



National user survey 2011

Encuesta nacional de usuarios 2011

TÍTULO

Encuesta nacional de usuarios 2011

EDITORIAL

Dirección de cultura (2012)

FOTOS

Portada, Jens Bach, Struer Museum

Página 2, Caspar Miskin, Københavns Museum

Página 4, Niels Nyholm, Naturama

Página 7, Agnete Birger Madsen, Kvindemuseet

Página 8, Den gamle by

Página 12, Mette Elimar Jensen, Morsland Historiske Museum

Página 15, Bornholms Kunstmuseum

Página 17, Arbejdermuseet

Página 21, Agnete Birger Madsen, Kvindemuseet

Página 27, Lisbeth Lund, J. F. Willumsen

Página 30, Den gamle by

Página 32, Arbejdermuseet

Página 34, Lars Skaaning, ARKEN

Página 36, Forsorgsmuseet Viebæltegård

Página 104, Lars Skaaning, ARKEN

DIBUJOS

Todos los dibujos son de Claus Bigum

REDACCIÓN

Janice Bille Andersen, Jacob Thorek Jensen,

Ida Brændholt Lundgaard (ansvarshavende)

TEXTOS

Ida Brændholt Lundgaard, Kulturstyrelsen

Anna Maria Foldgast, TNS Gallup

Los datos fueron suministrados por TNS Gallup



TNS Gallup

DISEÑO GRÁFICO

Mark Gry Christiansen

IMPRESIÓN

Prinfo Holbæk-Hedehusene

TIRADA

1500 ejemplares impresos

ISBN

978-87-91298-94-3 (versión impresa)

978-87-91298-95-0 (versión web)

978-87-91298-96-7 (versión en inglés)

AGRADECIMIENTOS

La Dirección de Cultura quiere agradecer a todos los museos, los estatales y los reconocidos oficialmente por el estado, por su participación en esta encuesta. Igualmente desea agradecer a la Organización Danesa de Museos, por su colaboración.

Foreword

User surveys frequently receive a good deal of attention. Since the publication of the first national user survey in 2010, many within the media have dissected the figures for average museum use – and recently we have been able to read about the welcome increase in the visitor numbers to the country’s museums during the past year. And with 13.3 million of them, we enjoy a visitor rate which is the envy of many countries.

But the figures do not of themselves ensure a quality museum visit. This also depends upon what the visitors take home with them, upon their satisfaction with the visit – in terms of the museum itself, the café, shop, etc – which is subject to ever-greater focus. It is therefore good to know our visitors, who they are and what they demand in general. We have many fine examples of this in Denmark.

The national user survey means that museums are actually able to work strategically with all the citizens who make use of Danish museums every year and are extremely satisfied with them. And, at the same time, the survey is a tool to involve underrepresented sections of society in the development and reshaping of the museum sector. As a result, many museums are today attracting young people, for example.

A large-scale professional development of museums is currently taking place, focusing particularly on the sharing and production of knowledge within relevant professional fields for contemporary citizens in order to ensure that museums are central players in the development of cultural democracy in Denmark. Training and the development of frameworks for museums and cultural institutions in Denmark takes place under the auspices of a new cross-aesthetic and cross-cultural agency.

We have evaluated and focused the user survey with particular reference to citizen diversity during a new three-year period. And now a wide range of other cultural institutions also wish to make use of the museums’ user survey concept.

There is also great international interest in the collaboration between Danish museums and the Danish Agency for Culture in producing the user surveys.

Inspiration and the exchange of experience are important. We can always learn from and with each other – not only within the borders of individual countries, but also internationally. Professional development is a common requirement for museums, in which we need both to learn from local initiatives and also to inform ourselves about important international practices.

Today, education encompasses not only cultural awareness, but also competences such as social intelligence, media awareness and the ability to communicate. The concept of education has acquired new content, yet it is still about ensuring that it equips us with the tools to navigate our way around a complex society and a globalised world. Education is a prerequisite to enable us to handle the challenges we face as individuals and as a society.

User surveys are a tool to further develop museums in the 21st century. They are essential to ensuring that museums are a major part of our social and cultural development. And I believe there are good grounds for optimism in relation to the current development of museums. We need the constructive support and criticism of the museums. And, as Professor of Museology George Hein reminded us all at the Danish Agency for Culture’s seminar on Youth and Museums at the National Art Museum: Progressive societies have progressive museums!

Ole Winther,

Head, Centre for Cultural Institutions
and Operational Support,
Danish Agency for Culture





Contents

1	Introduction: National user survey	5
	Dissemination of survey results	6
	Target groups	6
	Guidance for readers	7
<hr/>		
2	Data, main conclusions and recommendations	9
	Data	9
	Main conclusions	12
	GallupKompas	14
	The typical and the atypical museum	15
	Recommendations	16
<hr/>		
3	Trends 2009-11	17
	Profiles	17
	Evaluations	22
	Visiting patterns	24
	Summary	29
<hr/>		
5	User evaluations of museums	31
	Summary	31
<hr/>		
6	Profile of museum users	33
	Summary	33
<hr/>		
7	Visitor patterns	35
	Summary	35
<hr/>		
8	Compass analysis	36
	Summary	36



1 Introduction: National user survey

This report presents the results of the national user survey for state and state-recognised museums for 2011, as well as trends within selected areas from 2009-11.

The survey provides an insight into who is making use of the museums, how they are using them, and the users' evaluations of the museums.

The annual report provides an opportunity to compare the results over a number of years and is therefore a tool to follow up on objectives and strategies in accordance with the results of the user survey.

With the survey, the museums have acquired a tool enabling them to work strategically to target exhibitions, activities and arrangements for their user groups. The results can also be used to launch initiatives directed toward new user groups.

The purpose of the survey is to establish instruments for the professionalisation of dissemination and communication at Danish museums. The user survey contributes to informed debate about the museums' ability to disseminate information, thus making it possible for them to collaborate and to learn from each other's experience.

The survey is a central part of the Ministry of Culture's Educational Plan, which will contribute to the professionalism of the museums and their ability to communicate within the following areas:

- Development of museums' communication
- Research in communication
- Education and development of skills
- Museums and education
- User surveys
- Knowledge sharing

The Educational Plan is a part of the government's program to create equal access to culture for all Danish citizens. As part of this program, user surveys are a field of activity with a budget for qualitative user surveys, to which museums can apply. The results of these surveys are intended to supplement those of the national user survey.

The Danish Agency for Culture, as part of the Educational Plan, contributed to the national user survey with its 2010 publication "Museums' web users – A national user survey of museum websites".

In autumn 2011, the Danish Agency for Culture published target group research on young users and non-users of Danish museums as a consequence of the national survey having revealed that young people are notably underrepresented in museums in relation to the Danish population as a whole.

The user surveys can be downloaded at:
www.kulturstyrelsen.dk

Dissemination of survey results

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

- In the present report, which presents the national results annually for every state and state-recognised museum.
- In individual departmental reports, which include the six-monthly results of each participating museum.
- Via an online portal, where the museums can find more detailed results and compare them with each other.

Moreover, the Danish Agency for Culture and TNS Gallup are hosting three workshops in June 2012, at which museum employees can discuss the findings of the report and how these can be translated into new practices.

Target groups

The findings of the national user survey are primarily directed toward three target groups:

- Museums
- Policymakers
- Citizens and journalists

The target groups within museums are their leaders, press and communication officers and curators. The museums can make use of the results to obtain a better understanding of how each particular museum positions itself within the overall Danish museum landscape. Museums are thus provided with the tools to continue with their task of working to create access on behalf of all Danish citizens to their cultural heritage and of bringing their expertise to the wider society. In addition, the findings of the national survey should supplement the findings of individual museums' own reports.

The results of the national user survey can provide relevant background information for policymakers. The findings of the report can therefore be a catalyst for local, regional and national initiatives to improve museums' communications.

The findings of the user survey can provide citizens and journalists with an insight into who makes use of Danish museums, and into the relationship between users on the one hand and state and state-recognised museums on the other.

It is intended that the findings of the national user survey will form the basis for forging a shared commitment and shared responsibility for the professional development of the museums' communication skills.



Guidance for readers

This report is designed in such a way that it can be read either in its entirety or selectively – depending upon the target group to which one belongs or upon which results are of particular interest. Note that, unless otherwise indicated, the results refer only to Danish users.

Chapter 2 summarises the survey's data, conclusions and the Danish Agency for Culture's recommendations.

Chapter 3 presents trends from 2009-11 within chosen areas.

Chapter 4 presents overall statistical analyses of data.

Chapter 5 shows, among other things, the overall levels of user satisfaction with the museums, with the museums' core activities and with their service levels and practical arrangements.

Chapter 6 shows the distribution of users according to gender, age, education and place of residence.

Chapter 7 analyses visitor patterns, including users' distribution according to the three museum categories; the purposes of users' visits; and their sources of information about the museum they are visiting.

Chapter 8 analyses users on the basis of Gallup-Kompas.

Chapter 9 provides a detailed description of GallupKompas' nine segments, including their cultural and media habits.

Chapter 10 describes the methods and design of the user survey.

There follows an overview of all the figures within the report, as well as a list of the participating museums.



2 Data, main conclusions and recommendations

There follows a summary of the survey's combined data, main conclusions based on the survey's 2011 results (incorporating the data trends from 2009 to 2011), and the Danish Agency for Culture's recommendations to the museums.

Data

The survey includes the 120 state and state-recognised museums in Denmark, covering a total of 182 departments (see Appendix 2). When the term "museums" is mentioned in the report, this includes all of the museums' 182 departments.

The 2011 survey collected a total of 51,657 questionnaires relating to state and state-recognised museums. In 2010, the museums collected a total of 56,124 questionnaires. The slightly reduced figure for 2011 is partially explained by the reduced visitor numbers to museums at the beginning of 2011¹. The target group for the questionnaires includes all users aged 14 and above able to complete

the questionnaire in Danish, English or German. A "user" is a visitor to a physical museum or someone who has participated in an arrangement inside or outside a museum which the museum has organised.

Museum categories and regional distribution

Museums are divided into three categories: art museums, cultural history museums and natural history museums.

Table 2.1 and Figure 2.1 show the regional distribution of the three categories of museum. 75% of the state and state-recognised museums in Denmark are cultural history museums, 21% are art museums and 4% are natural history museums. The North Jutland Region has the largest proportion of cultural history museums, with 86%. 29% of the museums in the Capital Region are art museums and, as such, this is the region with the highest proportion of art museums.

1) A number of museums point to the harsh winter conditions as the reason behind the reduced visitor numbers.

