



# Survey Report on Digitisation in European Cultural Heritage Institutions 2015

by

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## REVISION HISTORY AND STATEMENT OF ORIGINALITY

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### Statement of originality:

This deliverable contains original unpublished work except where clearly indicated otherwise. Acknowledgement of previously published material and of the work of others has been made through appropriate citation, quotation or both.

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## Table of Contents

<b>Executive Summary .....</b>	<b>4</b>
<b>1. Introduction.....</b>	<b>6</b>
<b>2. Response to the survey .....</b>	<b>7</b>
2.1 Institutions by Type.....	8
2.2 Institutions by Annual budget .....	9
2.3 Institutions by Number of paid staff .....	10
<b>3. Collections and Digitisation activity .....</b>	<b>11</b>
3.1 Long-term collection care .....	11
3.2 Digital collections .....	11
3.3 Born digital collections .....	12
3.4 Object types.....	13
3.4.1 Text based resources .....	15
3.4.2 Visual 2D resources .....	15
3.4.3 3D man-made resources .....	16
3.4.4 Natural resources .....	16
3.4.5 Geography based resources .....	17
3.4.6 Time based resources .....	17
3.4.7 Digital interactive resources (“exclusively digital”).....	18
3.5 Digital cataloguing .....	18
3.6 Digitisation progress .....	19
<b>4. Digital access.....</b>	<b>20</b>
4.1 Availability online of heritage collections metadata.....	20
4.2 Availability online of digitally reproduced and born digital heritage collections.....	21
4.3 Reasons for providing digital access .....	21
4.4 Measuring the use of digital collections.....	22
4.4.1 Percentages of institutions measuring .....	22
4.4.2. How the institutions are measuring .....	23
4.5. Channels used to offer access to the digital collections .....	24
<b>5. Digital preservation .....</b>	<b>26</b>
5.1 Digital preservation strategy .....	26
5.2 Use of international standards for digital preservation .....	27
<b>6. Digitisation Expenditure .....</b>	<b>29</b>
6.1 Internal and external budgets .....	29
6.2 Incidental and structural costs .....	29
6.3 In-house costs and outsourced costs.....	30
6.4 Paid staff and volunteers .....	31
6.5 Funding.....	31
<b>Appendix – Core Survey 3 Questionnaire .....</b>	<b>32</b>

## Executive Summary

The *Report on ENUMERATE survey [Core Survey 3, 2015]* represents the fourth major study into the current state of digitisation in Europe: in 2008 the NUMERIC Study was done, and in 2011 and 2013 the follow-up *Core Survey 1* and *Core Survey 2* were organised. *Core Survey 3* is the result of a survey carried out by the ENUMERATE Team, as a relatively self-contained part of the overarching Europeana v3 project, that was funded by the European Commission within the ICT Policy Support Programme. About 1,000 institutions answered the call to participate between February and May 2015. This most recent survey in the series could not have been done without the help of national coordinators, in 31 European countries (in 13 languages).

The survey asked questions about:

- The collections;
- Digitisation activity;
- Digital access;
- Digital preservation strategies;
- Digitisation expenditure.

Highlights of the report's findings are:

### ***The collections***

- 90% of the respondents are memory institutions with collections to be kept for future generations;
- 84% of institutions have a digital collection (83% in *Core Survey 1*, 87% in *Core Survey 2*);
- Most institutions have a rich mix of heritage materials, which confirms the outcomes of both *Core Survey 1* and *Core Survey 2*;
- Most mentioned object type as part of the heritage collection of the institutions is text based (83%) and visual 2D (81%) followed by time based material (56%) and 3D man-made material (46%). These percentages are close to the percentages in earlier surveys.

### ***Digitisation activity***

- 41% of the institutions have a written digitisation strategy (34% in *Core Survey 1*; 36% in *Core Survey 2*);
- 60% of the institutions have born digital items (52% in *Core Survey 1*, 53% in *Core Survey 2*);
- On average 58% of the heritage collections has been catalogued in a collection database;
- On average 23% of the heritage collections has been digitally reproduced (in *Core Survey 1* and *Core Survey 2* these figures were 20% and 17% respectively)
- 50% still needs to be reproduced (in *Core Survey 1* this was 57%; in *Core Survey 2* 52%);
- For an estimated 27% of the collections there is no need to digitally reproduce collection items.

### ***Digital access***

- Overall institutions report that they have 45% of their descriptive metadata online for general use. Libraries are at the high end for this indicator (68%), whereas museums have the lowest score (31%);

## D1.2: Report on ENUMERATE survey

- Overall institutions report that they have 32% of their digitally reproduced and born digital heritage collections online for general use. Again libraries are at the high end for this indicator (48%), whereas archives and other records offices have the lowest score (32%);
- As in *Core Survey 2* Academic research is perceived<sup>1</sup> as the most important reason to provide digital access to the collection (8,6), followed by educational use of the collection (8,1). Least important reason is sales and commercial licensing (3,0);
- 52% of all institutions measure the use of digital collections (42% in *Core Survey 1*, 51% in *Core Survey 2*);
- 91% of the institutions use web statistics (this is exactly the same percentage as in *Core Survey 2*);
- 38% use social media statistics (this was 32% in *Core Survey 2*);
- At least 51% of digital objects is available offline only (for staff use);
- For the digital objects that *are* available online 55% is available on currently the most popular channel, the institutional website;
- Remarkably in *Core Survey 3* respondents foresee a decrease (-5%) in the number of digital objects that will be available through the institutional website in two years (in *Core Survey 1* and *Core Survey 2* this was an increase);
- Channels for which a substantial growth is expected over the next two years are Europeana (+7%), national aggregators (+6%) and institutional APIs (+6%).

### **Digital preservation**

- 26% of the institutions have a written digital preservation strategy that is endorsed by the management (23% in *Core Survey 1*; 26% in *Core Survey 2*);
- 47% of the institutions do not have a solution yet for long term preservation based on international standards for digital preservation (this was 48% in *Core Survey 2*)
- National libraries and other types of institutions are 'front runners' in using digital archives that meet the international criteria for long term preservation).

### **Digitisation Expenditure**

- The estimated average budget for digital collections is €276,471;
- An average of 8 people are involved on a full-time basis in digital collection activities: 6 fte paid staff and 2 fte volunteers. The absolute number (8 fte) is the same as in *Core Survey 2*, but the ratio in *Core Survey 2* was different (5 fte paid staff; 3 fte volunteers);
- About 52% of the costs are qualified as being incidental cost and 47% are structural costs. This is equal to the ratio in *Core Survey 2*.
- In *Core Survey 3* 74% of the costs are in-house costs (*Core Survey 2* 72%) and 26% are out-of-pocket costs for external service providers (in *Core Survey 2* this was 28%);
- Digital collection activities are funded by internal budgets (88% of the institutions). National public grants are available to 35% of the respondents. 21% receives regional or local public grants. The results are very similar to the results of *Core Survey 1 and 2*.

This report is part of a series. The ENUMERATE survey efforts will be continued under Europeana CEF in 2015-2016.

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<sup>1</sup> Based on a scale of 1 to 10, where 1 is 'not important' and 10 is 'very important'

## 1. Introduction

In 2011-2012 and 2013 the ENUMERATE Thematic Network, then funded under the EU ICT Policy Support Programme, organised two so-called *Core Surveys*. These surveys may be seen as a follow-up to the NUMERIC study, which was done on behalf of the EU Commission in 2008.

All three surveys in the series aimed at getting a clear picture of the progress made in creation, management and preservation of digital collections in European cultural heritage institutions. The outcomes of these surveys were published in three separate reports.<sup>2</sup>

The lessons learned in this first series of surveys resulted in a Conceptual Framework, that could be used in future monitoring of digital heritage collections related activities in European memory institutions.

In the present report, the main findings of the next phase in the ENUMERATE Core Survey series are presented. For the first time this *Core Survey 3* was organised as a relatively self-contained part of the overarching Europeana v3 project, that was funded by the European Commission within the ICT Policy Support Programme.

Since the financial resources available for running the survey were smaller than in the preceding survey rounds, the instruments used to rollout the survey - contacts in the various EU member states, online questionnaire, guides, translations, etc. - were for the large part the same as in the earlier survey efforts.

