9  
\(^{99}\) Office for National Statistics (2003) Social Trends No. 33  
\(^{100}\) MORI (2001a) *National Portrait Gallery Visitor Research 2001* p.9  
\(^{101}\) MORI (2001a) *National Portrait Gallery Visitor Research 2001* p.10  
\(^{102}\) Fleming D (Museums Journal April 1999 p. 29): *A Question of Perception*  
\(^{103}\) Fleming D (Museums Journal April 1999 p. 29): *A Question of Perception*
Age profile of V&A Museum visitors

<table>
<thead>
<tr>
<th>Age</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>16-17</td>
<td>1</td>
</tr>
<tr>
<td>18-24</td>
<td>14</td>
</tr>
<tr>
<td>25-34</td>
<td>19</td>
</tr>
<tr>
<td>35-44</td>
<td>19</td>
</tr>
<tr>
<td>45-54</td>
<td>18</td>
</tr>
<tr>
<td>55-59</td>
<td>8</td>
</tr>
<tr>
<td>60-65</td>
<td>9</td>
</tr>
<tr>
<td>66-74</td>
<td>9</td>
</tr>
<tr>
<td>75+</td>
<td>2</td>
</tr>
</tbody>
</table>


Visitors to the V&A were more likely to be accompanied by other adults, although men were twice as likely to visit alone, and only 5% of individuals and 6% of parties were accompanied by children. As with other museum services, the ethnic profile of visitors to the V&A was predominantly white (93%), with only 5% of respondents stating that they were from a non-white or mixed background.

The V&A, Science Museum and Natural History Museum together have commissioned some research investigating the schools market although to date we have not been able to secure access to the study report. Access to such information is important since national museums have to demonstrate, as part of their funding agreements, success in attracting visitors from ethnic minority groups. Whilst this can be determined for adult visitors from ongoing visitor surveys, it cannot be provided for school groups which may include children from a number of different ethnic background.

3.7 Under-represented and Excluded Audiences for Museums

In the light of the above research, which in the main focuses on users, rather than non-users, determining who are the under-represented and excluded audiences for museums relies partly on a process of deduction. If certain groups are not appearing in large numbers in user profile research, by definition they will be non- or infrequent users. Research undertaken in 2001 for the Heritage Lottery Fund\(^\text{104}\) identified the following groups as being under-represented as users of museums and galleries:

- C2, D & E socio economic groups
- Disabled people
- Ethnic minorities (although not all sources agree about this)
- Families with babies and small children
- Older people
- People with no or few educational qualifications
- School aged children, particularly 5 – 12s
- Socially disadvantaged (e.g. The homeless, unemployed, prisoners)
- Teenagers
- Under 25s
- Young professionals

As well as the market research reports already consulted for this study, the HLF research also drew on a decade-old study by the London Museums Consultative Committee entitled ‘Dingy Places with Different Kinds of Bits’ – An Attitudes Survey of London Museums Amongst Non-Visitors

3.8 Measuring User Satisfaction

3.8.1 The People’s Panel

As indicated in Section 2.5, local authorities are required to monitor user satisfaction with a wide range of services and, in some cases, to report this information as a BVPI. This information may also be published by individual authorities on Best Value websites or in printed form. Reporting satisfaction with in the museum domain is not a statutory responsibility as it is for libraries (see Section 5).

Measuring satisfaction in quantitative terms will always be somewhat controversial since it is by nature a personal and subjective opinion, and different users may perceive the same level of service in a different way. Further problems arise in measuring satisfaction with any service that is tailored to the needs of each user, since the delivery can become as variable as the user’s experience and opinion of it.

Nonetheless, some national baseline data does exist for the museums domains, collected as part of the People’s Panel initiative carried out on behalf of the Office of Public Services Reform at the Cabinet Office (OPSR)\(^{105}\). Unfortunately the research did not distinguish between museums and art galleries, and thus the findings for ‘museums’ refer to a broader area of service than is directly relevant to the work of Resource. Key findings are summarised below:

People’s Panel’s opinions on aspects of local authority services, May 2002

<table>
<thead>
<tr>
<th>Question</th>
<th>Museum and Art Galleries</th>
</tr>
</thead>
<tbody>
<tr>
<td>How satisfied or dissatisfied are you with the quality of …</td>
<td>+79 net satisfaction(^{106})</td>
</tr>
<tr>
<td>Very satisfied</td>
<td>26%</td>
</tr>
<tr>
<td>Fairly satisfied</td>
<td>47%</td>
</tr>
<tr>
<td>Neither satisfied nor dissatisfied</td>
<td>16%</td>
</tr>
<tr>
<td>Fairly dissatisfied</td>
<td>1%</td>
</tr>
<tr>
<td>Very dissatisfied</td>
<td>*</td>
</tr>
<tr>
<td>No opinion</td>
<td>3%</td>
</tr>
</tbody>
</table>

Which four or five services on this card (list of 28 public services) are the most important |


Note: * less than 0.5%

To summarise, it appears as if most people are satisfied with the quality of museums and art galleries in the UK, although only a very small proportion of people believe that they are a priority public service.

3.9 Issues Arising from the Research

3.9.1 Data Validity

Much of the national, regional and service/ site-level data derived from questionnaire surveys of users and non-users appears, on the face of it, to be statistically reliable within acceptable levels of confidence. The use of MRS-registered companies to carry out most site or user surveys gives some comfort as to the quality of the research programmes overall although obviously without independent auditing of each survey its absolute reliability cannot be guaranteed. Thus the information on users and non-users contained in this section and in the following two sections is presented in good faith.

3.9.2 Reliable Monitoring of Visitor Throughput

An issue that has arisen time and time again relates to the robustness and validity of throughput figures collected by museums and galleries and then reported to studies such as

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\(^{106}\) Net satisfaction measures the percentage of people who are satisfied minus the proportion dissatisfied
the annual *Survey of Visits to Visitor Attractions*, the CIPFA Annual Leisure and Recreation Estimates or the Museums Association Yearbook. There are two factors to consider:

- The reliability of data gathered in the first place
- The absence, by and large, of any independent auditing and hence the possibility that erroneous figures may be passed on either knowingly or unknowingly

In 1999 the DOMUS survey asked respondents to indicate how they determine the number of visits to their museum. Just over 25% reported using techniques that should be 100% accurate (i.e. ticket sales) whilst all of the other responses (e.g. turnstiles, hand-held ‘clickers’) contain the risk of error either through under or over-counting.

### Counting methods used to determine the number of museum visits (1999)

<table>
<thead>
<tr>
<th>Counting method</th>
<th>No. of museums</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Computerised box office ticket sales</td>
<td>41</td>
<td>3%</td>
</tr>
<tr>
<td>Electronic ticket sales (e.g. cash till)</td>
<td>311</td>
<td>25%</td>
</tr>
<tr>
<td>Physical methods (e.g. turnstiles)</td>
<td>395</td>
<td>31%</td>
</tr>
<tr>
<td>Estimated by sample count</td>
<td>120</td>
<td>10%</td>
</tr>
<tr>
<td>Other (e.g. electronic beam, entries in visitor books, manual counting by staff)</td>
<td>395</td>
<td>31%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>1,262</strong></td>
<td><strong>100%</strong></td>
</tr>
</tbody>
</table>

*Source: UK Museums Retrospective Statistics Projects 2001*

The inability of those organisations collating data provided by museum services (e.g. the Moffat Centre, CIPFA) to guarantee the validity of visitor numbers is impossible to address without a major investment in resources and hence increase in study costs, and thus any future action should be directed towards the improvement of visitor monitoring activities at museums and galleries.

This is particularly important at the Nationals, for instance, where free entry has been re-introduced and thus where the reliability of ticket sales data has been lost. Moreover, by ensuring that the information produced by these studies is of real benefit to facility managers, the likelihood of improved returns should be increased.

Support for this recommendation is contained within the recent House of Commons Select Committee report, which states that:

“DCMS should certainly take have taken the lead in establishing appropriate methodologies (to count visitors) and should now work towards establishing a common framework to improve the accuracy and consistency of the counting and profiling of visitors for the purposes of improving policy”.

This is certainly an area where Resource could assist DCMS, by preparing guidelines on acceptable methodologies for monitoring the number of users of museums and galleries where ticket sales data is not available.

### 3.9.3 Management Information or Performance Indicators?

During our consultations with museum sector professionals, concern has been expressed that insufficient attention is paid generally to the collection of reliable management information relating to users and non-users. Where research budgets are available, they are often swallowed up by exercises associated with collecting the information needed to provide the performance indicators required by the Office of the Deputy Prime Minister (ODPM), DCMS and other funding agencies.

Given that there appears to be some concern amongst museum professionals that competing agendas within Resource are dissipating the organisation’s efforts to provide

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strategic leadership, it is essential that early discussions are held with the ODPM and DCMS to ensure that future data gathering at the national level is able to meet the agenda of individual managers as well as those monitoring policy initiatives. By showing leadership in this respect, and communicating the results of these discussions to the domain, the profile of Resource as an agent of support will be enhanced.

3.9.4 Evidence of Social Impact

Particularly since 1997, Government has required the cultural sector to demonstrate its impact on society, learning and economic growth. This reflects a number of current concerns:

- A climate of financial constraint that requires public organisations to be accountable to all their stakeholders (users, staff and funding bodies)
- The aspiration of New Labour that DCMS and its constituents, as with every other Government Department, should contribute to the Government’s manifesto and particularly in the area of social inclusion
- The increasing commitment to evidence-based policy making and strategic planning

Museums have been shown to have a considerable social impact, particularly in areas of personal development, including:

- Skills acquisition
- Experience development
- Increased confidence and self-esteem
- Attitudinal change
- Developing creativity, cultural awareness, communication and memory

Anecdotal evidence also suggests that museums have an impact in wider social areas, such as:

- Community empowerment, cohesion and capacity building
- Influencing disadvantaged and socially excluded groups
- Promoting healthier communities
- Tackling unemployment
- Tackling crime

Our initial data trawl supports earlier suggestions, that extensive hard evidence of the social impact of museums, gathered systematically is generally lacking. This consequently makes

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111 Selwood, S (2002) *Measuring Culture* Online article: [www.spiked-online.com/Printable/00000006DBAF.htm](http://www.spiked-online.com/Printable/00000006DBAF.htm)
Consulted 16/01/03
it more difficult to establish verifiable causal links between the sector and social impact.\textsuperscript{115} This moves the data collection procedures on from monitoring outputs to outcomes, an area of investigation that requires a more qualitative and user-based approach to measurement rather than a facility or service-based investigation.

3.9.5 Timeliness of Data Supply

The principal supply-side sources on attendances at museums and galleries in the UK can appear anything up to a year or more after the year in question and thus are of limited value when a swift indication of engagement levels are required. Moreover, because data refers generally to annual visits and not to monthly attendances, the currency of the information tends to be lost quite quickly. For instance, provision of monthly throughput information at museums across the country as a whole would have been valuable during the Foot & Mouth (FMD) outbreak in 2001 when museums in rural towns were affected by the negative publicity associated with FMD and the restrictions of movement in some areas. Had relevant information been available within a few weeks on attendances across the sector as a whole, and on a regional basis, then policy and marketing responses could have been introduced more swiftly. It is relevant to note that VisitScotland (formerly the Scottish Tourist Board) endeavours to publish topline accommodation occupancy data within six weeks of the end of the month to which the data refers. This swift turn around reflects the commercial value of occupancy information to the tourism sector. The Association of Independent Museums and the Association of Scottish Visitor Attractions both undertake similar exercises on behalf of their members although the data is not made publicly available.

We recommend that the method for publishing the findings of the \textit{Sightseeing in the UK} survey may therefore need to be reviewed by the commissioning agencies, in order to provide a better turn around of information. At the same time, opportunities for securing a monthly return for throughput data should also be considered. Resource should play a role in these discussions.

A further opportunity to overcome this and to provide a swifter response would be to collate and publish data on engagement by different segments, or by the population as a whole, using omnibus surveys. Such information tends to offer high levels of statistical reliability and provides useful guidance on the short-term impacts of national attempts to increase attendances across the domain. We explore this issue in more detail in the concluding section of this report.

4 Audience for Archives

4.1 Introduction to the Domain

Resource is charged with providing strategic support and assistance for a wide range of archives\(^{116}\), including:

- Local authority archives
- Business and company archives
- Museums and gallery archives
- Library archives and special collections
- Moving image and special collections
- Historical house archives and private collections
- Scientific, medical, health and industrial archives
- Digital archives
- Community archives
- Charity and charitable archives
- Religious archives
- University, HE and school archives

The above list is not definitive and nor are the categories mutually exclusive. However, it is included here to provide an indication of the range of depository types, managing organisations and formats covered by the domain. An alternative breakdown of the domain is proposed by Pickford who seeks to discriminate between archives on the basis of their primary ‘mission’, the organisational context of the archival activity and the level of priority accorded to archival activities within the parent organisation. His provisional breakdown is as follows:

<table>
<thead>
<tr>
<th>Type</th>
<th>Definition</th>
<th>Key features</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Archives as main activity of organisation or department</td>
<td>Collecting repository with area or subject-based remit. Important archival holdings from a broad range of depositors. Key player in archival networks. Professional and dedicated support staff. Public access. Facilities approved by PRO/HMC etc. Service identifies primarily with the archives domain and the archival agenda</td>
</tr>
<tr>
<td>2</td>
<td>Archival activities as an identifiable secondary function of an organisation with other responsibilities (e.g. library or museum)</td>
<td>Significant archival holdings of own organisation and/or for a specified area or subject-based remit. Some collecting. Involved in archival networks. Dedicated or specialist staff (not necessarily full time). Some public access. Covered by Museum Registration (or similar) but not recognised or approved by PRO/HMC. The department or unit identifies with the archive agenda but with a degree of loyalty to the mission of another domain</td>
</tr>
<tr>
<td>3</td>
<td>Archives held peripherally as a minor element as part of the holdings of a library, museum, or similar body</td>
<td>Some original materials (e.g. a small number of specific collections) but otherwise mainly ephemera rather than archives. Outside archival networks. Run by non-specialist staff. Limited public access. Not approved for archives. Primarily driven by non-archival agendas (e.g. museum, library, business, administrative or professional)</td>
</tr>
<tr>
<td>4</td>
<td>Archives in care of creating organisation</td>
<td>No collecting outside organisation. Archives under control of administrative staff. Material primarily held and managed for internal use. Limited public access. Outside the approval system for archive repositories. No significant identity or association with the archival agenda</td>
</tr>
</tbody>
</table>

Source: Pickford, C (undated) Categorisation of Archives Services: unpublished manuscript

In order to facilitate the review of available information on users and non-users, we have sought to identify a number of mutually-exclusive sub-domains as follows:

### Users & Non-Users of Museums, Libraries and Archives: Review of Available Data

| National | • Includes PRO, PRONI, National Archives of Scotland |
| Local authority archive services | • County or District Council or Unitary Authority archive services |
| University, higher education & school archives | • Held by public or private sector educational and learning institutions |
| Religious archives | • Held by cathedrals, churches and other religious bodies |
| Museum & gallery archives | • May be public sector or independent museums or galleries. If public sector, archive is not owned or managed by a County archive service |
| Charity & charitable archives | • Held by a private organisation with charitable status |
| Business & company archives | • Held by a private company |
| Private collections (not commercial) | • Including historic house archives, professional and learned societies and other private collections |
| Other | • e.g. community archives |

Source: PLB Consulting Ltd

This is not a definitive categorisation and does not necessarily reflect Resource’s own thinking on this issue. Its role in this report is to reflect the main areas of data collection across the domain, which appears to be determined at present mainly by governance and ownership criteria rather than content. There is currently no recognisable established infrastructure for the collection and management of data across the domain, and the collection of such information is skewed towards the public sector and local authority services.

#### 4.2 Mapping the Population of Archives in the UK

Recent mapping exercises indicate that there are some 235 public archives in England, 95 in Scotland and at least 22 in Wales (14 local authority services and 8 specialist record offices). CIPFA reports that there are 84 ‘large’ and 34 ‘small’ services in England and Wales. No information is currently available on the number of archives operating in Northern Ireland.

There is no definitive figure for the total population of archives held by institutions of higher and further education, although a study of the archival records of British Universities and Colleges of Higher Education undertaken in 1997 identified 178 institutions supported by the Higher Education Funding Councils or the Department of Education, Northern Ireland. This survey covered the current and non-current records of the institutions themselves, rather than specialist archives held by a University, such as the Kellett Collection of rare medical textbooks held by the University of Durham.

Difficulties in defining what constitutes an archive once one moves out of the public sector create a problem when one is seeking to quantify overall demand patterns across the domain. For instance, the Society of Archivists estimates that there are more than 2,000 specialist repositories across Britain, including public archives, although this sum includes a large number of private or company archives that serve a very small audience and which were established solely to provide records management and archive services to their parent organisations, with public access necessarily a secondary consideration.

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117 Williams, C, Procter, M (nd) *Snapshot diagnostic of data flow in the archival domain* p.4
118 Williams, C, Procter, M (nd) *Snapshot diagnostic of data flow in the archival domain* p.4
120 Scottish Council on Archives (2000) *An Archival Account of Scotland 1999*
122 Source: [http://www.kcl.ac.uk/projects/srch/reports/tfpl.html](http://www.kcl.ac.uk/projects/srch/reports/tfpl.html)
If there is uncertainty over the exact size of the domain, then there is also likely to be some confusion over the size of the existing audience for archives. Certainly, the snapshot diagnostic of data flow in the domain\(^\text{124}\) found problems in establishing the nature and extent of information collected on audiences for UK archives, owing to the lack of any established structure for the management of data across the entire domain.\(^\text{125}\) Further problems are reported to occur with some of the data collected for the domain, as its collection does not always seem to have been purposeful, leading to unstructured and inconsistent results.\(^\text{126}\)

There are currently only two annual surveys in the domain:

- CIPFA’s work with local authority repositories in England and Wales
- An annual survey of archives held in Higher Education institutions in the UK, administered by SCONUL

Key findings of these are discussed below.

### 4.3 Recent Trends in the Archive Domain

The CIPFA and SCONUL surveys mentioned in the previous section, and other ad hoc research, indicate that public use of archives is increasing. Indeed, notwithstanding the relatively small number of direct access points across the domain, archives and archive services have seen their public profile increase in recent years. This appears to be partly due to a growth in people’s interest in their own family histories and in the opportunities that archives provide for engaging in lifelong learning. For instance, the report on the archival mapping project for Wales reported that:

> **“a recent boom in genealogical research, coupled with a rise in the general awareness of what archives are and what they have to offer, has seen many offices’ reader numbers escalate to record levels”**\(^\text{127}\).

Encouragement for increasing public usage of archives is coming from other directions as well. For instance, Government itself has seen the potential of archives as a resource for lifelong learning, and there has been pressure on archives to undertake social inclusion activities in order to broaden their audience base and increase their relevance to disadvantaged groups. However, despite the fact that some archives have been attempting to develop new audiences as a step towards social inclusion, many have been doing this without the non-user research which should be a pre-requisite to identifying which new audiences should be targeted\(^\text{128}\).