Table 2.1 The regional distribution of museums included in the survey

	Total	Art	Cultural history	Natural history
Denmark in total	182	38	137	7
Capital Region	45	13	30	2
Zealand Region	23	4	18	1
South Denmark Region	49	10	37	2
Mid-Jutland Region	43	8	33	2
North Jutland Region	22	3	19	0

Figure 2.1 Regional distribution of museums in the three museum categories

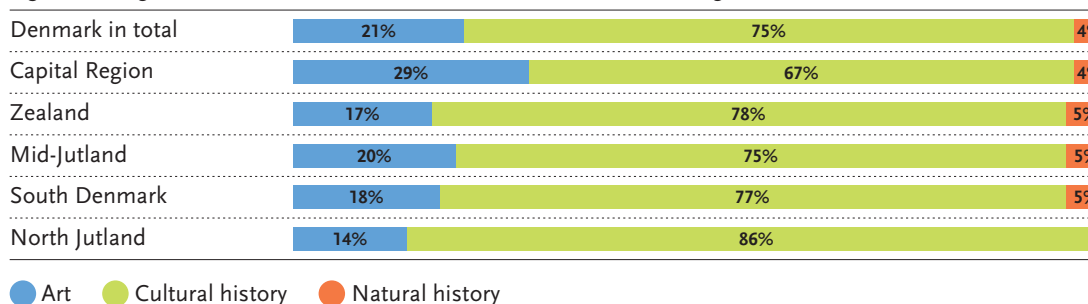


Figure 2.2 Museums according to region compared with the distribution of the Danish population

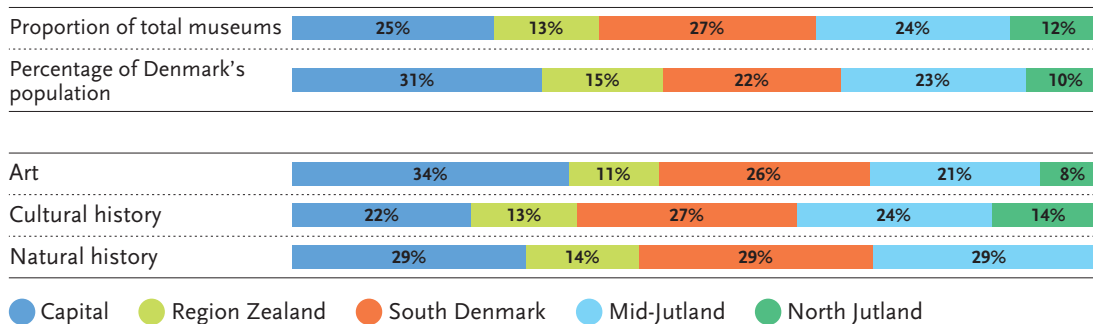


Figure 2.3 Danish and foreign users according to residency

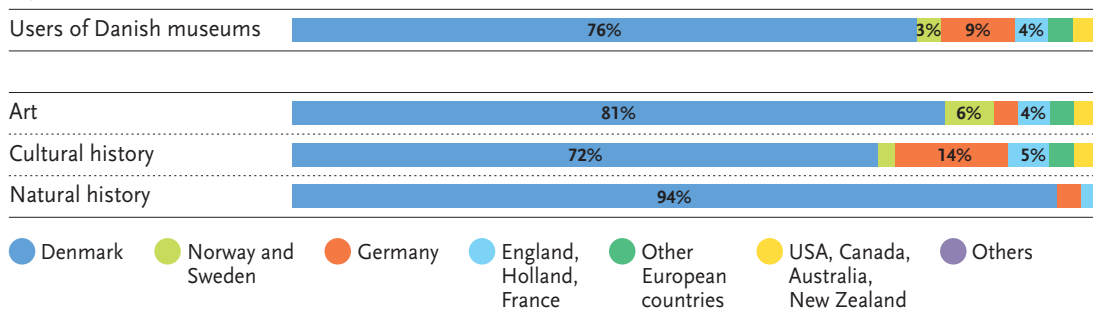


Figure 2.2 shows the location of Danish museums relative to the distribution of the population. It also shows the geographical distribution of the museums in each of the three museum categories.

25% of the museums are located in the Capital Region, while 12% of the museums are located in the North Jutland Region.

Figure 2.2 also shows the regional distribution of the Danish population. It is apparent from the figures that the regional distribution of museums approximately corresponds to the regional distribution of the Danish population.

The Capital Region, with a third of all art museums (34%), has the largest share of art museums among the regions.

The South Denmark Region is the region with the most cultural history museums, i.e. 27% of all

the cultural history museums included in the survey.

Danish and foreign users

The following sections present data material based on the following parameters: Place of residence, gender, age and education. All users are included – both those residing in Denmark and those residing abroad.

Residency

Figure 2.3 shows the distribution of users resident in Denmark and those resident abroad.

76% of users of state and state-recognised museums are resident in Denmark, while 24% of users are resident abroad.

Figure 2.4 Distribution of users resident outside Denmark (%)

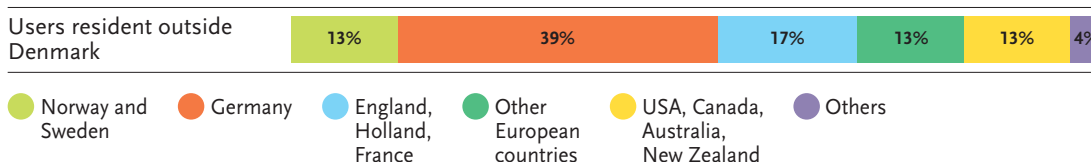


Figure 2.5 Distribution of users according to gender

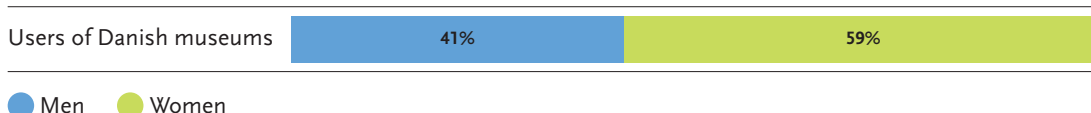


Figure 2.6 Distribution of users according to age

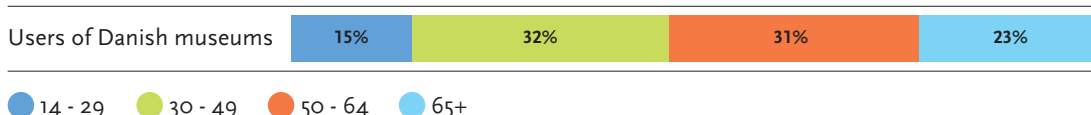


Figure 2.7 Distribution of users according to education

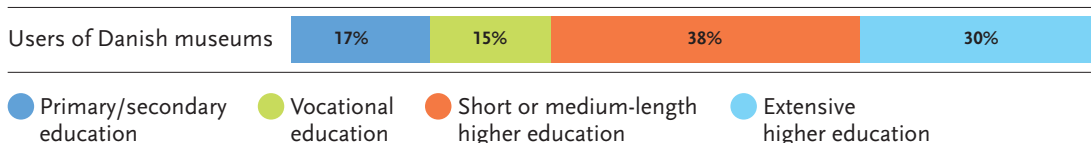


Figure 2.4 shows the distribution of users living outside Denmark

39% of the foreign users are resident in Germany.

Users residing in Norway or Sweden constitute 13% of all users residing outside Denmark. 17% of all foreign users come from England, Holland and France.

Gender

Figure 2.5 shows the distribution of users according to gender. Women represent 59% of museum users, while 41% are men.

Age

Figure 2.6 shows the distribution of users according to age categories. Those aged 14-29 are, with

15% of all users, the least-represented age group; 32% of users are aged 30-49; 31% of users are 50-64 and 23% are aged 65 or above.

Education

When the report refers to the education level of users, the term covers both those who have completed their education and those who have not yet completed it.

Figure 2.7 shows the distribution of users of Danish museums. The largest group within this category have a short or medium-length higher education (38%). This group is followed by those with an extensive higher education (30%). Those with a primary or secondary (17%) or a vocational education (15%) constitute the smallest user-groups.

Main conclusions

Danish museums are being utilised as never before. And users are generally extremely satisfied with their museum experience.

But the results of the national user survey show that Danish museums continue to face challenges in terms of their relevance for every section of society. This really becomes apparent with the 2011 national user survey, because we now have 3 years' worth of national survey results from state and state-recognised museums.

User surveys are a crucial tool for actively tackling social inequality among museum users – an inequality meaning that the young are the most underrepresented museum user group, alongside those with a primary, secondary or vocational education.

Below, we chart the broad trends characterising Danish museum users in 2011 and trends to be found in the figures from 2009-11. Unless otherwise stated, the conclusions are based upon users resident within Denmark. By and large, there is no significant development in the figures from 2009-11.

Users are extremely satisfied

Users of Danish museums rate the overall museum experience highly, with a score of 8.2 on a scale of 1-10.

Users want to actively participate

Of the museums' core activities, users of Danish museums give the lowest rating to the opportunity to participate actively, with a score of 6.7 on a scale of 1-10.

Users with an extensive higher education are overrepresented

Users of Danish museums with an extensive higher education are significantly overrepresented. They constitute 27% of museum users, but only 4% of the Danish population. The percentage of museum users with any form of higher education is 68%, compared with 25% within the Danish population as a whole.

Youth is underrepresented

The proportion of young users – those aged 14-29 – of museums is low, at 13%, compared to 23% among the Danish population as a whole. The proportion of users aged 65U rose slightly from 22% in 2009 to 26% in 2011.



Citizens with a vocational education are underrepresented

Citizens with a vocational education are the most underrepresented group at Danish museums. They constitute 15% of the museums' users, but 33% of the Danish population.

Reasons for museum visits

The proportion of users stating that they come to see the museum is 61%, whilst 30% state that they come to see particular exhibition. 39% of museum visitors are first-time users, whilst 61% have visited the museum previously.

Gender

40% of museum users are men, whilst 60% are women.

Museum visits are a social occasion

Museum use is a social occasion. 34% are accompanied and 46% arrive in a group of 3-6 people, whilst just 7% visit alone. The proportion of users arriving in groups of 3-6 has risen, whilst the proportion of larger groups visiting museums has fallen.

Differences between the three museum categories

Art museums are accounting for a growing share of museum users. 44% of users of Danish museums went to art museums in 2011. That is an increase of 5% from 2009, when art museum users constituted 39% of the total. 20% of all Danish museums are art museums.

Users of the cultural history museums constituted 53% of total museum usage in 2011, representing a fall from 58% in 2009. Cultural history museums make up 76% of all Danish museums.