The company that coordinated the earlier surveys - Panteia in the Netherlands - hosted the survey questionnaire and database and assisted in some minor adjustments of these tools. Due to the limited budget we did not construct a central database with contact details provided by the the ENUMERATE coordinators in the EU countries. Instead, they were requested to contact and invite the highest possible number of cultural heritage institutions.

As in Core Survey 2, in some countries a more or less complete database covering memory institutions was available. In most countries such a database is lacking. In those cases a sample of e-mail addresses based on a wide range of sources was used. The Guide to Managing the ENUMERATE *Core Survey 3* offers hints and tips to construct a representative sample. Social media and websites were also used to invite institutions to participate in the project. An open link was the access point to the online questionnaire for all respondents. Respondents were asked to identify themselves, in order to un-duplicate institution contacts, and for the ENUMERATE Team to be able to send personalised response forms.

In this report results are presented fairly straightforward, the collected data have been anonymised and where possible, a generic comparison is made with the results of the earlier NUMERIC and ENUMERATE Core Survey outcomes.

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<sup>2</sup> See <http://pro.europeana.eu/enumerate/statistics/results>.

## 2. Response to the survey

The first completed survey was registered on February 27th 2015. At the time of closing the survey (May 7<sup>th</sup> 2015) the number of fully completed questionnaires was 806. A far larger number of respondents showed some activity, however, and the number of actually usable responses amounts to 1030.

Spain, Sweden and the Netherlands show the highest numbers of respondents. Iceland has an excellent response, as compared to the number of institutions in that country. Some Central and East European countries have good results too, for example Lithuania and Slovenia. Other relatively successful countries are Ireland and Portugal.

**Table 2.1:** Response per country

<b>Country</b>	<b>Core survey 1</b>	<b>Core survey 2</b>	<b>Core survey 3</b>
Austria	95	36	32
Belgium	42	29	7
Bosnia and Herzegovina	0	1	0
Bulgaria	0	1	1
Cyprus	21	13	1
Czech Republic	111	34	9
Denmark	58	16	9
Estonia	18	16	9
Euskadi (autonome region of Spain)	0	0	2
Finland	89	59	46
France	0	2	2
Germany	227	279	65
Greece	58	10	0
Hungary	85	44	31
Iceland	0	38	25
Ireland	25	15	31
Italy	127	25	50
Jersey, Channel Islands	0	0	1
Latvia	16	4	25
Liechtenstein	5	1	2
Lithuania	71	61	54
Luxembourg	28	15	6
Malta	4	2	1
Monaco	0	1	0
Netherlands	140	143	126
Norway	0	0	1
Poland	58	23	8
Portugal	85	44	51
Republic of Macedonia	0	1	0
Republic of Moldova	0	1	0
Romania	39	14	2
Slovak Republic	78	4	3

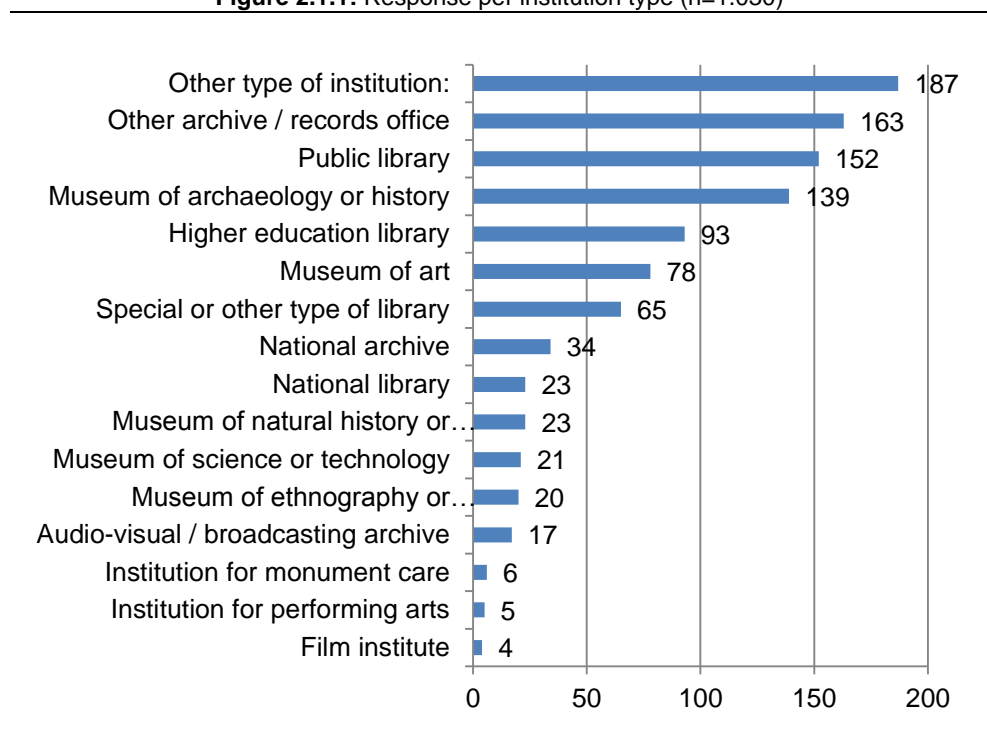
## D1.2: Report on ENUMERATE survey

Slovenia	56	57	54
Spain	255	180	194
Sweden	33	125	134
Switzerland	77	23	27
United Kingdom	49	55	21
Other country: USA, not included in analyses	0	1	0
<b>Total</b>	<b>1950</b>	<b>1373</b>	<b>1030</b>

### 2.1 Institutions by Type

A large number of respondents choose not to classify their institution in one of the standard categories that are shown in the questionnaire. In total 187 respondents selected the category 'Other type of institution'. They did so mostly because of the mixed nature of the collections in their institutions probably. As in the earlier surveys a substantial number of institutions thus self-classified were re-assigned in a post-processing adaptation of the grouping by Type. These institutions have a profile matching a more general category of museum, archive or library. In order to re-allocate these institutions to one of the specific institution types, the websites and object types in their collections were evaluated and these institutions were placed in the high level categories that contained similar institutions.

**Figure 2.1.1:** Response per institution type (n=1.030)

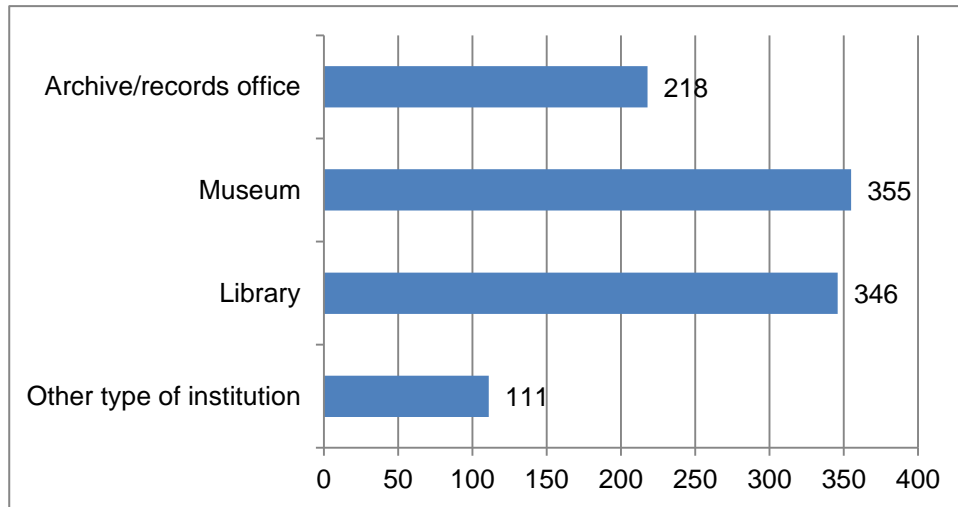




## D1.2: Report on ENUMERATE survey

The results in this report will be analysed for the 4 main categories shown below.

