europeana
think culture

Summary of Awareness Evaluation and Tracking Study for Europeana

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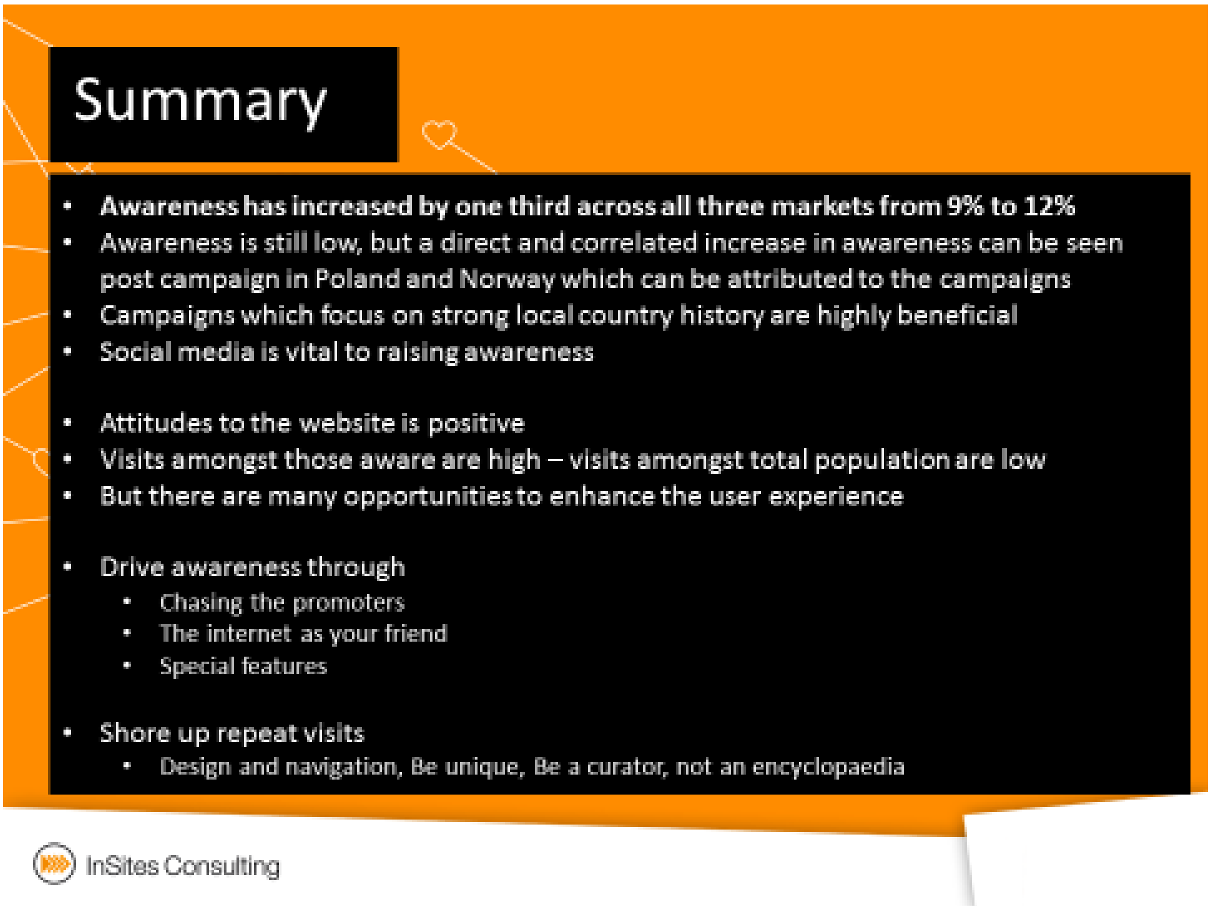
This note gives topline details of the research conducted into awareness and usage of the Europeana website in Italy, Poland and Norway. The study was conducted in two waves, in 2013 and 2014. Further technical details can be found at the end of the document.

Objectives

Produce a benchmark of awareness, attitudes and usage of Europeana in three markets, pre and post campaigns being launched, in order to measure a shift in awareness of europeana post campaign amongst consumers in three European markets.

In addition to attitudes and usage amongst those aware of the site, we "activated" those not aware of the site to visit Europeana, and report back their thoughts and experience.

