The National Archives

Digital services and archive audiences: Local Authority archives 2014

A research study

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Foreward

Over the last two decades, increased internet access and more affordable digital technologies have opened up culture and heritage organisations to a global audience. Archives are no exception. Searchable, aggregated online catalogues, such as The National Archives' Discovery, epitomise this era of highly-connected, easily-accessible, and wide-ranging information; millions of records across thousands of archive collections in the UK are now available with one simple click.

Just as the audience for archives is changing, and the way people find information has been transformed by digital technologies, the content and format of collections have never been more far-reaching in scope. Archives now provide digitised copies of many physical records and also catalogue 'born-digital' material, such as websites and social media activity. Better online finding aids and broader, richer collections provide individuals and communities with unparalleled opportunities to understand and explore their past, exemplified by the rise in family and house history.

Whether at The National Archives, university special collections, private archives, or local authority record offices, visitors to archive websites expect relevant information, innovative interpretative content, and engaging resources to better connect with archive collections and other archive users. The National Archives is committed to supporting these archives across the sector to further adapt to this discerning online audience.

Digital Services and Archive Audiences 2014 is our response to the changing landscape of archive services and users. It is our first attempt to map out the landscape of digital services provided by local authority archives for online audiences. The study should act as a health check for local authority archives to see how their online services compare with similar services, but should also be a useful resource for all types of archive across the UK.

As well as helping to benchmark online services, this research points to broader comparisons with other organisations in the culture and heritage sectors. We hope the study opens up debate about how archive services should respond to the rise of digital services and online audiences, and welcome your feedback.

Carol Tullo

Director of Information Policy and Services

1. Introduction

The National Archives commissioned *Digital Services and Archive Audiences* in-house in May, 2014. Lasting six months, the research was designed to establish which online services are available on local authority archive websites across England.

Using quantitative, desk-based research methods to gather data, *Digital Services and Archive Audiences* is the first survey of local authority archive online services. The findings are placed into a broader context by analysis of government publications and studies from across the heritage, arts, and culture sectors. This study hopes to offer a new perspective on the broader challenges and opportunities for deploying digital services for online audiences in local government archives.

A cross-departmental consultation identified six essential online services for online audiences. These are: web presence, a searchable online catalogue, a digitised image collection, prints and downloads for purchase, social media provision, up-to-date news and blogging, and clear reference to premium research tools such as Ancestry and FindMyPast.

Research Scope

This study is divided into four sections:

- It highlights national research which shows internet usage across the UK is rising year-on-year. It also examines the ever more central role being played with mobile technologies in connecting archive audiences to the information and services on the web.

- In section two, 'Archive Visitors and Online Users: Demographics', a range of research studies are analysed to suggest archive audiences across the UK are changing. It argues fewer people are going to archives, yet more are going online to use archive services. In addition, it shows users of archives are more likely to be older than a decade ago. Section three is linked to this and briefly examines in more depth UK archive website usage over the last decade.

- Following this analysis of archive trends and demographics, the final section analyses quantitative data gathered on all 115 local authority archive websites. It breaks down the results in two ways: by all local authorities, and by authority type. Analysis of each authority's activity on social media is also provided.

- The study finishes with a conclusion and a list of references used to support the original quantitative research collected for this study. It shows that digital audiences for online services are increasing. Though fewer people are visiting archives in person, there is now greater demand in 2014 for online services.

2. UK Internet usage and technology trends

Internet usage continues to rise

Over the last decade, consistent growth in the number of people using the internet in the UK are reflected in changes to local authority online archive services. In 2014, over double the number of people now use the internet every day compared with 2006 (see Fig. 1).

Broadband Access

For example, in August 2014 Ofcom published a report stating that 77% of UK adults aged 16 and over say they have broadband internet access at home and 84% of UK adults say they use the internet either at home or in other locations.[1]

Daily Internet Use

The Oxford Internet Survey (Oxis), the Office for National Statistics (ONS), and the Office for Communications (Ofcom) all report over three-quarters of adults use the internet on a daily basis. The Office of National Statistics (ONS) figure is slightly lower as it covers Great Britain only: in 2014, 76% of adults used a computer every day. This 2014 figure is 28% higher than in 2006.[2] The biannual Oxford Internet Survey (OxIS) meanwhile reported in 2013 that 78% of the UK population use the Internet.[3]
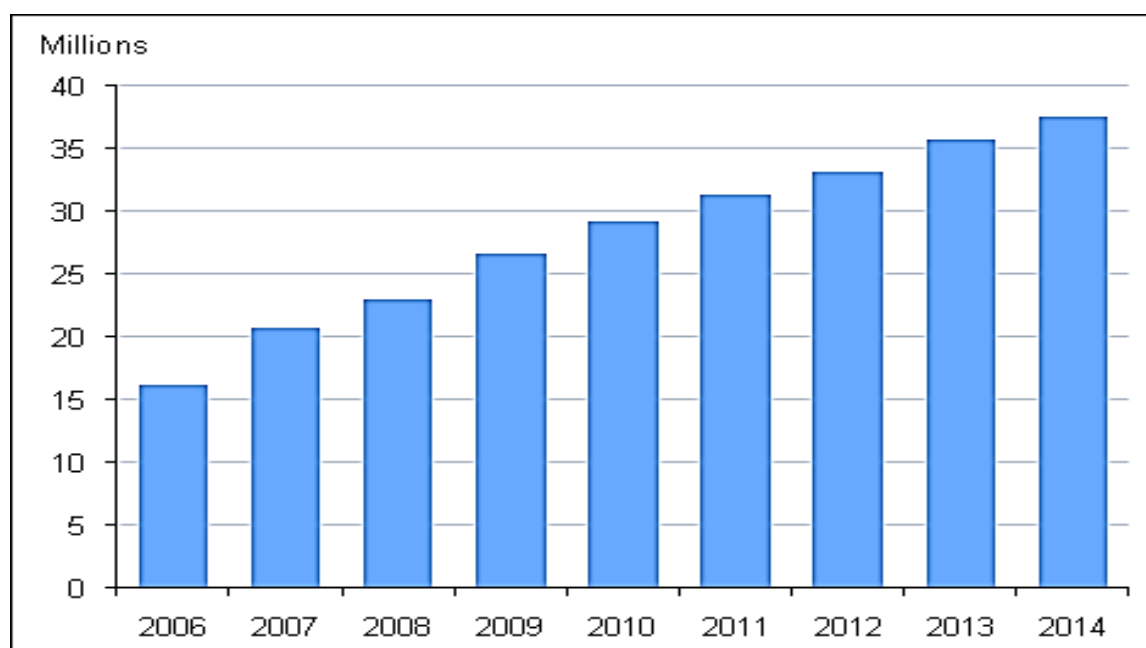

Figure 1: ONS, Daily Internet Use in the UK, 2006-14

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[1] Ofcom, 'Internet Attitudes and Use: metrics bulletin 2014', August 2014, p.3.
[2] ONS, 'Internet Access – Households and Individuals', August 2014, p.2.
[3] Oxis, William H. Hutton and Grant Blank, 'Cultures of the Internet in Great Britain: Oxford Internet Survey', 2013, p.4.

National growth in mobile internet users

Internet users are becoming less tethered to their desktop computer, and more mobile in terms of devices, locations and patterns of use. As internet use has gone up overall, more than ever before people in the UK now access the internet 'on the go' via smartphones, tablets, laptops, and e-readers.

In the UK, 68% of adults who use a mobile phone, portable computer and/or handheld device access the internet 'on the go' (See Fig. 2). This continuing trend indicates that mobile internet use is likely to make the internet a more integral part of everyday life and work.[4]

For instance, household take-up of tablet computers has almost doubled over the past year. 44% of households owned a tablet in Q1 2014, up from 24% the previous year. Of these users, 28% are aged over 55.[5]

While choice and capability of portable technology has increased, faster wireless internet provides even better mobile broadband connections and capacity. Areas covered by 4G services are expanding steadily to 6m users in Q1 2014, and a study by Ofcom shows consumers believe access to a mobile phone with the internet is the most essential tool for communication.[6]

Along with this variety of devices and increased mobile network speeds, companies operate thousands of wi-fi hotspots across the country. Wireless internet is regularly available at locations such as pubs, cafes and hotels.[7]

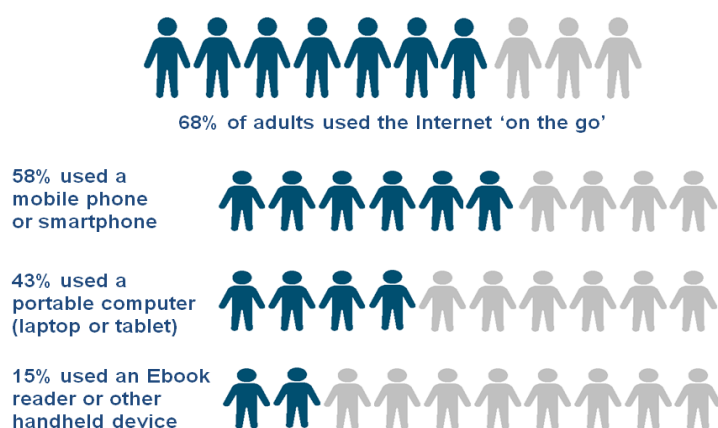Image 1: Internet use 'on the go' by device, 2014