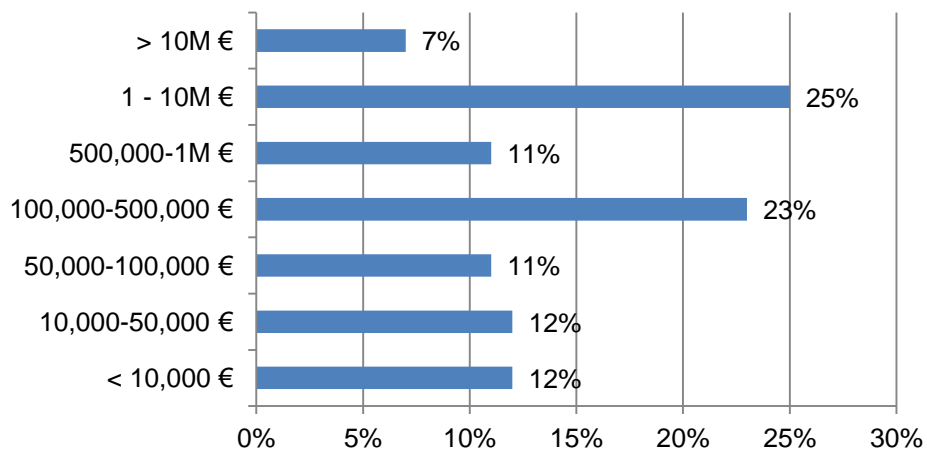
**Figure 2.1.2:** Response per institution type in 4 categories (n=1.030)



## 2.2 Institutions by Annual budget

Looking at the annual budget, the responses covered all categories of institutions, large as well as small. 32% have an annual budget of over €1 million. In contrast 12% have a rather small annual budget not exceeding €10,000. The median is the category €10,000-€50,000. Based on size, this is different from *Core Survey 1* and *Core Survey 2*, with the median in the category €100,000-€500,000. In *Core Survey 3*, there is a larger participation of smaller institutions than in the previous surveys.

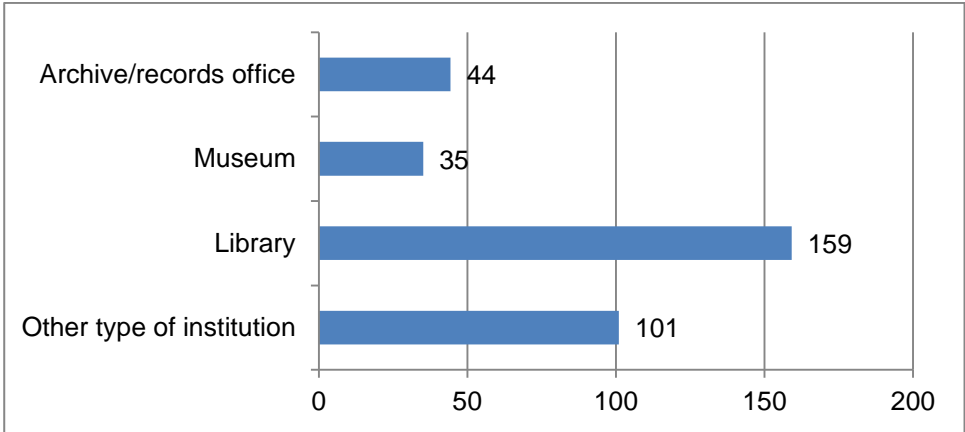
**Figure 2.2:** Annual budget (n=1.030)



2.3 Institutions by Number of paid staff

Another indicator for the size of an institution is the number of paid staff in full-time equivalents (FTE). In this survey the average institution size is 118 FTE. The overall median is 12 FTE paid staff. Core Survey 1 had a median staff size of 15 FTE; the median staff size in *Core Survey 2* was 12 FTE.<sup>3</sup>

**Figure 2.3:** Average size of institutions by number of paid staff (n=985)



<sup>3</sup> In this question, we've explicitly asked for the number of FTE of the staff involved in the heritage department of the institution. Some unlikely numbers did occur, for instance 20,000 staff members. In 11 cases, we've excluded these numbers from the calculation.

### 3. Collections and Digitisation activity

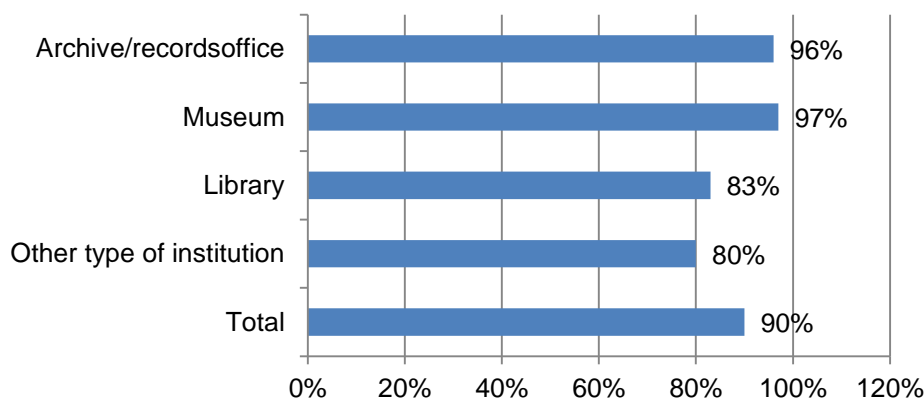
#### 3.1 Long-term collection care

The ENUMERATE Core Surveys focus on *memory institutions*. Therefore a control question was included - "Does your institution have collections that need to be preserved for future generations?" - in order to make sure that the main body of the questionnaire was rightly focused.

Amongst libraries (17%) and especially amongst institutions classified as "Other" (20%) there were relatively many institutions not falling in the category of memory institutions. Overall about 10% of the respondents indicated that they did not consider their institutions to be a memory institution. In Core Survey 1 and Core Survey 2 these percentages were 17% and 8% respectively.

Since respondents from institutions *without* long-term collection care were removed from the analysis - the main body of questions was skipped automatically for respondents in this category - the analysis results are not affected by the fact that these institutions responded to the call to participate.

**Figure 3.1:** Percentage of institutions that have collections that need to be preserved for future generations. (n=996)

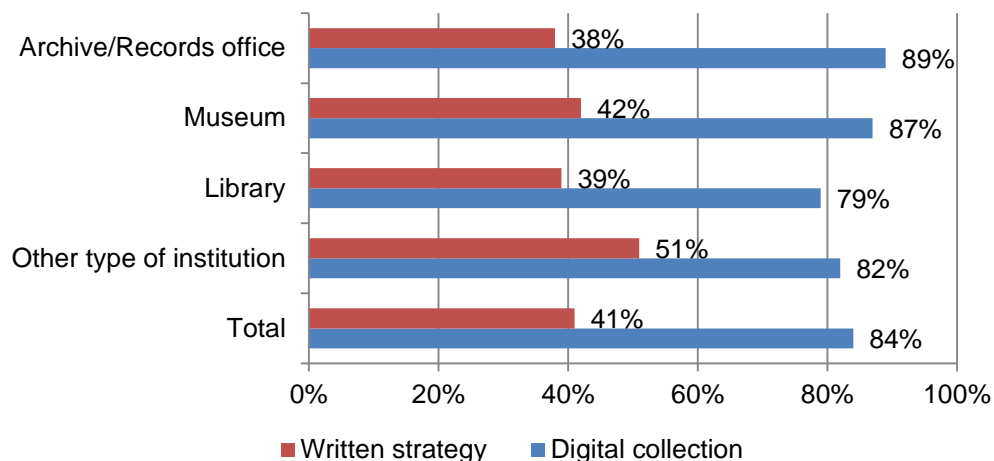


#### 3.2 Digital collections

Most institutions, 84%, have a digital collection. This is less than the percentage we found in Core Survey 2 (87%), but it is a slight increase as compared to Core Survey 1 (83%). These differences may have to do with the relative large number of smaller institutions as compared to Core Survey 2.

The results of the related question of whether institutions have a written digitisation strategy seem to be promising. Whereas in Core Survey 2 (36%) the percentage was already higher than in Core Survey 1 (34%), in Core Survey 3 the upward trend seems to be confirmed (41%). The discrepancy between both indicators remains notable: a large portion of the institutions has no policy for extending and managing the digital collections they hold.