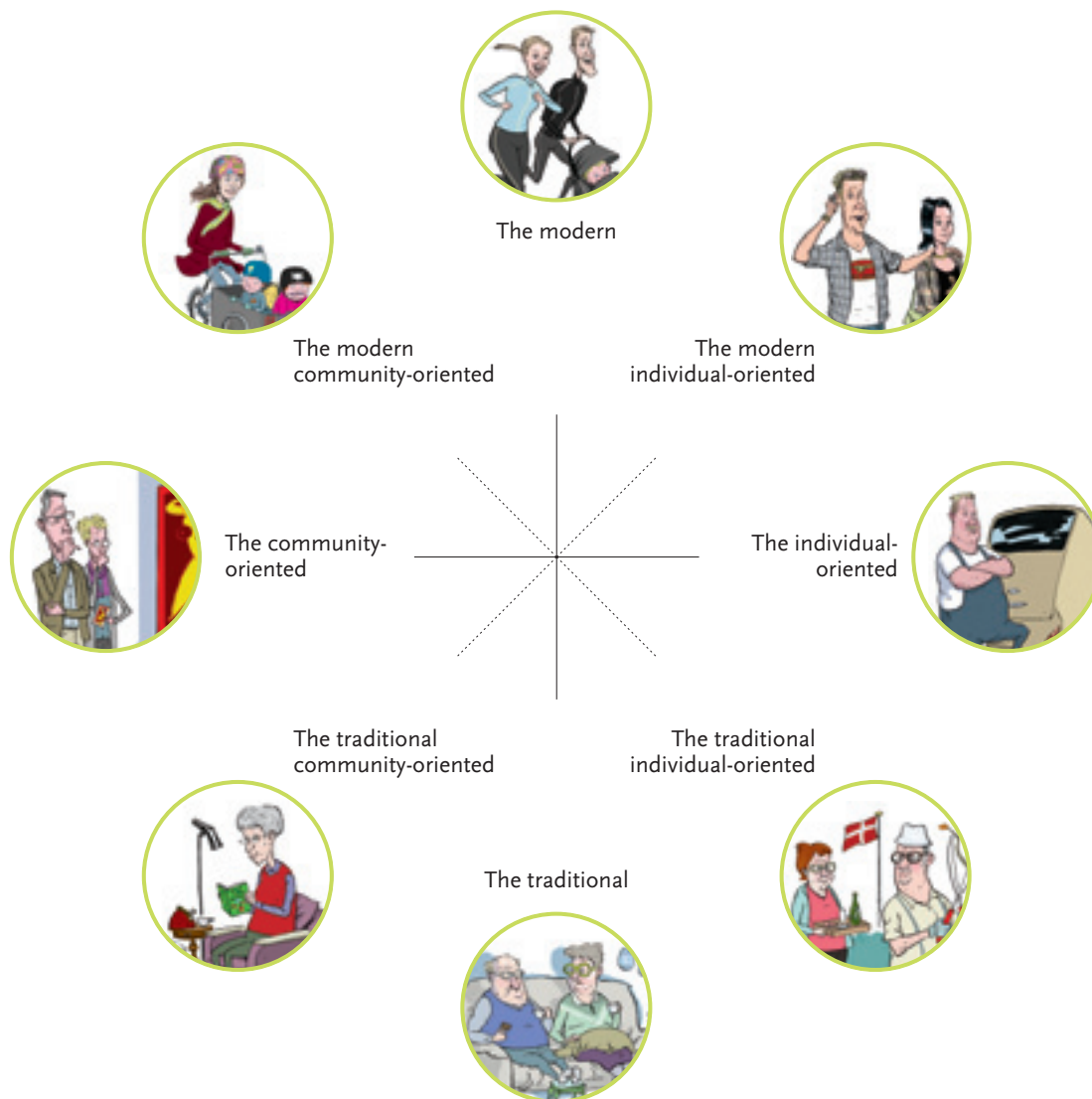
Foreign users

The proportion of foreign museum users is 24% and among these the share of young people aged between 14-29, as well as the share of users with an extensive higher education, is larger than among Danish users.

The proportion of German users rose by 5% between 2009 and 2011, while the proportion from Sweden and Norway fell by 6% during the same period.

Regional differences

In 2011 the total proportion of museum users in the Capital Region was 38%, whilst 25% of all state and state-recognised museums are located in the Region. This represents a fall of 8% in the Region's share of Danish museum users since 2009. Conversely, the Mid-Jutland Region has experienced an increase in its share of museum users. In 2011, they constituted 26% of museum users in Denmark, against 18% in 2009. The state and state-recognised museums in the Mid-Jutland region constitute 24% of all museums in Denmark.



GallupKompas

GallupKompas is a tool that divides the population into segments according to beliefs, values and lifestyles. With GallupKompas it is possible to compare the segment composition among museum users with the segment composition of the whole Danish population. (See Chapter 8 for a detailed description.)

Overrepresented segments

Four segments are overrepresented at the museums relative to the whole Danish population:

- *The modern community-oriented*
- *The community-oriented*
- *The traditional community-oriented*
- *The modern*

The modern community-oriented segment

The modern community-oriented segment constitutes the largest proportion of museum users, with 23%; this segment constitutes 12% of the Danish population. This segment increased by 3% between 2009 and 2011, whilst *the three individual-oriented* segments, along with *the traditional* segment continue to be the most underrepresented segments among users of Danish museums.

Underrepresented segments

Four segments are underrepresented at the museums in relation to the entire Danish population:

- *The traditional*
- *The traditional individual-oriented*
- *The modern individual-oriented*
- *The individual-oriented*

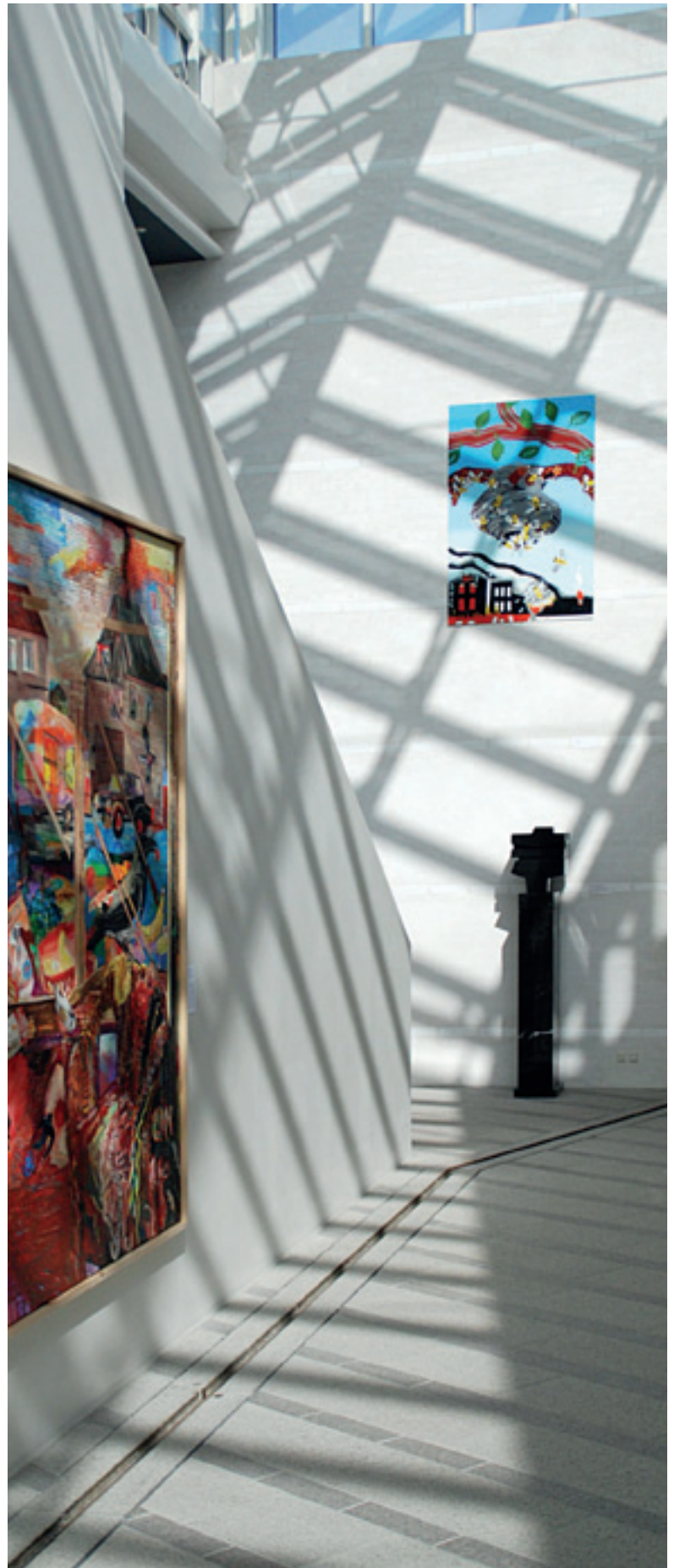
The typical and the atypical museum

The typical museum user

The typical museum user is a woman aged 52 living in the Capital Region. She has an M.A. and teaches at a secondary school. When she visits a museum, it is often an art museum in the Capital Region. She visits a museum relatively frequently – more than four times a year. She has acquired her information about the museums she uses through her previous visits, and she most often visits museums with her family, friends or acquaintances. She belongs to the modern community-oriented segment.

The atypical museum user

The atypical museum user is a man aged 25, living in the South Denmark Region. He has vocational training and goes to a museum once a year at most, typically as a result of an arrangement made by others. He belongs to the traditional individual-oriented segment.



Recommendations

The results of the user surveys challenge the museums' self-understanding as this finds expression within the organisation and among its employees, just as the results demand new professional methods and the development of new content in dialogue and partnership with citizens and institutions within society. In other words, the user surveys suggest the promotion of conditions for inclusive museums in Denmark which will contribute to the development of a cultural democracy.

The Danish Agency for Culture, working with representatives from museums and universities, has prepared a set of recommendations based upon a rethinking of the museum-as-institution, building upon continuous quality assurance and development as this relates to the museums' performance vis-à-vis citizens and the wider society.

The recommendations focus on the museums' potential as knowledge centres and learning environments and contribute to the creation of new professional standards for knowledge sharing and knowledge production. The recommendations can be divided into three categories, which mutually influence and assist in the development of each other:

Institution

- To develop a learning institute, building upon the strategic resource development of employee diversity and the specialist knowledge and skills of employees.
- To develop professional educational and communication skills.
- To challenge the institutional assumptions of employees.
- To enter into partnerships with local associations, businesses and institutions, including educational institutions.

Citizens

- To generate new knowledge connected to, and relevant for, the daily life of citizens.
- To stimulate curiosity, personal reflection and the ability to think critically.
- To create opportunities for the exploration and clarification of values able to strengthen and challenge identities.
- To contribute to the ability to deal with complexity and uncertainty and to promote responsible action and motivation.

Society

- To address challenges and opportunities in society.
- To facilitate meetings between a range of diverse social groups promoting debate and social interaction.
- To initiate long-term cooperative relations with significance for the wider society.
- To raise awareness of global influences on local conditions and decisions.

3 Trends 2009-11

This chapter shows the trends emerging from the data collected from the surveys 2009-2011.

Unless otherwise indicated, trends are based upon information provided by users resident in Denmark.

The chapter highlights the following areas:

- The profiles of museum users
- Users' evaluation of Danish museums
- The visitor patterns of museum users.

Profiles

Trends in user profiles are examined in terms of the proportion of Danish and foreign users and in terms of the gender, age, education and place of residence of Danish users.