68% of adults used the Internet 'on the go'

58% used a mobile phone or smartphone

43% used a portable computer (laptop or tablet)

15% used an Ebook reader or other handheld device

Figure 2: ONS, Internet use 'on the go' by device in 2014

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[4] Oxis, William H. Hutton and Grant Blank (2013), ['Cultures of the Internet in Great Britain: Oxford Internet Survey'](#), p.12
[5] Ofcom, ['The Communications Market Report'](#), August (2014), p. 262
[6] Ofcom, ['Results of Research into Consumer Views on the importance of Communications services and their affordability'](#), p. 18
[7] ONS, August (2014), ['Internet Access – Households and Individuals'](#)

3. Archive visitors and online users: demographics

UK internet demographic breakdown

The most frequent users of the internet in 2014 are aged 25-44. This younger audience is not a frequent user of archive services. However, looking at Fig. 3 below, the most significant aspect for archives services is that the 55-64 and 65+ groups have seen a huge increase over this eight-year period in the number of people using the internet. As explained below, this age group form the majority audience for archives across the UK.
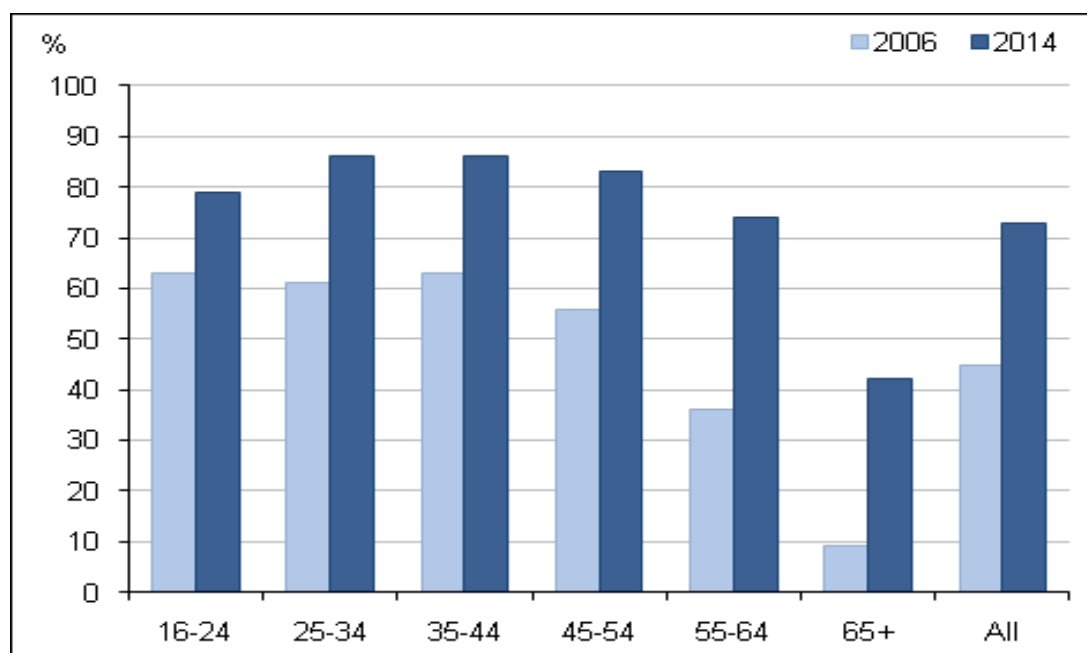

Figure 3: ONS, Daily Computer Use by Age Group, 2006 and 2014

Archive visitors are older in 2014 than in 2006

The Public Services Quality Group (PSQG) survey from 2012 shows a clear trend: visitors to archives are older than in 2006. There are 9% fewer people visiting archives aged 44-64 in 2007 than in 2012. Conversely, the 65-74 age bracket has seen a 5% increase as has the over 70s, which is up by 3%.Younger age groups between 2006 and 2014 remained largely stable.[8]

The Department for Culture, Media, and Sport's quarterly Taking Part survey produced similar findings to PQSG: the 65-74 year old age group had a significantly higher proportion of archive visits in the last 12 months (6%) than any other age groups. Visits amongst 16-24 year olds (2%) were significantly lower than people aged 45-64 and 65-74.[9]

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[8] PSQG, Survey of Visitors to UK Archives (2012)
[9] DCMS, 'Taking Part 2013/14 Quarter 4 Statistical Release – Archives'

Fewer people are visiting UK local authority archives

Since 2005, visitor numbers to local authority archives have declined (See Fig. 4). The proportion of adults who had visited an archive (in their own time or for voluntary work) when surveyed was 3%, a significant decrease from the 2005/06 level of 6%.[10]

If we include paid work visits and visits for academic study, the proportion of adults who said they had attended an archive in the last year has also fallen since 2008/09 from 5% to 4% in 2013/14.[11]
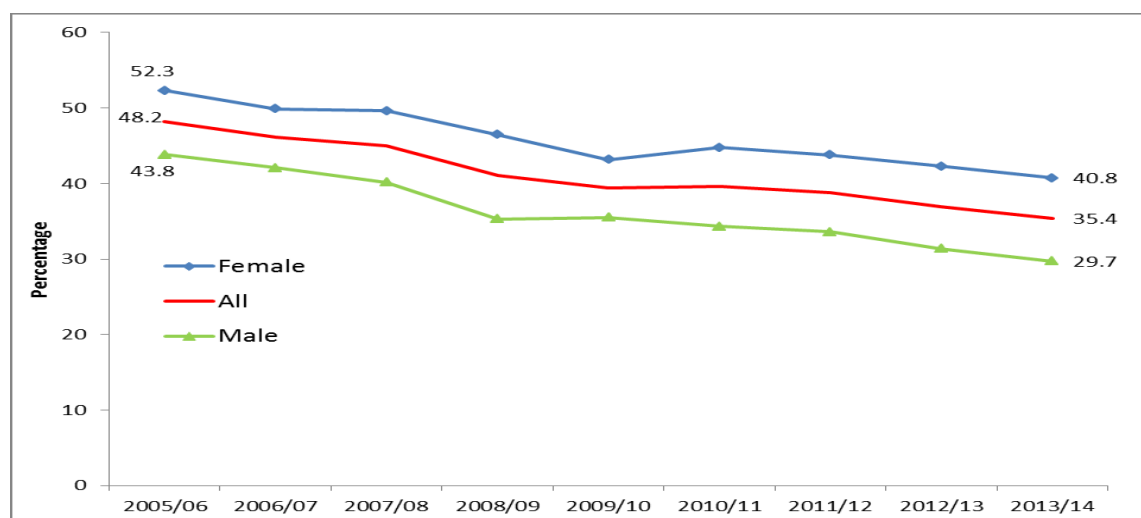

Figure 4: DCMS, Taking Part Q4 2013/14: Percentage of adults surveyed who had visited an archive or record office in the last twelve months

Online users form the same demographic as visitors

The National Archives' own survey of users of its website in 2013 found similar results to PQSG. 84% of all users of The National Archives website are over 55 years old (See Fig. 5).[12]
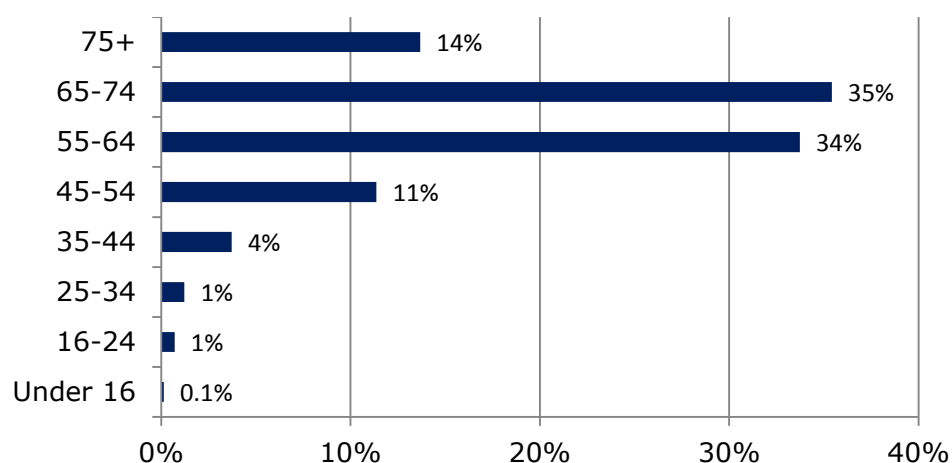

Fig. 5: The National Archives Website Survey 2013 – User Demographics

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[10] DCMS, 'Taking Part – Statistical Release', 2013/14 Q4, p. 28.
[11] DCMS, 'Taking Part – Statistical Release', 2013/14 Q4, p. 28.
[12] The National Archives, 'March 2013 Website Survey'