The National Council on Archives has suggested, for example, that only 18% of archives surveyed the needs of non-users, and only 9% surveyed specific groups they were targeting\(^\text{129}\). Information is rarely collected for distance users or group visits\(^\text{130}\). This is in part the reason for Resource itself to gather more information on existing and potential audiences for archives and their needs; the Resource Action Plan for the UK’s archives calls specifically

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\(^{124}\) Williams, C & Procter, M (2002) *Snapshot Diagnostic of Data Flow in the Archival Domain*. Liverpool University Centre for Archive Studies

\(^{125}\) Williams, C & Procter, M (2002) *Snapshot Diagnostic of Data Flow in the Archival Domain*. Liverpool University Centre for Archive Studies, p.4

\(^{126}\) Williams, C & Procter, M (2002) *Snapshot Diagnostic of Data Flow in the Archival Domain*. Liverpool University Centre for Archive Studies, p.4


\(^{129}\) The National Council on Archives (nd) *Taking part: An audit of social inclusion work in archives* p.19

\(^{130}\) G. Pick Pers. Comm.14th January 2003
for a needs assessment review of archives, in order to critically assess them from a user perspective\textsuperscript{131}.

A further reason for increased demand for archive services, particularly from younger people who have not traditionally been considered a major audience for archives, has been brought around by changes in the national curriculum. In particular, the emphasis on resource-based learning, and the requirement for documentary research in subjects such as geography and history, is reported to have stimulated interest in archives in a new generation\textsuperscript{132}, although as yet this does not seem to have been borne out in the findings of the Public Services Quality Group (PSQG) services.

This increase in demand is, however, bringing with it problems for the domain as service providers find themselves unable always to provide the high quality of service that they would like. For instance, Scotland’s archive mapping exercise concluded that:

“public archive services in Scotland are poor. Usage is increasing markedly and many services cannot meet the demand adequately”\textsuperscript{133}.

This problem is not, however, confined to Scotland. Surveys of satisfaction amongst archives users provide a mixed tale, with some services able to meet their users’ requirements and expectations without too much trouble but with others finding many obstacles to the delivery of a good quality experience. In particular, the fact that access to archives tends to be restricted by the availability (or otherwise) of work stations, limited opening hours and by the need to visit in person artificially constrains the ability of archivists to satisfy the requirements of every potential visitor. There are furthermore concerns that satisfaction scores may not be critical enough due to the nature and expectation of users and as such surveys rarely seek the views of remote or non-users.\textsuperscript{134}

However, the nature of archival records and the fact that the majority can be converted into electronic form is opening up new opportunities for public engagement with this aspect of our heritage. In particular, the increased use of IT has the potential to make archive services more efficient and to increase their potential as a learning and recreational resource. The report of the archival mapping project for England suggested that it is important to:

“increase opportunities afforded by IT to make local archives more accessible to a much wider public and thus broaden the already substantial customer base of local archive services”\textsuperscript{135}.

This in turn creates a further need to measure reliably usage of archive services, and in particular raises the spectre of how ‘virtual’ usage can be accurately measured to reflect public engagement with a domain whose profile as a heritage asset is only now truly emerging in the public eye.

The remainder of this section examines:

- Levels of usage of public and other archives, as measured by CIPFA and other surveys
- The profile of archive users as evidenced by survey work carried out by the Public Survey Quality Group (PSQG) and other organisations operating in the domain

\textsuperscript{132} Archival Mapping Project Board (1998) Archival Mapping Project Board Report p.2
\textsuperscript{134} Williams, C & Procter, M (nd) Snapshot diagnostic of data flow in the archival domain Liverpool: University of Liverpool Centre for Archive Studies p.18
\textsuperscript{135} Archival Mapping Project Board (1998) Archival Mapping Project Board Report p.4
• Profiles of non-users, as identified by a number of ad hoc surveys. Where known, barriers to engagement are also indicated
• Levels of public satisfaction with public archives
• Issues that require to be addressed by Resource and partners working within the domain, in order to improve the quality of data on users and non-users and to provide information that will guide the enhancement of service delivery across the domain

4.4 Levels of Usage of National Archives

Throughput figures for the three national archives are presented below, and indicate a steady increase in reader visits over the last few years.

Reader visits to the UK’s national archives, 1997 – 2002

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>National Archive of Scotland</td>
<td>10,698</td>
<td>11,718</td>
<td>12,566</td>
<td>12,123</td>
<td>12,617</td>
</tr>
<tr>
<td>Public Record Office, Kew</td>
<td>n/a</td>
<td>n/a</td>
<td>93,177</td>
<td>101,090</td>
<td>103,000</td>
</tr>
<tr>
<td>Family Records Centre (reader visits to PRO section)</td>
<td>n/a</td>
<td>n/a</td>
<td>167,451</td>
<td>166,941</td>
<td>160,000</td>
</tr>
<tr>
<td>Public Record Office of Northern Ireland</td>
<td>16,000*</td>
<td>16,000*</td>
<td>16,000*</td>
<td>16,000*</td>
<td>15,087</td>
</tr>
</tbody>
</table>

Sources: Data collected from individual institutions by PLB Consulting Ltd

4.5 Levels of Usage of Public Archives

4.5.1 Volume of Activity

The principle source of information on usage of public sector archives is the annual survey carried out by the Institute of Public Finance (IPF), a subsidiary of the Chartered Institute of Public Finance and Accountancy (CIPFA). The CIPFA survey is in its 15th year and provides estimates of provision of, spending on, and usage of, local authority archive services. The survey currently covers the following local authority groupings:

• London Boroughs
• Metropolitan Areas
• Metropolitan Districts
• English Counties
• Unitary Authorities in England
• Wales

Wales has been included in the survey since the financial year 1997-1998. At the time of writing, the Society of Archivists in Scotland is in dialogue with CIPFA regarding joining the survey. Less progress is being made in Northern Ireland although discussions have commenced between CIPFA and the relevant authorities there.

The archives survey generally achieves a response rate above 90% - the 2002-2003 estimates secured a 91% response rate overall. As with the other CIPFA surveys of local government services, participation is voluntary although it is reported that an element of peer pressure is used to secure as high a response rate as possible. The CIPFA working group on the archives survey is reportedly happy with the estimates as published, and sees no virtue in conducting a second survey at the end of the financial year to determine actual levels of spend and activity (unlike the libraries domain). In all, there were estimated to be some 853,000 reader visits to archives covered by the CIPFA survey in financial year 2001-02. The figure below summarises the CIPFA data on archive usage by local authority type. Full responses for each local authority are available in the relevant CIPFA report.136

---

Engagement with local authority archives, 2001-02

<table>
<thead>
<tr>
<th>Authority Type</th>
<th>Number of reader visits</th>
<th>Attendance at lectures/ talks given</th>
<th>Number of telephone enquiries</th>
<th>Number of postal enquiries</th>
<th>Email enquiries</th>
</tr>
</thead>
<tbody>
<tr>
<td>London Boroughs</td>
<td>72,891</td>
<td>14,343</td>
<td>28,943</td>
<td>7,757</td>
<td>6,518</td>
</tr>
<tr>
<td>Met Areas</td>
<td>75,400</td>
<td>2,023</td>
<td>25,783</td>
<td>12,181</td>
<td>5,948</td>
</tr>
<tr>
<td>Met Districts</td>
<td>162,231</td>
<td>4,574</td>
<td>51,007</td>
<td>7,014</td>
<td>21,724</td>
</tr>
<tr>
<td>English Counties</td>
<td>452,098</td>
<td>39,085</td>
<td>192,514</td>
<td>74,198</td>
<td>43,298</td>
</tr>
<tr>
<td>English Unitaries</td>
<td>45,540</td>
<td>2,872</td>
<td>22,465</td>
<td>5,187</td>
<td>4,507</td>
</tr>
<tr>
<td>Wales</td>
<td>45,582</td>
<td>5,390</td>
<td>7,868</td>
<td>4,731</td>
<td>3,588</td>
</tr>
<tr>
<td>Total</td>
<td>853,742</td>
<td>68,287</td>
<td>328,580</td>
<td>111,068</td>
<td>85,583</td>
</tr>
</tbody>
</table>


CIPFA reports that in recent years, there has been an annual growth in reader visits of around 3 to 4% per annum with unitary and metropolitan authorities having the highest growth rate recently. However, since 1996-97, reported reader use of local authority archives has increased by some 177%, from 480,000 to 853,000 (see below).

Usage of local authority archives, 1996/97 – 2001/02

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Readers</td>
<td>481,075</td>
<td>472,140</td>
<td>779,823</td>
<td>833,300</td>
<td>833,266</td>
<td>853,742</td>
</tr>
<tr>
<td>Talks and Lectures</td>
<td>1,967</td>
<td>1,712</td>
<td>2,612</td>
<td>2,766</td>
<td>2,766</td>
<td>2,811</td>
</tr>
<tr>
<td>Exhibitions and Displays</td>
<td>482</td>
<td>459</td>
<td>649</td>
<td>748</td>
<td>748</td>
<td>794</td>
</tr>
</tbody>
</table>


In terms of regional variations in engagement with the domain, the 200203 Archives Estimates report provides the first set of information that can be used as a baseline against which to monitor future activity.

Engagement with local authority archives by region, 2001-02

<table>
<thead>
<tr>
<th>Region</th>
<th>Number of readers in year</th>
<th>Number of exhibitions/displays</th>
<th>Attendances at talks/ lectures</th>
</tr>
</thead>
<tbody>
<tr>
<td>South East Exc. London</td>
<td>104,221</td>
<td>133</td>
<td>3,090</td>
</tr>
<tr>
<td>Greater London</td>
<td>98,660</td>
<td>147</td>
<td>2,340</td>
</tr>
<tr>
<td>Eastern</td>
<td>91,579</td>
<td>96</td>
<td>4,114</td>
</tr>
<tr>
<td>East Midlands</td>
<td>68,524</td>
<td>70</td>
<td>431</td>
</tr>
<tr>
<td>North East</td>
<td>30,990</td>
<td>50</td>
<td>1,453</td>
</tr>
<tr>
<td>North West</td>
<td>144,284</td>
<td>90</td>
<td>1,046</td>
</tr>
<tr>
<td>South West</td>
<td>85,584</td>
<td>62</td>
<td>943</td>
</tr>
<tr>
<td>West Midlands</td>
<td>130,910</td>
<td>60</td>
<td>329</td>
</tr>
<tr>
<td>Yorkshire &amp; Humberside</td>
<td>53,408</td>
<td>51</td>
<td>-</td>
</tr>
</tbody>
</table>


4.5.2 Profiles of Public Archives Users

In recent years the amount of information on the level of use of public archives has been augmented by the findings of three major research studies co-ordinated by the Public Services Quality Group (PSQG). These surveys focus more on visitor profile and satisfaction with the service at which they were interviewed rather than on absolute numbers of users and thus provide a valuable insight into existing audiences for archives in Britain.

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137 CIPFA Statistical Information Service (2002b) Archive Service Statistics 2001-02 Estimates
Key findings from the PSQG surveys, which constitute the largest and most detailed publicly available information on current and recent archive users, are summarised in the following table. Key points to note are:

- The ratio of male to female users has remained consistent over the period with neither gender exceeding 55% of all users. Male users do, however, seem to outnumber females.

- The age range of visitors has remained fairly constant, with over 70% over 44 and 30% under. Only 3% of users are aged under 24. This could suggest that a high percentage of users are retired, something that was highlighted in the 1998 survey.

- The ethnicity categories used changed over the period, as the 2001 survey used those from the 2001 Census, whereas the 1998 and 1999 surveys used the 1991 categories. Overall figures suggest that there has been little change nationally in visits made to archives by people from ethnic minority groups. White ethnic groups continually comprise 86-97.8% of all archive users.

- The method of assessing visitors who consider themselves to be disabled changed between 1998 and 2001. It appears, however, as though the percentage of disabled users has decreased within that period by 2-3%. This usage pattern implies that other people with disabilities are not using archive services as they do not meet their physical needs.\(^{138}\)

The PSQG work seems to indicate that use of public archives is restricted to a limited section of the populace. This is confirmed by recent research carried out by Cumbria County Council that found that upwards of 78% of the population have never used their local record office.\(^{139}\)

Individual archive services collect information on users and, in some instances, non-users as part of Best Value Reviews and Improvement Plans. Within the constraints of this study it has not been possible to collate all of the relevant information held on the following website: www.bestvalueforarchives.org.uk/online.htm. A review of some of the information held on the website confirms some relevance to the topic under review here although because they are organisation-specific their relevance to the provision of national baseline data is limited.

\(^{138}\) The National Council on Archives (nd) *Taking part: An audit of social inclusion work in archives* p.18

\(^{139}\) J. Grisenthwaite pers. comm. 23rd December 2002
Profile of archive users, from PSQG surveys

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>%</td>
<td>%</td>
<td>%</td>
</tr>
<tr>
<td><strong>Gender</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Male</td>
<td>43</td>
<td>53</td>
<td>55</td>
</tr>
<tr>
<td>Female</td>
<td>45</td>
<td>47</td>
<td>45</td>
</tr>
<tr>
<td>No answer</td>
<td>13</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Age Group</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Under 16</td>
<td>1</td>
<td>0.4</td>
<td>0.3</td>
</tr>
<tr>
<td>16-24</td>
<td>5</td>
<td>3</td>
<td>2</td>
</tr>
<tr>
<td>25-44</td>
<td>19</td>
<td>19</td>
<td>18</td>
</tr>
<tr>
<td>45-59</td>
<td>38</td>
<td>34</td>
<td>35</td>
</tr>
<tr>
<td>60+</td>
<td>34</td>
<td>43</td>
<td>44</td>
</tr>
<tr>
<td>No answer</td>
<td>4</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Ethnic Group</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Asian Bangladeshi</td>
<td>0</td>
<td>0.1</td>
<td>0</td>
</tr>
<tr>
<td>Asian Chinese</td>
<td>0</td>
<td>0.1</td>
<td>0</td>
</tr>
<tr>
<td>Asian Indian</td>
<td>0</td>
<td>0.1</td>
<td>0.2</td>
</tr>
<tr>
<td>Asian Pakistani</td>
<td>0</td>
<td>0.0</td>
<td>0</td>
</tr>
<tr>
<td>Asian (Other)</td>
<td>0</td>
<td>0.2</td>
<td>0</td>
</tr>
<tr>
<td>Black African</td>
<td>0</td>
<td>0.4</td>
<td>0.4</td>
</tr>
<tr>
<td>Black Caribbean</td>
<td>0</td>
<td>0.2</td>
<td>0</td>
</tr>
<tr>
<td>Black (other)</td>
<td>0</td>
<td>0.0</td>
<td>0.2</td>
</tr>
<tr>
<td>White</td>
<td>86</td>
<td>98</td>
<td>98</td>
</tr>
<tr>
<td>Other</td>
<td>0</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>No answer</td>
<td>13</td>
<td>37</td>
<td></td>
</tr>
<tr>
<td>Do you have a disability?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Yes</td>
<td>7</td>
<td>18</td>
<td>7</td>
</tr>
<tr>
<td>Visual difficulty</td>
<td>4</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Hearing difficulty</td>
<td>5</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Physical difficulty</td>
<td>7</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Learning difficulty</td>
<td>0.2</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td>2</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>No</td>
<td>87</td>
<td>82</td>
<td>93</td>
</tr>
<tr>
<td>No answer</td>
<td>7</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>


4.6 University and FE Institution Archives

4.6.1 Volume of Activity

There is little information on levels of use at university and FE archives, although SCONUL does report the number of special collection consultations in university libraries. The number of short and long-term loans is reported to far exceed the number of archive consultations, with one consultation taking place for every two active borrowers.\(^{140}\)

4.6.2 User Profiles

A major study of this sub-domain found that there is a lack of specialist knowledge of archive management and that this has been constraining access to archives held by the Higher and Further Education sector\(^{141}\). In general, the main barrier to greater access to these resources is a lack of knowledge of what is available, and a lack of understanding as to whether holdings are comprehensive or not. If the role of University and other academic archives as a research resource is to be enhanced, then this understanding needs to be developed and the holdings themselves promoted more effectively.

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\(^{141}\) JISC (1997) *Study of the Archival Records of British Universities*
4.7 Business Archives

4.7.1 Volume of Activity

The snapshot diagnostic study found that there is no identifiable regular collection of statistical or qualitative data in the area of business archives\(^\text{142}\). Evidence from the Society of Archivists suggests that of all sub-domains, business archives make the least provision for public access, with the HSBC and the Post Office two notable and laudable exceptions\(^\text{143}\). Despite the relative lack of public engagement with business archives, it is reported that the number of enquiries and visitors is increasing and that these facilities, like their colleagues in the public sector, face similar problems of insufficient seating and consultation facilities\(^\text{144}\).

4.8 Other Specialist Archives

Our desk research and consultations have not revealed any information on the level of usage of specialist archives.

4.9 Profiles of Non-users of Archives

There are a number of specific audiences that research suggests are traditionally non-users of archives\(^\text{145}\):

- Families with children
- Children and young people
- School groups
- Workers / carers who have no time
- People who lack basic skills
- Low-achieving households
- Ethnic groups
- People without information retrieval skills
- People with no experience of computers / ICT
- The socially disadvantaged, including the poor, homeless, unemployed and penal
- Rural communities
- People under 45

4.10 Public Satisfaction with British Archives

As indicated above, the PSQG has carried out three national surveys of visitors to British Archives in 1998, 1999 and 2001. Some 126 archives across Britain and Northern Ireland contributed to the 2001 survey and whilst this is not the full population of public archives in the UK, the findings are believed to provide a most robust picture of the performance of the domain. One benefit of this PSQG data is that, unlike the OPSR satisfaction information for the libraries and museums domain (see Section 3.9), a regional breakdown is published. Issues for which satisfaction was monitored included:

- Advance information
- Catalogues, indexes, leaflets etc.
- Copy services
- Customer care
- Document delivery
- Micro-film & fiche viewing
- Opening hours
- Research advice services
- Visitor facilities

Below we present only the data for the overall rating for the services. Full findings are available in the PSQG survey reports.

### Overall rating for the UK’s archive services, 2001

<table>
<thead>
<tr>
<th>Area</th>
<th>Overall rating for the archive service</th>
<th>n</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Excellent</td>
<td>Good</td>
</tr>
<tr>
<td>East Midlands</td>
<td>47%</td>
<td>50%</td>
</tr>
<tr>
<td>Eastern</td>
<td>44%</td>
<td>52%</td>
</tr>
<tr>
<td>London</td>
<td>27%</td>
<td>67%</td>
</tr>
<tr>
<td>North East</td>
<td>43%</td>
<td>52%</td>
</tr>
<tr>
<td>North West</td>
<td>42%</td>
<td>55%</td>
</tr>
<tr>
<td>South East</td>
<td>48%</td>
<td>49%</td>
</tr>
<tr>
<td>South West</td>
<td>42%</td>
<td>54%</td>
</tr>
<tr>
<td>West Midlands</td>
<td>46%</td>
<td>52%</td>
</tr>
<tr>
<td>Yorks &amp; Humberside</td>
<td>42%</td>
<td>54%</td>
</tr>
<tr>
<td>Scotland</td>
<td>40%</td>
<td>55%</td>
</tr>
<tr>
<td>Wales</td>
<td>49%</td>
<td>47%</td>
</tr>
<tr>
<td>Other</td>
<td>30%</td>
<td>57%</td>
</tr>
<tr>
<td>Weighted UK total</td>
<td>31%</td>
<td>63%</td>
</tr>
</tbody>
</table>

Source: PSQG 2001
Note: * less than 0.5%

Unfortunately, the rating systems used in the PSQG research do not reflect those used in the OPSR information and thus it is not possible to directly compare the two data sets. However, a basic comparison of the data suggests that in late 2001/ early 2002, archive users were more likely to give the domain the equivalent of an excellent or good rating than museum users (see section 3.9), with library users falling somewhere in between (Section 5.11).