Figure 3.1 Danish and foreign museum users according to residency (2009-11)

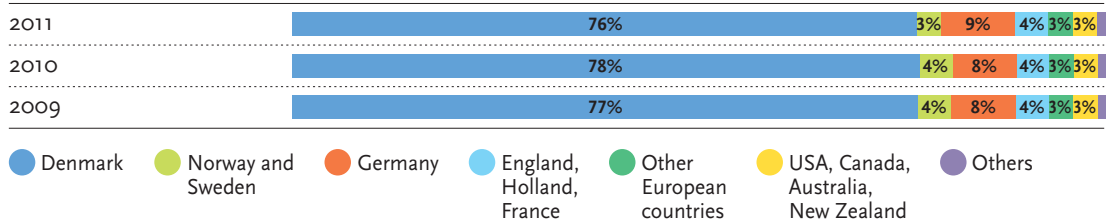
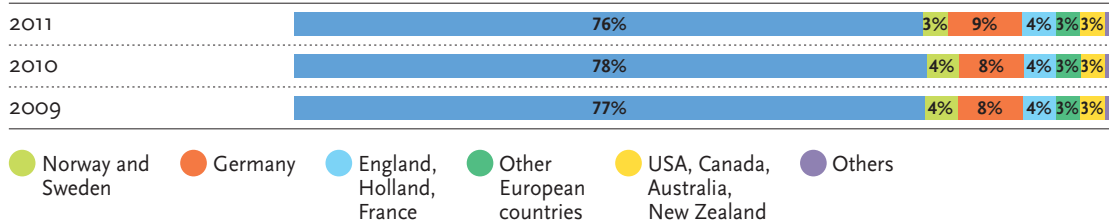


Figure 3.2 Foreign museum users according to place of residence (2009-11)



Danish and foreign users

Figure 3.1 shows the breakdown according to place of residence of Danish and foreign museum users in 2011 compared to 2009 and 2010.

76% of users were resident in Denmark, which was comparable to their share in 2009 and 2010.

Figure 3.2 shows where users resident outside Denmark came from in 2011 compared to 2009 and 2010.

Users resident in Germany continued to constitute the largest single group of foreign visitors to the museums. With a 39% share of all foreign users, there was a rise of 3% in the proportion of German users in relation to 2010 and of 5% in relation to 2009.

The proportion of users resident in Norway and Sweden, by contrast, fell by 6% from 19% in 2010 to 13% in 2011. The shares were otherwise comparable to other years.

Danish users

The figures on the following page show who users resident within Denmark are distributed according to gender, age and education.

Gender

Figure 3.3 shows the distribution of museum users according to gender in 2011 compared to 2009 and 2010. The proportion of women and men was similar in 2011 to that of 2009 and 2010.

Figure 3.4 shows the gender distribution of museum users divided according to museum category in 2011 compared to 2009 and 2010. This shows that the proportion of men and women divided according to museum category remained at the levels of 2009 and 2010.

Age

Figure 3.5 shows the age distribution of museum users in 2011 compared to 2009 and 2010. The distribution was largely unchanged from 2010 to 2011.

Figure 3.6 shows the age distribution of museum users according to museum category in 2011 compared to 2009 and 2010.

At art museums there was a fall in the proportion of 50 to 64-year-olds compared to 2010 and this age group constituted 35% of art museum users in 2011.

The age distribution of cultural history museums remained roughly the same in 2011 as in 2010.

The proportion of natural history museum users aged 30-49 fell by 4%, whilst the proportion aged 14-29 and 65U rose by 2%.

Figure 3.3 Gender distribution of museum users (2009-11)

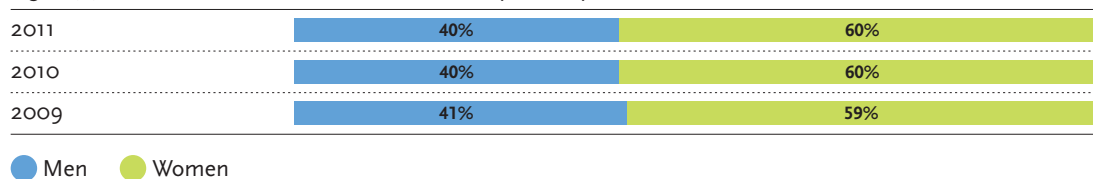


Figure 3.4 Gender of museum users according to museum category (2009-11)

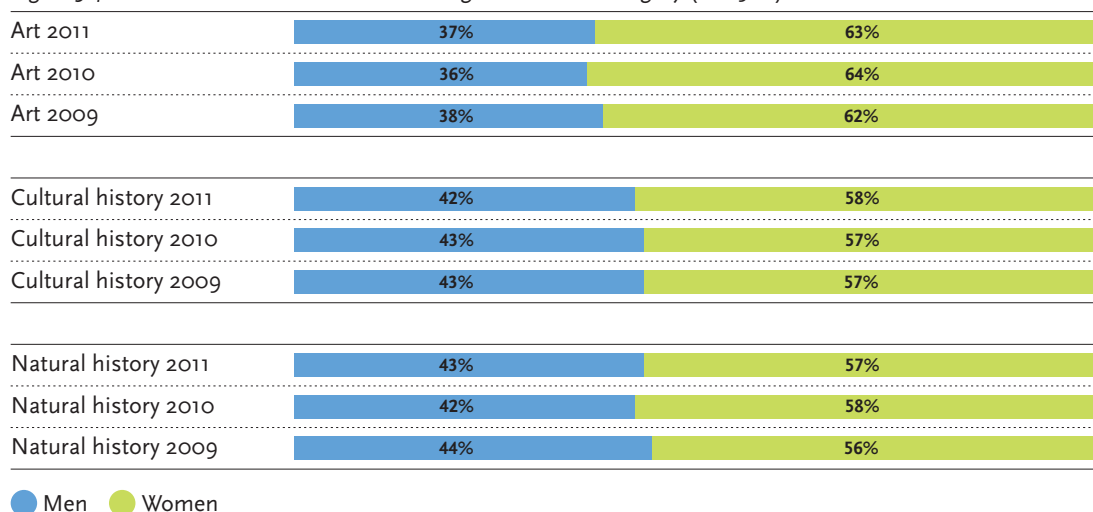


Figure 3.5 Age distribution of museum users (2009-11)

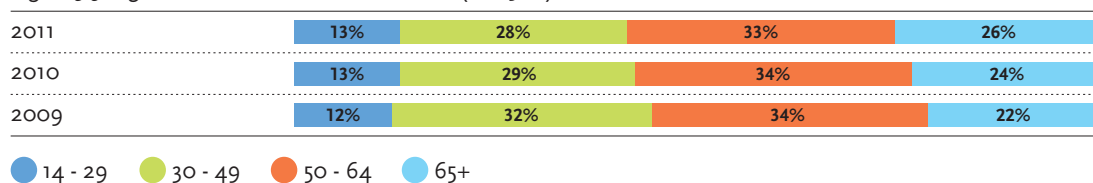


Figure 3.6 Age distribution of museum users according to museum category (2009-11)

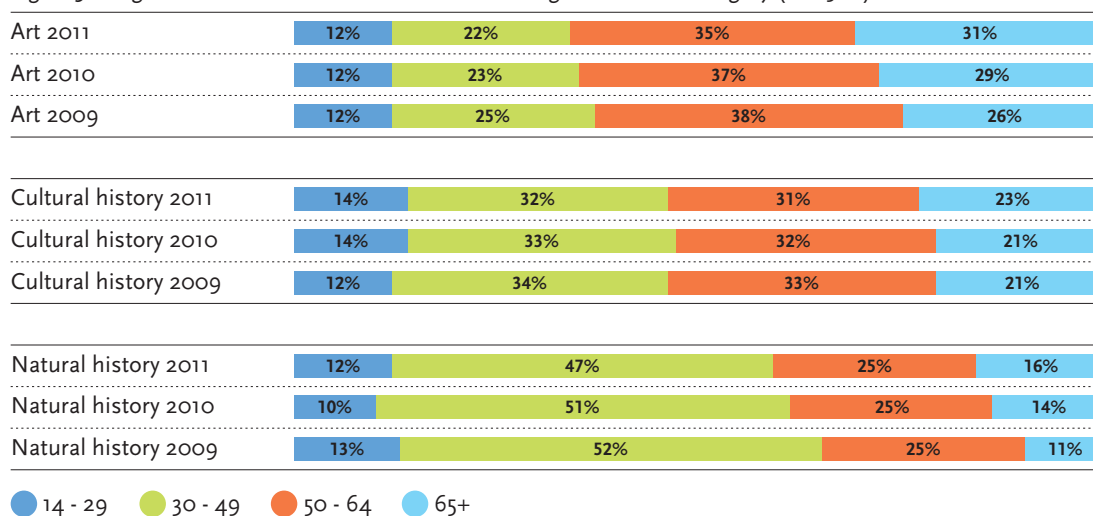


Figure 3.7 Education of museum users (2009-11)

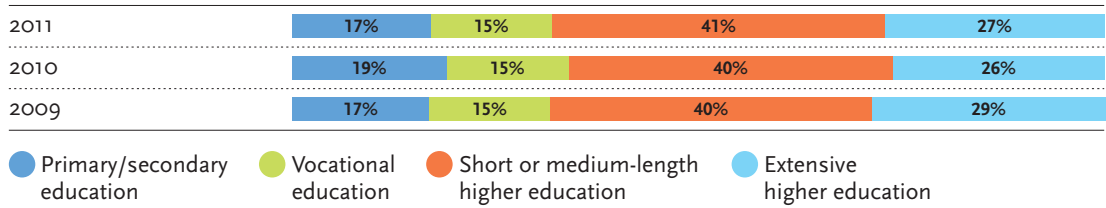
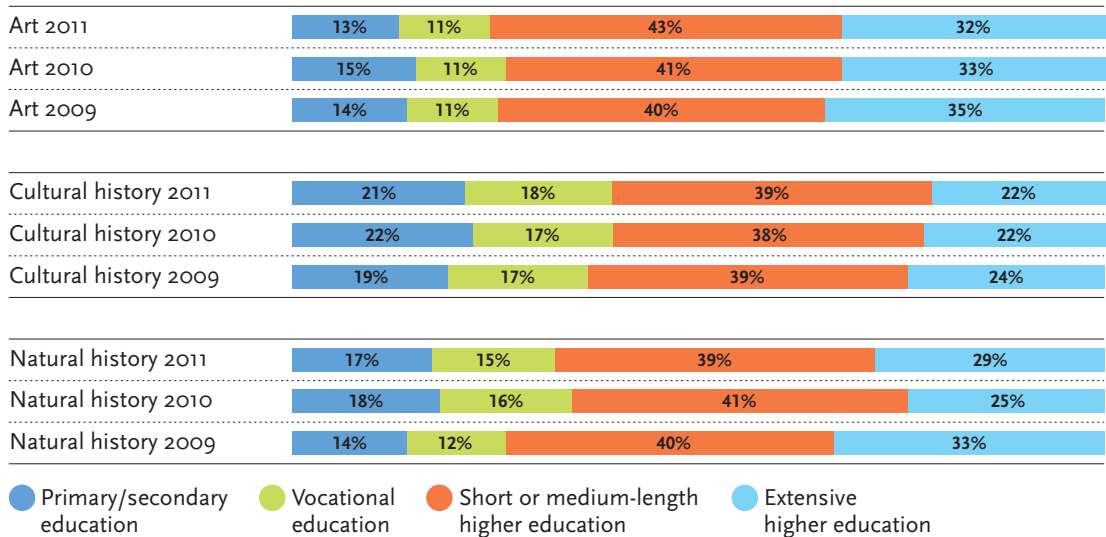