UK archive website use

National rise in archive website usage

Visitor numbers to archives are dropping, but users of archive websites rose moderately during the last decade. According to the DCMS's Taking Part survey, from 2005 to 2014 the number of adults who said they visited an archive website in the last twelve months rose by 1.6% and peaked at 13.5% potentially due to the impact of the London 2012 Olympics (see Fig. 6).
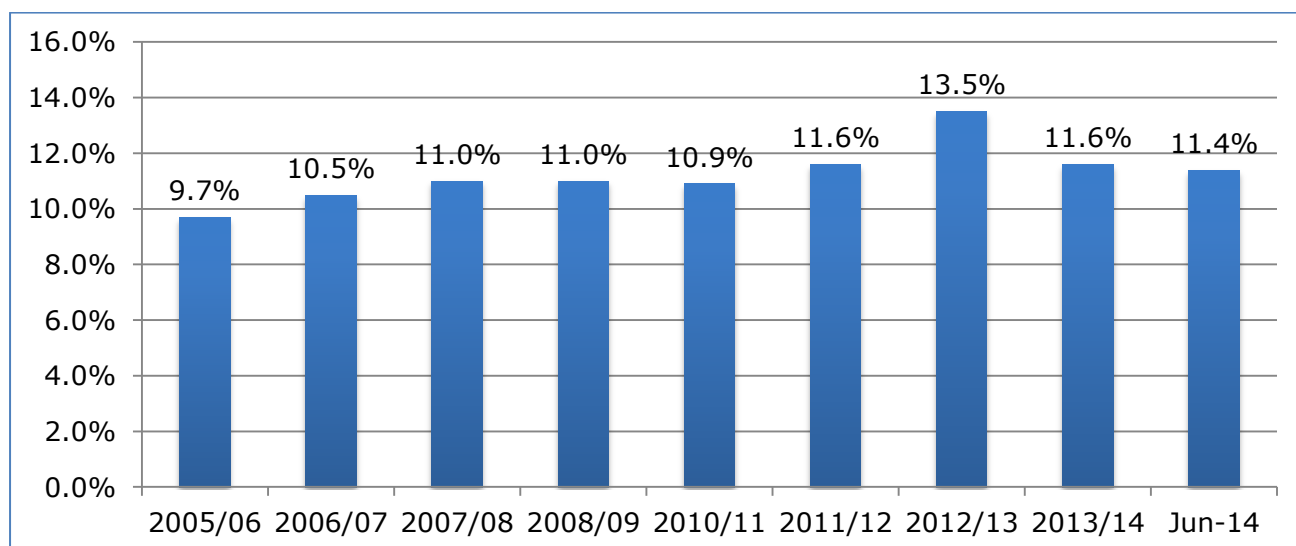

Fig 6: DCMS, Taking Part Q1 2014/15 – Statistical Release, Digital Participation, national archive website user figures

More visitors to archives now also use archive websites

Those people who do visit archives are using archive websites in greater numbers. Of visitors to archives in 2012, the Public Services Quality Group (PSQG) reported 71% of those surveyed used archive websites compared with 59% in 2007.[13]

This 12% rise in archive website usage chimes with The National Archives' own study shown above undertaken in 2013 on users of its website - 94% of all its website are over 45, matching the demographic profile of the audience who visit archives.[14] Furthermore, the Distance Enquiry Survey by the Archives and Records Association found 84% of all website users of archives surveyed were over 45.[15]

The online audience for archives is not rising due to an increase in younger users. It appears the existing users of archives are turning to online services to access services and information.

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[13] PSQG, 'Survey of Visitors to UK Archives (2012)'
[14] The National Archives, 'March 2013 Website Survey'
[15] ARA, CIPFA Social Research, PSQG, 'Distance Enquiry Services Survey', 2012, p. 8.

Archive website use and the wider arts and culture sector
The overall audience for archives and record officers is substantially smaller than for museums and galleries, public libraries, and heritage sites. DCMS's Taking Part survey provides data on how the number of visitors to archive websites compares with the wider culture sector (see Fig. 10).

Online User numbers drop after 2012

The trend in archive online user numbers is mirrored by other culture and heritage organisations. For example, public libraries show a similar peak in 2012/13, followed by a levelling off in the subsequent years, yet overall users rose by 5.3% (see Fig. 8).
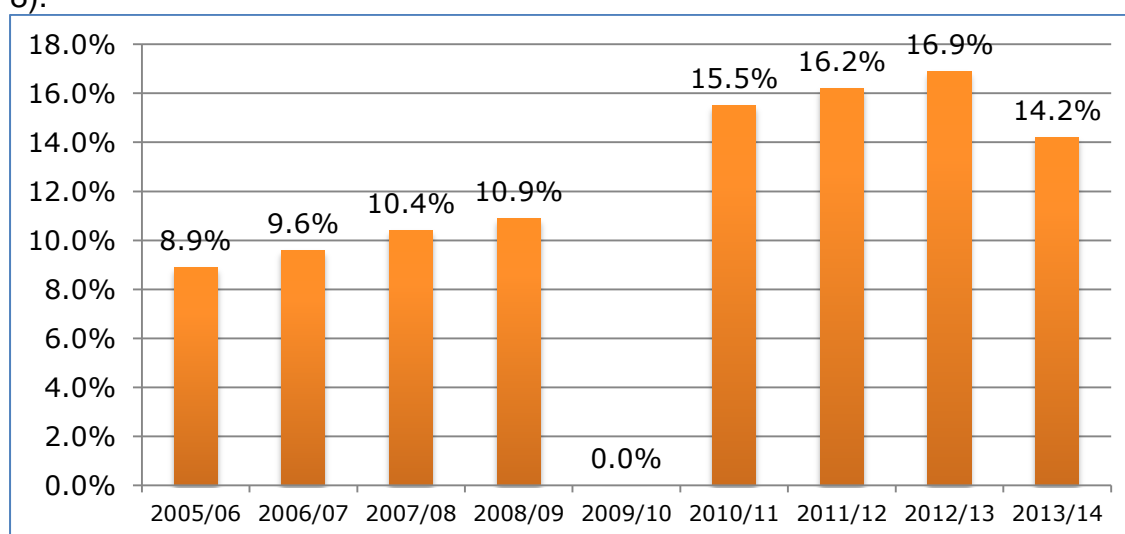

Figure 8: DCMS, Taking Part Q1 2014/15 – Statistical Release, Digital Participation, national public library website user figures

The same pattern is present in online website visitor figures for museums and galleries. The increase is even greater at 11.6% (see Fig. 9).
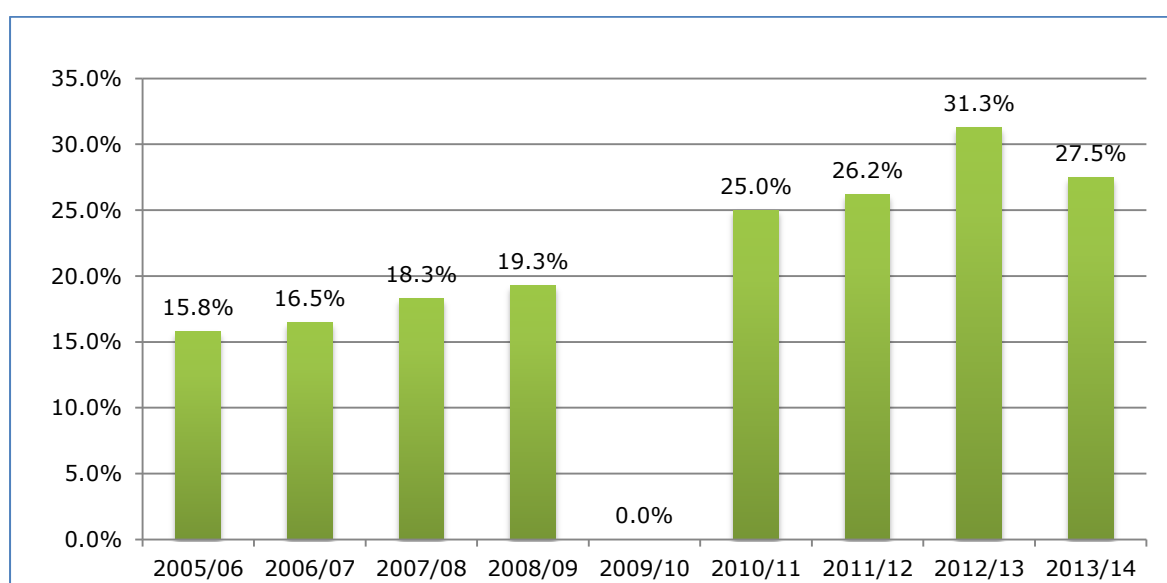

Figure 9 DCMS: Taking Part Q1 2014/15 – Statistical Release, Digital Participation, national museum and galleries website user figures