Topline Results – Summary and Recommendations



Awareness

Overall prompted awareness of Europeana was originally low at just 9% across all three markets. By country, awareness was highest in Italy (12%) and lowest in Norway (4%). Awareness in Poland is at 6%.

In the second wave of research, awareness had increased by one third, and now stands at 12%. Awareness in each market is 10% in Italy, 7% in Norway and 14% in Poland – with the biggest increase in awareness being seen in Poland and Norway, due to effective and well received campaigns.

Specifically, following the campaigns, the situation is as follows:

•In Italy, the change in awareness is statistically flat following the PR campaign
(10% v 12%)
•However, awareness in Poland has more than doubled compared with the previous wave (14% v 6%)
In Norway, awareness rose by 75% to 7% from 4%.

Spontaneous awareness of Europeana as a site which contains art, museum collections, digitised books and background information about artists, culture, books and history collections online is still non-existent. However, the sector as a whole does not have any stand out sites – the highest being Wikipedia (5%). Google arts and Google books both score 1% for spontaneous awareness.

Looking in more detail at individual countries, we see the following shifts in awareness. It is useful to note that a proportion of the increases in awareness in Poland and Norway can be directly attributed to the campaigns:

Poland

Results for Poland showed that:

- One third of those questioned were aware of the 1989 campaign
- 83% of those who used Europeana were aware of the campaign
- **The increase in awareness of Europeana can be directly attributed to awareness of the 1989 campaign**
- **Those aware of the campaign were 7 times more likely to be aware of Europeana than those not aware of the campaign**

Italy

Results for Italy showed that:

- The change in awareness in Italy is currently flat in comparison with awareness before the PR campaign.
- We speculate that awareness was already high in Italy due to previous publicity work done around the project Europeana Fashion.

Norway

Results for Norway showed that awareness rose significantly from the previous very low base.

- Three quarters of Norwegian respondents were interested in the themes chosen for the events (untold 2nd World War stories/role of the Sami people).
- While awareness of the specific events was below 20%, those that were aware of the events were 6 to ten times more likely to be aware of Europeana.
- The events can be said to have directly impacted on the increase in awareness of Europeana in Norway.

Lessons learned

There are clear lessons learned that are valuable for Work Package 1 partners when developing and planning future PR campaigns:

•There is a clear trend in increased awareness of Europeana through social media. The importance of social and online media in raising awareness should not be underestimated and campaign approaches should ensure these areas sit alongside more traditional media.

• Campaigns benefit from a strong local country tie to the theme of the campaign (see Poland and Norway). The resonance of the subject matter with the public in Poland (the anniversary of the fall of the Iron Curtain) played a strong role in capturing interest and raising awareness.

•Those very interested in Arts and Culture are more likely to be aware of Europeana. If those most receptive to learning about Europeana are those who are very interested in Arts and Culture rather than those who are quite interested, then targeting specialist media and channels on these subjects should be a key element of media plans for all PR campaigns.

•Those aged 25-44 are most likely to be aware of Europeana. This target group should be specifically considered when choosing media channels and approaches to the campaign.

Usage

Conversion from awareness to usage remains good. Of those who use the site, 84% claim to have used Europeana in the last month (up from 80% in wave one) across all three markets. However, due to, low awareness, this means that only 8% of the potential population have used Europeana. This puts it way behind google books, and google arts for usage (39% and 19% respectively) and also behind local museum portals and sites in local markets.

Potential future usage amongst those who are aware is high. 97% of those aware of the site say they will visit again in the next 6 months.

Recommendation

Future recommendation is good. Three quarters of those aware of the site are likely to recommend it to others, and 45% would be very likely to recommend it. Recommendation to friends, family and colleagues of a product, site or channel has been proven as an indication of both closeness to the product, and a way to promote the site through effective word of mouth communication. This should be pursued for Europeana in order to help promote and enhance awareness and trial.

Other attitudes to the site

Europeana is well rated by those aware. It is seen as being an authoritative source (85%) and a new way to explore (77%). However, there is a large sentiment which suggests that the site is not unique. 66% of those aware agree that they can get the same information that is on Europeana elsewhere. This presents a challenge for the product and marketing teams to give consumers a unique reason to visit.