**Figure 3.2:** Digital Collection (n=993) and Written digitisation strategy (n=835)



### 3.3 Born digital collections

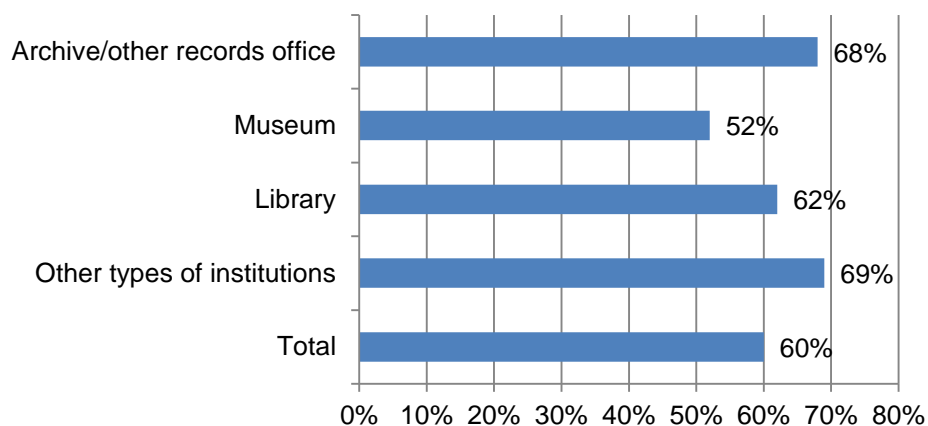
A born digital object is an object created by digital means in a digital format. The precise definition used in the survey is:

“Digital materials which are not intended to have an analogue equivalent, either as the originating source or as a result of conversion to analogue form.”

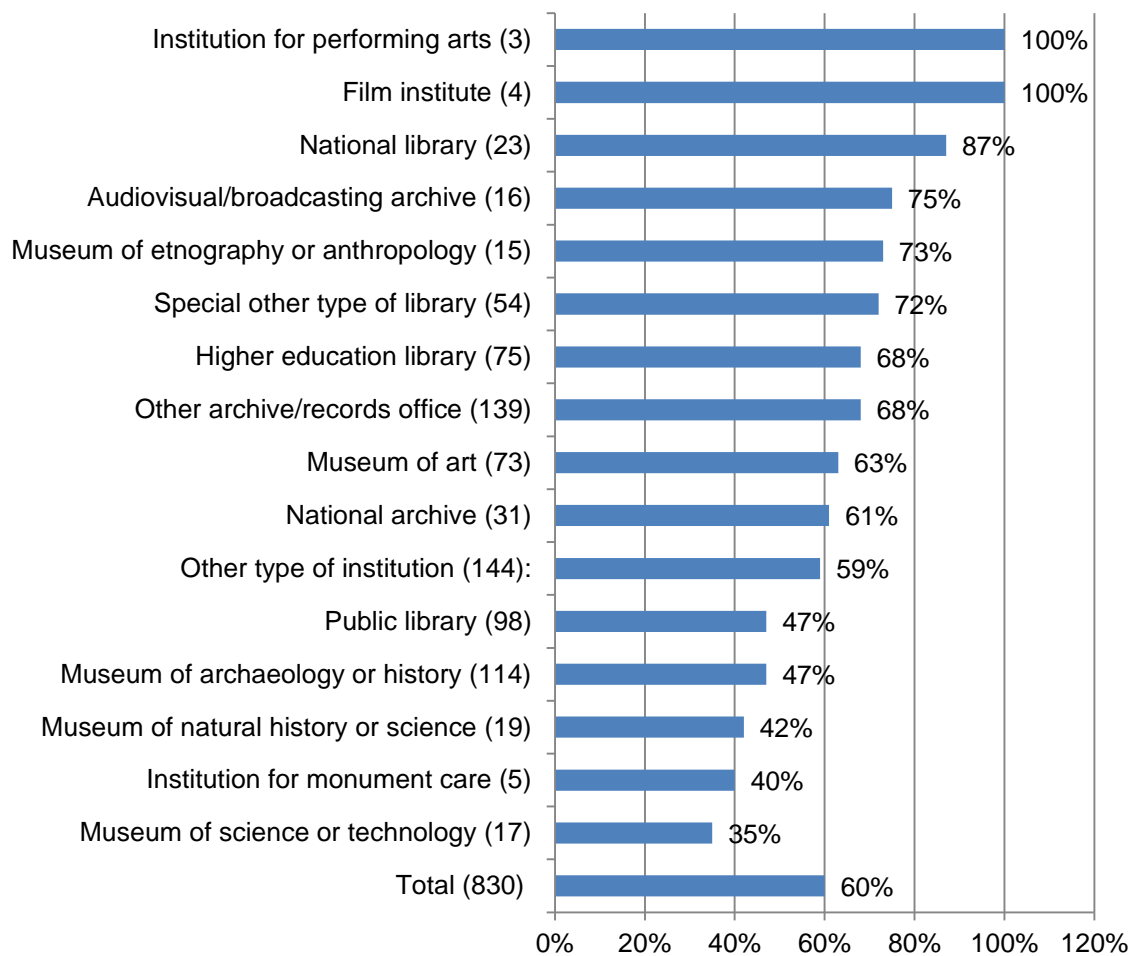
Examples of born digital heritage materials are digital images, digital video, digital sound, digital art, games or websites. As can be expected Audio-Visual, Broadcasting and Film institutions often have born digital materials in their collections.

Other institutions collecting substantial amounts of born digital heritage materials are the National libraries. In *Core Survey 3* 60% of the institutions indicated to collect born digital heritage. This is higher than in previous editions: In *Core Survey 2* the percentage was 53% and in *Core Survey 1* this was 52%.

**Figure 3.3.1:** Does your organisation collect born digital heritage? (n=830)



**Figure 3.3.2:** Does your organisation collect born digital heritage? (n=830)



### 3.4 Object types

Part of *Core Survey 1* and *Core Survey 2* were exhaustive questions about the composition of the collections of the responding institutions. Since these questions were in large part facultative, the number of respondents per question was low. Therefore, in *Core Survey 3* only a fairly simple, high-level question about the object types in the collection was asked.

Based on earlier research we classified heritage materials into eight main object types (classes). Respondents were asked to check out all relevant collection types from the list below, and to indicate whether their institution have these in their *analogue* and/or *digital* collections:

- (01) TEXT BASED RESOURCES
- (02) VISUAL (2D) RESOURCES
- (03) ARCHIVAL RESOURCES (not included in 01 or 02)
- (04) 3D MAN-MADE MOVABLE OBJECTS
- (05) NATURAL RESOURCES
- (06) GEOGRAPHY BASED RESOURCES
- (07) TIME BASED RESOURCES
- (08) DIGITAL INTERACTIVE RESOURCES (EXCLUSIVELY DIGITAL)