### 4.11 Summary

To summarise the current state of play in the archive domain:

- Almost the whole of the domain has been mapped in the last five years, with the exception of Northern Ireland
- Survey findings indicate that the number of visits to archives has been growing over this period, to a position where there are approaching one million visits to UK archives a year
- User satisfaction at archives is consistently high. The 2001 PSQG survey indicated that all areas of service apart from visitor facilities were judged to be excellent or good by 90-100% of users. This represents an improvement on the figures from both 1998 and 1999
- Opportunities for engagement with archives are being limited by physical constraints at service points, and by the slow progress in some quarters being made towards digitisation of records
- Emerging audiences for archives include group visits and the education sector, although monitoring procedures are not always adequately capturing profile information from these market segments
- New forms of access, and particularly the use of ICT, are likely to increase both the number of people engaging with audiences and the nature of this engagement. Again, however, monitoring procedures do not always capture either the management information or the Performance Indicator data required of service providers
- Although there is no co-ordinated data collection process across the domain, certain sub-domains now have relatively advanced user monitoring procedures. This is particularly
true of the public sector archive service domain in England and Wales, and in the Higher Education sector

- Even though (or perhaps because) there is no co-ordinated approach to data collection in the domain, there is a concern amongst archivists that there are too many requests for information and that there is also duplication amongst some of the requests received. This duplication of activity requires early resolution in order to encourage future participation in data collection exercises

- Data collection in the public sector in particular appears to measure delivery against set service level standards and some of the indicators used do not, according to domain professionals, provide a true reflection of the impact of their work

It has long been a matter of public policy that access to archives should be increased and that sufficient investment is made in the domain to facilitate this. In particular:

“Public bodies that create records should be required, and private bodies and individuals encouraged, to make adequate arrangement for access to records which merit protection as archives”

and

“the governing bodies of archive services in both the public and private sectors should take all appropriate measures to make the archives for which they are responsible available for public consultation, given due consideration for any continuing confidentiality”\(^\text{146}\).

Yet the evidence collected to date suggests that many archives remain unaware of all but the most basic information on their users, and have even less baseline data on non-users.

**Recommendation:** There is thus an urgent need for a major investigation, across the whole of the domain and not just public archives, on the profile and requirements of users and non-users, in order to advise future audience development and social inclusion work. This should build on the work of the PSQG and should be introduced into those sub-domains such as university, FE, business and specialist archives, for which data is currently lacking.

Once this has been achieved, then all archives will be able to address the general principles of access developed some years ago, that require an archive service to:

- serve its community as effectively and efficiently as possible
- serve all of its community, devising a range of services appropriate to the community’s stated or implied needs
- encourage as much access by users to primary source material as is compatible with the permanent preservation of unique and irreplaceable material. There should be a presumption of openness
- ensure that the satisfaction of users is amongst its primary objectives
- have user feedback mechanisms and complaints procedures and clear channels of communication to and from other stakeholders
- make services available at the times when the community requires them.\(^\text{147}\)

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\(^{147}\) Pickford, C & Watt, I (1999) *Standard for Access to Archives – a working document*
5 Audiences for Libraries

5.1 Introduction to the Domain

5.1.1 Definitions

Unlike the other domains, there is an international standard which covers library statistics and which includes a breakdown of library types (ISO 2789:2003 Information and documentation; International library statistics). A paraphrasing of the definitions for each sub-domain is presented below, as it provides a useful framework within which to review information on users and non-users.

The term "library" is taken to be inclusive of all types of library, information unit, resource centre or similar, regardless of nomenclature. The library sectors covered by ISO 2789 are:

- **National Library**
  Library that is responsible for acquiring and conserving copies of all relevant documents in the country in which the library is located; it may function as a legal deposit library and normally compiles a national bibliography. The definition of "national library" allows for more than one in a country.

- **Libraries of Institutions of Higher Education**
  Libraries whose primary function is to serve students, academic and professional staff in universities and other institutions of education at the third (tertiary) level and above; may also serve the general public.

- **Public Libraries**
  A general library that serves the whole population of a local or regional community and is usually financed, in whole or in part, from public funds. It may serve the general public or special groups of users such as children, visually impaired persons, hospital patients or prisoners. This definition includes services provided to schools by a public library organisation.

- **School Libraries**
  Those are attached to all types of schools and colleges below the third [tertiary] level of education whose primary function is to serve the pupils and teachers of such a school.

- **FE sector**
  The library standard includes in the ‘schools’ category libraries and resource collections in all educational institutions below the third level that may be described as "Colleges", "Colleges of further education", "Vocational Institutes" etc. However, we have separated this out into a separate grouping

- **Special Libraries**
  Independent libraries covering one discipline or particular field of knowledge or a special regional interest. Includes libraries primarily serving a specific category of users, or primarily devoted to a specific form of document, or libraries sponsored by an organisation to serve its own work-related objectives. Special Libraries can be divided into seven subgroups, as follows:

- **Government Libraries**
  Those maintained to serve any government service, department or agency, or parliament, including both national and local (regional) government organisations. Exclude National Libraries, Public Libraries and Health Service Libraries, which have their own categories.
• **Health Service / Medical Libraries**
  Those that serve health service professionals in hospitals or elsewhere, whether in the private or public sector. Exclude pharmaceutical company libraries, which should be included under ‘industrial and commercial’

• **Professional and Learned Institutions and Associations**
  Libraries maintained by professional or trade associations, learned societies, trade unions and other similar bodies whose primary objective is to provide services to the members and practitioners of a specific trade or profession.

• **Industrial and Commercial Libraries**
  Libraries in any industrial enterprise or business firm, maintained by the parent organisation to serve the information needs of its staff. Include libraries maintained by information and management consultants, manufacturing and service industries and law libraries.

• **The Media**
  Libraries serving media and publishing firms and organisations, including newspapers, publishers, broadcasting, film and television.

• **Regional Library**
  Major libraries serving a particular region whose primary function cannot be described as that of a public or academic library nor as part of a national library network. There are no such libraries in the UK.

• **Prison libraries**, a separate category added by the consultants to the international standard for the purpose of this study

• **Other**
  Any library not included elsewhere e.g. libraries within voluntary organisations, museums, etc.

What is important to note is that this breakdown of library types covers both governance and also principal user groups (and thus to some extent also content), and that in some cases the categories are not necessarily mutually exclusive. Nor does the categorisation make reference to the format in which data are held. For instance, a web-based library need not have a physical presence, nor a defined user group and thus it would have to be categorised on the basis of governance (i.e. the organisation or individual that assembled the holdings and made them available).

### 5.2 Mapping the Domain

There is no comprehensive source of information on the number of libraries in the UK. What information exists refers mainly to public sector provision, and particularly public libraries. This of course has a bearing on the amount and quality of information available on users and non-users. As has recently been pointed out:

“Public libraries are surveyed in probably the most detail of any type of library”\(^{148}\).

Data on the population, holdings, financial costs, services and usage of public libraries are all well covered by CIPFA amongst other organisations, and the findings of this work and other research studies and reports have been used in this section to determine users and non-users of libraries in the UK.

---

### UK libraries, by sub-domain

<table>
<thead>
<tr>
<th>Sub-domain</th>
<th>Number of libraries</th>
<th>Note</th>
</tr>
</thead>
<tbody>
<tr>
<td>National Library</td>
<td>3 libraries</td>
<td>8 service points</td>
</tr>
<tr>
<td>HE Libraries</td>
<td>791</td>
<td>450 at ‘old’ universities 211 at ‘new’ universities 130 in HE colleges</td>
</tr>
<tr>
<td>Public Libraries</td>
<td>4,171 libraries and 655 mobile libraries</td>
<td>23,512 service points</td>
</tr>
<tr>
<td>School libraries</td>
<td>Estimated 6,500 service points</td>
<td></td>
</tr>
<tr>
<td>FE colleges etc</td>
<td>550 publicly funded FE colleges in the UK</td>
<td></td>
</tr>
<tr>
<td><strong>Special Libraries</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Government Libraries</td>
<td>35</td>
<td></td>
</tr>
<tr>
<td>Health Service/ Medical libraries</td>
<td>500 - 600</td>
<td>400+ are in England and Wales</td>
</tr>
<tr>
<td>Professional and Learned Institutions and Associations</td>
<td>No data</td>
<td></td>
</tr>
<tr>
<td>Industrial and commercial libraries</td>
<td>No data</td>
<td></td>
</tr>
<tr>
<td>Media libraries</td>
<td>No data</td>
<td></td>
</tr>
<tr>
<td>Regional libraries</td>
<td>No such libraries in the UK</td>
<td></td>
</tr>
<tr>
<td>Prison libraries</td>
<td>150 service points</td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td>(e.g. voluntary organisations, museums)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>No data</td>
<td></td>
</tr>
</tbody>
</table>

**Source:** PLB Consulting Ltd

The information that is collected about the libraries sector predominantly measures inputs, outputs and resources. Although there have been increasing numbers of surveys that include qualitative questions on services and facilities, very few collect outcome measures and almost none look for impact measures.

---

153 Creaser, C; Maynard, S & White, S (2002) *LISU Annual Library Statistics 2002* p.104 Figure includes service points, mobile libraries and institutions
156 Creaser, C; Maynard, S & White, S (2002) *LISU Annual Library Statistics 2002*
5.3 Visitors to Libraries in the UK

Around ten million people, according to The Library and Information Commission’s *New Library: The People’s Network* report of 1997\(^{161}\), were recorded as using libraries on a regular basis i.e. at least once a fortnight and in 2001, 21% of the population had visited a library more than 11 times in the past year.\(^{162}\) Visiting a library is one of the most popular away from home leisure activities, and in the past has been considered the most frequently undertaken cultural activity.\(^{163}\)

### Participation in selected leisure activities away from home by age, 1997-98

<table>
<thead>
<tr>
<th>Great Britain (1997-8)</th>
<th>Percentages attending in the three months prior to interview</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>16-24</td>
</tr>
<tr>
<td>Visit a public house</td>
<td>82</td>
</tr>
<tr>
<td>Meal in a restaurant</td>
<td>63</td>
</tr>
<tr>
<td>Meal in a fast food restaurant</td>
<td>77</td>
</tr>
<tr>
<td>Library(^{164})</td>
<td>41</td>
</tr>
<tr>
<td>Cinema</td>
<td>65</td>
</tr>
<tr>
<td>Historic building</td>
<td>24</td>
</tr>
<tr>
<td>Short break holiday</td>
<td>39</td>
</tr>
<tr>
<td>Disco or night club</td>
<td>68</td>
</tr>
<tr>
<td>Spectator sports event</td>
<td>31</td>
</tr>
<tr>
<td>Museum or art gallery</td>
<td>21</td>
</tr>
<tr>
<td>Fun fair</td>
<td>27</td>
</tr>
<tr>
<td>Theatre</td>
<td>14</td>
</tr>
</tbody>
</table>


What is particularly interesting about the figures in the above table (more recent information has not been published in Social Trends 30, 31, 32 and 33) is the apparent consistency of use of libraries right across the age ranges. Research by the Public Library and Social Exclusion Project Team suggests, however, that traditional usage statistics may be considerably overstated and that regular usage may be as low as 20%.\(^{165}\)

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\(^{164}\) N.B. This does not appear to discriminate between public libraries and other libraries

Participation in cultural activities by English residents 2001

<table>
<thead>
<tr>
<th>Cultural Activity</th>
<th>Number participating</th>
<th>Participants as a % of Respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Film</td>
<td>3,344</td>
<td>55%</td>
</tr>
<tr>
<td>Well-known park / gardens</td>
<td>3,062</td>
<td>51%</td>
</tr>
<tr>
<td>Library</td>
<td>2,746</td>
<td>45%</td>
</tr>
<tr>
<td>Stately home / castle / garden</td>
<td>2,222</td>
<td>37%</td>
</tr>
<tr>
<td>Museum / art gallery</td>
<td>2,133</td>
<td>35%</td>
</tr>
<tr>
<td>Exhibition</td>
<td>1,155</td>
<td>19%</td>
</tr>
<tr>
<td>Craft exhibition</td>
<td>1,036</td>
<td>17%</td>
</tr>
<tr>
<td>Books / writing event</td>
<td>478</td>
<td>8%</td>
</tr>
<tr>
<td>Video / elec. art event</td>
<td>391</td>
<td>8%</td>
</tr>
</tbody>
</table>

Source: Data manipulated by PLB from information contained in Skelton, A et. al (2002) ‘Arts in England. Attendance, Participation and Attitudes in 2001’ (Dataset) (Base 6,042)

Recent research, such as that for the Arts Council of England assessing attendance and participation in the arts, indicates that library visitation is no longer the most frequently undertaken cultural activity. In contrast to earlier studies, only 45% of respondents stated that they used libraries within the past twelve months, in contrast to 55% who had seen a film and 51% who had visited a well known park or garden.166

5.4 Use of National Libraries

5.4.1 Data Availability

The number of National Libraries is very low and there is no systematic survey per se carried out on them.167 Each National Library is, however, governed by a funding agreement with its parent government department, which requires the reporting of statistical and qualitative performance indicators.168

The British Library collects data to produce performance indicators at an executive and middle management level.169 Much of this information relates to measuring outcomes, although an increasing amount refers to satisfaction rates.170 This latter is obtained through a six monthly survey amongst readers to ascertain levels of service satisfaction.171 The National Library of Wales collects data on acquisitions and use and also conducts a basic user survey three times a year.172 Figures are also available for the National Library of Scotland for acquisitions, purchases, items issued and user visits.173

5.4.2 Volume of Usage

There are three national libraries operating in the UK from eight specific sites.174 Over ten million items are consulted and supplied remotely per year, with a further 1.7 million reading room consultations.175 In 2001, this amounted to 456,100 reader visits to the British Library,176 65,852 user visits to the National Library of Scotland177 and up to 35,414 users at

169 See British Library (2002b) Funding Agreement Between the Department for Culture, Media and Sport and the British Library 2002/03 http://www.bl.uk/about/policies/pdf/funding0203.pdf Page consulted 3rd April 2003
171 P. Chapman pers. comm. 27th January 2003
172 R. Huws pers. comm. 20th December 2002
the National Library of Wales.\textsuperscript{178} The British Library Document Supply Centre also supplies \textit{3} million items to UK and international users.\textsuperscript{179} The National Libraries supply information in the form of ‘high-level research or learning materials’ to academic and post-graduate researchers; other students with a high-level research interest; commercial businesses; professionals and managers; accredited learners and approved researchers.\textsuperscript{180}

At the British Library, the number of requests for photocopies and loans has increased between 1990 and 2001 by \textit{9}% from the UK and by \textit{70.6} % from overseas.\textsuperscript{181} The source of requests for these loans varies between UK and overseas customers. 51% of UK requests come from academic libraries, which is 11% more than in 1990, whilst in contrast, requests from commercial or industrial libraries fell by \textit{5} % and public libraries by \textit{7} %.\textsuperscript{182} Overseas requests are dominated by the industrial and commercial sector with \textit{43} % of the total, whilst academic (32\%) and government (22\%) are the only other sectors with more than \textit{1} % of the total.\textsuperscript{183}

The methods of requesting loans and photocopies changed considerably in the 1990’s with postal requests falling from 41\% in 1991-92 to just 1\% in 2001-2002, whilst e-mail now accounts for 50\% of requests and on-line access has also increased considerably in popularity.\textsuperscript{184} There is now a requirement to widen access to the national library services, whilst also maintaining the quality and specialist services for key groups.\textsuperscript{185}

The National Library of Wales has recorded the number of users, issue slips and postal enquiries for the 2000-01 period covering materials such as, printed books, manuscripts, pictures and maps, microforms and the sound and moving image collection. The usefulness of the data is, however, constrained, as there is no means to make comparisons with other years in to develop a perception of trends.

\textbf{User activity at the National Library of Wales}

<table>
<thead>
<tr>
<th></th>
<th>Printed books</th>
<th>Manuscripts</th>
<th>Pictures and maps</th>
<th>Microforms</th>
<th>Sound and moving image collection</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of users</td>
<td>19,691</td>
<td>5,746</td>
<td>2,555</td>
<td>6,630</td>
<td>792</td>
</tr>
<tr>
<td>Number of issue slips</td>
<td>76,445</td>
<td>19,647</td>
<td>11,839</td>
<td>115,831</td>
<td>4,300</td>
</tr>
<tr>
<td>Number of postal enquiries</td>
<td>1,397</td>
<td>5,078</td>
<td>1,462</td>
<td>-</td>
<td>185</td>
</tr>
</tbody>
</table>


LISU has access to information on the usage of the services at the National Library of Scotland. In this instance data has been collected on user visits and items issued between 1999 and 2001. This indicates that there has been a slight increase in both user visits and items issued over the period and across a range of services.

\textsuperscript{177} Library and Information Statistics Tables (2001) \textit{National Library Statistics} \texttt{http://www.lboro.ac.uk/departments/dils/lisu/list01/nat01.html} Page consulted 16th April 2003
\textsuperscript{178} Creaser, C; Maynard, S & White, S (2002) \textit{LISU Annual Library Statistics 2002} p.161
\textsuperscript{181} Creaser, C; Maynard, S & White, S (2002) \textit{LISU Annual Library Statistics 2002} p.151
\textsuperscript{182} Creaser, C; Maynard, S & White, S (2002) \textit{LISU Annual Library Statistics 2002} p.151-2
\textsuperscript{183} Creaser, C; Maynard, S & White, S (2002) \textit{LISU Annual Library Statistics 2002} p.152
\textsuperscript{184} Creaser, C; Maynard, S & White, S (2002) \textit{LISU Annual Library Statistics 2002} p.152
User activity at the National Library of Scotland

<table>
<thead>
<tr>
<th></th>
<th>1999-00</th>
<th>Items issued</th>
<th>2000-01</th>
<th>Items issued</th>
</tr>
</thead>
<tbody>
<tr>
<td>User visits</td>
<td>51,839</td>
<td>134,260</td>
<td>54,685</td>
<td>190,953</td>
</tr>
<tr>
<td>Main reading room</td>
<td>2,444</td>
<td>-</td>
<td>2,384</td>
<td>5,190</td>
</tr>
<tr>
<td>Map library</td>
<td>4,667</td>
<td>40,561</td>
<td>4,279</td>
<td>43,442</td>
</tr>
<tr>
<td>Manuscripts reading room</td>
<td>3,549</td>
<td>14,812</td>
<td>4,694</td>
<td>14,450</td>
</tr>
<tr>
<td>Rare books reading room</td>
<td>3,353</td>
<td>9,882</td>
<td>3,363</td>
<td>9,500</td>
</tr>
<tr>
<td>Scottish science library</td>
<td>7,775</td>
<td>33,261</td>
<td>-</td>
<td>-</td>
</tr>
</tbody>
</table>


5.4.3 Profile of Users

Research by the National Library of Wales suggests that a considerable barrier to access at the National Library is the institution itself. The building is seen to be inaccessible and intimidating in its built form and in the services it provides. Respondents to the survey felt that access could be improved by making the building, its approaches and services more accessible and user friendly, with opening hours extended and disabled access improved.