Figure 3.8 Education of museum users according to museum category (2009-11)



Education

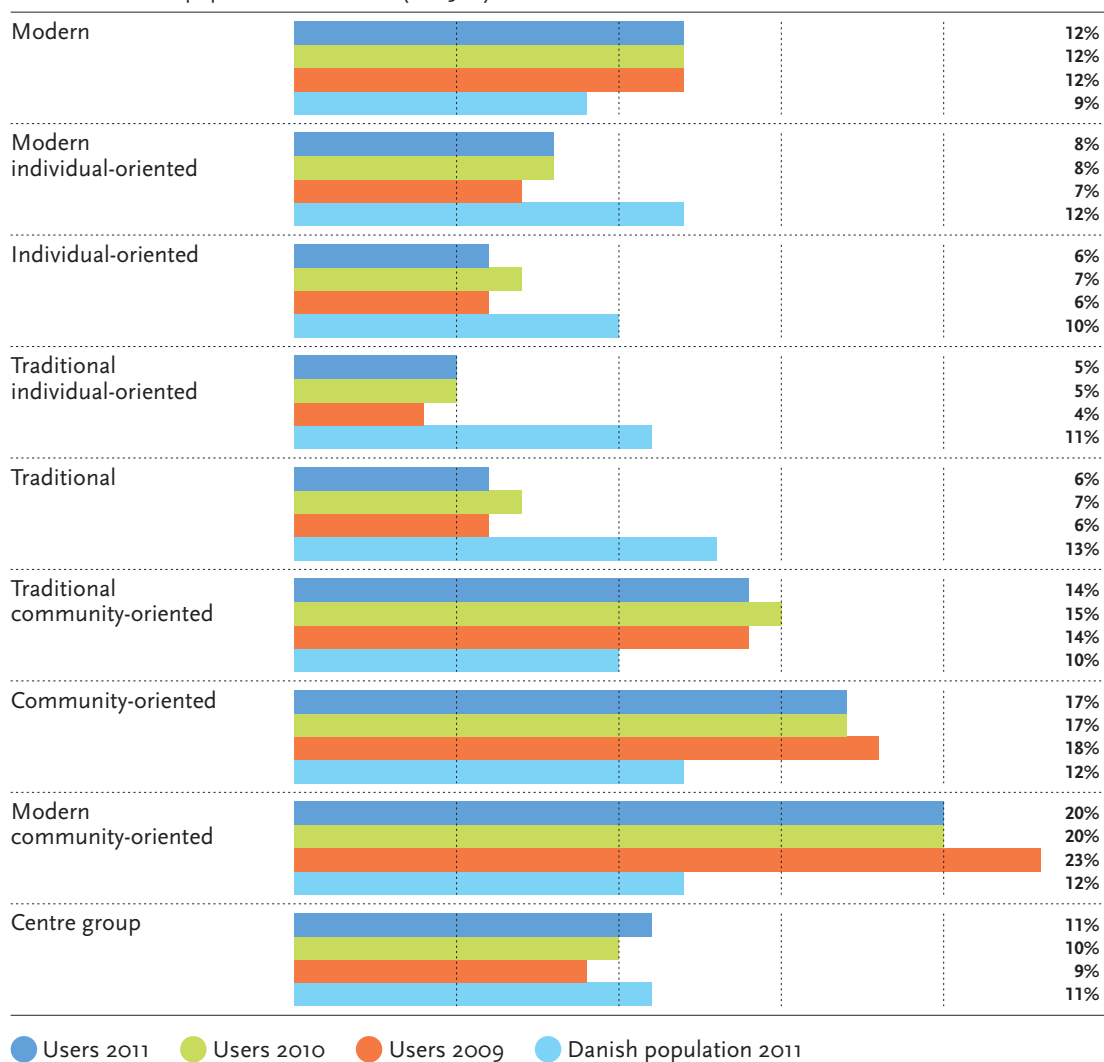
Figure 3.7 shows the distribution of museum users according to education in 2011 compared to 2009 and 2010.

In 2011 the proportion of museum users with a secondary (high school) educational background returned to the same level as in 2009 (17%); in 2010 the figure was 19%.

Figure 3.8 shows the distribution of museum users' educational backgrounds according to museum category in 2011, compared to 2009 and 2010.

The only noteworthy change from 2010 to 2011 was that natural history museums experienced an increase in the number of users with an extensive higher education. That group now constitutes 29% of users compared to just 25% in 2010. This occurred at the expense of the three other groups of users with a shorter education.

Figure 3.9 Distribution of museum users according to GallupKompas's segments and the segment distribution within the Danish population as a whole (2009-11).



Segments

Figure 3.9 shows the distribution of museum users according to GallupKompas's nine segments in 2009, 2010 and 2011, alongside the distribution of these segments within the Danish population as a whole. (See Chapter 9 for an introduction to GallupKompas's nine segments.)

The modern community-oriented segment is, with 23%, that which in 2011 constituted the largest single share of museum users; it is also the segment with the greatest share increase in relation to 2009 and 2010, i.e. 3%.



Figure 3.10 Users' evaluation of their overall museum experience (2009-11)

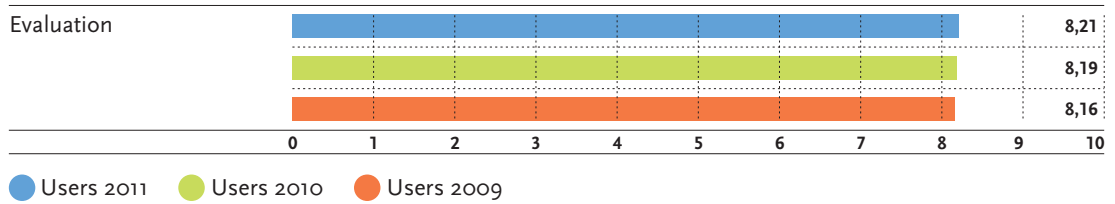
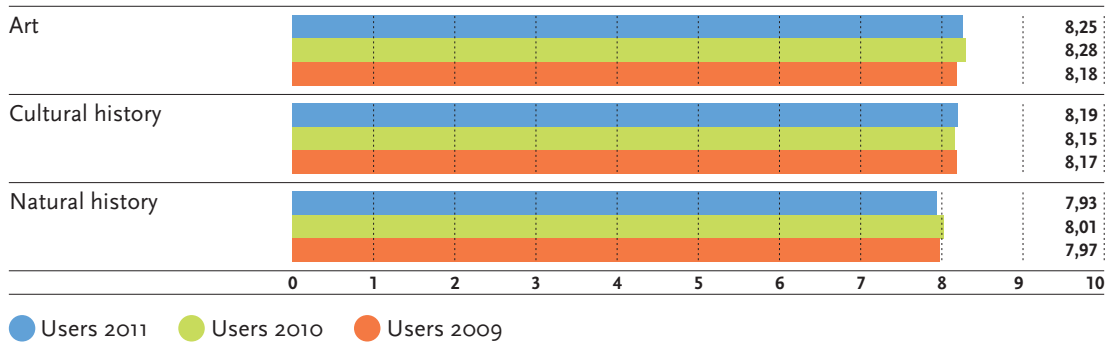


Figure 3.11 Users' evaluation of their overall museum experience according to museum category (2009-11)



Evaluations

This section shows the trend in users' average evaluation of their overall museum experience from 2009-2011, as well as the users' assessment of the core services provided by the museums, the museums' service and practical arrangements, and satisfaction ratings on a sliding scale.

Thee overall museum experience

Figure 3.10 shows museum users' average evaluation of their overall museum experience in 2009, 2010 and 2011.

Users' average evaluation of their overall museum experience in 2011 (8.21) was similar to that of 2009 (8.16) and 2010 (8.19).

Figure 3.11 shows museum users' average evaluation of their overall museum experience according to museum category in 2011 compared to 2009 and 2010.

The figures were broadly in line with those in 2009 and 2010, as can be seen in Figure 3.10.

Museums core services

Figure 3.12 shows museum users' average evaluation of the core services provided by museums in 2011 compared to 2009 and 2010.

The evaluation score was broadly in line with that of 2010.

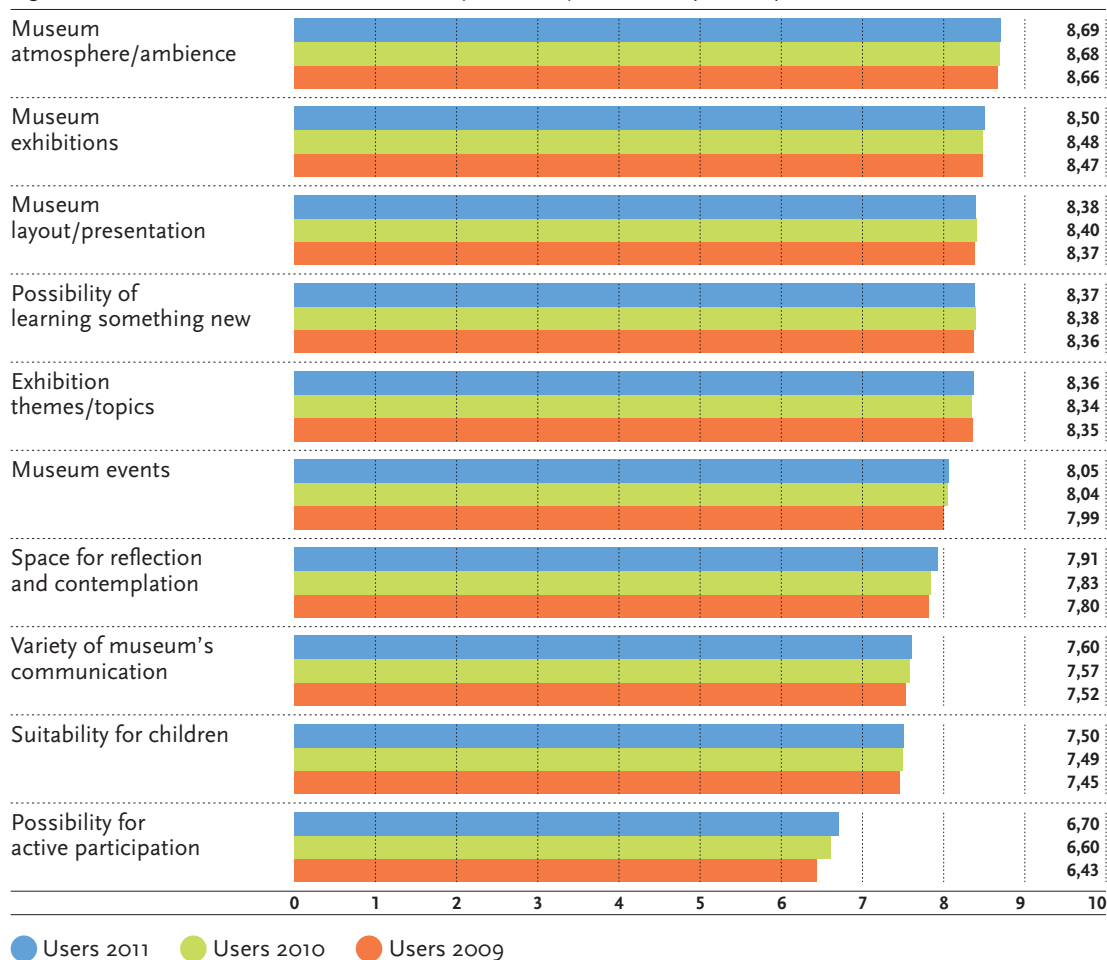
The biggest increase in the evaluation score of museums' core services was for "the possibility of active participation", for which the average score rose from 6.4 in 2009 to 6.7 in 2011, although this remains the lowest-rated of all the core services provided by museums.