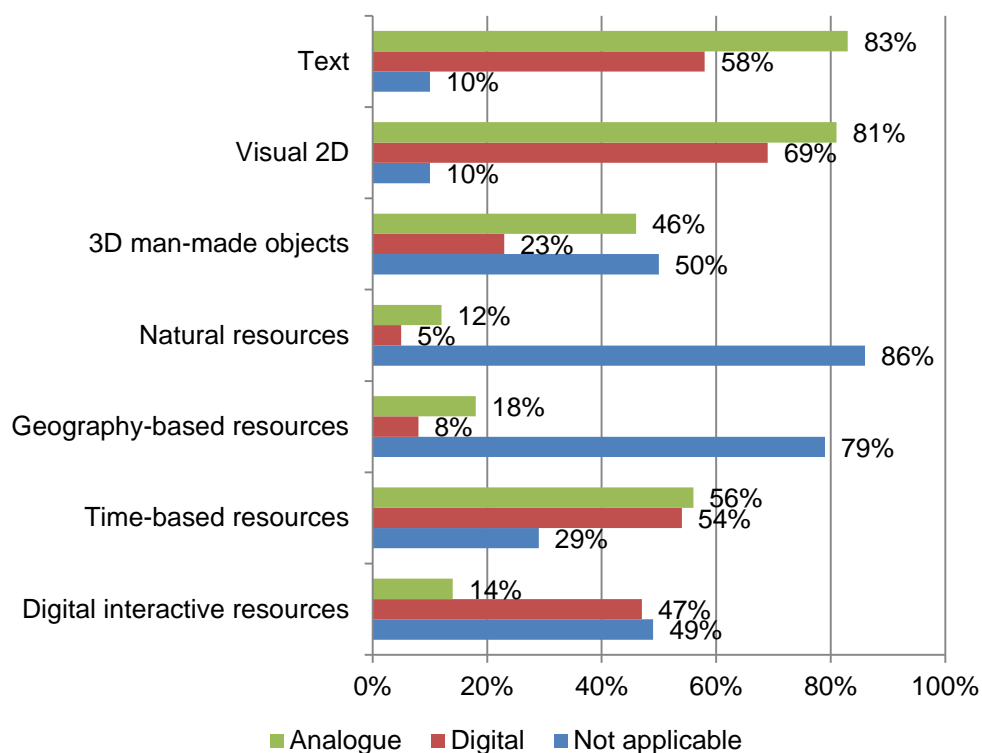
## D1.2: Report on ENUMERATE survey

In a separate paragraph the option to map collections in a more detailed way was offered. In careful wording the ENUMERATE Team tried to persuade respondents to start this mapping exercise, but none of the respondents seized the opportunity.:

The category 'Archival resources' was left out of this analysis, because strange results occurred for this type of material. For instance: only 12% of the archives claimed to have this kind of material, but 70% of the archives claim to have these kind of material in digital form. We strongly recommend to remove this category in the next survey, since all objects within this category can also be listed under the other object categories.

Most institutions have text based objects and visual 2D objects in their collections. About half of the institutions also have 3D man-made objects, time-based resources and digital interactive resources in their collections. Please note that this last category cannot be compared to the 60% mentioned in § 3.3, because not all born digital materials are considered to be interactive (consider for example the differences between a digital photograph and a computer game).

**Figure 3.4:** Object types that are part of the heritage collections of the institutions (n=815)



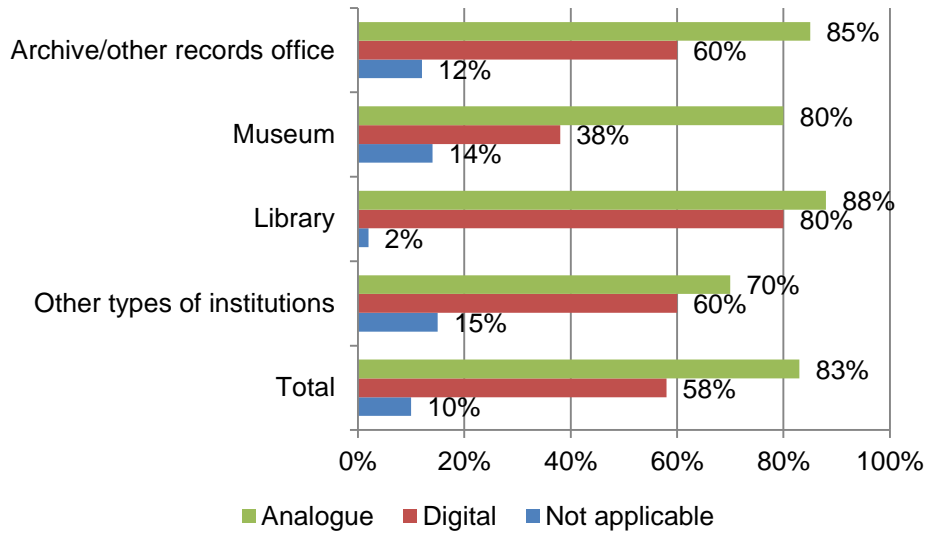
A noteworthy finding from *Core Survey 1* and *Core Survey 2* was that most institutions have a rich mix of heritage materials. This was confirmed in *Core Survey 3*.

Below we will present the data about the prevalence of specific resources in libraries, archives, museums and other types of institutions in somewhat more detail. Per graph both the stats for analogue and for digital collections are given.

### 3.4.1 Text based resources

Text Based resources in analogue format can be found in institutions of all types. Text Based digital resources prevail in libraries.

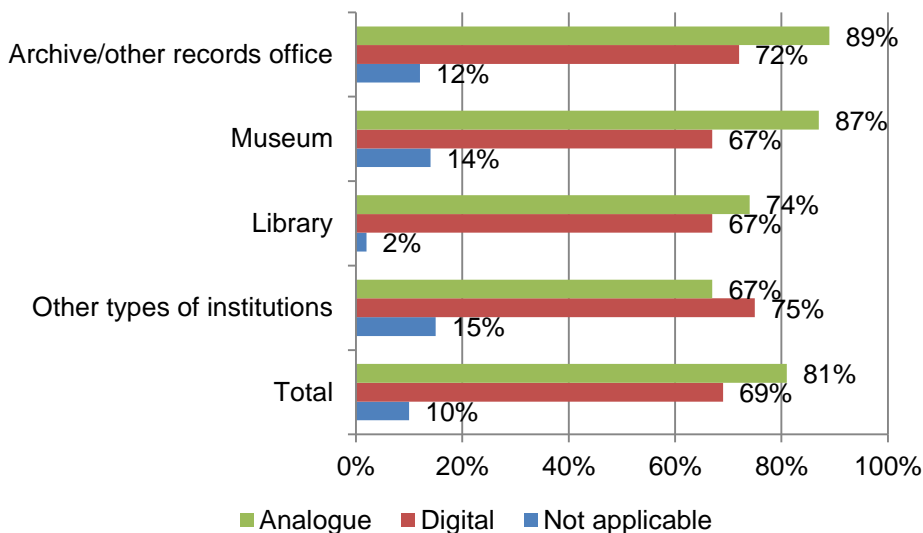
**Figure 3.4.1:** Text Based resources per institution type in percentages (n=815)



### 3.4.2 Visual 2D resources

Figure 3.4.2 shows the degree to which visual 2D resources can be found in the various types of institutions. The largest category is archives/ other records office, both analogue and digital.

**Figure 3.4.2:** Visual 2D resources per institution type in percentages (n=815)

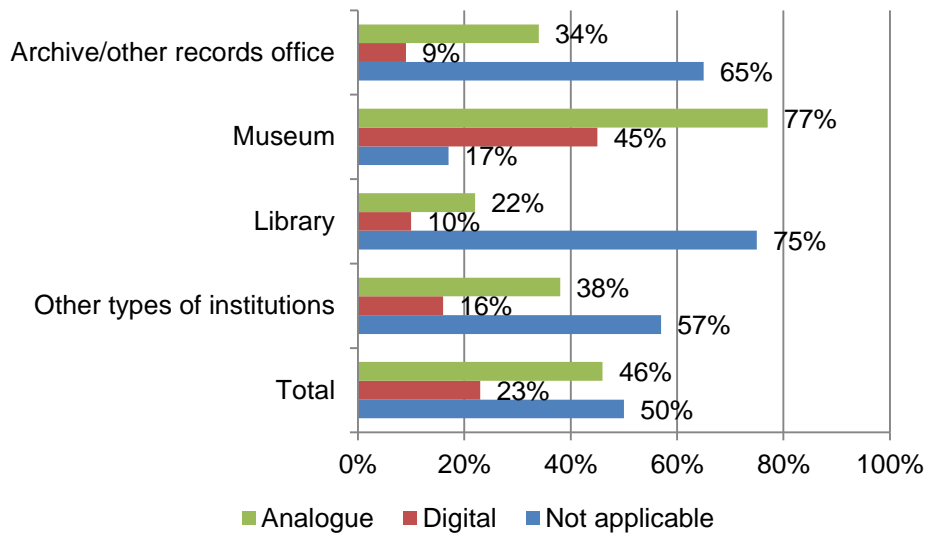


## D1.2: Report on ENUMERATE survey

### 3.4.3 3D man-made resources

The object type 3D Man-made movable resources, like works of art and furnishing, can be found mostly in museums.