In contrast to the National Library of Wales, data collected by the National Library of Scotland and the British Library does not appear to analyse the profile of their visitors. Available information focuses primarily on outputs and levels of performance as required to meet Ministerial objectives.

It is possible that usage at National Libraries may be restricted by the perception that the institutions only collect material relating to that particular home country or in one language. This is particularly the case in Wales, where one respondent commented that they were made to feel a ‘second-class citizen’ as they did not speak Welsh.

5.5 Use of Libraries in Universities and HE Institutions

5.5.1 Data Availability

It is reported that there has been a considerable amount of organisational change in the sector and the agencies responsible for collecting data have also altered, leading to fragmented reporting, discontinues in time-series surveys and figures that cannot be compared across the sector.

The only time series survey of university and HE libraries is produced by SCONUL. These figures include performance indicators and can be used to show broad cost:output ratios. The information collected refers to inputs, outputs and attempts to calculate efficiency measures.

SCONUL’s datasets are available to members on their website for libraries to carry out their own analysis and comparisons. LISU also use a subset of the SCONUL data in the production of their Annual Statistics.

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It is considered unlikely that university and higher education institutions will conduct research into non-users, as they have no remit to serve the entire community.\textsuperscript{194}

5.5.2 Volume of Usage

The total number of students in old universities has increased from 1991-92 and the number of loans at their libraries has increased at a comparable rate.\textsuperscript{195} The number of visits to library premises increased from 46.5 million in 1991-92 to 60.7 million in 2000-01, but at the same time the number of visits per full time student fell from 98 to 81.\textsuperscript{196} This pattern seems to occur across the HE sector, with the number of visits rising by 9.9% between 1995 and 2001 with the number of visits per full time student decreasing by 4.9%.\textsuperscript{197}

The patterns of library visitation and loans are reported to differ between old universities, new universities and higher education colleges. The number of visits per student is declining in universities, whilst there is a suggestion that this may have stopped in the higher education colleges.\textsuperscript{198} This seems to indicate a general pattern of increasing issues per visit. Enquiries at university libraries show a distinct difference between old universities, with there being 10.8 enquiries per full time student in the former and 7.5 in the latter during 2000-01.\textsuperscript{199} LISU suggest that the main reason for visiting academic libraries is not book borrowing, but there is little information as to what uses the facilities are put to.\textsuperscript{200}

Analysis of the volume of use at university libraries indicates that a considerable percentage of potential users do not make use of the available facilities. On average, this amounts to 24\% of an institution’s studentship or 25\% of university students in the UK. A further 8\% of registered users in an average university are not active users. This means that approximately 30\% of potential university library users at an average university or 40\% nationally are either non-borrowers or non-users. These statistics are, however, mitigated, as only an average of 76\% university library users are registered.\textsuperscript{201}

<table>
<thead>
<tr>
<th>User activity at UK university libraries</th>
<th>Total potential users</th>
<th>Total registered users</th>
<th>Active borrowers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average per university</td>
<td>20,054</td>
<td>15,188</td>
<td>14,039</td>
</tr>
<tr>
<td>Total</td>
<td>1,945,246</td>
<td>1,458,016</td>
<td>1,165,253</td>
</tr>
</tbody>
</table>


Although, there are a considerable number of potential or unregistered users of university libraries, SCONUL’s research indicates that registered users make reasonably frequent use of the resource.\textsuperscript{202} As universities tend to have a teaching period of approximately 32 weeks per year, this indicates that average use is around two visits per week.

<table>
<thead>
<tr>
<th>Activity at UK university libraries</th>
<th>Total FTE users</th>
<th>Total annual visits</th>
<th>Average number of visits per user</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average per university</td>
<td>13,923</td>
<td>886,482</td>
<td>64</td>
</tr>
<tr>
<td>Total</td>
<td>1,545,461</td>
<td>100,172,465</td>
<td>65</td>
</tr>
</tbody>
</table>


\textsuperscript{194} R. Warburton pers. comm. 12\textsuperscript{th} December 2002
\textsuperscript{195} Creaser, C; Maynard, S & White, S (2002) LISU Annual Library Statistics 2002 p.114
\textsuperscript{197} Creaser, C; Maynard, S & White, S (2002) LISU Annual Library Statistics 2002 p.140
\textsuperscript{198} Creaser, C; Maynard, S & White, S (2002) LISU Annual Library Statistics 2002 p.138
\textsuperscript{199} Creaser, C; Maynard, S & White, S (2002) LISU Annual Library Statistics 2002 p.140
\textsuperscript{200} Creaser, C; Maynard, S & White, S (2002) LISU Annual Library Statistics 2002 p.138
\textsuperscript{201} SCONUL (2000) SCONUL Annual Library Statistics 1998-99 p.69
\textsuperscript{202} SCONUL (2000) SCONUL Annual Library Statistics 1998-99 p.21
SCONUL’s research indicates that active borrowers at university libraries will borrow an average of 45 items per year, which is equivalent to less than one loan item per visit.

### Activity types at UK university libraries

<table>
<thead>
<tr>
<th>Total no. issues</th>
<th>Active borrowers</th>
<th>Average no. issues</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average per university</td>
<td>540,052</td>
<td>12,309</td>
</tr>
<tr>
<td>Total</td>
<td>72,366,904</td>
<td>1,304,760</td>
</tr>
</tbody>
</table>


#### 5.5.3 Profile of Users

There are around two million students and staff in Higher Education institutions in the UK covered by 791 service points in the 166 universities and other higher education institutions in the UK. Higher education library facilities provide a service to undergraduate, postgraduate and research students; academic staff; researchers; managers and support staff, as well as members of the public, including accredited learners and approved researchers. There are issues within the management of these institutions as to how to balance the needs of competing user groups.

### User profiles, university libraries

<table>
<thead>
<tr>
<th>Registered users average</th>
<th>1,354</th>
<th>337</th>
<th>1,175</th>
<th>2,218</th>
<th>914</th>
<th>11,370</th>
<th>899</th>
<th>565</th>
</tr>
</thead>
<tbody>
<tr>
<td>Potential users average</td>
<td>845</td>
<td>312</td>
<td>1,616</td>
<td>2,741</td>
<td>849</td>
<td>13,143</td>
<td>3,303</td>
<td>590</td>
</tr>
<tr>
<td>Registered users – total</td>
<td>117,793</td>
<td>15,520</td>
<td>78,717</td>
<td>195,210</td>
<td>75,859</td>
<td>1,057,453</td>
<td>60,226</td>
<td>37,318</td>
</tr>
<tr>
<td>Potential users – total</td>
<td>84,540</td>
<td>28,043</td>
<td>158,374</td>
<td>274,065</td>
<td>84,077</td>
<td>1,301,196</td>
<td>300,529</td>
<td>47,757</td>
</tr>
</tbody>
</table>


Remote users have reported that they find it difficult to benefit from existing university and HE libraries. This situation will be limiting library use but could be solved through encouraging libraries to share responsibilities with other institutions. It is important, for example, that students have access to library and information services close and convenient to their place of work or residence.

The LIC report suggested that in order to ensure that efforts are directed towards those users they are funded to support, namely students and researchers, individual institutions have increasingly restricted access by other users. As a result, access to learning resources have become seen as the preserve of a select few, with access being actively discouraged.

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by some university and college libraries. Some universities, such as Sheffield and Sunderland have sought to widen access to the local population, through arrangements between public and educational library services but these remain in a minority. There is therefore a clear need for public and educational libraries to draw up ‘access maps’ so that users and learners can access the services they require according to their needs.

5.6 Public Libraries

5.6.1 Data availability

There are a number of major surveys gathering and, in some case publishing, information on usage of public libraries, including:

- Public Library Plans (DCMS)
- Annual Library Statistics – Actuals (CIPFA)
- Annual Library Statistics – Estimates (CIPFA)
- Public Library Services to Children (LISU)
- School Library Service (LISU)
- Public Library User Surveys (CIPFA PLUS, Children’s PLUS, County PLUS, e-PLUS)

Only a limited number of library services have reported that they survey younger users either through CPLUS or by using their own questionnaires. Only 12 authorities have reported conducting their own surveys of children, and a further 60% of responding authorities carry out no survey of children as users of public libraries, although 34% have reported using the CPLUS scheme.

Libraries also collect data internally, an analysis of which is useful in assessing the relationship between institutions, users and non-users. 90% of library authorities are known, for example, to use comment/complaints/suggestions forms or books, 80% of which found them very effective or quite effective. There are however problems with this form of data collection, not least due to the amount of ‘nonsense’ recording or copying of other entries. In 1996, 81% of library services reported conducting user satisfaction surveys, although the quality of these consultation exercises did vary.

Although three-quarters of respondents found these to be ‘quite effective’, a number of factors were found to be limiting, including infrequency of surveys, small samples, low response rates, users’ inclination to favour the existing situation, low level of resources for following up surveys, public aversion to completing questionnaires and the tendency of users to express satisfaction to please staff. Some 37 out of the 134 responding library authorities reported carrying out non-user surveys and 29 conducted lapsed user surveys, which were perceived as valuable in marketing terms but not in terms of the time and money.

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they require to be invested.\textsuperscript{219} Lapsed user surveys were felt by some to produce better feedback than non-user surveys and also prompted some users to rejoin.\textsuperscript{220} It is, however, questionable whether many public library authorities will have the resources to undertake comprehensive work with non-users.\textsuperscript{221}

5.6.2 CIPFA Public Library Statistics

CIPFA has been collating and publishing statistics on public libraries for more than 40 years, with the 01/02 actuals being the 41\textsuperscript{st} such publication and the 02/03 estimates the 29\textsuperscript{th} of its kind. Unlike their work in the other domains, the library statistics now cover the whole of the UK. Moreover, their reliability is enhanced by the fact that both the ‘estimates’ and the ‘actuals’ are generally based on a 100% response rate, although some authorities do not provide all of the information requested and thus in some case, summary tables are ‘grossed up’ to account for missing data. Despite the information being detailed, comprehensive and current, they are not well known or appreciated outside the profession.\textsuperscript{222}

The figure below summarises figures for the last five years covering:

- Number of active borrowers
- Number of housebound readers
- Number of visits to library premises
- Number of requests for specific items
- Number of borrower requests not satisfied
- Number of enquiries

\textsuperscript{219} Barron, E (1996) ‘User Consultation: An Evaluation of the different Methods Used by Public Library Services to Give Users a Real choice and Influence Over the Shaping of their Service’ p.31

\textsuperscript{220} Barron, E (1996) ‘User Consultation: An Evaluation of the different Methods Used by Public Library Services to Give Users a Real choice and Influence Over the Shaping of their Service’ p.31

\textsuperscript{221} R. Warburton pers. comm. 12th December 2002

### Use of Public Libraries in the UK, 1996 – 2001

<table>
<thead>
<tr>
<th>Measure of use</th>
<th>96-97</th>
<th>97-98</th>
<th>98-99</th>
<th>99-00</th>
<th>00-01</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of active borrowers</td>
<td>n/a</td>
<td>22,192,553</td>
<td>21,828,677</td>
<td>18,801,581</td>
<td>17,210,885</td>
</tr>
<tr>
<td>Number of housebound readers</td>
<td>n/a</td>
<td>123,569</td>
<td>121,991</td>
<td>120,999</td>
<td>127,201</td>
</tr>
<tr>
<td>Number of visits to library premises</td>
<td>369,337,636</td>
<td>356,590,395</td>
<td>344,576,856</td>
<td>330,606,909</td>
<td>323,834,998</td>
</tr>
<tr>
<td>Number of requests for specific items</td>
<td>8,707,178</td>
<td>8,291,095</td>
<td>7,630,287</td>
<td>7,436,389</td>
<td>7,688,675</td>
</tr>
<tr>
<td>Number of borrower requests not satisfied</td>
<td>13%</td>
<td>269,065</td>
<td>285,047</td>
<td>310,898</td>
<td>316,229</td>
</tr>
<tr>
<td>Number of enquiries</td>
<td>61,089,281</td>
<td>61,363,640</td>
<td>61,519,211</td>
<td>60,311,342</td>
<td>58,234,134</td>
</tr>
</tbody>
</table>

Source: CIPFA Statistical Information Service Public Library Statistics - Actuals London: The Chartered Institute of Public Finance and Accountancy

<table>
<thead>
<tr>
<th>Number of active borrowers</th>
<th>97-98</th>
<th>98-99</th>
<th>99-00</th>
</tr>
</thead>
<tbody>
<tr>
<td>England</td>
<td>18,598,689</td>
<td>18,456,958</td>
<td>15,410,686</td>
</tr>
<tr>
<td>Scotland</td>
<td>1,806,904</td>
<td>1,638,865</td>
<td>1,628,739</td>
</tr>
<tr>
<td>Wales</td>
<td>1,146,098</td>
<td>1,101,816</td>
<td>1,080,229</td>
</tr>
</tbody>
</table>

Source: CIPFA Statistical Information Service Public Library Statistics - Actuals

### Propensity to use public libraries

Research by MORI indicates that public libraries are considered one of the most important services available to households. The 2001 Library and Information Statistics Tables showed that there were 34,508,000 registered borrowers within the UK population of 59,497,200, equating to some 58%. This is consistent with the trend observed by BML between 1989 and 1999 that 56-59% of adults owning tickets for public libraries. Library membership does not, however, relate directly with use, as it is estimated that 45% of the population will have visited a public library in the previous 12 months. This figure indicates a user base of 27 million people and a potential base of 33 million. There is a distinct gender split in the current library user profile, with females consistently comprising some 60% of all visitors. The pattern of ticket ownership follows that for propensity to visit, with those aged 17-24 are particularly likely, AB social grade householders and households with children being more likely to hold tickets. Only one

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224 Library and Information Statistics Tables (2001) Public Library Statistics [http://www.lboro.ac.uk/departments/dils/lisu/list01/publib01.html](http://www.lboro.ac.uk/departments/dils/lisu/list01/publib01.html) Page consulted 16th April 2001
quarter of resident children are, however, active borrowers. Those in London and East Anglia were most likely to hold tickets in contrast with those in the North East.

### Library activity across the UK

<table>
<thead>
<tr>
<th>Home Country</th>
<th>Registered child members</th>
<th>Active borrowers</th>
<th>% of library population</th>
</tr>
</thead>
<tbody>
<tr>
<td>England</td>
<td>3,821,306</td>
<td>1,890,205</td>
<td>27%</td>
</tr>
<tr>
<td>Wales</td>
<td>129,823</td>
<td>60,915</td>
<td>17%</td>
</tr>
<tr>
<td>Northern Ireland</td>
<td>170,507</td>
<td>62,709</td>
<td>29%</td>
</tr>
<tr>
<td>Scotland</td>
<td>417,153</td>
<td>228,833</td>
<td>30%</td>
</tr>
<tr>
<td>Total UK</td>
<td>4,538,789</td>
<td>2,242,662</td>
<td>27%</td>
</tr>
</tbody>
</table>


The Public Library Policy and Social Exclusion Project Research Team suggest, however, that regular usage of public libraries could be as low as 20%. Research by Audit Scotland research on performance indicators also suggests that borrowing as a percentage of the population could be lower than the figures highlighted by earlier studies. Reports from the Scottish Councils to Audit Scotland indicates that between 1996 and 2000, the highest number of borrowers as a percentage of the resident population was the 1997-98 period with a figure of 33.5%. It is possible that some of the variation in statistics could lie in the style of questions asked. John Parry has suggested, for example, that the PLUS style of questioning encourages respondents to infer that they visit libraries more often than they actually do.

There is a reasonable amount of variation in the statistics illustrating the frequency of library use and this does not seem to be attributable to changes over time. ASLIB's research from 1995 indicated that users of main or central libraries would use the facility thirty times a year, contrasted with the 23-24 visits per annum for branch or local village libraries and once a month for mobile libraries. More recent information from MORI's People's Panel data for 1998-2002, however, indicates a different pattern of use:

### Frequency of public library use

<table>
<thead>
<tr>
<th></th>
<th>1998</th>
<th>2000</th>
<th>2002</th>
</tr>
</thead>
<tbody>
<tr>
<td>Everyday</td>
<td>5,064</td>
<td>1,086</td>
<td>1,044</td>
</tr>
<tr>
<td>*</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Once a week</td>
<td>14</td>
<td>15</td>
<td>11</td>
</tr>
<tr>
<td>Once a month</td>
<td>26</td>
<td>29</td>
<td>29</td>
</tr>
<tr>
<td>Within the last six months</td>
<td>13</td>
<td>12</td>
<td>14</td>
</tr>
<tr>
<td>Within the last year</td>
<td>7</td>
<td>7</td>
<td>8</td>
</tr>
<tr>
<td>Longer</td>
<td>18</td>
<td>14</td>
<td>18</td>
</tr>
<tr>
<td>Never used</td>
<td>21</td>
<td>23</td>
<td>19</td>
</tr>
</tbody>
</table>


It appears as though there may be considerable variation between the regions regarding frequency of usage, as Cumbria County Council have reported that over 50% of respondents to their survey used a library in the past month and a further 20% within the past year.