Headline measures from Taking Part Survey - Adult

	Significant changes since earliest data	Trend	2005/06	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13	2013/14
Culture											
Has engaged with the arts in the last year	▬		76.3	75.9	76.8	75.7	75.7	76.2	78.2	78.4	77.5
Has engaged with the arts three or more times in the last year	▬		62.5	61.3	62.2	59.9	60.7	61.2	63.3	64.1	62.8
Has visited a museum or gallery in the last year	▲		42.3	41.5	43.5	43.4	46.0	46.3	48.9	52.8	53.1
Has visited a public library in the last year*	▼		48.2	46.1	45.0	41.1	39.4	39.7	38.8	37.0	35.4
Has visited a heritage site in the last year	▲		69.9	69.3	71.1	68.5	70.4	70.7	74.3	72.7	72.5
Has visited an archive or records office in the last year (own time and voluntary)	▼		5.9	5.0	4.9	4.0	3.8	4.0	3.6	3.7	3.1
Volunteering and charitable giving											
Has volunteered in last 12 months	▬		23.8	24.0	24.0	25.0	N/A	24.2	23.3	25.9	23.9
Has volunteered in DCMS sectors in last 12 months	▲		7.0	6.9	7.2	7.8	N/A	7.7	7.1	9.3	7.4
Has donated money in the last 12 months **	▬		N/A	N/A	N/A	N/A	N/A	88.4	89.7	89.7	88.2
Has donated money to the DCMS sectors in last 12 months **	▼		N/A	N/A	N/A	N/A	N/A	33.0	30.9	32.0	28.7
Digital participation (Has visited a...)											
Museum or gallery website	▲		15.8	16.5	18.3	19.3	N/A	25.0	26.2	31.3	27.5
Library website	▲		8.9	9.6	10.4	10.9	N/A	15.5	16.2	16.9	14.2
Heritage website	▲		18.3	18.9	21.0	21.3	N/A	26.7	28.6	31.3	27.4
Arts Websites (including music, theatre, dance, visual arts and literature)***	▼		30.5	32.2	34.6	35.3	N/A	42.6	32.2	30.3	25.1
Archive or records office website	▲		9.7	10.5	11.0	11.0	N/A	10.9	11.6	13.5	11.6
Sport website	▲		26.1	27.9	30.6	31.3	N/A	36.4	37.6	40.1	35.8

Figure 10: Taking Part 2013/14 – UK participation in arts and heritage activities in person and online

4. Analysis of Local Authority archive online services

Introduction

Over the last decade, rapid expansion of mobile technologies and broadband infrastructure has connected 38 million people to the internet in the UK. The web has never been more accessible. Internet users aged over 65–the most frequent users of archives–are four times more likely to use the web in 2014 than in 2006.

Archive users are now more likely to be users of online services. As shown above, archives now get fewer visitors, but more online users. Those who do visit archives increasingly use archive websites, too.

To obtain a clearer picture of the online services provided to archive audiences, the following analysis concentrates on local authority archives. Below are the findings from the quantitative, desk-based analysis of 115 local authority archive service websites: county councils, unitary authorities, London boroughs, and metropolitan counties and boroughs.

The findings may prove beneficial for several reasons:

- local authority archives will be able to benchmark with allied authorities

- archives outside local government such as in Higher Education may glean contextual and comparative data to help support planning of future web services and online audience strategies

- organisations in the culture and heritage sector can obtain a deeper understanding of online archive services

- *Digital Services and Online Audiences* establishes quantitative data foundations that will ensure further research into local authority archives and the wider archive sector.

Scope and method
The study involved looking at 115 local authorities' archive online services. The study assessed whether local authority archives had the following:

- **a website presence**: a standalone website or a page embedded in a central local authority site

- **searchable online catalogue**: a fully-searchable catalogue to allow users to search part of or all of local authority archive collection. Archives were included if affiliated in joint cataloguing projects

- **digitised image collection**: the archive offers digitised images of parts of their collection to be viewed online

- **prints/downloads for purchase**: archive offers copying, printing, and digital reproductions of its collection

- **social media**: the archive connects with audiences via Facebook or Twitter.

- **blog/newsletter/news**: archives publish a dedicated blog, newsletter, or a regularly updated news page connected with their services and collections

- **premium research access**: archive advertises free access to Findmypast and Ancestry on their website.

The data is presented in two ways:

- **by all local authorities:** this provides an overview of the state of all local authority archives included in this study.

- **by local authority type**: the data is broken down to compare counties, unitaries, London boroughs, and metropolitan counties and boroughs. The aim is to help archives from each authority type identity challenges and opportunities in their service and also to benchmark performance alongside other authorities.

Results – all 115 Local Authorities
The results from the study are summarised below for all 115 local authority archives. The data in Fig. 11 and Fig. 12 show:

- **local authority archives are online**
  99% of Local Authorities have a web presence. This demonstrates local authority archives recognise that meeting audience expectations requires provision of information and services online

- **the majority of archives offer searchable catalogues online**
  72% of local authority archives provide a searchable online catalogue. Widespread provision of online catalogues suggests that local authority archives are committed to providing online audiences with digital finding aids to better connect with their collection

- **over half of all authorities have digitised part of their collection**
  54% of archives provide online users with access to digitised images of the archive collection

- **most archives offer copying, printing, and digital image services**
  70% of Local Authority Archives provide a range of copying options for users. Whether offering premium prints of photographs, maps, or basic document copying services, archives are promoting their collections to audiences through a range of reprographic services

- **archives connecting via social media**
  46% of archives engage with audiences online via Facebook or Twitter. Limited resources restrict widespread use. Ownership of social media channels at authorities remains an issue, though only 30% of authorities blocked social media in 2013 down from 53% in 2012[16]

- **minority of archives using blogs and e-newsletters**
  39% of archives provide audiences with up-to-date news, a frequent newsletter, or a blog containing stories about the collection

- **premium research services well established**
  70% of archives advertise availability of premium research services via Findmypast and Ancestry.

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[16] BDO, 'Following the Trends: Local Government Social Media Survey', p. 3.
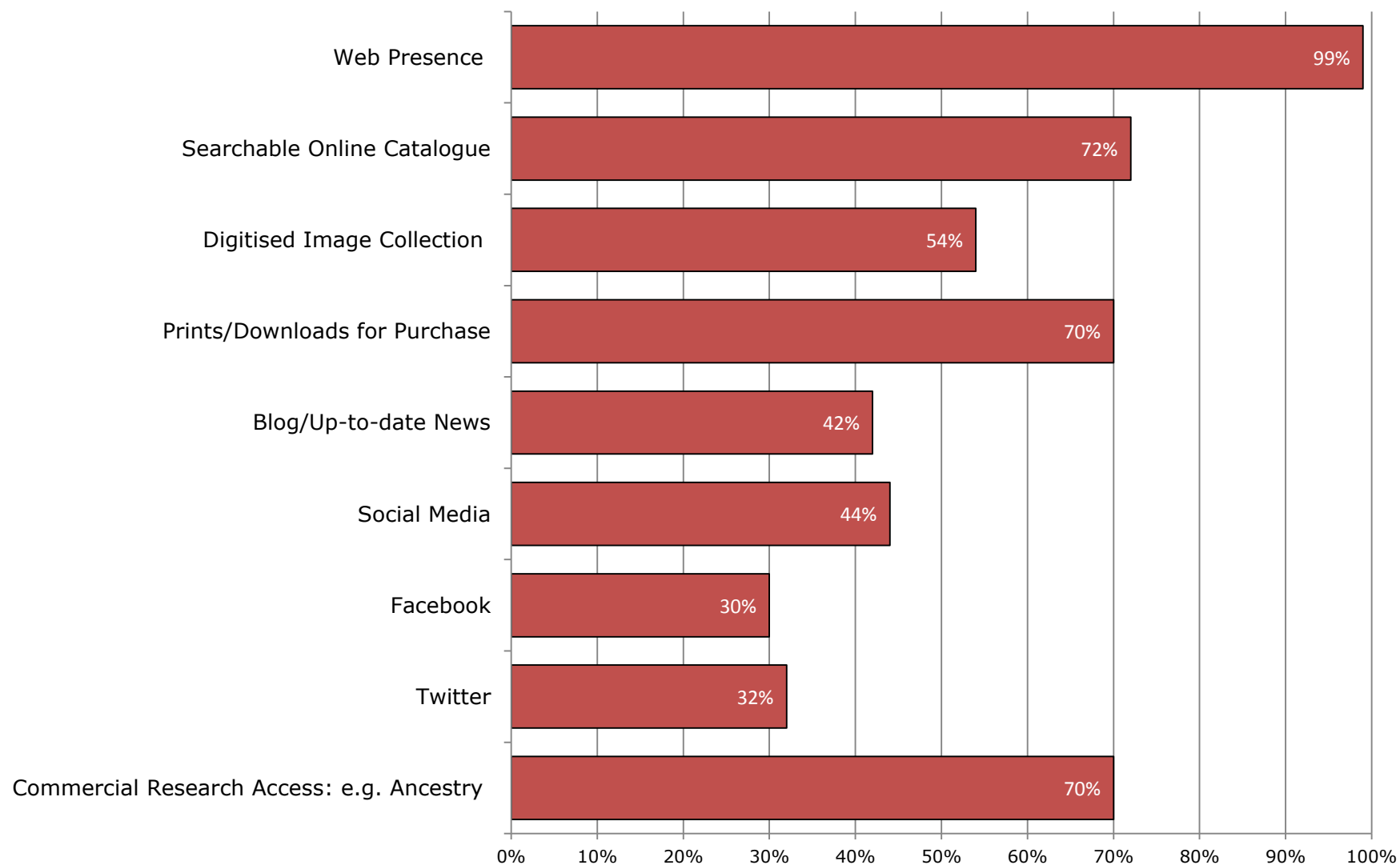
Figure 11: Percentage of 115 local authority archives offering online services

Analysis of results at local authority level

Summary

This section analyses local authorities by type, breaking them down into county councils, unitary authorities, London boroughs, and metropolitan and county boroughs. The data is shown below: county councils (Fig. 13), unitary authorities (Fig. 14), London boroughs (Fig. 15), and metropolitan counties and boroughs (Fig. 16).