Attitudes to the site post activation

As the vast majority of participants (88%) were not aware of the site, we also provided them with a link and asked them to visit the site for a few minutes before returning to the questionnaire and asking further questions. This allows us to measure two things:

- Attitudes of those previously aware of the site (and changes in perception)
- Attitudes to the site amongst those not previously aware

Those who were not previously aware of the site were in the main positive about europeana. They thought it was:

- A new way to explore (58%)
- Authoritative (57%)
- Easy to navigate (55%)

And 57% would recommend to a friend/colleague/family member.

However, again there is a large belief (55%) that they can get the same information elsewhere indicating a need to push and promote uniqueness.

Only half of previously unaware participants found most things they wanted, with a large number being unsure (37%) or disagreeing, indicating potential issue with the user experience.

Figures were most positive in Italy and Poland, less so in Norway for all attitudes to the site. This picture is consistent across both waves of research.

Those who had previously been aware of Europeana had more positive views of Europeana than those who were not previously aware. And we also noticed that when they returned to the site, their views in the main were the same as their attitudes before we asked them to visit again.

However – they were less likely to agree that they could get the same information elsewhere, indication that the site was more unique than they previously remembered.

How to push people to the site?

When looking at the "fans" of the site, and thinking of ways to get them to recommend the site to other people in order to drive awareness and trial, we notice that there are key groups who can be targeted. High interest in the arts is obviously a key driver to a site like Europeana, and we notice that for instance those who are most likely to recommend Europeana have characteristics such as:

- Work in culture/education
- Very interested in arts/culture
- Previously visited google arts project

These could be groups that can be targeted and used as promotors of the site. They are also more likely to visit the site themselves when aware of it.

Future Usage Intention

Future usage intention is highest amongst those previously aware. It is lower among those not aware, but still high – with 71% saying they would visit again. This shows the need to improve awareness overall for the site, as once consumers are activated to visit, then they like what they see

Likes and Dislikes of the site (collected through open ended comments)

The main pluses of the site relate to the content, and the ability it gives those interested to be informed, learn and find interesting information – either through specific searches or things they were not looking for.

Main dislikes relate to an issue of language for non-English speakers outside the main body of the site, and the user friendliness of the site. These issues have been consistent across waves, and we would suggest that some form of user experience and usability research is undertaken. At the moment, we do not believe that the content is optimised for use by a consumer target across multiple countries.

Likes	Dislikes
1. Interesting & useful content *"Seems like a very original and interesting site, it collects things that otherwise would be impossible to find on the Internet."*	***1. Language issues/constraints*** *"For those unfamiliar with other languages, like me, it becomes a useless site."*
2. To seek information & to be informed – *general or in relation to a specific event/exhibition etc.*	***2. User-friendliness*** *"Is not very intuitive"*
3. To learn *to expand current knowledge or to explore the site in more detail.*	***3. Preference for other sites*** *"These are topics that interest me but I can find them elsewhere."*
4. Is detailed and complete with a wealth of information	***4. Unclear & complex*** *"A little complicated compared to other sites, it takes more time to get results."* *"Seems too high class, built for academics."*
5. Easy to navigate and search	***5. Layout & design*** *"Since the design is also a bit boring and does not invite me to further explore the site."*

The special features on the sites were also particularly well liked, and indicated a sense that visitors were willing to be directed to special topics and exhibits on the site, as they would be with a curated museum exhibition. This could be a potential communication tool, and content driver if the resources are available.

"More search results and texts on a specific topic."

"Several more of these special features would be nice."

"More info., photos, maps, images, and deeper investigation."

Technical Details

Results are based on 1,551 online interviews conducted across Italy, Norway and Poland (500 in each market) in wave one, and 1,570 interviews in wave 2.

All respondents were aged between 18 – 65 and had to have:

- Interest in arts/culture/history
- Visited museums, exhibitions, libraries, events in last six months

Eligibility rates in each country were as follows.

	Eligibility rates
Italy	60.4%
Norway	46.9%
Poland	73.1%
Total	**64.5%**

Unweighted data was weighted according to the above incidence rates by age group within country, and grossed to the total online population in each country.

	Unweighted screened sample	Weighted and grossed
Italy	516	24.3m (52.9%)
Norway	505	1.5m (3.3%)
Poland	530	20.1m (43.8%)
Total	**1,551**	**45.9m people**

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