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233 Linley, R (2000) Comments from Public Library Policy and Social Exclusion Project Research Team p.2
234 J. Parry pers. comm. 18th November 2002
237 J. Grisenthwaite pers. comm. 23rd December 2002, citing the Best Value review of the Cumbria Archive and Library Service
Cumbria County Council also report that nearly 30% of respondents have either not visited in the last year or have never visited their library.\textsuperscript{238}

Although there is a wide variation between authorities in the annual visits per capita, there appears to be a general decline in the number of visits, with figures being down 2.6% between 1999-2000 and 2000-2001 and 15.6% lower than the numbers from 1995-1996.\textsuperscript{239} The highest levels of visits per capita were in London, with the lowest in Northern Ireland where visitation decreased by 18% between 1995 and 2001, despite a 3.1% increase in 2000-2001. This trend is reflected in the decline in book issues, which have fallen by 28% between 1990 and 2001, although in this instance, the greatest falls were located in metropolitan districts and Scotland, and the smallest in Northern Ireland.\textsuperscript{240} In common with figures for visits and loans, the overall number of requests and requests per capita fell in the period 1990-2001.\textsuperscript{241}

The most popular activities related to public library use remain reading and the provision of books and three-quarters of library visits involve a book loan.\textsuperscript{242} Heavy borrowers of books are a minority of users but account for 70-80% of all traffic.\textsuperscript{243} Although there is a considerable amount of non-borrowing activity, the majority of it is restricted to active borrowers.\textsuperscript{244} It is among the younger users that there is a greater breadth in activities undertaken. Whilst older users tend to focus on book borrowing and reading newspapers/magazines, younger people are more likely to borrow CDs, videos, seek information and study.\textsuperscript{245} The least popular activity recorded was visiting an exhibition, although the data for this might be inaccurate as not all libraries would have had exhibitions in place at the time of the survey.\textsuperscript{246} Non-borrowing visits were nearly all made by adults, with men, those aged 55+, AB’s and households without children accounting for larger shares of non-borrowing visits.\textsuperscript{247}

\begin{table}[h]
\centering
\begin{tabular}{|l|c|c|c|}
\hline
\textbf{‘Additional’ Public Library Services/Facilities Used in the UK} & \textbf{All Individuals} & \textbf{All Borrowing within the Last 12 Months} & \textbf{All Not Borrowing in Last 12 Months} \\
\hline
\textbf{Whole sample} & 100 & 47 & 53 \\
\textbf{Information – general/leisure} & 17 & 31 & 6 \\
\textbf{Photocopyer} & 11 & 19 & 4 \\
\textbf{Bought second-hand books/other items} & 9 & 17 & 2 \\
\textbf{Local community information} & 8 & 14 & 3 \\
\textbf{Read newspapers/ magazines} & 8 & 15 & 3 \\
\textbf{Information – business/work} & 7 & 12 & 3 \\
\textbf{Exhibition/meeting/event} & 7 & 13 & 2 \\
\textbf{Used study space} & 5 & 9 & 1 \\
\textbf{Careers information} & 3 & 5 & 1 \\
\textbf{Fax machine} & 0.5 & 1 & 0.5 \\
\textbf{Internet/e-mail} & 0.5 & 0.5 & 0.5 \\
\textbf{Other} & 3 & 6 & 1 \\
\textbf{Used any additional facility/service} & 44 & 79 & 12 \\
\hline
\end{tabular}
\end{table}

\textsuperscript{238} J. Grisenthwaite pers. comm. 23\textsuperscript{rd} December 2002, citing the Best Value review of the Cumbria Archive and Library Service
\textsuperscript{239} Creaser, C; Maynard, S & White, S (2002) \textit{LISU Annual Library Statistics} p.82-83
\textsuperscript{240} Creaser, C; Maynard, S & White, S (2002) \textit{LISU Annual Library Statistics} p.62
\textsuperscript{241} Creaser, C; Maynard, S & White, S (2002) \textit{LISU Annual Library Statistics} p.86
\textsuperscript{244} Sumsion, J (2001) ‘Public Library Use and Users: Statistical Explorations’ p.10
\textsuperscript{245} Sumsion, J (2001) ‘Public Library Use and Users: Statistical Explorations’ 42 p.26
\textsuperscript{246} Creaser, C; Maynard, S & White, S (2002) \textit{LISU Annual Library Statistics} p.107
Users & Non-Users of Museums, Libraries and Archives: Review of Available Data

Source: BML Book Facts 2000

<table>
<thead>
<tr>
<th>Type of library use, by age group</th>
<th>UK Average</th>
<th>0-24</th>
<th>25-44</th>
<th>45-64</th>
<th>65+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Borrow/ Return Books</td>
<td>74</td>
<td>50</td>
<td>70</td>
<td>77</td>
<td>86</td>
</tr>
<tr>
<td>Borrow/ Return Cassettes</td>
<td>7</td>
<td>3</td>
<td>7</td>
<td>7</td>
<td>5</td>
</tr>
<tr>
<td>Borrow/ Return CDs</td>
<td>5</td>
<td>8</td>
<td>8</td>
<td>4</td>
<td>1</td>
</tr>
<tr>
<td>Borrow/ Return Videos</td>
<td>8</td>
<td>8</td>
<td>15</td>
<td>7</td>
<td>3</td>
</tr>
<tr>
<td>Read Newspaper/ Magazine</td>
<td>14</td>
<td>11</td>
<td>11</td>
<td>14</td>
<td>17</td>
</tr>
<tr>
<td>Seek Information</td>
<td>23</td>
<td>33</td>
<td>22</td>
<td>23</td>
<td>17</td>
</tr>
<tr>
<td>Photocopier</td>
<td>6</td>
<td>8</td>
<td>6</td>
<td>6</td>
<td>5</td>
</tr>
<tr>
<td>Browse</td>
<td>30</td>
<td>30</td>
<td>30</td>
<td>31</td>
<td>27</td>
</tr>
<tr>
<td>Study</td>
<td>8</td>
<td>26</td>
<td>8</td>
<td>5</td>
<td>3</td>
</tr>
<tr>
<td>Exhibition/ Event</td>
<td>3</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>Other</td>
<td>8</td>
<td>16</td>
<td>13</td>
<td>9</td>
<td>6</td>
</tr>
<tr>
<td>Total</td>
<td>186</td>
<td>194</td>
<td>182</td>
<td>186</td>
<td>173</td>
</tr>
</tbody>
</table>


5.6.4 Profile of Public Library Users

A survey of public user surveys undertaken in 1999 found that:

- Men and women use libraries about equally
- Middle class users predominate, but by no means exclusively (33% of library users are C2DE compared to 48% C2DE of the UK population)
- Older people, particularly retired people, use libraries more
- Younger people, apart from students, are less likely to use libraries

This supports other data published some time ago by the British Library, which indicated that some 27% of regular public library users are from social class DE, compared with 22% of the population as a whole. There is a slight over-representation of younger people and people from social classes C1, C2 and DE among library users, and an under-representation of older people and those from class AB, relative to the population as a whole. Other research indicates, however, that people in social groups DE under-utilise libraries in comparison to other classes.

When analysis is made of users and non-users within specific socio-economic or occupational groups, slightly different patterns emerge. Whilst upwards of 50% of intermediate and managerial workers are library users, as could be expected with the predominance of middle class members, usage levels are lower within other social groups. This seems to contradict earlier work by Insight Research, which stressed the high proportion of C2DE users, and some of the statistics used by the DCMS. Although people from DE socio-economic groups may be members of the library, work by Creaser and White have indicated that individuals from C2DE social groups are 20+% less likely to be library users than ABC1's.

References:

251 The proportion of DE users in relation to the size of the DE population is less than among other socio-economic groups.
Bohme and Spiller argue, however, that the profile of individual and household visitors to public libraries closely matches that of the total British population. Whilst children are relatively more likely to have visited public libraries than adults, they only represent a fifth of visitors, as they only account for a fifth of the general population.²⁵⁵

Similarly, although AB households are more likely to visit than DE’S, the latter account for nearly twice as many public library customers.²⁵⁶ There are a number of demographic groups that are of importance to public libraries due to their visitation habits. Women, for example, were 42% of the total sample of individuals, they accounted for 52% of all visits to public libraries. Similarly, those aged over 55 are a quarter of the population yet account for over a third of visits to public libraries, whilst ABC1’s (44% of households) were responsible for 54% of visits and the 29% of house holds with children accounted for 40% of visits.²⁵⁷

**Frequency of library use in relation to employment**

<table>
<thead>
<tr>
<th></th>
<th>Full-time</th>
<th>Part-time</th>
<th>Unemployed</th>
<th>Retired</th>
<th>Student</th>
<th>Other</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Within last month</td>
<td>39</td>
<td>54</td>
<td>55</td>
<td>60</td>
<td>53</td>
<td>50</td>
<td>52</td>
</tr>
<tr>
<td>Within last year</td>
<td>24</td>
<td>22</td>
<td>32</td>
<td>13</td>
<td>20</td>
<td>21</td>
<td>19</td>
</tr>
<tr>
<td>More than one year</td>
<td>29</td>
<td>21</td>
<td>9</td>
<td>19</td>
<td>20</td>
<td>24</td>
<td>22</td>
</tr>
<tr>
<td>Never visited</td>
<td>7</td>
<td>3</td>
<td>6</td>
<td>9</td>
<td>7</td>
<td>5</td>
<td>7</td>
</tr>
</tbody>
</table>

Source: J. Grisenthwaite pers. comm. 23rd December 2002, citing the Best Value review of the Cumbria Archive and Library Service

Work by Cumbria County Council highlights that a high percentage of the two age groups that visit libraries most frequently are not in full-time employment, as nearly half the 16-24 age group are students, whilst over 90% of 65+ users are retired.²⁵⁸ Although full-time employees appear to be the largest proportion of public library users, the frequency of their visitation falls beneath that of any other user group. These statistics are, perhaps less transparent than would initially appear, as the data tables do not make it apparent whether the latter survey represents a statistically random sample of the population, or rather a selection of existing library users.

Although now slightly dated, BML’s 1998 Household Library Use Survey highlighted that 84% of households with children aged under 16 visited a public library within the previous 12 months.²⁵⁹ 64% of individuals within each household in a nationally representative sample were indicated to have visited a public library in the previous 12 months.²⁶⁰ This figure was rose to around 70% for women, boys and girls, compared with 56% of men.²⁶¹ Children aged between 6 and 16 years are seen to be the group with the greatest propensity to visit public

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²⁵⁸ J. Grisenthwaite pers. comm. 23rd December 2002, citing the Best Value review of the Cumbria Archive and Library Service
libraries, despite them being most likely group to visit non-public libraries. All public library sectors, apart from English unitary authorities, have, however, reported a decline in children’s issues in 2001-02 and in Scotland issues have fallen by 32% over the past 5 years.

Sumison suggests that there is a greater tendency for women to borrow books than men and it is children and young adults that have the greatest frequency of borrowing. The high level of library borrowing declines with the 25-34 age group, who whilst making up the highest percentage of the sample group were most likely not to have borrowed a book in the past year. This position is, however, challenged by LISU, who argue that there is no apparent trend in the gender profile of visitors, with 60% of users consistently being female. There are also suggestions within LISU’S data that the average age profile of adult library users has increased to from 50 in 1997 to 52 in 2000. They believe that this is particularly worrying as they have also reported a reduction in overall visitor numbers and falls in children’s issues.

There are a number of methods of segmenting library customers in order to analyse borrowing trends either through looking at the volume of items borrowed or the frequency of borrowing. Through looking at the volume of books borrowed, men, who were 36% of the sample population and 27% of all borrowers accounted for 23% of books issued and 34% of audio-visual items. The 26% of the sample population aged 55+ accounted for 31% of books borrowed, compared with 23% of audio-visual items. The data highlights that C1 households are important to the borrowing of books and audio-visual material accounting for 37% and 40% of all issues respectively. Analysis of the frequency of borrowing suggests that the 10% of individuals who had borrowed at least 8 times in the past two months prior to interview accounted for 27% of all books and 43% of audio-visual items. Those who borrowed 4 times in the past 8 weeks (36%) accounted for 63% of books and 75% of audio-visual items.

CIPFA results indicate that the proportion of library users from ethnic minority backgrounds is higher in relation to their total population than among white communities. In 2000, ethnic minority groups accounted for 8.2% of all library visits in relation to their 5.9% of the total population. The CIPFA PLUS results also indicate that different ethnic groups may use library services for varying purposes. Whilst white groups will predominantly use libraries to borrow or return books, other communities make greater use of the facilities to search for information, sit, study, read newspapers/magazines and to borrow CDs and videos.

### Propensity to use different library services, by ethnic group

<table>
<thead>
<tr>
<th>Ethnicity</th>
<th>Borrow Books</th>
<th>Seek Information</th>
<th>Sit/study/work</th>
<th>Read Newspapers/magazines</th>
<th>Borrow CDs</th>
<th>Borrow Videos</th>
</tr>
</thead>
<tbody>
<tr>
<td>White</td>
<td>77</td>
<td>22</td>
<td>6</td>
<td>12</td>
<td>5</td>
<td>8</td>
</tr>
</tbody>
</table>

Users & Non-Users of Museums, Libraries and Archives: Review of Available Data

<table>
<thead>
<tr>
<th>Country</th>
<th>Users</th>
<th>Non-Users</th>
<th>Users</th>
<th>Non-Users</th>
<th>Users</th>
<th>Non-Users</th>
</tr>
</thead>
<tbody>
<tr>
<td>Indian</td>
<td>56</td>
<td>29</td>
<td>18</td>
<td>28</td>
<td>5</td>
<td>8</td>
</tr>
<tr>
<td>Pakistani</td>
<td>68</td>
<td>24</td>
<td>13</td>
<td>21</td>
<td>6</td>
<td>9</td>
</tr>
<tr>
<td>Bangladeshi</td>
<td>65</td>
<td>28</td>
<td>12</td>
<td>16</td>
<td>6</td>
<td>6</td>
</tr>
<tr>
<td>Black African</td>
<td>33</td>
<td>30</td>
<td>46</td>
<td>30</td>
<td>3</td>
<td>5</td>
</tr>
<tr>
<td>Black Caribbean + Other</td>
<td>50</td>
<td>29</td>
<td>22</td>
<td>19</td>
<td>8</td>
<td>10</td>
</tr>
<tr>
<td>Chinese</td>
<td>58</td>
<td>27</td>
<td>20</td>
<td>27</td>
<td>10</td>
<td>8</td>
</tr>
<tr>
<td>Other</td>
<td>66</td>
<td>27</td>
<td>15</td>
<td>20</td>
<td>7</td>
<td>12</td>
</tr>
</tbody>
</table>


There are suggestions that the People’s Network has helped to attract wider and different audiences to public libraries, although there is no statistical evidence to back this up. Anecdotal evidence indicates that due to the scheme, library usage by individuals from DE socio-economic grades, the unemployed, young users and ‘silver surfers’ has increased. Library authorities have estimated that of the non-members who have used the People’s Network, 40% have now become members with Leeds reporting a 10% increase in membership. Work to use libraries as an agent of tackling social exclusion has highlighted that beyond some institutional complacency or reluctance, barriers to inclusion can come from within excluded groups. Results indicated that some socially excluded groups choose to be excluded and remain reluctant to use unfamiliar skills and materials.

Further information on the profile of public library users, and on their satisfaction with the service they receive, is collated each year by CIPFA from local authority library services using the PLUS (Public Library User Survey) tools. CIPFA PLUS surveys tend to be carried out on a sample basis every three years, and are implemented for a one or two week period during the late summer/early autumn. This information is available only to CIPFA members and although aggregated summary data is published by CIPFA, it had not been made available to us during the preparation of this interim report.

LISU have highlighted that users tend to be satisfied with the service provided. 76.3% of those seeking information in 2000 were able to find it, whilst 57.5% of users were able to find the book they sought. Over two-thirds of users thought that the range of materials available in libraries is ‘good’ or ‘very good’, although 6.3% found it ‘poor’ or ‘very poor’, the highest proportion in any service. Staff helpfulness and knowledge is however highly rated. Recent research by MORI as part of the People’s Panel highlights a net satisfaction of 82-85% with the quality of libraries, although in 2002 10% fewer users were ‘very satisfied’ with the service than in 1998. It appears as though frequent users tend to have a more positive image of their public libraries. MORI’s research for the Audit Commission through a reanalysis of BVPI satisfaction data, People’s Panel 1998-2000 and 14 studies for local authorities, suggests that library users are approximately twice as likely to be satisfied as non-users. This seems to confirm ASLIB’s earlier research, which highlighted that frequent users have a more positive image of public libraries and see them as well organised sources of reliable facts, providing a good quality service. Non-users, in contrast were found to

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277 Anon (2002) Creating opportunities for others via libraries. The COOL project: A case study. Unpublished report on an LIC supported project run by Department of Information and Library Studies, University of Wales Aberystwyth p.28
278 Anon (2002) Creating opportunities for others via libraries. The COOL project: A case study p.28

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284 ASLIB (1995) Review of the Public Library Service in England and Wales p. 139, 144

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believe that the library has an unchanging image and were unsure whether they offer quality, value for money or up-to-date systems.285

Top reasons for satisfaction with libraries (users)

<table>
<thead>
<tr>
<th>Authority type</th>
<th>Wide range of books for adults</th>
<th>Helpful staff</th>
<th>Wide range of books for children</th>
<th>Good reference section</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unitary council</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>London borough</td>
<td>Convenient location</td>
<td>Helpful staff</td>
<td>Good reference section</td>
<td>Wide range of books for children</td>
</tr>
<tr>
<td>City council</td>
<td>Wide range of books for adults</td>
<td>Helpful staff</td>
<td>Wide range of books for children</td>
<td></td>
</tr>
</tbody>
</table>

Source: MORI (2002a) Perceptions of Libraries: Desk Research Conducted for Audit Commission

The basis of satisfaction for library users is firmly located within the core aspect of the service, books, material and staff. Research by Cumbria county council indicates that 60% respondents considered range of stock to be the most important factor in the quality of service.286 It is also these same factors that are involved in dissatisfaction of the library service, although there are issues regarding access.287 In contrast, however, reasons for non-use by non-users focus on time and activity preferences:

286 J. Grisenthwaite pers. comm. 23rd December 2002, citing the Best Value review of the Cumbria Archive and Library Service
287 MORI (2002a) Perceptions of Libraries: Desk Research Conducted for Audit Commission
Top reasons for non-use (non-users)

<table>
<thead>
<tr>
<th>Authority type</th>
<th>Too busy</th>
<th>Not interested</th>
<th>Prefer to buy books</th>
<th>Prefer to use college/work library</th>
<th>Prefer to buy CDs/tapes/videos</th>
<th>Prefer to buy CDs/tapes/videos</th>
</tr>
</thead>
<tbody>
<tr>
<td>London Borough</td>
<td>Too busy</td>
<td>Not interested</td>
<td>Prefer to buy books</td>
<td>Prefer to use college/work library</td>
<td>Prefer to buy CDs/tapes/videos</td>
<td>Prefer to buy CDs/tapes/videos</td>
</tr>
<tr>
<td>London Borough</td>
<td>Not interested</td>
<td>Prefer to buy books</td>
<td>Prefer to use college/work library</td>
<td>Prefer to buy CDs/tapes/videos</td>
<td>Prefer to buy CDs/tapes/videos</td>
<td>Prefer to buy CDs/tapes/videos</td>
</tr>
<tr>
<td>London Borough</td>
<td>Too busy</td>
<td>Not interested</td>
<td>Prefer to buy books</td>
<td>Prefer to buy CDs/tapes/videos</td>
<td>Prefer to buy CDs/tapes/videos</td>
<td>Prefer to buy CDs/tapes/videos</td>
</tr>
<tr>
<td>County Council</td>
<td>Too busy</td>
<td>Not interested</td>
<td>Prefer to buy books</td>
<td>Prefer to buy CDs/tapes/videos</td>
<td>Prefer to buy CDs/tapes/videos</td>
<td>Prefer to buy CDs/tapes/videos</td>
</tr>
<tr>
<td>County Council</td>
<td>Prefer to buy books</td>
<td>Too busy</td>
<td>Prefer to buy CDs/tapes/videos</td>
<td>Prefer to buy CDs/tapes/videos</td>
<td>Prefer to buy CDs/tapes/videos</td>
<td>Prefer to buy CDs/tapes/videos</td>
</tr>
<tr>
<td>County Council</td>
<td>Too busy</td>
<td>Not interested</td>
<td>Prefer to buy books</td>
<td>Prefer to buy CDs/tapes/videos</td>
<td>Prefer to buy CDs/tapes/videos</td>
<td>Prefer to buy CDs/tapes/videos</td>
</tr>
<tr>
<td>Unitary Authority</td>
<td>Prefer to buy books</td>
<td>Use the Internet at home instead</td>
<td>Too busy</td>
<td>Prefer to buy CDs/tapes/videos</td>
<td>Prefer to buy CDs/tapes/videos</td>
<td>Prefer to buy CDs/tapes/videos</td>
</tr>
</tbody>
</table>

Source: MORI (2002a) Perceptions of Libraries: Desk Research Conducted for Audit Commission

Users and non-users are critical of libraries for different reasons, with users being dissatisfied with the quality and choice of books available, inconvenient opening hours and ease of getting to the library. In contrast, the criticisms of non-users focus upon lifestyle. It is possible, however, that some levels of dissatisfaction or non-usage may result from a lack of information, as only 51% of those involved in wave 6 of MORI’s People’s Panel felt that they were well informed about services provided by libraries, a decline of 12% from the 1998 figures.