Web presence

Apart from one metropolitan borough (See Fig. 12), every archive provides a website for online users. The range and quality of services provided by authorities for online users is varied, though there are areas of continuity. Variety in design is often governed by whether the archive has a website embedded within a central corporate website, or runs a standalone web presence.

Searchable online catalogue

Online audiences are most likely to use an online catalogue at a county council - 93% of county council record offices provide catalogues online. Looking at the remaining authority groups, 39% of London boroughs provide a searchable online catalogue. When compared with unitary authorities (88%) and metropolitan counties and boroughs (75%), the difference between provision of an online catalogue between the London Boroughs and other authority types is significant.

Digitised image collection

Provision of digitised images from archive collections is relatively consistent across each authority type. Visitors are most likely to find this service at county councils (64%). Metropolitan counties and boroughs have the lowest provision of digitised images at 46%, with London Boroughs at 48% and Unitary Authorities at 64%.

Blog/up-to-date news

Online audiences may not be served as well as they could be by local authority archive websites in terms of blogs, newsletters, and up-to-date news. Indeed, there is a significant difference in the range of provision: unitary authorities offer the most comprehensive coverage (73%). At the other end of the scale, the London boroughs supply dedicated blog/newsletter/up-to-date news on only 18% of archive websites. County council provision (39%) and Metropolitan Counties and Boroughs (43%) also seem relatively low compared with unitary authorities.

Social Media: Facebook and Twitter

As with provision of blogs, newsletters, and up-to-date news, authorities vary greatly in their use of social media to engage with online audiences, in this case Facebook and Twitter. Unitary Authorities (62%) are the most active on social media channels

followed by Counties and Metropolitan Counties and Boroughs (46%), and London Boroughs (27%).

This variability may be due to a lack of resource to run effective social media channels, insufficient buy-in from local authorities as a whole into using social media to engage with service users, and a need for increased knowledge and skills on how to get the most out of social media tools.

Social media Activity

For a breakdown of local authority archive social media activity in August 2014, see Fig. 17, 18, 19, and 20. This includes number of Facebook 'likes', which shows how many users visited the page and choose to follow any future updates from the archive. The graphs also show number of Twitter followers and tweets. In a similar fashion to Facebook 'likes', Twitter followers see updates sent out by archive services. 'Tweets' sent out regularly by archive services are messages, which can be 'retweeted' or shared with other Twitter members.

As noted above, 46% of all local authority archives use social media. According to a Google-funded study by Lasa, 94% of charities surveyed use digital for communications (e.g. e-newsletters, social media and apps), 81% use it for essential infrastructure (e.g. remote office access and finance), and 70% for service provision.[17] As 54% of local authorities surveyed by BDO are now using social media at service level, this may be an area of growth and opportunity for archives.[18]

In terms of online audience engagement with social media and arts, culture and heritage content on social media, an Arts Council study from 2010 showed two thirds of regular social network users share information on arts and culture through social networks at least once a month (this equates to 34% of the total online population). Due to the national rise in social media usage, this figure is likely to be higher in 2014.[19]

Premium Research Access

Authorities performed well in advertising access to premium research tools such as Ancestry and Findmypast. The London Boroughs came out the strongest (73%) while Counties and Unitaries (69%) and Metropolitan Counties and Boroughs (64%) were not far behind. With the recent trend towards family and house history, this is an area all authorities support strongly. However, it is possible more authorities provide free access to premium research tools but do not make this clear on their archive website.

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[17] Lasa, 'Results of the Charity Digital Survey 2012'

[18] BDO, 'Following the Trends: Local Government Social Media Survey', 2013, p. 3.

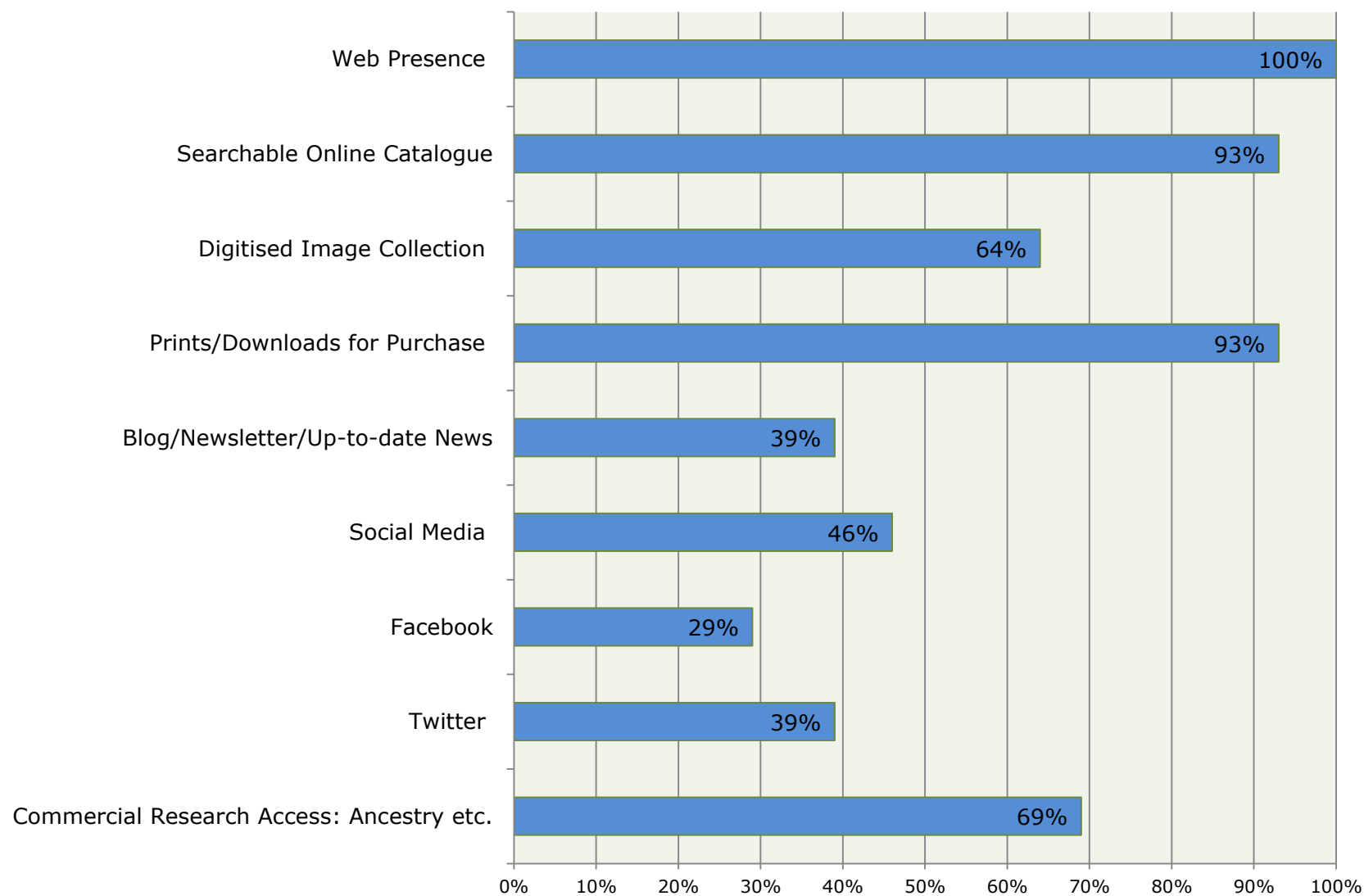[19] Arts Council England (MTM), 'Digital Audiences: engagement with arts and culture online', p. 22.