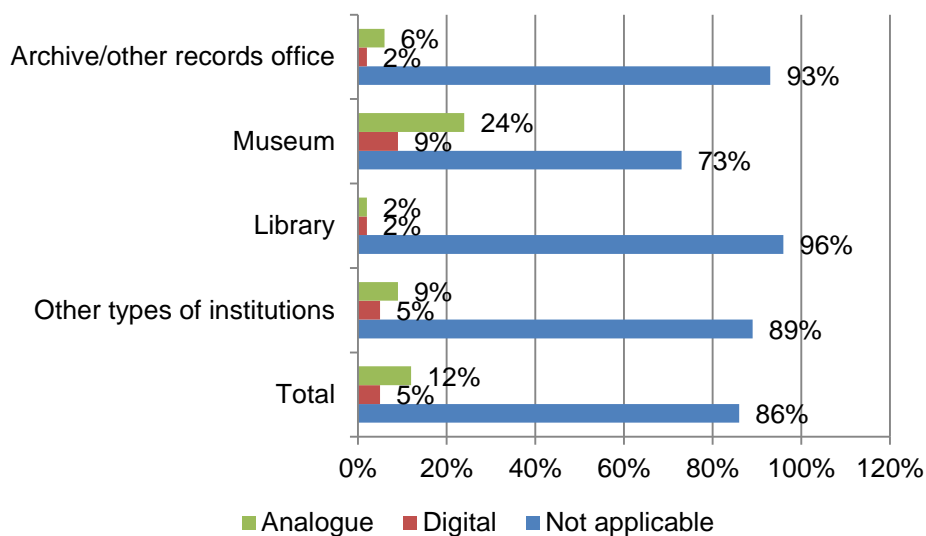
**Figure 3.4.3:** 3D man-made resources per institution type in percentages (n=815)



### 3.4.4 Natural resources

Amongst the institutions that participated in the survey, there were few having natural resources. This type of object is almost exclusively collected in museums.

**Figure 3.4.4:** Natural resources per institution type in percentages (n=815)

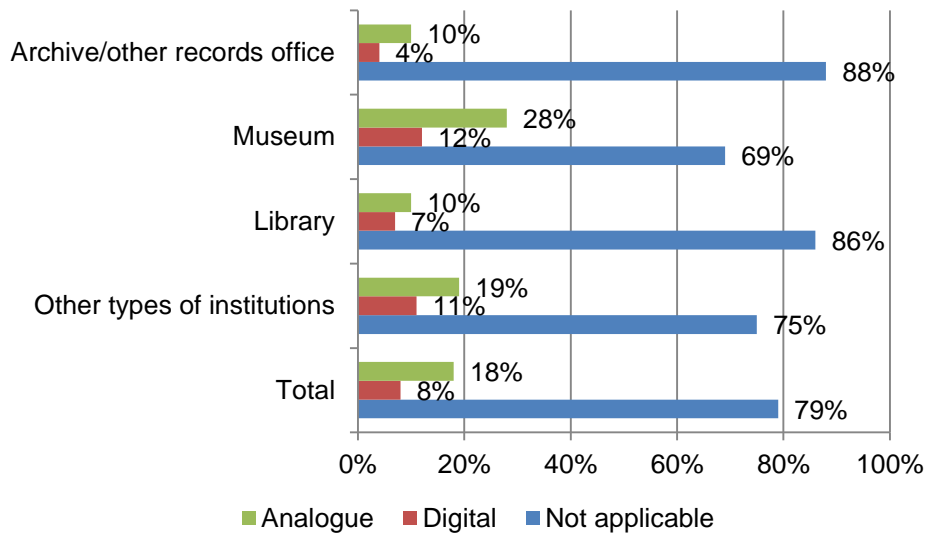




### 3.4.5 Geography based resources

Geography based resources, or the representations of these, are not collected by large numbers of institutions. They are most often in the collections of museums and other types of institutions.

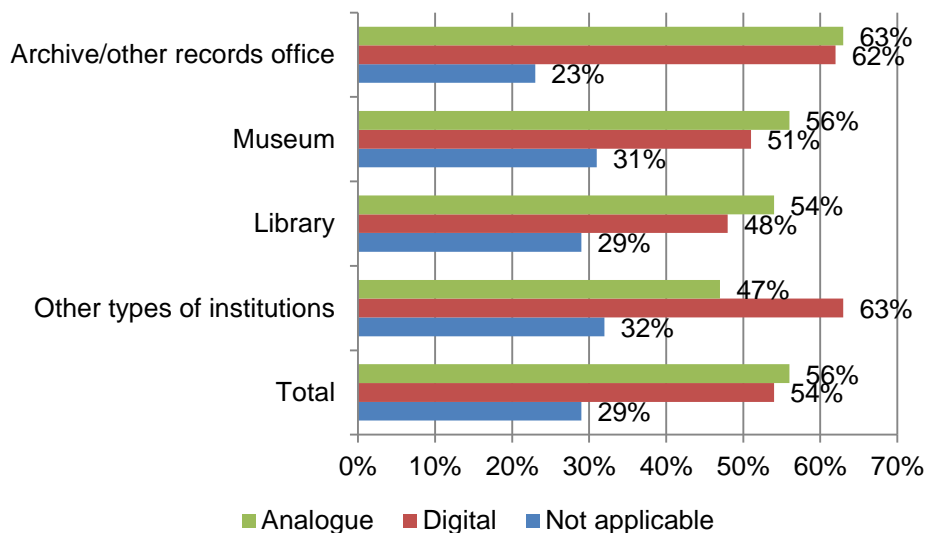
**Figure 3.4.5:** Geography resources per institution type in percentages (n=815)



### 3.4.6 Time based resources

Time based resources in digital format are found most in the categories Archives and Other type of institution. This category includes amongst others the Audio-Visual and Film institutes.

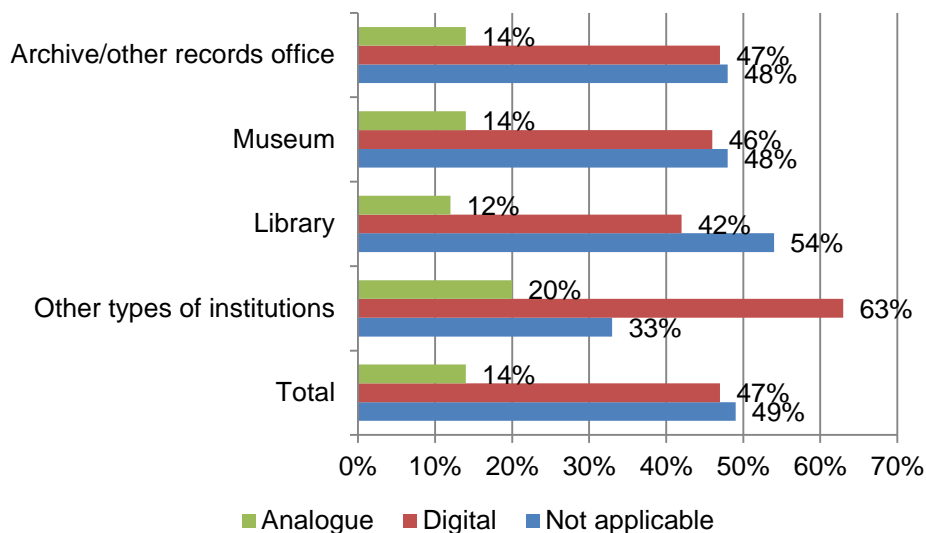
**Figure 3.4.6:** Time based resources per institution type in percentages (n=815)



### 3.4.7 Digital interactive resources (“exclusively digital”)

Born digital interactive resources are found in the collections of all types of institutes. Analogue in this context, refers to digital objects that are stored on analogue carriers (tapes for instance). As was explained above this category is more restricted than the category of born digital resources. This object type is found most often in Other types of institutions.