288 20% of respondents stated that local councils did not provide them with even limited information about public library services. Although there are indications within the statistics that reasons for non-usage of library facilities may be related to lifestyle choices, Muddiman et al. question whether it is truly possible for library services as a whole to deliver social inclusion targets.

Research by the DCMS into barriers to a socially inclusive use of public libraries highlighted a number of institutional, personal and social, perception and environmental barriers.

- Institutional
  - Unsuitable/restrictive opening hours or restrictions on service availability
  - Staff attitude and behaviour
  - Inappropriate rules and regulations
  - Charging policies
  - Book stock policies – not reflecting community needs or in unsuitable formats
  - Poor orientation
  - Lack of sense of community ownership and involvement
  - Lack of local authority service integration or a focal point for delivery
  - Lack of provision of services and facilities for people with disabilities

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• Personal and social
  o Lack of basic skills
  o Low income
  o Discrimination
  o Lack of social contact
  o Low self esteem
  o No permanent fixed address

• Perceptions and awareness (‘not for us’)
  o The educationally disadvantaged
  o Problem estates and urban decay
  o Rural isolation
  o Poor transport links

The Library and Information Commission report believed that potentially excluded groups include:

• Pre-school children
• School-age children
• People who lack basic skills/Low-achieving households
• Those with daytime working/caring commitments
• Elderly people who receive/qualify for housebound-reader services

The 1998 Household Library Use Survey by BML assessed reasons for not visiting public libraries among 37% of respondents who had not visited in the 12 months prior to interview. 44% of these adults stated that they lacked any need or reason to visit a public library, whilst over a quarter claimed that they were too busy or had no time. Some 20% of non-visiting adults stated that they bought all the books and audio-visual materials they required, whilst 17% claimed that they had no interest in books and reading. Among the 31% of children who did not visit public libraries, the most common reason given was that they were too young (30%) and 14% stated that they used other libraries, such as in school, instead of public ones. Very few adults or children did not visit due to inconvenient opening hours, other access difficulties or because the library did not offer the services required. Non-visiting ticket holders were, however, more likely than average to say that they found the opening hours inconvenient or that the library did not offer the services required. These people were also more likely to mention a lack of reason or time as being core factors in non-visitation.

References:

292 Library and Information Commission (2000) Empowering the Learning Community 1.2.1
Reasons for not using libraries

<table>
<thead>
<tr>
<th>Reason</th>
<th>All non-visitors</th>
<th>Adults</th>
<th>Children</th>
</tr>
</thead>
<tbody>
<tr>
<td>No need/reason to</td>
<td>39</td>
<td>44</td>
<td>19</td>
</tr>
<tr>
<td>Too busy/no time</td>
<td>22</td>
<td>26</td>
<td>5</td>
</tr>
<tr>
<td>Buy books/audio-visual</td>
<td>17</td>
<td>20</td>
<td>13</td>
</tr>
<tr>
<td>Not interested in books/reading</td>
<td>14</td>
<td>17</td>
<td>3</td>
</tr>
<tr>
<td>Borrow from friends, family etc</td>
<td>12</td>
<td>14</td>
<td>5</td>
</tr>
<tr>
<td>Not interested in any of the services</td>
<td>8</td>
<td>9</td>
<td>3</td>
</tr>
<tr>
<td>Too young/others borrow on behalf</td>
<td>6</td>
<td>1</td>
<td>30</td>
</tr>
<tr>
<td>Use other libraries instead</td>
<td>5</td>
<td>3</td>
<td>14</td>
</tr>
<tr>
<td>Get info from elsewhere</td>
<td>5</td>
<td>5</td>
<td>3</td>
</tr>
<tr>
<td>Not well/ housebound/don’t get out</td>
<td>4</td>
<td>5</td>
<td>2</td>
</tr>
<tr>
<td>Opening hours inconvenient</td>
<td>4</td>
<td>4</td>
<td>3</td>
</tr>
<tr>
<td>No public library convenient to get to</td>
<td>3</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td>Doesn’t have services required</td>
<td>2</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>Other</td>
<td>4</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>Any reason given</td>
<td>88</td>
<td>90</td>
<td>82</td>
</tr>
</tbody>
</table>


5.7 School Libraries

5.7.1 Data Availability

A key issue to note regarding school libraries is that library provision is not a statutory requirement and thus there is no imperative to collect information to measure the performance of school libraries. What activity exists in this area has generally been prepared by professional institutions such as CILIP. LISU publishes a regular review of library services to schools in the UK. The LISU research began in 1989-90 with a survey in England and Wales, and in 1991-92 was expanded to include Scotland and Northern Ireland. There is also some ad hoc coverage of school libraries as part of OFSTEAD inspections but the information obtained for these reports tends to focus upon teaching, learning and governance.

5.7.2 Volume of Usage

Warren states that in 2002, there were 9,845,500 school age children in the UK, all of whom could be potential school library users. In addition to this, staff and governors may also be given access rights at some libraries. There are approximately 6,400 secondary schools that may be expected to have a staffed library point or resource centre, although arrangements in primary schools tend to be more flexible and informal.

LISU estimates that around 6.6 million LEA pupils in the UK are served by schools library services or 71% of all pupils. Some 16 local authorities currently have no formal provision for school library support. Co-ordination between public libraries and school or academic libraries is also inadequate with there being little built-in incentive to achieve efficiencies through partnership. Provision of schools library services varies slightly across age bands, as follows:

- Primary schools 71%

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301 Creaser, C & Maynard, S (2002) *A Survey of Library Services to Schools and Children in the UK 2001-02*
305 Creaser, C & Maynard, S (2002) *A Survey of Library Services to Schools and Children in the UK 2001-02* p.4
307 Library and Information Commission (2000) *Empowering the Learning Community*
Secondary schools 73%
Special schools 83%

### Potential school library service users, UK

<table>
<thead>
<tr>
<th>Service based in</th>
<th>Children 0-14 (2000/01)</th>
<th>LEA pupils (2000/01)</th>
<th>Pupils served by schools library service</th>
</tr>
</thead>
<tbody>
<tr>
<td>London</td>
<td>1,408,500</td>
<td>799,910</td>
<td>336,279, 11,245</td>
</tr>
<tr>
<td>Metropolitan districts</td>
<td>2,183,300</td>
<td>1,576,303</td>
<td>845,406, 1,550</td>
</tr>
<tr>
<td>Unitary authorities</td>
<td>1,590,100</td>
<td>757,737</td>
<td>293,105, 1,551</td>
</tr>
<tr>
<td>English counties</td>
<td>4,268,500</td>
<td>3,768,277</td>
<td>1,958,541, 7,871</td>
</tr>
<tr>
<td><strong>Total England</strong></td>
<td><strong>9,450,400</strong></td>
<td><strong>6,902,226</strong></td>
<td><strong>3,433,330, 22,217</strong></td>
</tr>
<tr>
<td>Wales</td>
<td>553,700</td>
<td>440,248</td>
<td>84,882, n/a</td>
</tr>
<tr>
<td>Northern Ireland</td>
<td>381,800</td>
<td>231,704</td>
<td>230,760, 38,685</td>
</tr>
<tr>
<td>Scotland</td>
<td>935,900</td>
<td>588,043</td>
<td>543,845, 100,723</td>
</tr>
<tr>
<td><strong>Total UK</strong></td>
<td><strong>11,321,800</strong></td>
<td><strong>8,162,221</strong></td>
<td><strong>4,292,817, 161,625</strong></td>
</tr>
</tbody>
</table>

**Source:** Creaser, C & Maynard, S (2002) *A Survey of Library Services to Schools and Children in the UK 2001-02*

In England and Wales, the numbers of pupils using schools library services may be considerably less than the total number of pupils in the authority.\(^{308}\) This is especially noticeable in England and Wales, although services in Scotland and Northern Ireland do seem to perform better. The percentage of LEA pupils served in 2001-02 has fallen by 3% on the previous year along with the number of non-LEA pupils and this has affected all areas of England, Wales and parts of Scotland.\(^{309}\)

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Existing user populations for schools library services, UK

<table>
<thead>
<tr>
<th>Service based in</th>
<th>LEA pupils (000)</th>
<th>% served</th>
<th>Independent schools (000) served</th>
<th>Estimated total pupils served</th>
</tr>
</thead>
<tbody>
<tr>
<td>London</td>
<td>1,017</td>
<td>58</td>
<td>11.2</td>
<td>601</td>
</tr>
<tr>
<td>Met. Districts</td>
<td>1,838</td>
<td>69</td>
<td>1.6</td>
<td>1,263</td>
</tr>
<tr>
<td>English Unitaries</td>
<td>758</td>
<td>80</td>
<td>1.6</td>
<td>607</td>
</tr>
<tr>
<td>English Counties</td>
<td>3,993</td>
<td>71</td>
<td>7.9</td>
<td>2,842</td>
</tr>
<tr>
<td><strong>Total England</strong></td>
<td><strong>7,606</strong></td>
<td><strong>70</strong></td>
<td><strong>22.2</strong></td>
<td><strong>5,314</strong></td>
</tr>
<tr>
<td>Wales</td>
<td>497</td>
<td>56</td>
<td>0.0</td>
<td>277</td>
</tr>
<tr>
<td>Scotland</td>
<td>778</td>
<td>89</td>
<td>5.0</td>
<td>696</td>
</tr>
<tr>
<td>N. Ireland</td>
<td>294</td>
<td>100</td>
<td>38.7</td>
<td>332</td>
</tr>
<tr>
<td><strong>Total UK</strong></td>
<td><strong>9,175</strong></td>
<td><strong>71</strong></td>
<td><strong>65.9</strong></td>
<td><strong>6,618</strong></td>
</tr>
</tbody>
</table>


The number of estimated issues per capita by the schools library service shows a reasonable amount of consistency throughout England and Wales, ranging between two and three issues. In contrast, Scotland, issues only 1.3 items per capita, whilst in Northern Ireland this figure is 3.4.

Issues per capita, school library services

<table>
<thead>
<tr>
<th>Service based in</th>
<th>Issues (000's)</th>
<th>Issues per capita</th>
</tr>
</thead>
<tbody>
<tr>
<td>London</td>
<td>1,365</td>
<td>2.4</td>
</tr>
<tr>
<td>Metropolitan districts</td>
<td>1,646</td>
<td>2.2</td>
</tr>
<tr>
<td>English unitary</td>
<td>1,276</td>
<td>2.1</td>
</tr>
<tr>
<td>English counties</td>
<td>7,270</td>
<td>2.7</td>
</tr>
<tr>
<td><strong>Total England</strong></td>
<td><strong>11,556</strong></td>
<td><strong>2.2</strong></td>
</tr>
<tr>
<td>Wales</td>
<td>836</td>
<td>2.9</td>
</tr>
<tr>
<td>Scotland</td>
<td>941</td>
<td>1.3</td>
</tr>
<tr>
<td>Northern Ireland</td>
<td>1,137</td>
<td>3.4</td>
</tr>
<tr>
<td><strong>Total UK</strong></td>
<td><strong>14,470</strong></td>
<td><strong>2.2</strong></td>
</tr>
</tbody>
</table>


5.7.3 Profile of Users

It is difficult to obtain information on the user profile of school libraries, as schools library services count loans to schools, which include short-term project loans and longer-term deposit loans, not to individual pupils. Where loans per capita information has been collected in schools, there appear to be no discernible trends. It is, however, possible to catalogue the numbers and percentage of pupils served by school library services.

Through comparing loans with pupil numbers, it appears as though special schools obtain an average of 7.8 loans per pupil, whilst secondary schools receive least, at 0.2. This perhaps reflects that many areas focus their loan services on primary and lower secondary materials.

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### Library Service Provision for School Pupils

<table>
<thead>
<tr>
<th>Service Based In</th>
<th>LEA Nursery &amp; Primary</th>
<th>LEA Secondary</th>
<th>Special &amp; PRU</th>
<th>Independent</th>
<th>Total eligible</th>
<th>Other Institutions</th>
<th>External</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>No.</td>
<td>% served</td>
<td>No.</td>
<td>% served</td>
<td>No.</td>
<td>% served</td>
<td>No.</td>
</tr>
<tr>
<td>London</td>
<td>320,021</td>
<td>88</td>
<td>175,089</td>
<td>65</td>
<td>8,519</td>
<td>81</td>
<td>145</td>
</tr>
<tr>
<td>Metropolitan districts</td>
<td>727,230</td>
<td>93</td>
<td>515,949</td>
<td>81</td>
<td>17,738</td>
<td>93</td>
<td>790</td>
</tr>
<tr>
<td>English counties</td>
<td>1,519,110</td>
<td>82</td>
<td>1,202,648</td>
<td>64</td>
<td>30,203</td>
<td>78</td>
<td>9,432</td>
</tr>
<tr>
<td>English unitaries</td>
<td>212,209</td>
<td>94</td>
<td>149,576</td>
<td>77</td>
<td>4,805</td>
<td>91</td>
<td>2,870</td>
</tr>
<tr>
<td>Total England</td>
<td>2,778,569</td>
<td>87</td>
<td>2,043,262</td>
<td>69</td>
<td>61,264</td>
<td>83</td>
<td>13,237</td>
</tr>
<tr>
<td>Wales</td>
<td>78,164</td>
<td>79</td>
<td>56,264</td>
<td>57</td>
<td>678</td>
<td>73</td>
<td></td>
</tr>
<tr>
<td>Scotland</td>
<td>349,189</td>
<td>98</td>
<td>232,149</td>
<td>100</td>
<td>6,679</td>
<td>93</td>
<td></td>
</tr>
<tr>
<td>Northern Ireland</td>
<td>142,118</td>
<td>100</td>
<td>100,461</td>
<td>99</td>
<td>4,571</td>
<td>100</td>
<td>23,239</td>
</tr>
<tr>
<td>Total UK</td>
<td>3,348,040</td>
<td>88</td>
<td>2,432,136</td>
<td>74</td>
<td>93,192</td>
<td>85</td>
<td>36,476</td>
</tr>
</tbody>
</table>

(Percentages based only on those services providing both total number of pupils and numbers served)

5.8 FE Colleges

5.8.1 Volume of Usage

There is no major systematic survey of FE sector libraries. CILIP have undertaken two surveys on Library and Learning Resources Services in Further Education since 1992 but these are perhaps of limited use due to the drastic changes within the sector over the past decade. Further education institutions do not have a remit to serve the entire population and it is therefore questionable whether many will have undertaken any non-user research.

The potential user community consists of around 4 million part and full-time students, teaching and other staff, or approaching 70% of 16 year olds in full time education.

5.8.2 Profile of Users

The user base of further education libraries includes 4 million part-time and full-time students, as well as teaching and other staff. The further education library sector covers:

- Post-16 students
  - Learning/studying full-time
  - Learning/studying part-time
  - Engaged in academic study
  - Engaged in vocational training,
  - Those seeking employment and needing new skills
  - Those in work seeking to develop their skills
  - Those working on-site
  - Distance learners
  - Sixth-form students
  - Those on HE courses
  - Those involved in lifelong learning
  - Those needing second chance general education
  - Learning for leisure

- Staff
  - Full-time lecturers/tutors
  - Part-time/sessional lecturers and tutors
  - Managers and administrators
  - Other college staff

- Different types of institution
  - Colleges of technology or new technology
  - Colleges for specialist subjects (e.g. schools of art/design)
  - Colleges for specific industries (e.g. agriculture/horticulture)
  - Colleges for particular stages of study (e.g. Sixth Form)
  - Tertiary colleges (combined FE/Sixth form)
  - Colleges offering HE courses

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315 R. Warburton pers. comm. 12th December 2002
5.9 Special Libraries

5.9.1 Government Libraries

Input and output data are collected for Government Libraries by the Committee of Departmental Librarians.\(^\text{319}\)

There is some confusion over the number of government libraries in the UK. LISU report around 35 libraries whilst initial work for the WILIP initiative suggests that there are around 20 government department libraries and a further 70 in government agencies and devolved administrations\(^\text{320}\).

**Average Number of Loans and Enquiries at Government Departmental Libraries 1991-92 to 2000-01**

<table>
<thead>
<tr>
<th></th>
<th>Average No. Loans</th>
<th>Average No. Enquiries</th>
</tr>
</thead>
<tbody>
<tr>
<td>1991-92</td>
<td>20,000</td>
<td></td>
</tr>
<tr>
<td>1992-93</td>
<td>30,000</td>
<td></td>
</tr>
<tr>
<td>1993-94</td>
<td>40,000</td>
<td></td>
</tr>
<tr>
<td>1994-95</td>
<td>50,000</td>
<td></td>
</tr>
<tr>
<td>1995-96</td>
<td>60,000</td>
<td></td>
</tr>
<tr>
<td>1996-97</td>
<td>70,000</td>
<td></td>
</tr>
<tr>
<td>1997-98</td>
<td>80,000</td>
<td></td>
</tr>
<tr>
<td>1998-99</td>
<td>90,000</td>
<td></td>
</tr>
<tr>
<td>1999-2000</td>
<td>100,000</td>
<td></td>
</tr>
<tr>
<td>2000-01</td>
<td>110,000</td>
<td></td>
</tr>
</tbody>
</table>


Although there is a considerable amount of variation in the data pattern, this initially seemed to stem in part from the range in number of responding libraries. When average numbers of enquiries and loans are worked out, however, the differences in value between the years remain. There does appear to have been a general trend for the number of enquiries and loans to increase over the period from an average of 1374 loans in 1991-92 to 30882 in 2000-01.