Satisfaction ratings on a sliding scale

Figure 3.13 shows users' average evaluation of museums on a sliding scale in 2011 compared with 2009 and 2010.

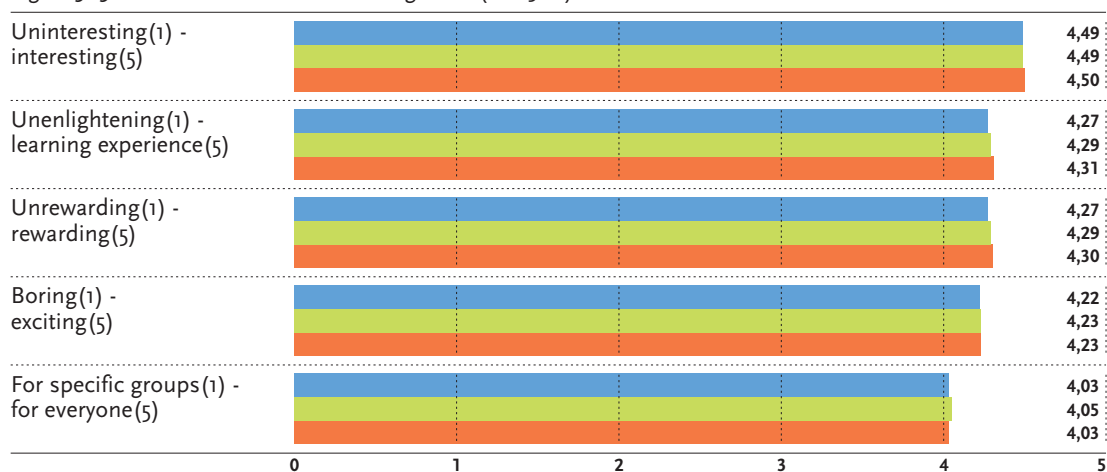
On this scale, their evaluation scores were slightly below those of 2010. The largest fall was seen within the categories "unrewarding – rewarding" and "unenlightening" – "a learning experience": in both categories the score was 4.27 in 2011, compared with 4.29 in 2010.

Figure 3.12 Users' evaluation of core services provided by museums (2009-11)



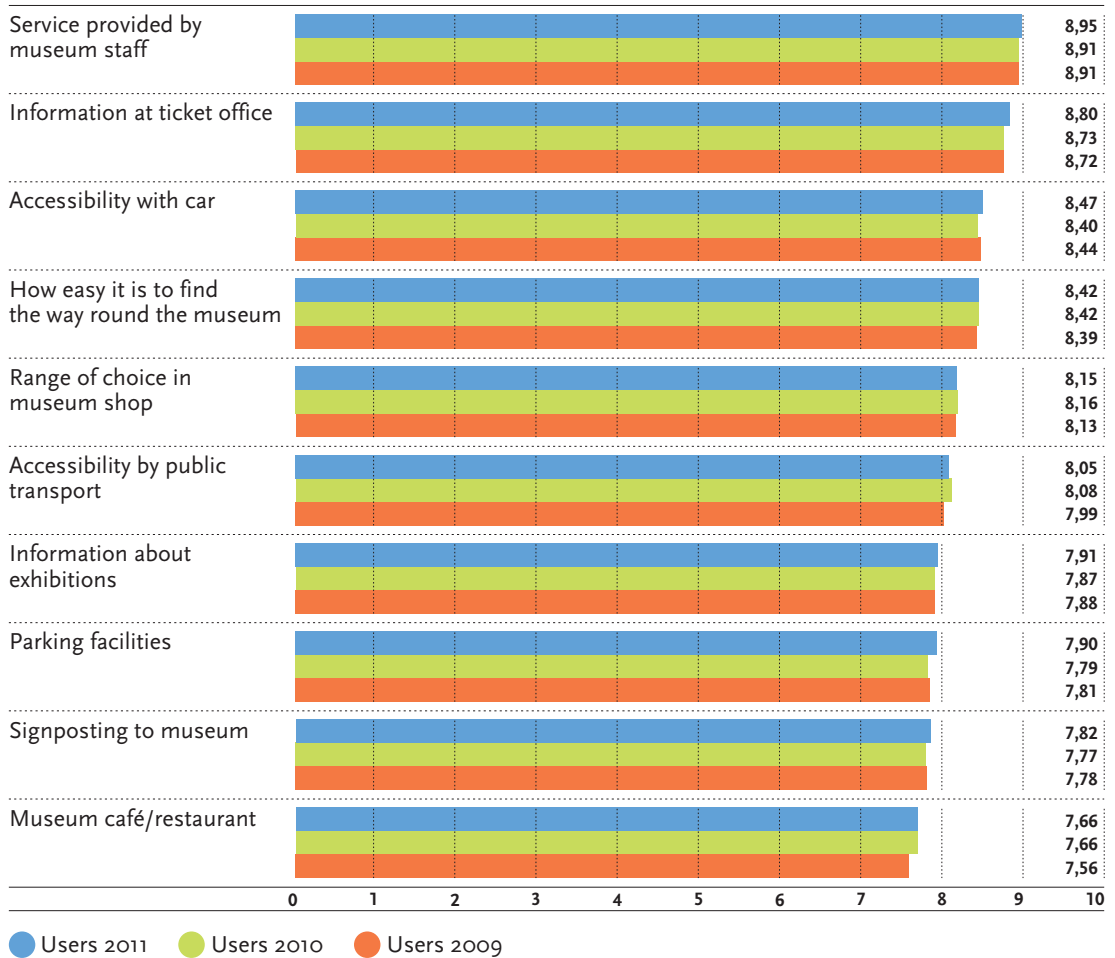
● Users 2011 ● Users 2010 ● Users 2009

Figure 3.13 Users' evaluation on a sliding scale (2009-11)



● Users 2011 ● Users 2010 ● Users 2009

Figure 3.14 Users' evaluation of the service level and practical arrangements provided by museums (2009-11)



Service levels and practical arrangements at museums

Figure 3.14 shows users' average evaluation of the service level and practical arrangements provided by museums compared with 2009 and 2010. Generally, there was a small improvement on the 2010 level in all areas. The biggest advance occurred in the evaluation of "parking facilities", which rose to 7.9 in 2011, compared with 7.79 in 2010. Satisfaction ratings for "accessibility by car" and "information at ticket office" increased by 0.07 in 2011 compared to 2010. The biggest fall occurred in the category "accessibility by public transport", which fell to 8.05 in 2011 from 8.08 in 2010.

Visiting patterns

This section shows the trends in users' visiting patterns according to the three museum categories, their geographical location, reasons for visiting, frequency of visits, group size and whether users are first-time or repeat visitors.

Museum categories

Figure 3.15 shows the proportion of museums and museum users divided according to museum category in 2011, compared with 2009 and 2010.

There was an increase (from 39% to 44%) in the proportion of users of art museums, against the proportion of cultural history museum users, which fell from 58% to 53%.

Figure 3.15 Users and museums according to museum category (2009-11)

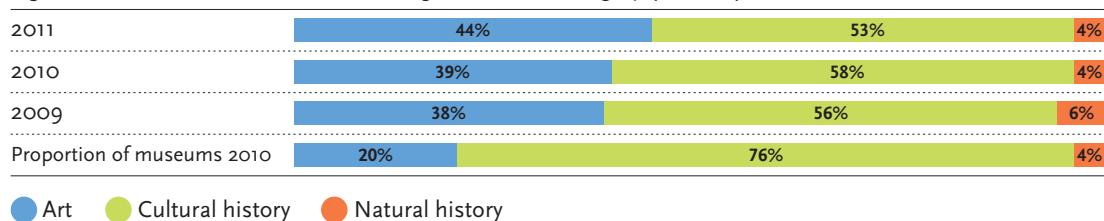
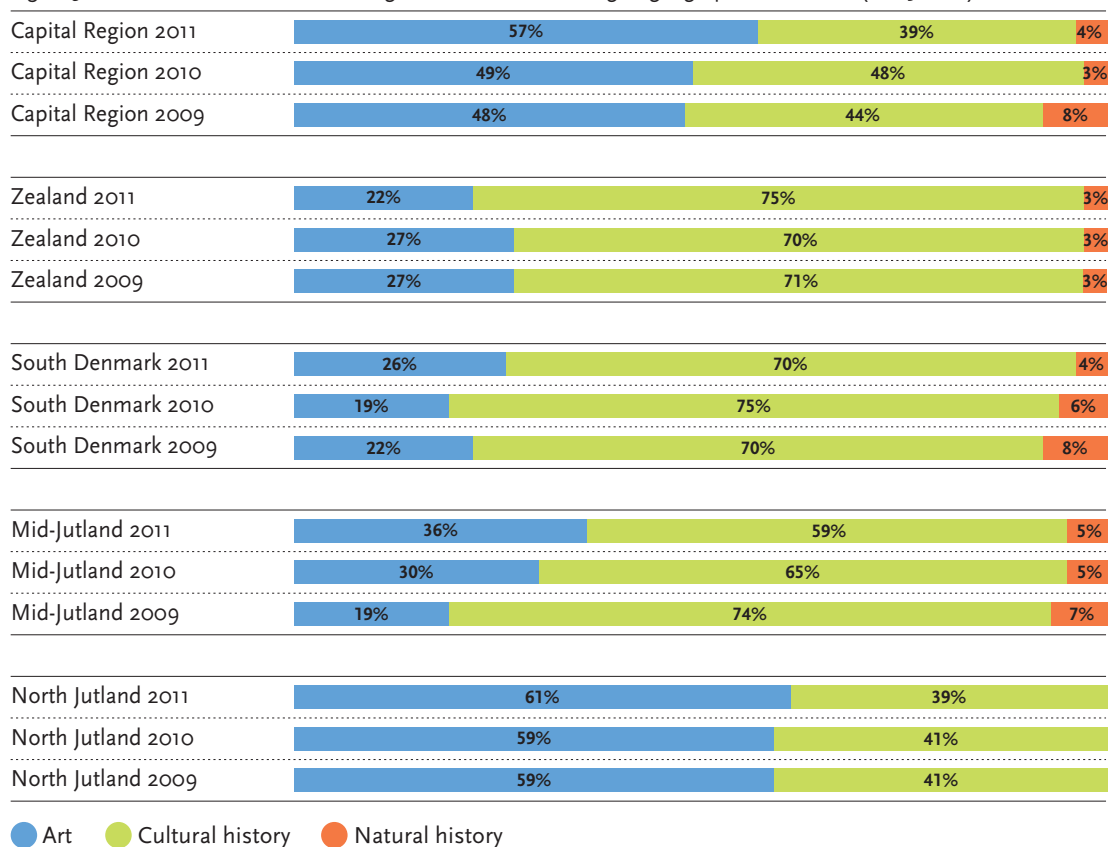


Figure 3.16 User share of museum categories divided according to geographical location (2009-2011)



Region

Figure 3.16 shows users of the three museum categories divided according to the geographical location of the museums in 2011, compared with 2009 and 2010.