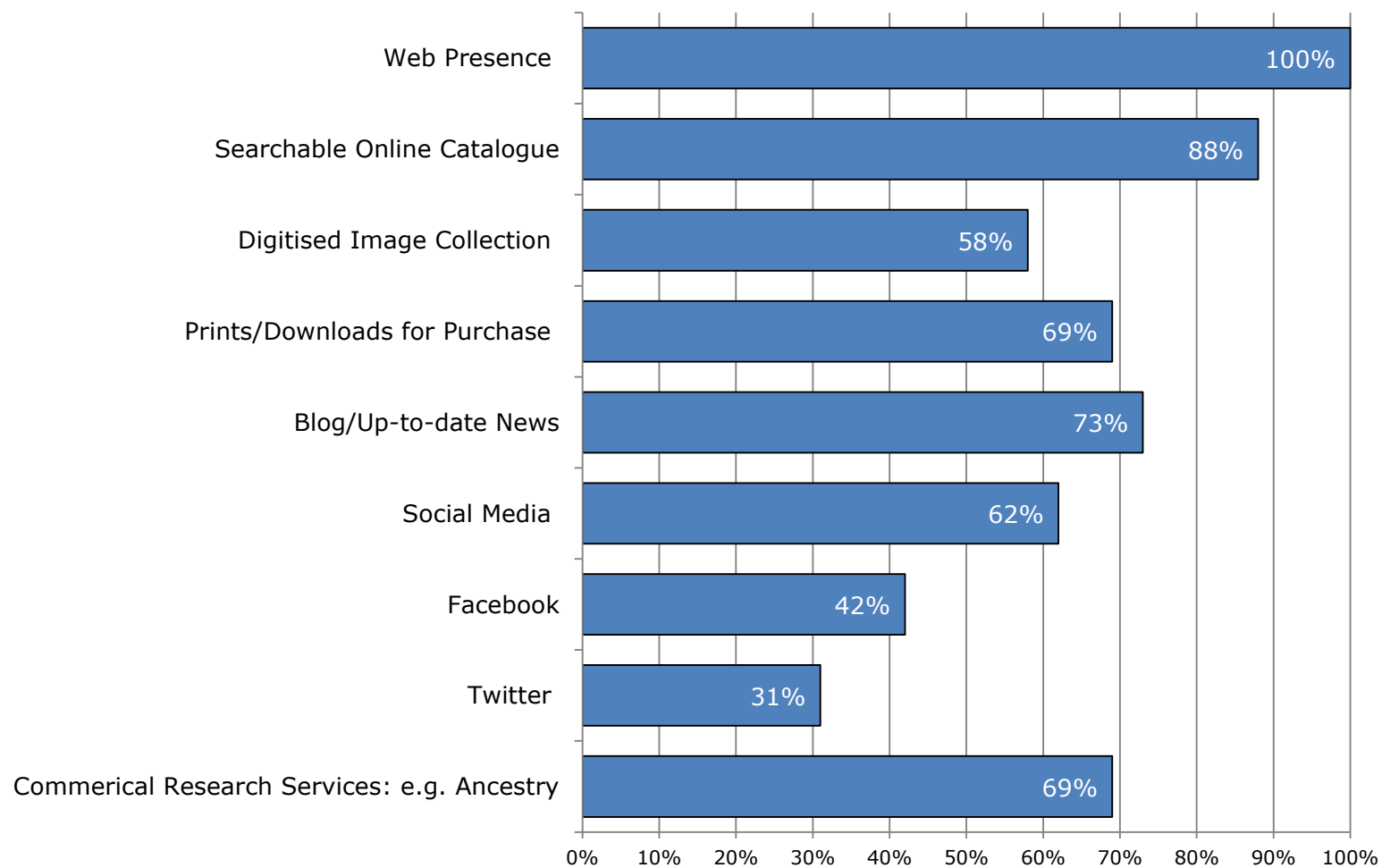**Figure 12**: Percentage of 28 County Councils offering digital services

Chart data:
- Web Presence: 100%
- Searchable Online Catalogue: 93%
- Digitised Image Collection: 64%
- Prints/Downloads for Purchase: 93%
- Blog/Newsletter/Up-to-date News: 39%
- Social Media: 46%
- Facebook: 29%
- Twitter: 39%
- Commercial Research Access: Ancestry etc.: 69%

Figure 13: Percentage of 26 Unitary Authorities offering digital services
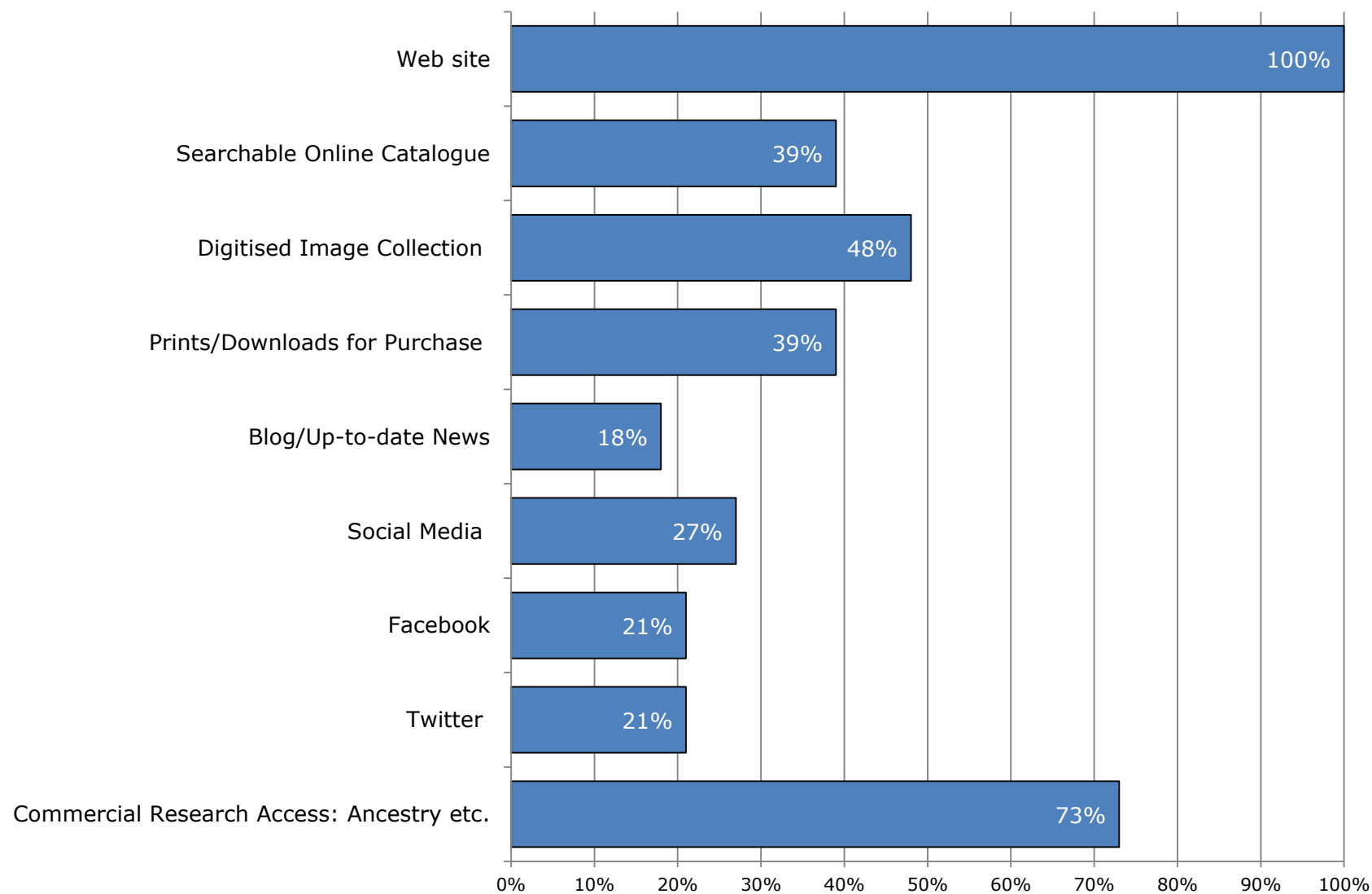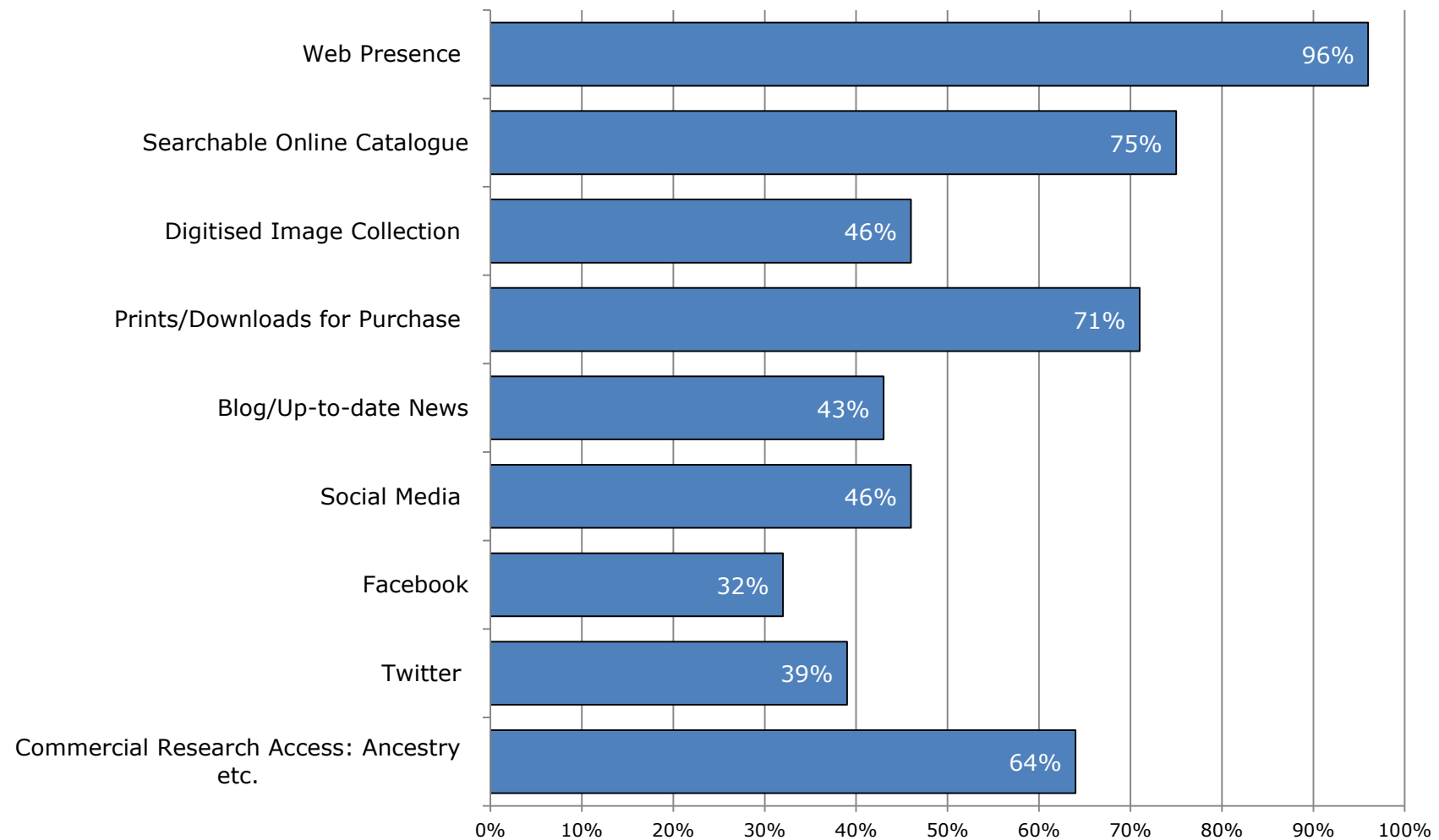
Figure 14: Percentage of 33 London Boroughs offering digital services