In terms of the potential audience there are currently some 392,000 Civil Servants in England. Figures for the other home countries are not available, although LISU have highlighted that the number of potential users of Government departmental libraries was around 1,674,273 in 2000-01. In addition, 41% of Government libraries also provide some service to the general public,\(^\text{321}\) targeting an average of 1,582 users per institution.\(^\text{322}\) 46% of these users are believed to access these services on a regular basis.\(^\text{323}\) Warren suggests that one of the key issues for the sub-domain will be the implications of ‘open government’

and ‘freedom of information’, which will place increasing emphasis on public access to government libraries and archives.\textsuperscript{324}

\subsection*{5.9.2 Health Service/ Medical Libraries}

No data have been found on the volume of usage of health service or medical libraries although one estimate of the potential audience gives a figure of 782,100 employed staff in the NHS\textsuperscript{325}. This figure obviously excludes medical staff working in private hospitals and clinics, and also excludes the millions of patients each year who may not borrow medical texts or journals, but who take advantage of the more general loans service provided by many hospital libraries. There are, however, approximately 600 libraries in the NHS sector.\textsuperscript{326}

The NHS Regional Librarians Group commissions an annual survey of health libraries concentrating exclusively on input and output measures.\textsuperscript{327} The Department of Health through its Review of Central Returns seeks to discourage too many surveys in order to reduce distractions for practitioners,\textsuperscript{328} although responses for the NHS Regional Librarians Group survey are reported to be usually good, at around 80%.\textsuperscript{329} Information from this survey indicates that usage of these libraries is highly limited with an average of between 5.5 and 8.2 books being loaned from stock from 1992 to 2000.\textsuperscript{330} It is, however, more common for articles to be photocopied, with between 1,443 and 2,261 articles being copied each year per institution between 1992 and 2000.\textsuperscript{331}

\subsection*{5.9.3 Professional and Learned Institutions and Associations}

Potential audiences for these institutions include all members and recognised researchers, as well as, in some instances, members of the public by arrangement. Some 32\% of professional associations allow some level of public access,\textsuperscript{332} serving a target user base of 27,741 per institution.\textsuperscript{333} Despite the large number of target users, only 18\% of these are considered regular users.\textsuperscript{334} This is not necessarily surprising as the target audience for these institutions is typically the total number of association members.\textsuperscript{335} CILIP and ASLIB are unaware of any data being collected related to users and non-users in libraries belonging to professional and learned institutions and associations.\textsuperscript{336} Information that is collected relates to library type, staff, subject coverage, structure and purpose.\textsuperscript{337}

\subsection*{5.9.4 Industrial and Commercial Libraries}

Although some industrial and commercial libraries do allow public visitation, the majority, especially business libraries, are designed to serve employees. There is little information on, and no systematic data collection from, industrial and commercial libraries.\textsuperscript{338} The sector is highly diverse and issues of commercial confidentiality interfere with the collection of data. Three surveys have been made of the sector, two of which by TFPL focused exclusively on

\begin{itemize}
\item \textsuperscript{326} Creaser, C; Maynard, S & White, S (2002) LISU Annual Library Statistics 2002 p.145
\item \textsuperscript{327} Ede, S (2002) Snapshot Diagnostic of Data Flow in Relation to the Library Domain p.25
\item \textsuperscript{328} Ede, S (2002) Snapshot Diagnostic of Data Flow in Relation to the Library Domain p.25
\item \textsuperscript{329} Creaser, C; Maynard, S & White, S (2002) LISU Annual Library Statistics 2002 p.145
\item \textsuperscript{330} Creaser, C; Maynard, S & White, S (2002) LISU Annual Library Statistics 2002 p.145
\item \textsuperscript{331} Creaser, C; Maynard, S & White, S (2002) LISU Annual Library Statistics 2002 p.148
\item \textsuperscript{332} Spiller, D, Creaser, C, Murphy, A (1998) ‘Libraries in the Workplace’ p.195
\item \textsuperscript{333} Spiller, D, Creaser, C, Murphy, A (1998) ‘Libraries in the Workplace’ p.196 The median number of users targeted by libraries belonging to professional associations is 13,000
\item \textsuperscript{334} Spiller, D, Creaser, C, Murphy, A (1998) ‘Libraries in the Workplace’ p.196
\item \textsuperscript{335} Spiller, D, Creaser, C, Murphy, A (1998) ‘Libraries in the Workplace’ p.196
\item \textsuperscript{336} Ede, S (2002) Snapshot Diagnostic of Data Flow in Relation to the Library Domain p.28
\item \textsuperscript{337} Ede, S (2002) Snapshot Diagnostic of Data Flow in Relation to the Library Domain p.28
\item \textsuperscript{338} Ede, S (2002) Snapshot Diagnostic of Data Flow in Relation to the Library Domain p.28
\end{itemize}
resources. The third survey, commissioned by the British Library Research and Innovation Centre and carried out by LISU, looked not only at resources, but also at use and performance.

Information obtained by LISU indicates that there are three groups of workplace libraries, those which only serve clients within their own organisation, those which only serve external clients and those which serve both. There are considerable differences in the level of potential public access between libraries of varying employment sectors:

### Public access to workplace libraries

<table>
<thead>
<tr>
<th>Library</th>
<th>% serving the general public</th>
</tr>
</thead>
<tbody>
<tr>
<td>Voluntary orgs</td>
<td>69%</td>
</tr>
<tr>
<td>Law</td>
<td>23%</td>
</tr>
<tr>
<td>Finance</td>
<td>24%</td>
</tr>
<tr>
<td>Energy</td>
<td>33%</td>
</tr>
<tr>
<td>Pharmaceutical</td>
<td>32%</td>
</tr>
<tr>
<td>Consultants</td>
<td>33%</td>
</tr>
</tbody>
</table>


5.9.5 The Media

No information has been identified relating to this sub-domain.

5.9.6 Prison Libraries

The 137 prison/penal institution libraries in England and Wales serve the inmates and staff of their institutions. In this context, ‘inmates’ include convicted and sentenced offenders, convicted offenders awaiting sentence and prisoners on remand or awaiting deportation, whilst ‘staff’ incorporate prison officers, governors and management and other employees. The UK prison population is currently over 72,000.

Use of prison libraries is included in CIPFA public library surveys, where they are grouped with other branch libraries and not analysed separately.

CILIP has begun a series of studies looking at stock, staffing and issue data. Information is collected on issues, reservations, satisfaction and levels of usage. Library data does not feature in any regular analysis of the database provided to the Prison Service or the Home Office.

5.9.7 Regional Libraries

There are no regional libraries in the UK.

---

5.10 Non-users of Libraries
The HLF-commissioned research previously discussed (Section 2.7) identified the following as being under-represented users of libraries:\(^{347}\):

- Families with children
- Children and young people
- Carers and workers with no time
- People lacking basic skills
- Low achieving households
- People from ethnic groups
- People without information retrieval skills and/or with no experience of computers/ICT
- The socially disadvantaged
- Rural communities
- Socio-economic groups AB

5.11 User Satisfaction with Libraries
As indicated in Section 2, local authorities are required to monitor user satisfaction with a wide range of services and, in some cases, to report this information as a BVPI. It is currently a statutory responsibility to report user satisfaction with library services, such information being gathered through Public Library User Surveys (PLUS surveys). This information may also be published by individual authorities on Best Value websites or in printed form.

Measuring satisfaction in quantitative terms will always be somewhat controversial since it is by nature a personal and subjective opinion, and different users may perceive the same level of service in a different way. Further problems arise in measuring satisfaction with any service that is tailored to the needs of each user, since the delivery can become as variable as the user’s experience and opinion of it.

Nonetheless, some national baseline data does exist for the museums and libraries domains, collected as part of the People’s Panel initiative carried out on behalf of the Office of Public Services Reform at the Cabinet Office (OPSR)\(^ {348}\). Key findings for libraries are summarised below:

**People’s Panel’s opinions on aspects of local authority services, May 2002**

<table>
<thead>
<tr>
<th>Question</th>
<th>Libraries</th>
</tr>
</thead>
<tbody>
<tr>
<td>How satisfied or dissatisfied are you with the quality of ……</td>
<td>+82 net satisfaction(^ {349})</td>
</tr>
<tr>
<td>Very satisfied</td>
<td>31%</td>
</tr>
<tr>
<td>Fairly satisfied</td>
<td>54%</td>
</tr>
<tr>
<td>Neither satisfied nor dissatisfied</td>
<td>85</td>
</tr>
<tr>
<td>Fairly dissatisfied</td>
<td>3%</td>
</tr>
<tr>
<td>Very dissatisfied</td>
<td>1%</td>
</tr>
<tr>
<td>No opinion</td>
<td>3%</td>
</tr>
<tr>
<td>Which four or five services on this card (list of 28 public services) are the most important</td>
<td>15% (ranked 10(^{th}))</td>
</tr>
</tbody>
</table>


Note: * less than 0.5%

---


\(^ {349}\) Net satisfaction measures the percentage of people who are satisfied minus the proportion dissatisfied
In short, it appears that UK residents place far more value on public libraries than they do on local authority museums and art galleries (see Section 3), but that users of both services are, in the main, satisfied with the quality of the provision they receive.

Individual local authority performance and satisfaction ratings, as indicated by Best Value inspection reports, performance indicators and library plan contents, can be found on the Audit Commission website: [www.audit-commission.gov.uk](http://www.audit-commission.gov.uk).
6 Common Under-Represented Groups

6.1 Summary of Common Under-Represented Groups

The review of user and non-user research presented in the previous three sections has revealed some commonalities in missing or under-represented audiences for museums, archives and libraries. This information is presented in summary form below although the table should be treated with some caution since it is based partly on inference, and, as indicated throughout the report, there are large gaps in available data that, once filled, may lead to a revision for the following matrix.

Summary of common under-represented groups

<table>
<thead>
<tr>
<th>Audience</th>
<th>Museums</th>
<th>Archives</th>
<th>Libraries</th>
</tr>
</thead>
<tbody>
<tr>
<td>AB socio-economic groups</td>
<td></td>
<td>*</td>
<td></td>
</tr>
<tr>
<td>C2DE socio-economic groups</td>
<td>*</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Disabled</td>
<td>*</td>
<td>*</td>
<td></td>
</tr>
<tr>
<td>Ethnic minorities</td>
<td>?</td>
<td>*</td>
<td>*</td>
</tr>
<tr>
<td>Families with babies/ small children</td>
<td>*</td>
<td>*</td>
<td>*</td>
</tr>
<tr>
<td>Low income households</td>
<td></td>
<td>*</td>
<td>*</td>
</tr>
<tr>
<td>Males</td>
<td></td>
<td>*</td>
<td></td>
</tr>
<tr>
<td>Older people</td>
<td>*</td>
<td></td>
<td></td>
</tr>
<tr>
<td>People lacking basic skills</td>
<td>*</td>
<td>*</td>
<td>*</td>
</tr>
<tr>
<td>Pre-school children</td>
<td>*</td>
<td>*</td>
<td>*</td>
</tr>
<tr>
<td>Rural dwellers</td>
<td>*</td>
<td>*</td>
<td>*</td>
</tr>
<tr>
<td>School children</td>
<td></td>
<td>*</td>
<td></td>
</tr>
<tr>
<td>Socially disadvantaged/ low achievers</td>
<td>*</td>
<td>*</td>
<td>*</td>
</tr>
<tr>
<td>Teenagers</td>
<td>*</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Unemployed</td>
<td></td>
<td>*</td>
<td></td>
</tr>
<tr>
<td>Workers and carers</td>
<td></td>
<td>*</td>
<td>*</td>
</tr>
<tr>
<td>Young adults</td>
<td></td>
<td>*</td>
<td>*</td>
</tr>
<tr>
<td>Young professionals</td>
<td></td>
<td>*</td>
<td>*</td>
</tr>
</tbody>
</table>

Source: PLB Consulting Ltd

The shaded rows represent those audience groups that are common across all three domains. It is important to note that many of these groups have not been identified as being under-represented or non-users of the particular domains through national surveys of engagement with the heritage, since the lifestyle information necessary to draw such conclusions are rarely gathered in such studies. In some cases, the groupings reflect findings of site and service-specific research studies that are of sufficient quality to be taken to reflect what is happening across the domain as a whole. The information for under-represented groups for libraries and museums have also been checked against the analysis prepared by LISU of the Arts Council England Omnibus Survey 2001.\(^{350}\)

7 Baseline Information, Data Gaps and Research Opportunities

7.1 Summary of Available Baseline Information

The following table demonstrates the virtual absence of any harmonised approach to baseline information that reflects engagement with the three domains from the demand point of view (i.e. proportion of the population engaging with each domain). Most worringly, there is currently no demand-side information produced for archives at all, and only limited data for the home countries other than England. Redressing this data gap is a matter of some urgency if Resource is charged with monitoring, on behalf of DCMS, the success of initiatives that are designed to increase visits to museums, archives and libraries by people from target segments such as the socially excluded, members of ethnic minorities and people with disabilities.

Baseline information: Engagement by the UK Population with the three domains

<table>
<thead>
<tr>
<th>Measure of activity</th>
<th>Museums</th>
<th>Archives</th>
<th>Libraries</th>
<th>Sources</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall engagement with each domain</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
| Percentage of UK adult population visiting within the previous 12 months | 22%     | n/a      | n/a       | Museums: BMRB TGI Autumn 2002
|                                                          |         |          |           | Archives: Libraries:                         |
| Percentage of English adult population visiting within the previous 12 months | 36%     | n/a      | 45%       | Museums: Arts in England, 2001
| Percentage of Scottish adult population visiting within the previous 12 months | 48%     | n/a      | n/a       | Museums: Arts in Scotland 2001
|                                                          |         |          |           | Archives: Libraries:                         |
| Profile of users                                         |         |          |           |                                              |
| Percentage of male adults visiting in previous 12 months (England) | 36%     | n/a      | 41%       | Museums: Arts in England, 2001
| Percentage of female adults visiting in previous 12 months (England) | 34%     | n/a      | 49%       | Museums: Arts in England, 2001
| Percentage of 7-10 year olds visiting in the previous 12 months (GB) | 72%     | n/a      | n/a       | Museums: BMRB TGI Youth, Autumn 2002
|                                                          |         |          |           | Archives: Libraries:                         |
| Percentage of 11-14 year olds visiting in the previous 12 months (GB) | 41%     | n/a      | n/a       | Museums: BMRB TGI Youth, Autumn 2002
|                                                          |         |          |           | Archives: Libraries:                         |
| Percentage of 15-19 years olds visiting in the previous 12 months (GB) | 22%     | n/a      | n/a       | Museums: BMRB TGI Youth, Autumn 2002
|                                                          |         |          |           | Archives: Libraries:                         |
| Percentage of 16-24 year olds visiting in the previous 12 months (England) | 28%     | n/a      | 53%       | Museums: Arts in England, 2001
<table>
<thead>
<tr>
<th>Measure of activity</th>
<th>Museums</th>
<th>Archives</th>
<th>Libraries</th>
<th>Sources</th>
</tr>
</thead>
</table>

**Baseline Information: Volume of activity across the domains**

<table>
<thead>
<tr>
<th>Measure of activity</th>
<th>Museums</th>
<th>Archives</th>
<th>Libraries</th>
<th>Sources</th>
</tr>
</thead>
<tbody>
<tr>
<td>Estimated total visits, local authority facilities in Scotland (2000/01)</td>
<td>5,538,592</td>
<td>n/a</td>
<td>30,761,505</td>
<td>Museums: Scotland’s National Audit; Archives: Libraries: CIPFA Public Library Statistics</td>
</tr>
<tr>
<td>Estimated total visits, university facilities in Scotland</td>
<td>305,066</td>
<td>n/a</td>
<td>n/a</td>
<td>Museums: Scotland’s National Audit; Archives: Libraries:</td>
</tr>
</tbody>
</table>
### Baseline Information, Profile of Users (from supply-side surveys)

<table>
<thead>
<tr>
<th>Measure of activity</th>
<th>Museums</th>
<th>Archives</th>
<th>Libraries</th>
<th>Sources</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Sex</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>% of users who are <strong>male</strong></td>
<td>n/a</td>
<td>55%</td>
<td>40%</td>
<td>Museums: PSQG 2001 Libraries: CIPFA PLUS (from LISU) 2002</td>
</tr>
<tr>
<td>% of users who are <strong>female</strong></td>
<td>n/a</td>
<td>45%</td>
<td>60%</td>
<td>Museums: PSQG 2001 Libraries: CIPFA PLUS (from LISU) 2002</td>
</tr>
<tr>
<td><strong>Social class</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>% of users who are in social class <strong>AB</strong></td>
<td>36%</td>
<td>n/a</td>
<td>n/a</td>
<td>Museums: MORI 2001 Libraries:</td>
</tr>
<tr>
<td>% of users who are in social class <strong>C1</strong></td>
<td>30%</td>
<td>n/a</td>
<td>n/a</td>
<td>Museums: MORI 2001 Libraries:</td>
</tr>
<tr>
<td>% of users who are in social class <strong>C2</strong></td>
<td>18%</td>
<td>n/a</td>
<td>n/a</td>
<td>Museums: MORI 2001 Libraries:</td>
</tr>
<tr>
<td>% of users who are in social class <strong>DE</strong></td>
<td>16%</td>
<td>n/a</td>
<td>n/a</td>
<td>Museums: MORI 2001 Libraries:</td>
</tr>
<tr>
<td><strong>Ethnic Origin</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>% of users who are of <strong>white/European origin</strong></td>
<td>94%</td>
<td>98%</td>
<td>92%</td>
<td>Museums: PSQG 2001 Libraries: Sumson 2001</td>
</tr>
<tr>
<td>% of users who are of <strong>black or Afro-Caribbean origin</strong></td>
<td>&lt;1%</td>
<td>1%</td>
<td>n/a</td>
<td>Museums: MORI 2001 Libraries: PSQG 2001</td>
</tr>
<tr>
<td>% of users who are of <strong>Asian origin</strong></td>
<td>2%</td>
<td>&lt;1%</td>
<td>n/a</td>
<td>Museums: PSQG 2001 Libraries:</td>
</tr>
<tr>
<td><strong>Age of users</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>% of users aged under 16</td>
<td>n/a</td>
<td>&lt;1%</td>
<td>&lt;1%</td>
<td>(but data refers to adult survey only)</td>
</tr>
<tr>
<td>% of users aged 16 – 24</td>
<td>13%</td>
<td>2%</td>
<td>8%</td>
<td>Museums: MORI 2001 Libraries: CIPFA PLUS (from LISU) 2002</td>
</tr>
<tr>
<td>% of users aged 25 – 34</td>
<td>n/a</td>
<td>n/a</td>
<td>11%</td>
<td>Museums: Libraries: CIPFA PLUS (from LISU) 2002</td>
</tr>
<tr>
<td>% of users aged 35 – 44</td>
<td>n/a</td>
<td>n/a</td>
<td>18%</td>
<td>Museums: Libraries: CIPFA PLUS (from LISU) 2002</td>
</tr>
<tr>
<td>% of users aged 45 – 54</td>
<td>13%</td>
<td>n/a</td>
<td>16%</td>
<td>Museums: MORI 2001 Libraries: CIPFA PLUS (from LISU) 2002</td>
</tr>
<tr>
<td>% of users aged 55 – 64</td>
<td>14%</td>
<td>n/a</td>
<td>16%</td>
<td>Museums: MORI 2001 Libraries: CIPFA PLUS (from LISU) 2002</td>
</tr>
<tr>
<td>% of users aged 65+</td>
<td>15%</td>
<td>n/a</td>
<td>29%</td>
<td>Museums: MORI 2001 Libraries: CIPFA PLUS (from LISU) 2002</td>
</tr>
</tbody>
</table>

**Users with a disability**
Users & Non-Users of Museums, Libraries and Archives: Review of Available Data

<table>
<thead>
<tr>
<th>Measure of activity</th>
<th>Museums</th>
<th>Archives</th>
<th>Libraries</th>
<th>Sources</th>
</tr>
</thead>
<tbody>
<tr>
<td>% of users with a disability</td>
<td>n/a</td>
<td>7%</td>
<td>n/a</td>
<td>Museums: Archives: PSQG 2001 Libraries:</td>
</tr>
</tbody>
</table>

7.2 Data Gaps

7.2.1 Introduction

The figure below seeks to summarise the main current data collection (as opposed to collation) exercises across the three domains and places them within the framework for the collection of statistical information proposed by Babbidge\(^{351}\). It should be noted that some of the annual headline reports cover sub-domains only and not the whole domain – for instance, the CIPFA reports cover public sector services only.