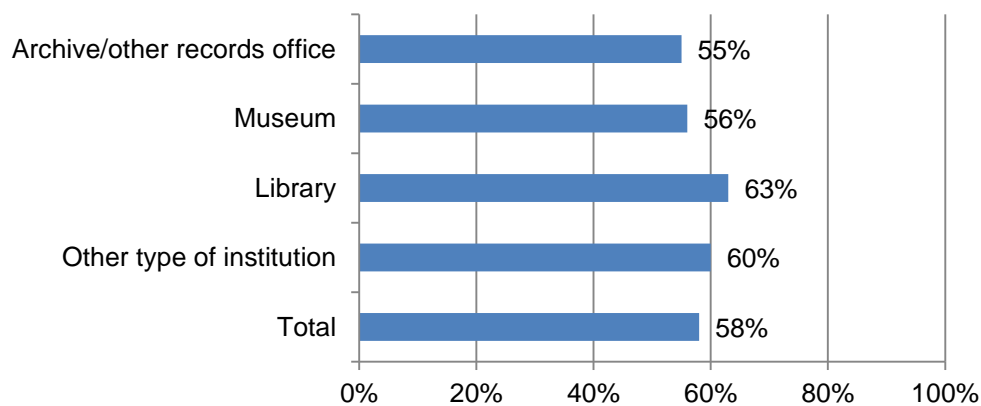
**Figure 3.4.7:** Digital interactive resources (“exclusively digital”) per institution type in percentages (n=815)



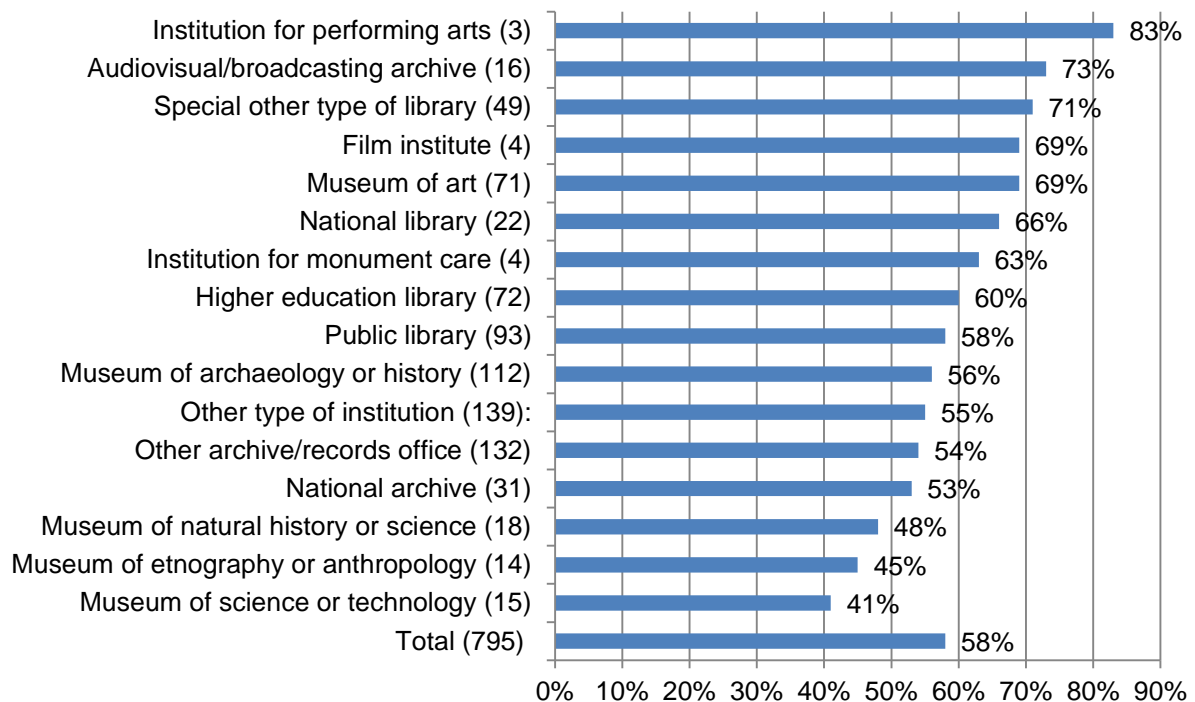
### 3.5 Digital cataloguing

In *Core Survey 3* on average, 58% of the collections are catalogued in a collections database. This is slightly higher than the percentage in *Core Survey 2* (54%). For the specific institution types the pattern is similar. Cataloguing percentages in libraries are highest. In certain types of museums and in archives and other records offices a lot of work still needs to be done.

**Figure 3.5.1:** Estimate the percentage of your entire heritage collections that has been catalogued in a collection database (n=795)



**Figure 3.5.2:** Estimate the percentage of your entire heritage collections that has been catalogued in a collection database (n=795)



### 3.6 Digitisation progress

Early 2015 on average, 23% of the heritage collections is digitised, according to the respondents. In *Core Survey 2* this figure was 17%. In *Core Survey 1* it was 20%.

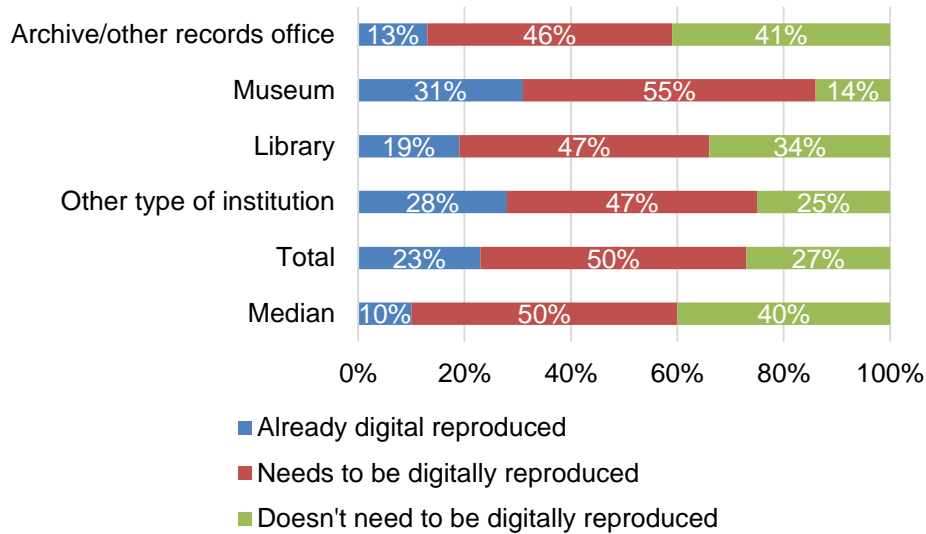
About 50% still needs to be digitised (in *Core Survey 1* this was 57%; in *Core Survey 2* 52%). Please note that these are not weighted figures. Institutions with small collections count as having the same in weight as institutions with large collections.

This is one of the reasons why the actual percentage of the digitisation level for *all* cultural heritage in Europe will most likely be smaller. The exact European heritage digitisation percentage cannot be calculated based on the current information, however.<sup>4</sup> The medians probably provide a more realistic indication than the averages.

<sup>4</sup> *Core Survey 2* included an optional section for institutions to provide more detail on the size of the collections. About a third of the respondents completed this section. Because of the huge amount of work and the low response to these questions, we've decided to leave these out in *Core Survey 3*.

## D1.2: Report on ENUMERATE survey

**Figure 3.6:** Estimate the percentage of your analogue heritage collections that has already been digitally reproduced (n=783) and still needs to be reproduced (n=780)



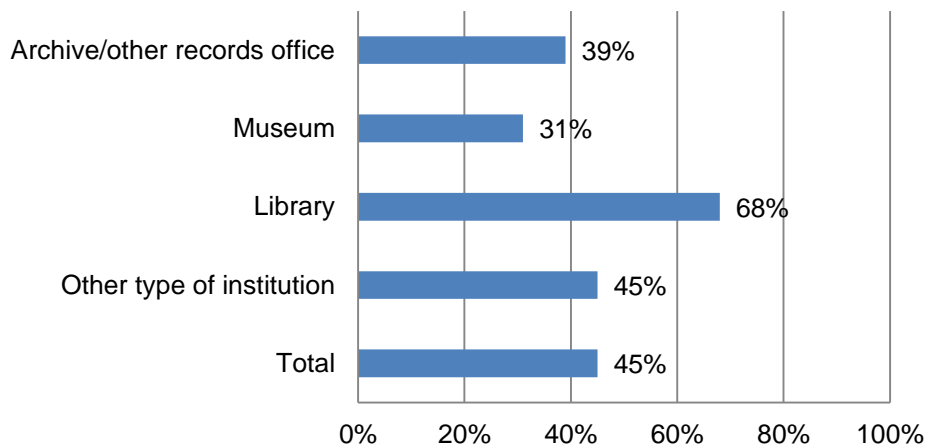
## 4. Digital access

### 4.1 Availability online of heritage collections metadata

The statistics of online availability of metadata and digital (object) collections were not asked in previous issues of the ENUMERATE Core Survey. Therefore comparisons cannot be made here. Not surprisingly libraries stand out in offering online access to their online catalogues.