In the Capital Region, South Denmark Region and Mid-Jutland Region the proportion of users of art museums increased by 8%, 7% and 6% respectively. Conversely, there was a corresponding fall in the proportion of users of cultural history museums. Within the Zealand Region, the proportion of users of art museums fell from 27% in 2010 to

22% in 2011. This led to an increase in the proportion of users of cultural history museums from 70% in 2010 to 75% in 2011.

The distribution of users in the North Jutland region remained largely unaltered. There was also little change in the proportion of users of natural history museums.

In the South Denmark Region that was a significant fall in the proportion of users of natural history museums from 6% to 4%, while the proportion of art museum users increased from 22% in 2009 to 26% in 2011.

Figure 3.17 Museums and users divided by region (2009-11)

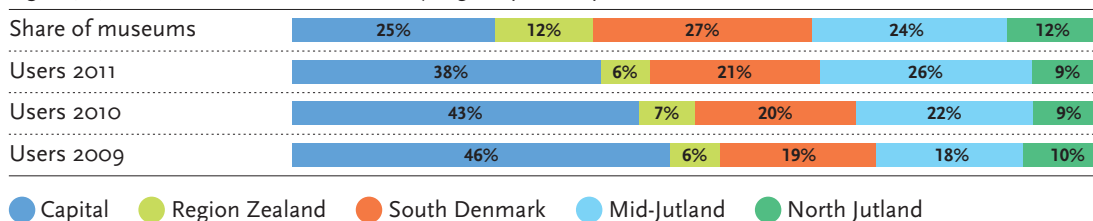


Figure 3.18 Museum users shown by category and divided according to the geographical location of the museum (2009-11)

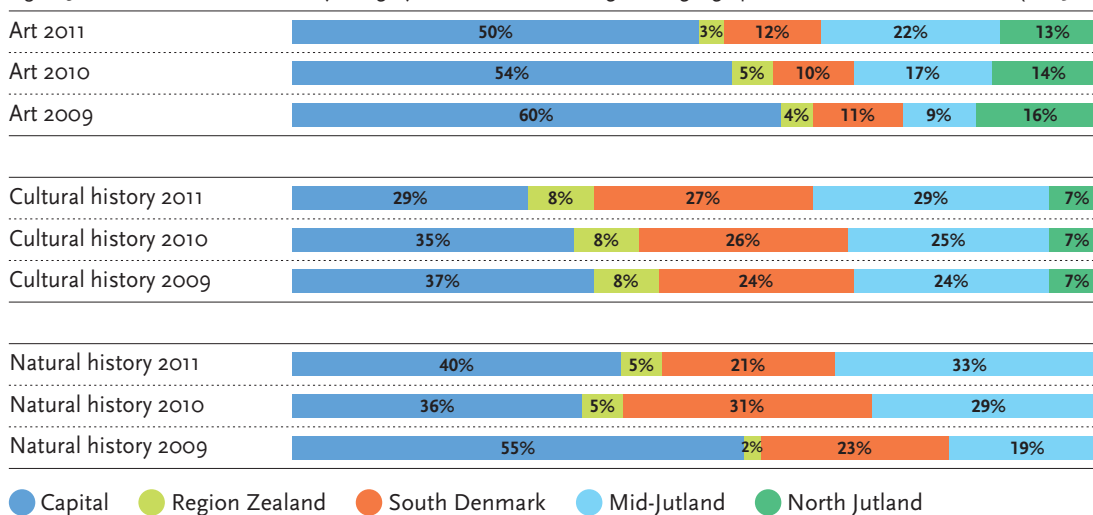


Figure 3.17 shows the museums' geographical distribution as well as the share of users in the museums' regions. The share of the Capital Region museums' share of total users fell from 43% in 2010 to 38% in 2011. The share of users in the Mid-Jutland Region increased from 22% of total users in 2010 to 26% in 2011. The South Denmark Region enjoyed a smaller increase in its share of users, from 19% in 2009 to 21% in 2011.

However, the Capital Region, with 25% of all Danish museums, is significantly overrepresented in terms of its share of total users compared to the other regions.

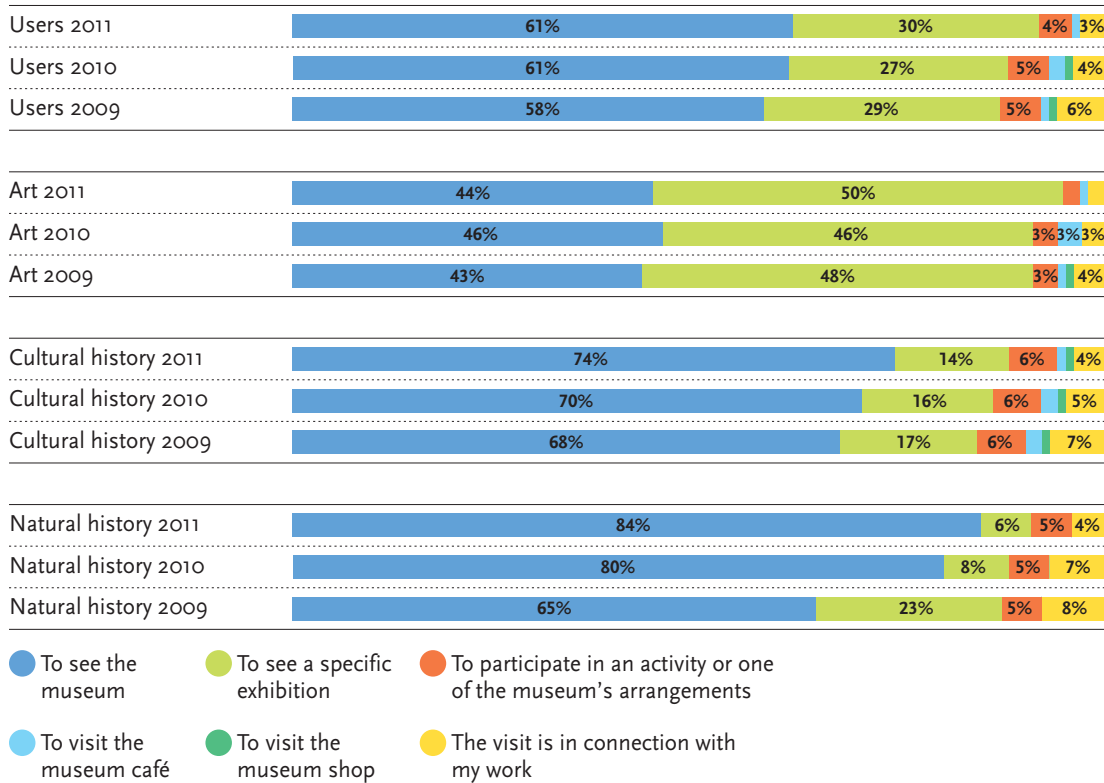
Figure 3.18 shows museum users according to category and divided into geographical location. The proportion of art museum users attending

museums in the Capital Region fell by 4% in relation to 2010, whilst the proportion attending their Mid-Jutland equivalents rose by 5%. 29% of all users of cultural history museums visited a museum in the Capital Region, which was a fall in comparison to the 2010 figure of 35%.

The share of cultural history museum users visiting a museum in the Mid-Jutland Region increased to 29% in 2011, compared to 25% in 2010.

Within the category of natural history museums, the share of museum users in the Capital Region increased by 4% to 36%. There was also a rise in Mid-Jutland's share of natural history museum users, to 33%, while there was a large fall in corresponding users within the South Jutland Region, with its share falling to 21% from a 2010 figure of 31%.

Figure 3.19 Reasons for museum visit divided according to museum category (2009-11)



Reasons for museum visit

Figure 3.19 shows the reasons given by museum users for their visits, divided according to museum category, in 2011 compared with 2009 and 2010. The figure shows that the most important reason given for museum visits during the three years as a whole is "to see the museum". The 2011 proportion giving this reason was the same as in 2010 (61%). "To see a specific exhibition" is the second most important reason, given by 30% of users in 2011, an increase from 27% in 2010.

The largest proportion of art museum users (50%) gave "to see a specific exhibition" as the main reason for their visit, against 44% stating "to see the museum".

At the cultural history and natural history museums, on the other hand, by far the greatest number of users came "to see the museum", with 74% and 84% of respective visitors giving this response as the reason for their visit. Both museum categories saw a rise of 4% from 2010.



Figure 3.20 Frequency of visits divided according to museum category (2009-11)

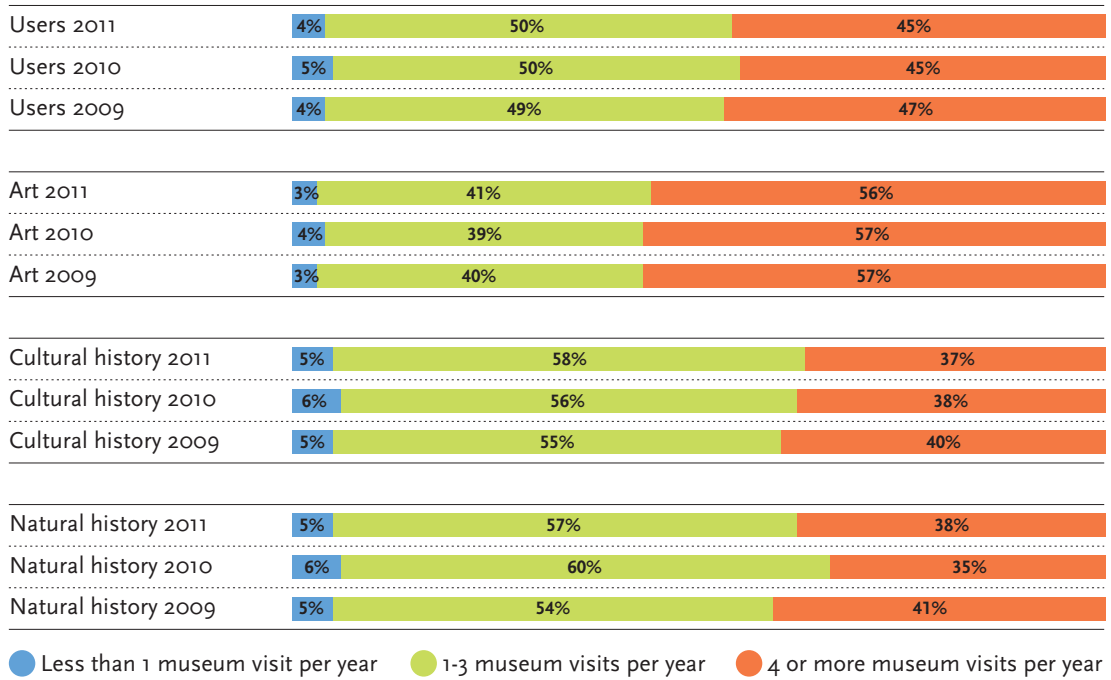


Figure 3.21 Group sizes (2009-11)