### Categorisation of data collection procedures across the domains

<table>
<thead>
<tr>
<th>Annual Headline Reports (listings of museums, estimates of the total museum economy, visitor numbers etc.)</th>
<th>Museums</th>
<th>Archives</th>
<th>Libraries</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Sightseeing in the UK</td>
<td>• CIPFA Leisure &amp; Recreation Estimates</td>
<td>• DCMS annual report</td>
<td></td>
</tr>
<tr>
<td>• CIPFA Archives Services Estimates</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Annual Trends Reports (samples investigating key issues over time)</th>
<th>Museums</th>
<th>Archives</th>
<th>Libraries</th>
</tr>
</thead>
<tbody>
<tr>
<td>• BVPIs</td>
<td></td>
<td>• SCONUL survey of archives</td>
<td></td>
</tr>
<tr>
<td>• AHRB (Universities only)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• AIM trading review</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• GLLAM benchmarking</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Public library plans</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• SCONUL survey of libraries</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• LISU</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Occasional Dipstick Reports (One-off surveys to inform perceived market changes at national or regional level)</th>
<th>Museums</th>
<th>Archives</th>
<th>Libraries</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Scotland’s National Audit</td>
<td></td>
<td></td>
<td>• Creaser &amp; Maynard (2002) Survey of school libraries</td>
</tr>
<tr>
<td>• MORI research on impact of free admissions to national museums</td>
<td></td>
<td></td>
<td>• Insight Research (1999) usage of British Public Libraries</td>
</tr>
<tr>
<td>• Desai &amp; Thomas (1998) Cultural Diversity</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Harris Qualitative (1997) Children as audiences for museums</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Cyclical Special Reports (to inform regular reporting or regional policy needs)</th>
<th>Museums</th>
<th>Archives</th>
<th>Libraries</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Arts in England</td>
<td>• Archive Council for Wales (2001)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Arts in Scotland</td>
<td>• Scottish Council on Archives (2000)</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Society of Archivists (2002)</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Archival Council Mapping Board (1998)</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• PSQG surveys</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: PLB Consulting Ltd

This ‘ground-clearing’ exercise of statistics on users and non-users of museums, archives and libraries has confirmed most people’s assumptions that data collection across the three domains remains partial in terms of coverage, and variable in terms of the quality of information provided. The above attempt to present sound baseline data on engagement with the sector by the UK population on the one hand, and levels of activity at, and satisfaction with, individual sites within the three domains on the other, has confirmed this.

---

Conflicting demands for information from resource and service managers on the one hand, and government and policy-makers on the other, creates a situation where constrained budgets are being stretched with management information often playing second fiddle to the need to produce performance indicators.

7.2.2 Museums
Key data gaps identified during this research include:

- A definitive figure for the number of museums in the UK
- Robust figures for the total volume of activity (i.e. absolute number of visits) at museums in the UK, on a national, home country and regional basis
- Demand-side (i.e. from omnibus or similar surveys) data on engagement with museums and galleries by people from ethnic minorities, and by disabled people
- Information on museum visiting patterns by young people/ school aged children
- Supply-side data on visits to museums by tourists on holiday in the UK, both domestic and international visitors
- Information on the ethnic background of schoolchildren visiting museums as part of school groups
- Reliable user statistics for free-entry museums and galleries
- A comprehensive understanding, gleaned from primary research, on the principal under-represented audiences for museums across the UK as a whole, and then at regional level (most of the available information is based largely on assumptions drawn from small, site or service-specific surveys or by a process of reduction – groups that do not feature highly in user surveys are assumed to be non-users)
- No national level indications of satisfaction although one could question whether or not such a measure is relevant, since this is a measure of service delivery to individuals by individual services and thus will be both subjective and also variable

A further problem with many of the surveys reviewed is that they use inconsistent definitions of the category under investigation – some include galleries and others exclude these; some also include historic houses and other forms of visitor attraction.

7.2.3 Archives
Key data gaps identified during this research include:

- A full understanding of the population and content of specialist repositories across Britain
- Demand-side (i.e. from omnibus or similar surveys) data on engagement with archives by the UK population as a whole, and by different groups within the population
- Information on numbers and profiles of users of University and FE Institution archives, as a sub-domain
- Information on numbers and profiles of users of religious archives, as a sub-domain
- Information on numbers and profiles of users of charitable archives, as a sub-domain
- Information on numbers and profiles of users of business archives, as a sub-domain
- Information on numbers and profiles of users of private collections, as a sub-domain
- Information on public satisfaction with all sub-domains, bar local authority/ public archives
- A comprehensive understanding, gleaned from primary research, on the principal under-represented audiences for archives across the UK as a whole, and then at regional level (most of the available information is based largely on assumptions drawn from small, site or service-specific surveys or by a process of reduction – groups that do not feature highly in user surveys are assumed to be non-users)

Of all of the domains, the archives domain is the one that rarely features at all in demand-side studies of engagement with the heritage such as omnibus surveys. It would be valuable for Resource to press for the inclusion of archives as a separate category in all surveys that
mention, as separate categories, museums or libraries. Although overall levels of activity are known to be much lower in the archives domain than for museums or libraries, inclusion of each as a discrete category will permit reliable comparisons to be made between data sets.

7.2.3 Libraries
Key data gaps identified during this research include:

- A full understanding of the number of libraries/ service points in the following sub-domains, the level of usage enjoyed and their main constituent user groups:
  - Professional and learned institutions and associations
  - Industrial and commercial libraries
  - Media libraries
- Information on how school libraries are used by pupils, teachers and others, and the role that they play compared to public libraries
- Profile of users of school libraries, and their satisfaction with these libraries
- Recent information on usage of libraries in the FE sector
- Data on the nature of usage of Government libraries, and satisfaction with these libraries
- Information on usage of, and satisfaction with, health libraries
- Separately published information on usage of prison libraries, on user-satisfaction and on the role that they can play in rehabilitation/ preparing offenders for re-entry into society
- Publicly available information that will allow libraries to benchmark the performance of individual service points against other similar libraries in different authorities – the CIPFA data, which is the most comprehensive available, only allows comparisons against different services
- A comprehensive understanding, gleaned from primary research, on the principal under-represented audiences for libraries across the UK as a whole, and then at regional level (most of the available information is based largely on assumptions drawn from small, site or service-specific surveys or by a process of reduction – groups that do not feature highly in user surveys are assumed to be non-users)

7.3 Activity or Users – which is more important?
A key issue that has come out of this research is the fact that the majority of Performance Indicators and national data collection surveys such as the CIPFA Library and Archive Surveys or Sightseeing in the UK report levels of activity in a domain rather than indicate the number or profile of different individuals engaging with the domain in question. Given the difficulties in measuring many types of engagement, any attempt to base formal policy on statistically questionable evidence is opening itself up to problems when seeking to monitor progress.

Given that a key plank of current Government policy is to develop evidence-based actions to increase access to our cultural services and heritage facilities by excluded and under-represented groups, it is, in our view, more important to gather information on engagement from a representative sample of the UK population as a whole, and thus determine levels of participation from a statistically robust standpoint, than rely on data collected on an ad hoc basis from a range of organisations with different survey capabilities and management objectives. Where specific initiatives are targeted at certain groups within the population, such as people from ethnic minorities, or residents of a particular region, then quotas should be imposed and sample sizes be increased to ensure provision of a statistically reliable sample.

This will require Resource and DCMS to work with one of the following organisations on a long term basis to build appropriate questioning into their UK omnibus surveys:

- BMRB (TGI Omnibus)
- Gallup (Telephone omnibus)
• Martin Hamblin GfK (BritBus)
• MORI (GB General Public survey)
• NEM (Research Omnibus survey)
• NOP (Telebus survey)
• Office for National Statistics (General Household Survey)
• Taylor Nelson Sofres (Phonebus omnibus)

Given that the requirement for sound statistical evidence to inform policy making is coming from Government Departments, we would argue that **in the first instance it should be the responsibility of ONS to gather and disseminate this information**, rather than commercial companies.

**Recommendation:** Resource and DCMS should discuss the prospects of re-introducing and sustaining questions relating to engagement with the three domains into the General Household Survey, in order to provide definitive baseline data and then trend data on:

- The proportion of the UK population engaging with each domain
- The profiles of users and non-users for each domain
- Variations in engagement with each domain by residents in each of the UK’s home countries/regions
- The nature of this engagement (as a visitor/user; remote – ICT user, volunteer; employee; guide etc)

This is not to deny the importance of gathering information on the profile of users at individual sites – such data is needed by all organisations seeking to retain existing visitors/users and attract new audiences when devising appropriate marketing and audience development initiatives. Furthermore, such data collection is also required by the nationals as they monitor progress towards their individual funding agreement targets be set by DCMS. However, from a resource efficiency and data validity point of view, it is better to insert questions into an existing, statistically reliable survey than it is to seek to develop a new national data collection exercise that will be unlikely to benefit from the same level of statistical robustness.

Linked to this issue of activity or users is the confusion that often exists in questionnaire and survey reports between visits and visitors. A recent review carried out for Resource highlights this as one of the main problems in current data collection exercises across the museums domain in particular and argues that this ambiguity can be particularly important when museums services are being asked to meet targets for increasing engagement by people from target audiences. A classic example where confusion may occur is in the current DCMS targets for Regional Museums which call for them to deliver, by the end of financial year 2005/06:

“500,000 visits to regional museums by new users, predominantly from social classes C2DE and ethnic minorities”

This issue was also raised during consultations with a senior officer of one of England’s larger library services. His re-analysis of CIPFA PLUS findings indicated that the total number of residents using some of the libraries in smaller towns in his county amounted to no more than a few hundred, although the high frequency with which they used the service meant that the library received a large number of visits and loaned a lot of books. The point made was that the level of subsidy per visit (a derivation of the total expenditure on that branch divided by the number of visits) was a poor indicator on the actual level of cost per

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resident, since a relatively small number of residents were in fact being subsidised to the
tune of several hundred pounds per annum. When local authorities are seeking to
demonstrate Best Value, for example, it is more important to know how many people are
benefiting from the service rather than the total number of visits or uses made.

**Recommendation:** Resource should clarify with DCMS and other partners (e.g. CIPFA,
GLLAM) when indicators are designed to monitor the total volume of activity, and when they
are supposed to identify the absolute number of separate individuals participating in an event
at that site.

### 7.4 Data Consistency

As has been seen in section 7.1, that seeks to summarise the main baseline data currently
available, there is very little harmonisation of data across the domains. At its most basic, this
can mean using different age groups when breaking down user profile data (see for example
the differences between the PSQG archive user surveys and the MORI work for Resource on
museum users). Other problems include:

- Variations in measuring use of websites (number of ‘hits’, length of visit, number of pages
  reviewed)
- Differences in spatial levels of disaggregation, with these not always reflecting
  Government Office regions
- The use of different age bands to analyse respondent’s profiles

We understand that the Office for National Statistics is heavily involved in developing a more
standardised approach to data collection, collation and presentation and early discussions
with this organisation could be fruitful.

**Recommendation:** Resource should work with key professional bodies across the three
domains and other partners, such as ONS, to prepare a definitive statement of statistical
definitions and the categories to be used when collecting user information and analysing data
returns across the three domains.

### 7.5 Monitoring Usage of Free Entry Facilities

One of the problems with the data provided on levels of activity at sites where no admission
fee is charged (and hence no ticket issued), or where is no transaction, is that quantifying the
volume of activity is dependent on means of counting that are less reliable than a cash
register.

As indicated in the body of the report, the House of Commons Culture, Media & Sport Select
Committee expressed some concern at the variable quality of management information
produced in this field, particularly since this information is required to help Government
improve policies in the sector. The Select Committee called upon DCMS to take the lead in
establishing appropriate methodologies to count visitors and to improve the accuracy and
consistency of volume and profile information. We see a clear role for Resource to support
DCMS in this area.

**Recommendation:** Resource should commence discussions with DCMS and other NGAs to
review Best Practice in measuring activity at free entry sites including museums and galleries
and other locations where there is no transaction that permits easy monitoring of user
numbers.

### 7.6 Other Research Opportunities

In order to guide future strategic planning and supporting activities by Resource and its
partners, we put forward below a number of other areas for research, in order to fill gaps in
our understanding of users and non-users of museums, archives and libraries. These
include:
• A more detailed understanding of the various activities enjoyed by visitors to the UK’s museums, and the reasons for visiting. There appears to be limited information at national level of the relative importance of, for instance, leisure visits as opposed to visits made to pursue an academic or lifelong learning interest. An investigation into motivations for visiting museums and galleries would be perhaps moving into the outcomes area, as opposed to outputs, but again would be important in that it would provide some guidance on where investment in product development, service development and marketing activities is required.

• Conducting a nationwide survey to gather data on the profiles of visitors to, and an analysis of usage of, university museums, to help determine their relative importance as teaching collections as opposed to general visitor facilities. This is particularly important when universities such as Newcastle are seeking major grants from HLF and other public sources to massively extend their operations, thus in effect competing with local authority museum provision.

• Following a mapping exercise of the UK’s specialist repositories, a basic user survey to establish the volume of activity at the UK’s specialist repositories and business archives, the profile of users at these establishments and user satisfaction. These facilities fall outside the remit of the PSQG work but are likely to be providing a useful service to key sectors within the community. Undertaking this research would provide a valuable addition to the stock of information relating to archive users derived from the PSQG studies.

• Analysis of the data collected by the UK Visitors Survey, International Passenger Surveys and Day Visitor Surveys on attendances at museums, galleries and other cultural facilities. This would allow us to get a better understanding of their role in the overall tourism industry in the country. Detailed analysis of participation pattern by tourist profile would also provide a better understanding of which tourist market segments should be targeted by museums & galleries - at present the information collected by individual sites is often based on very small sample sizes and thus statistically unreliable.

• Usage of school libraries and school library services, both in terms of the volume of use but also the role that school libraries play vis-à-vis public libraries. Such information would help guide policy on support for public library services in their broadest context.

• Usage, non-usage and user and non-user profiles at libraries in FE colleges. The data could be used to assess how FE college libraries perform in terms of attracting lifelong learners and other members of the community, a key objective of government policy.

Establishing how the findings of the “Community Plus” research tool, recently developed by CIPFA, can be used by Resource and other partners to advise policy with regards to non-users across all three domains. It seems as if this may provide a wealth of information on reasons for non-use of libraries, archives and possibly other cultural facilities from communities across the country. Although there will not be a continuous analytical sample to allow trend or time series analysis at individual authority level, there should be sufficient information to allow trend analysis at regional level as well as by different groups within society (e.g. older people, MEGs, rural dwellers). Given the confidentiality of the returns to CIPFA, and the fact that Community Plus is a voluntary initiative, there is a need for Resource to discuss with CIPFA how this good quality primary data can be used on an annual basis to inform policies on audience development, social inclusion etc. This tool might also replace or augment the information collected on museum & gallery use that has in
the past been gathered by ONS in the GHS and that is currently gathered by the TGI surveys (see Section 3)
Appendix 1: Bibliography

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Quality, Efficiency and Standards Team (QUEST) (2000) Modernising the Relationship: A New Approach to Funding Agreements. A report to the Secretary of State for Culture, Media and Sport London: DCMS


Resource (2002b) Museum Registration Scheme Leaflet London: Resource


Scottish Arts Council (2002) Attendance at, participation in and attitudes towards the arts in Scotland RES 1.


Appendix 2: Organisations Contacted

Advantage West Midlands
Archive Council for Wales
Association of Independent Museums
Audit Commission
Audit Commission Office in Wales
Audit Scotland
BMRB International
Bristol City Museum and Art Gallery
CILIP
Cornwall Record Office
Council of Museums in Wales
Cumbria Record Office
Cumbria Tourist Board
Department of Culture, Arts & Libraries
East Midlands Development Company
East of England Development Agency
East of England Libraries and Information Services Development Agency
East of England Tourist Board
EGERIA
EMMLAC
English Tourism Council
Essex Record Office
Gallup Organisation
Hampshire County Council
Heart of England Tourist Board
ICM Research Ltd
King’s college London
Kirklees Metropolitan Council
Lancashire County Council Library Service
London Archives Regional Council
London Development Agency
London Libraries Development Agency
London Metropolitan Archives
London Museums Agency
London Museums, Archives and Libraries
London Tourist Board
London Transport Museum
Mintel International Group Ltd
MORI
MUSE
Museums Association
National Archive of Scotland
National Library of Wales
National Portrait Gallery
NEMLAC
NFO World Group
NOP Research Group
North West Development Agency
North West Museums Service
North West Tourist Board
Northern Ireland Audit Office
Northern Ireland Museums Council
Northern Ireland Tourist Board
Northumbria Tourist Board
ONE North East
Public Record Office
Public Record Office Northern Ireland
Research International Group
SCONUL
Scottish Enterprise
Scottish Library and Information Council
Scottish Museums Council
SEMLAC
Society of Archivists
South East England Development Agency
South East England Tourist Board
South West of England Regional Development Agency
South West Regional Archives Council
South West Tourism Ltd
Southern Tourist Board
SWMLAC
The National Library of Wales
Victoria and Albert Museum
Visit Britain
Visit Scotland
Wales Tourist Board
Welsh Development Agency
West Midlands Libraries Partnership
West Midlands Regional Archive Council
West Midlands Regional Museum Council
Yorkshire Museum Council
Yorkshire Archive Council
Yorkshire Forward
Yorkshire Libraries and Information Council
Yorkshire Tourist Board
Appendix 3: Consultees

Eleanor Appleby Victoria and Albert Museum
Adrian Babbidge EGERIA
Toby Bainton SCONUL
Pim Baxter National Portrait Gallery
Paul Brough South West Regional Archive Council
Jan Bullivant Kirklees Metropolitan Borough Council
Claire Creaser LISU
Guy Daines CILIP
Maurice Davies Museums Association
Sam Evans Public Record Office
Jonathan Gordon CIPFA
Jim Grisenthwaite North West Regional Archive Council
John Haywood National Portrait Gallery
Morna Hinton Victoria and Albert Museum
Helen Jackson SEMLAC
Alison James Visitor Studies Group
Helen Jones Victoria and Albert Museum
Sarah Levitt GLLAM
David Lightfoot Preston County Library
Patricia Methven Director of Archive Services (King’s College London)
Sam Mullins Association of Independent Museums
John Parry Hampshire County Council
Geoff Pick London Metropolitan Archives
Chris Pickford Freelance Archival Consultant
Stephen Price Group of Large Local Authority Museums (GLLAM)
Jane Ryder Scottish Museums Council
Sarah Selwood PSI
Robert Warburton Kirklees Metropolitan Borough Council
Helen Wilkinson Museum Association
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