Figure 15: Percentage of 28 Metropolitan Counties and Boroughs offering digital services
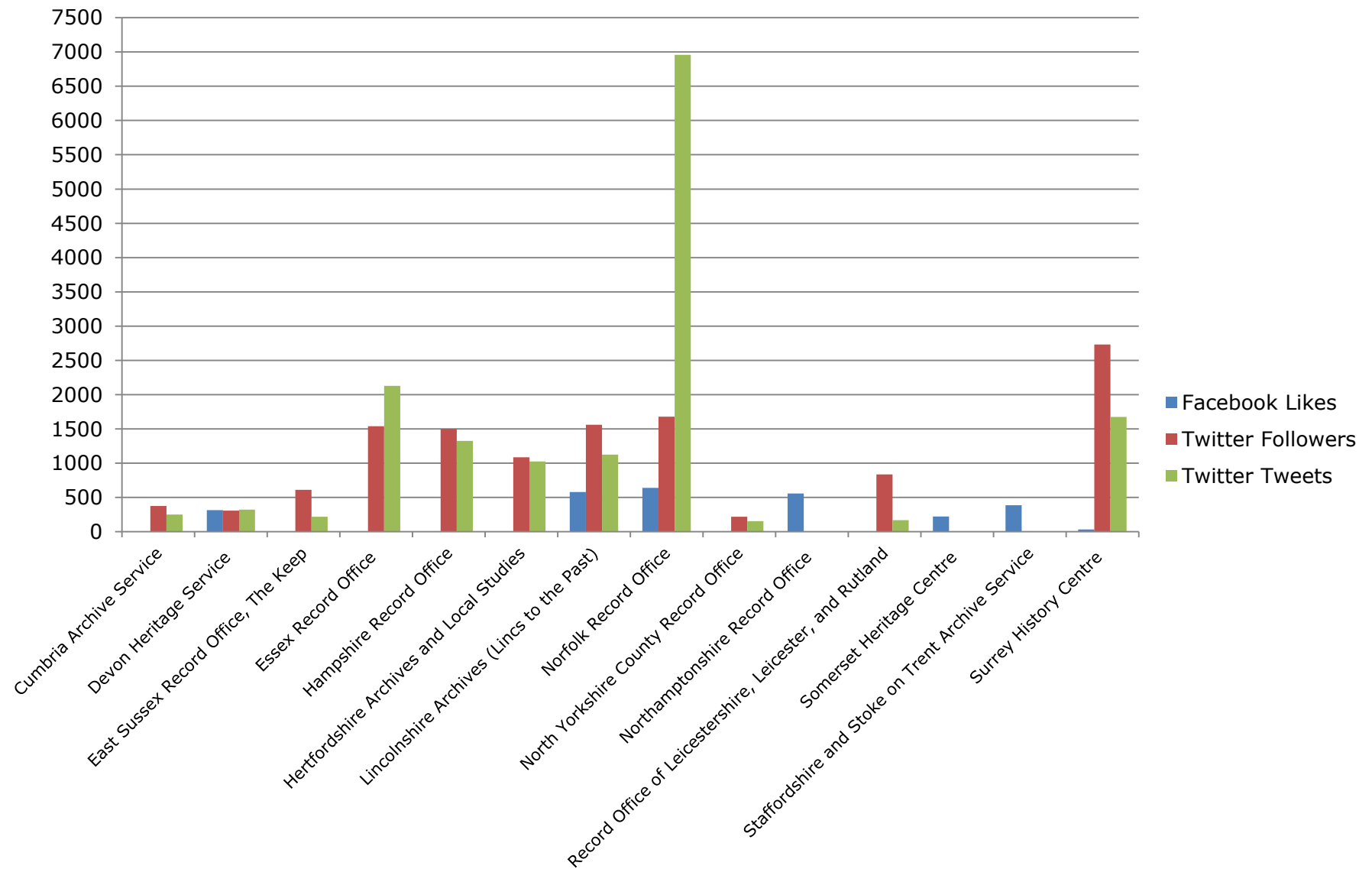
Figure 16: Social media activity at county council archives - measured in August, 2014
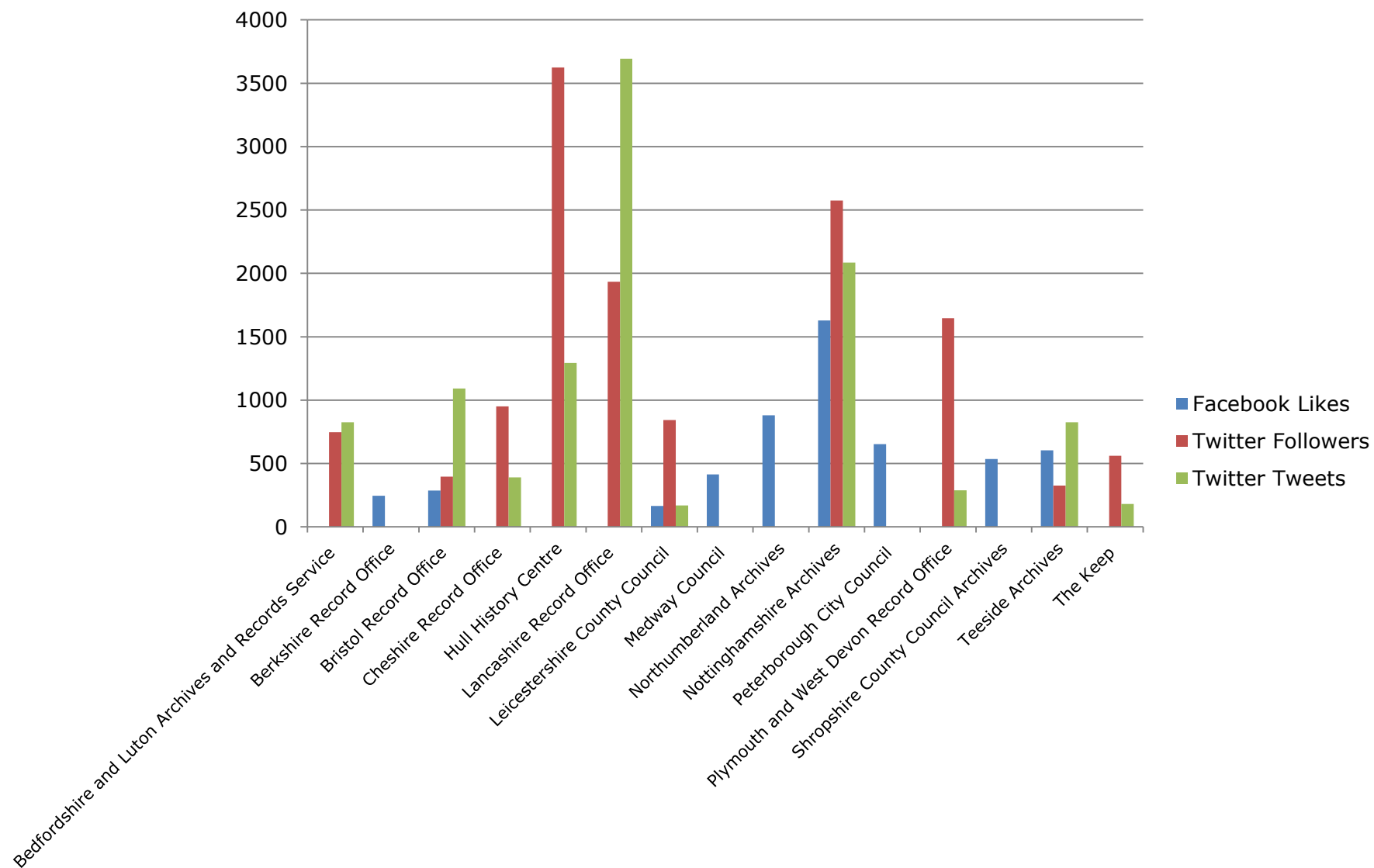
Figure 17: Social media activity at unitary authority archives - measured in August, 2014
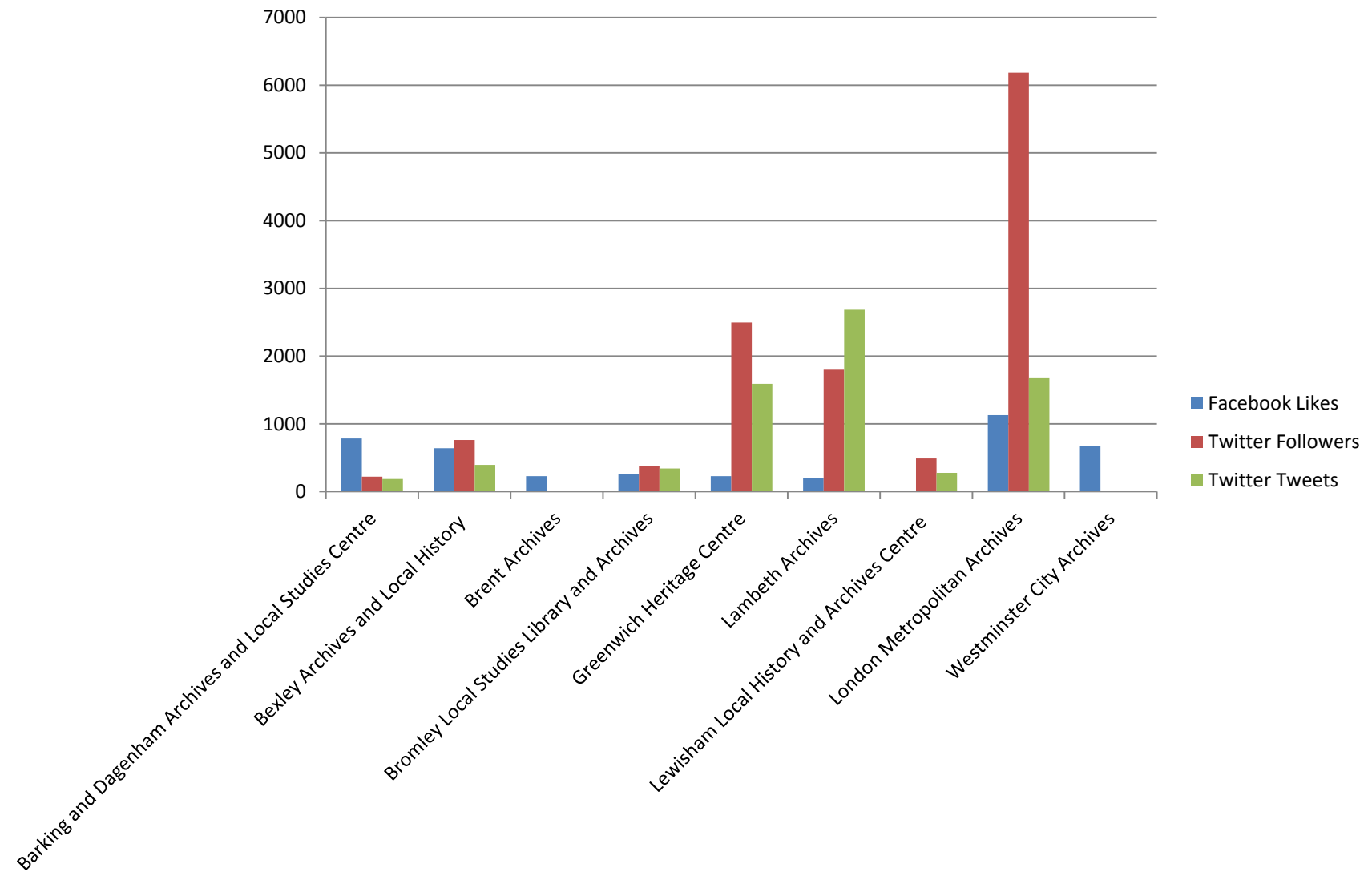
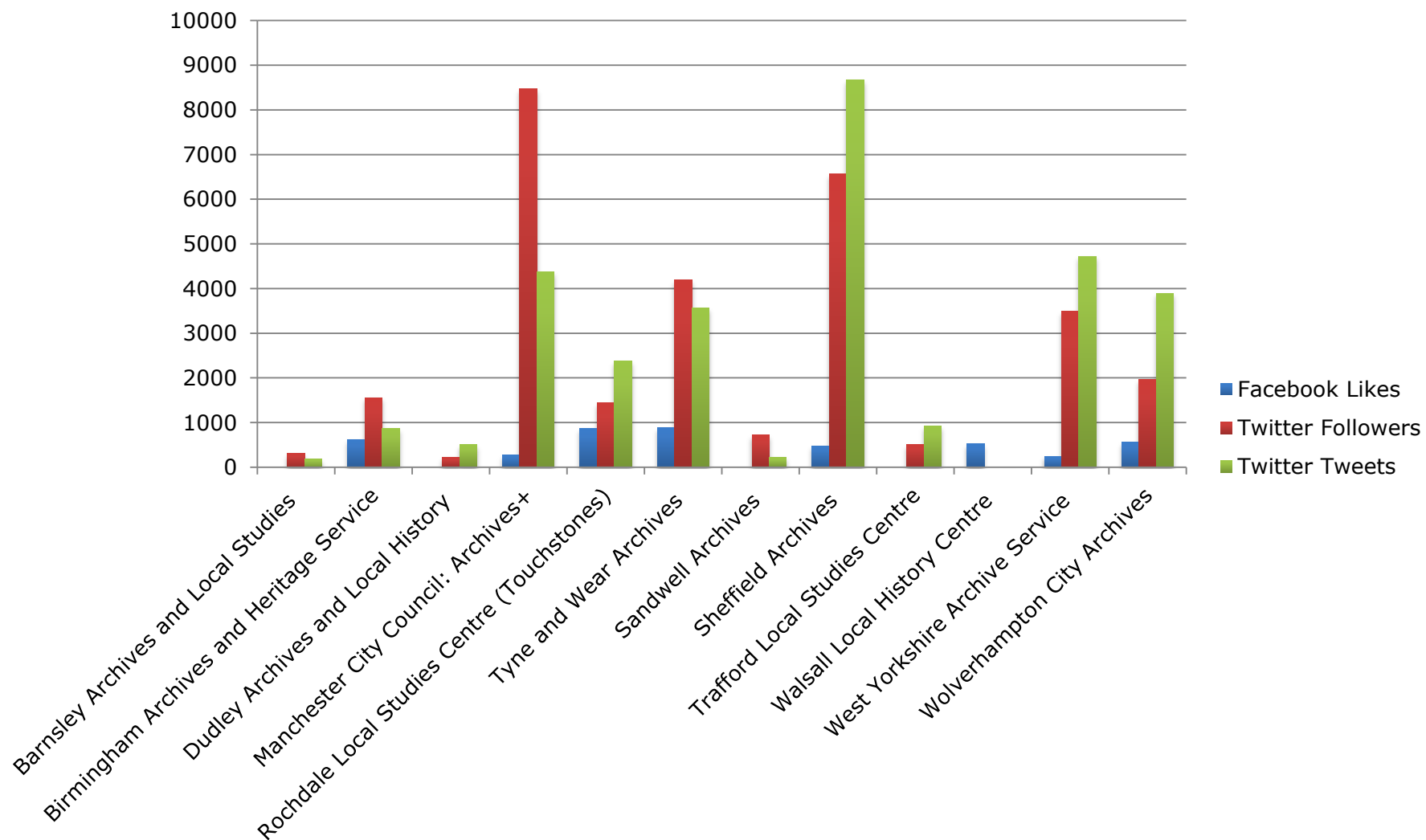**Figure 18:** Social media activity at London borough archives measured in August, 2014