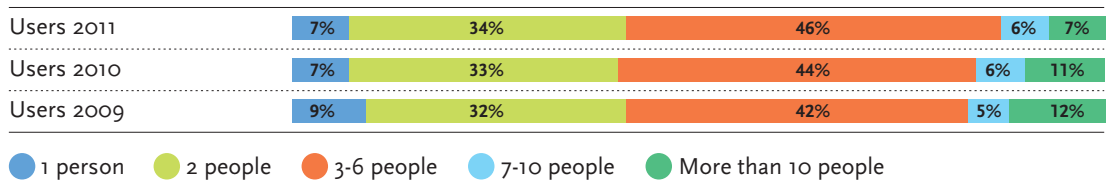
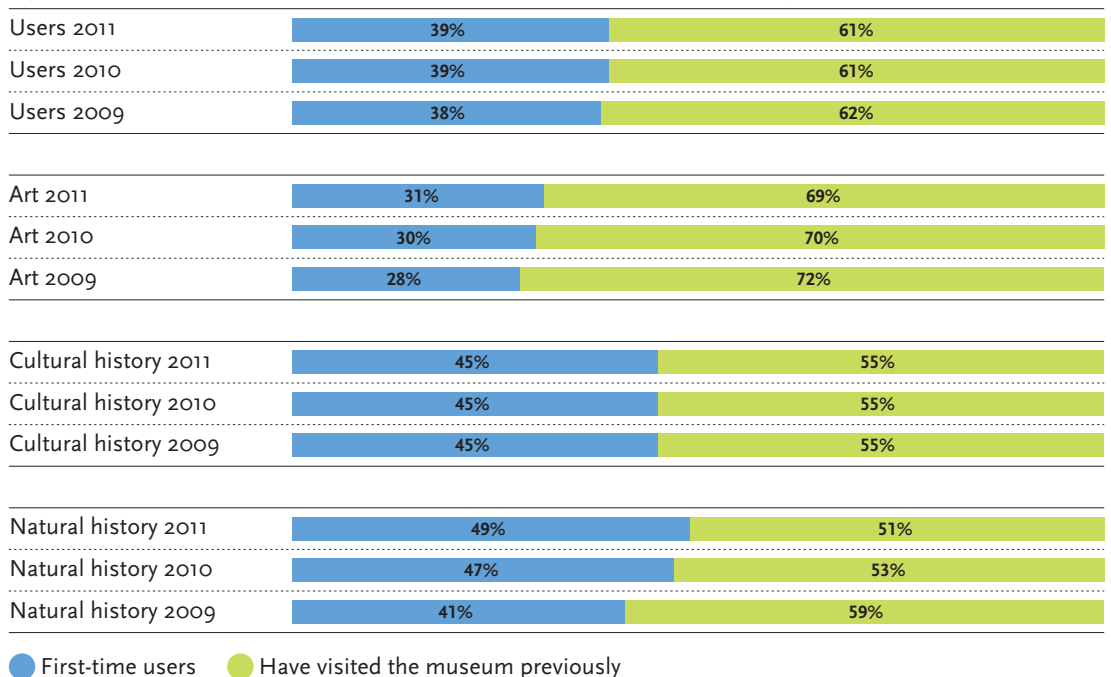


Figure 3.22 First-time users and repeat users, divided according museum category (2009-11)



Frequency of visits

Figure 3.20 shows the museum users' total frequency of visits, divided according to museum category in 2011, compared with 2009 and 2010.

The 2011 distributions were roughly on a par with those of 2009 and 2010.

At natural history museums, the proportion visiting museums between 1 and 3 times a year fell by 3%, and those visiting more than 4 times a year increased by 3%.

Groups

Figure 3.21 shows the trend in group sizes at museums from 2009 to 2011.

The figure shows that once again only 7% of users of Danish museums visited alone, whilst 34% were accompanied by a companion.

The proportion of users visiting museums in groups of 3-6 increased from 44% in 2010 to 46% in 2011. At the same time, the proportion of groups of over 10 people fell by 4% from 11% in 2010 to 7% in 2011.

First-time users and users with previous visits to the museum

Figure 3.22 shows the proportion of first-time users and users who had visited the museum previously totalled and divided according to museum category in 2011, compared with 2009 and 2010.

The proportion of first-time users was largely unchanged from 2009 to 2011 within all museum categories. Art museums experienced an increase of 3% in their share of first-time visitors. Natural history museums experienced an increase in their proportion of first-time visitors of 8%, from 41% in 2009 to 49% in 2011.

Summary

The proportions of Danish and foreign users, as well as the distribution of foreign users by country, remained largely unchanged from 2009 to 2011.

The ratio of women and men among museum users was around the same level in 2011 as in 2009 and 2010.

The proportion of users aged between 14 and 29 was the same in 2011 as in 2010. There was a small increase in the share of users aged 65 and above.

The share of museum users with a secondary education fell from 2010 to 2011, while the share of users with the longest education rose.

The proportion of the centre group segment increased between 2010 and 2011.

The three most underrepresented segments at the museums in relation to the Danish population as a whole were the modern individual-oriented, the traditional and the traditional individual-oriented.

In general, users' evaluations of Danish museums in 2011 were on a par with those of 2010.

The share of users visiting an art museum increased, while the share of users visiting a cultural history museum fell.

The share of users visiting a museum in the Capital Region fell, while the share of users visiting a museum in the South Denmark Region increased.

Most users gave "to see the museum" as their main reason for visiting the museum. This is on a par with 2010. A smaller percentage of users gave "to see a specific exhibition" as their main reason.

The ratios of first-time visitors and those having visited the museum previously were largely unchanged.

The share of users visiting in groups of 3-6 people increased between 2010 and 2011.



5 User evaluations of museums

Summary

Users rated their overall museum experience highly, with an average score of 8.21 on a scale of 1 to 10.

Art museums received a marginally higher overall rating than cultural history and natural history museums.

The three "traditional" GallupKompass segments generally rated museums more highly, while the lowest ratings were given by the three "modern" segments and the centre group (see Chapter 9 for a description of the segments).

Female users were a little more satisfied with the museums overall than male users, and older users were typically more satisfied than their younger counterparts.

Satisfaction with the museum experience was highest among those users who visit museums frequently, alongside those spending a long time at the museums.

Users rated most of the museums' core services at 7.5 or higher on a scale of 1 to 10.

On the whole, users scored the "atmosphere at the museum" and the "museum's exhibitions" most highly, and gave the lowest ratings to "suitability for children" and "possibility for active participation".

The biggest difference in the evaluation of core services occurred between art museums and natural history museums, with the latter receiving a notably higher score for "suitability for children" and "possibility for active participation".

In general, users regarded museums as being interesting, educational and rewarding. Users gave a slightly less positive reaction when asked whether museums are "for everyone".

Art museums were regarded by users as being more "for specific groups" than was the case for cultural history and natural history museums.

According to the evaluation of users, of museums' services and practical arrangements provided by museums the most highly rated were "service levels provided by employees" and "information provided by the ticket office", while a relatively low score was given to "the museum's café and restaurant".

For natural history museums, "accessibility by car" was rated relatively highly, while "the museum's café and restaurant" received the lowest rating of all, compared with both art and cultural history museums.



6 Profile of museum users

Summary

Six out of ten museum users are women, while women make up around half of the Danish population.

Art museums in particular have many female users.

Female museum users are overrepresented in almost all age groups in relation to the proportion of women in the population. However, this does not apply to the 65U age group, within which the share of female users is the same as the proportion of women within the population.

Conversely, male users are underrepresented in almost all age groups in relation to the proportion of men within the population. However, this does not apply to the 65U age group, within which the share of male users is the same as the proportion of men within the population.

Women are overrepresented at museums within all educational levels in relation to the proportion of women with corresponding educational levels within the Danish population as a whole. Men are similarly underrepresented.

The 14-29 age group is significantly underrepresented at museums in relation to their share of the population. Art museums have the oldest users, while natural history museums have the youngest users.

Both men and women in the 50-64 age group are significantly overrepresented at museums in relation to this age group's share of the Danish population.

Museum users have a longer education than the population as a whole and, in particular, those users with an extensive higher education are overrepresented at museums. Conversely, users with a secondary (high school) educational background and those with a vocational education are underrepresented at museums. Art museums in particular have a large number of users with an extensive higher education.

Museums have a relatively high number of users resident in the Capital Region and relatively few users resident in the North Jutland Region. Of art museum users, almost half are resident in the Capital Region.



7 Visitor patterns

Summary

Art museums have the largest share of users in relation to their share of museums included in the survey. Cultural history museums have correspondingly fewer users in relation to their share of all museums.

Around four out of ten museum users attend museums in the Capital Region.

In the North Jutland Region, slightly over six out of ten users visit an art museum.

More than six out of ten users have visited a museum before, most of them art museums. Natural history museums have the highest proportion of first-time users.

Museums have a particularly high number of first-time users in the May-August period.

Half of all museum users visit museums between 1 and 3 times a year.

Older users typically make more museum visits per year than younger users. Users with an extensive higher education attend museums more often than users with a shorter education.

Approximately six out of ten users come "to see the museum", with natural history museums accounting for the highest ratio. A relatively high number of users of art museums come "to see a specific exhibition".

Half of all users spend less than two hours at the museum. Cultural history museums have the highest proportion of visitors spending over three hours on a visit compared with the other two categories.

For the great majority, a museum visit is a social event. Only 7% of all users visit museums alone. More than 50% of all users visit museums with their family, friends or acquaintances.

68% of all users visiting natural history museums do so with their family, friends or acquaintances.

Just under half of all users know the museum from previous visits. Many have also heard about the museum from family, friends or acquaintances.

Most users come to the museum from their homes.

8 Compass analysis

Summary

The modern community-oriented, the community-oriented, the traditional community-oriented and the modern are overrepresented among museum users in relation to these segments' representation within the entire Danish population.

The traditional individual-oriented, the traditional, the individual-oriented and the modern individual-oriented are underrepresented.

Art museums, cultural history museums and natural history museums all attract relatively high numbers of modern community-oriented and community-oriented users.

A majority of users from all segments prefer cultural history museums. Relatively speaking, however, cultural history museums are most popular among the individual-oriented and the traditional

individual-oriented. The modern community-oriented and the community-oriented have a relatively high preference for art museums.

The three community-oriented segments have the relatively highest share of users visiting a museum at least four times a year. The three individual-oriented segments have the fewest.

The majority of users in all segments come "to see the museum", but the three community-oriented segments account for a relatively high number of users visiting "to see a specific exhibition".

Users from all segments indicate most frequently that they know of the museums from previous visits. A relatively high number of the modern and the modern community-oriented users indicate that they know of the museums from family, friends and acquaintances, or from the internet.