Figure 19: Social media activity at metropolitan county and borough archives - measured in August, 2014

Conclusion

The aim of *Digital Services for Online Audiences* is to help local authority archives to see for the first time a clear picture of which services are provided by archives online. This study successfully identified a range of online services offered to rising online audiences.

Using the latest government and market research data, *Digital Services and Online Audiences* demonstrates that the archive audience for online services is increasing. Though fewer people are visiting archives in person, there is now greater demand in 2014 for online services. Those who do visit archives are also using online services more often. This study argues that this rise in use is linked to the national rise in internet usage, supported by ever more affordable, versatile, and accessible mobile technologies.

In light of this increasing online audience, local authority archives should continue to augment their online service offer. The research shows almost every service is aware of the benefits and opportunities provided by online services.

We see users of archive websites can expect to find a website for local authority archives. It is likely they will be able to search an online catalogue for what they are looking for, and they will usually have the option to access premium research tools at the archive. Online audiences will more often than not be able to order copies of material in print and digital format, and have a good chance of viewing some digital material.

Audiences may not find as much up-to-date information on archive events and services, and they may find it difficult to connect with archive services via social media. However, it is acknowledged there are restrictions on social media usage in local authorities that may go beyond the control of archive services. Connecting with audiences is nevertheless an area which will see considerable growth at local authorities as they increasingly embrace these tools for online audience engagement.

In future studies there may be areas that should be adjusted, reduced, and expanded. The National Archives welcomes any feedback and comments on how we can improve and develop this study to support archives, not only in local authorities, but also across the archives sector.

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