Please keep in mind that the data provided here relates to those institutions that actually *have* digital catalogues.

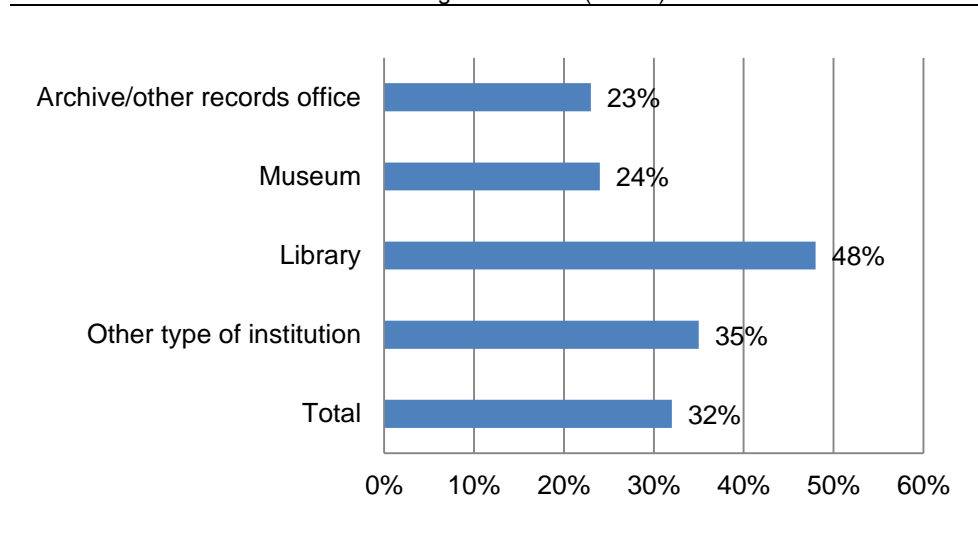
**Figure 4.1:** What percentage of your descriptive metadata (as recorded in your collection databases) is available online for general use? (n=761)



## 4.2 Availability online of digitally reproduced and born digital heritage collections

The question corresponding to online availability of cataloguing data addresses the percentages of collection items that are digitally reproduced or born digital *and* online accessible for general use. Understandably these percentage will be lower than the percentages in the previous question. But again, keep in mind that the data provided here relates to those institutions that actually *have* digitally reproduced or born digital collection items.<sup>5</sup>

**Figure 4.2:** Estimate the percentage of your digitally reproduced and born digital heritage collections that is available online for general use? (n=761)



## 4.3 Reasons for providing digital access

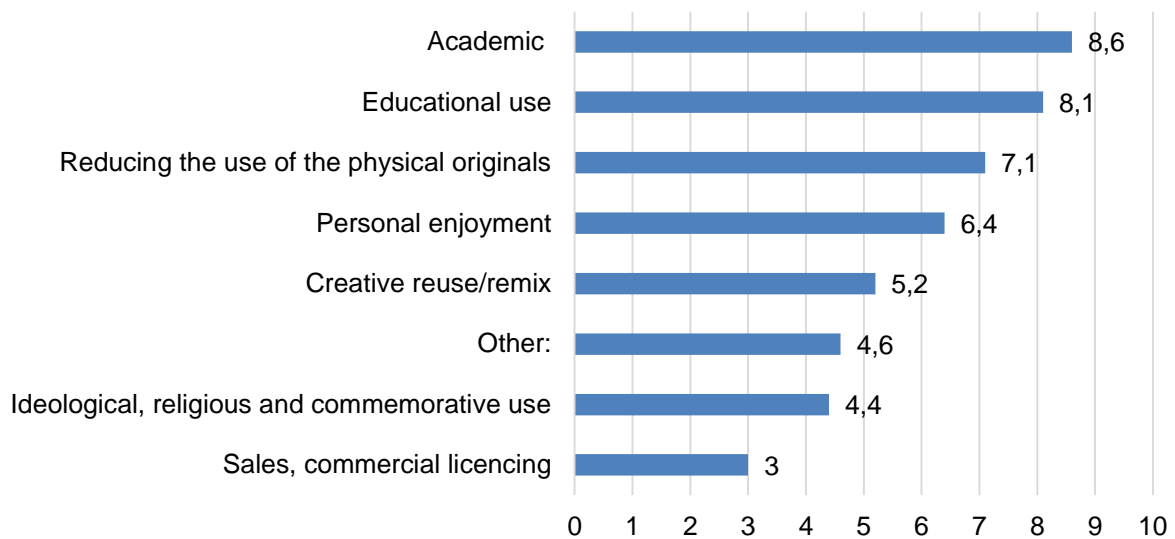
Institutions were asked to indicate the importance of a number of reasons to provide digital access to their collections. Answers are given on a 10-point scale ranging from 1 = *not important* to 10 = *very important*. This question was (newly) included in *Core Survey 2*. It was not in *Core Survey 1*.

Academic research is perceived as the most important reason to provide digital access to the collection. Second comes the educational use of the collection. Sales and commercial licensing is mentioned as the least important reason. The numbers are almost identical to those in *Core Survey 2*.

<sup>5</sup> See 4.5. for a more detailed overview of access channels.

## D1.2: Report on ENUMERATE survey

**Figure 4.3:** Collections are made accessible to the public for various reasons.  
How important is each of the following types of use for your institution? Mean results (n=756)



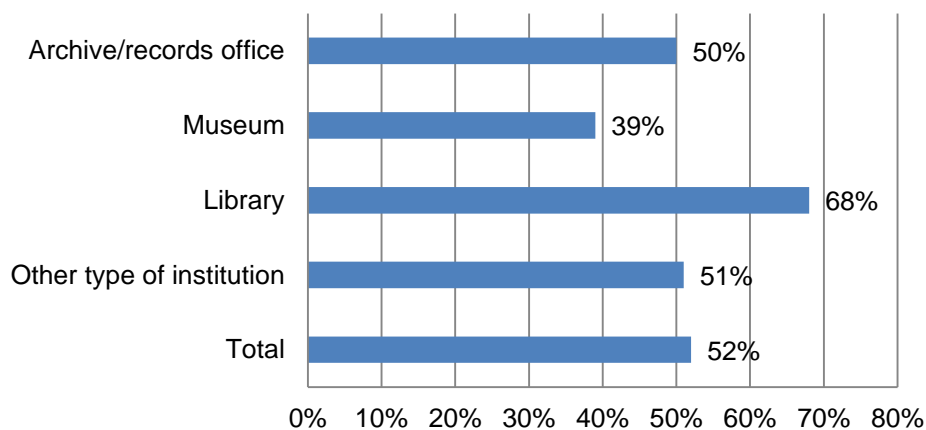
## 4.4 Measuring the use of digital collections

### 4.4.1 Percentages of institutions measuring

Over the years the number of institutions monitoring the *use* of their digital collections seems to increase slowly. In *Core Survey 1* on average 42% of all institutions monitored the use of the collection. In *Core Survey 2* we found a percentage of 51%. In *Core Survey 3* the overall percentage is 52%.

The list of institution types is not the same in the last survey, so on an institution type level we cannot compare the results accurately. We can however assume that in this area progress has been made.

**Figure 4.4.1:** Does your organisation measure the number of times that digital metadata and/or digital objects are being accessed by your users? (n=756)



4.4.2. How the institutions are measuring

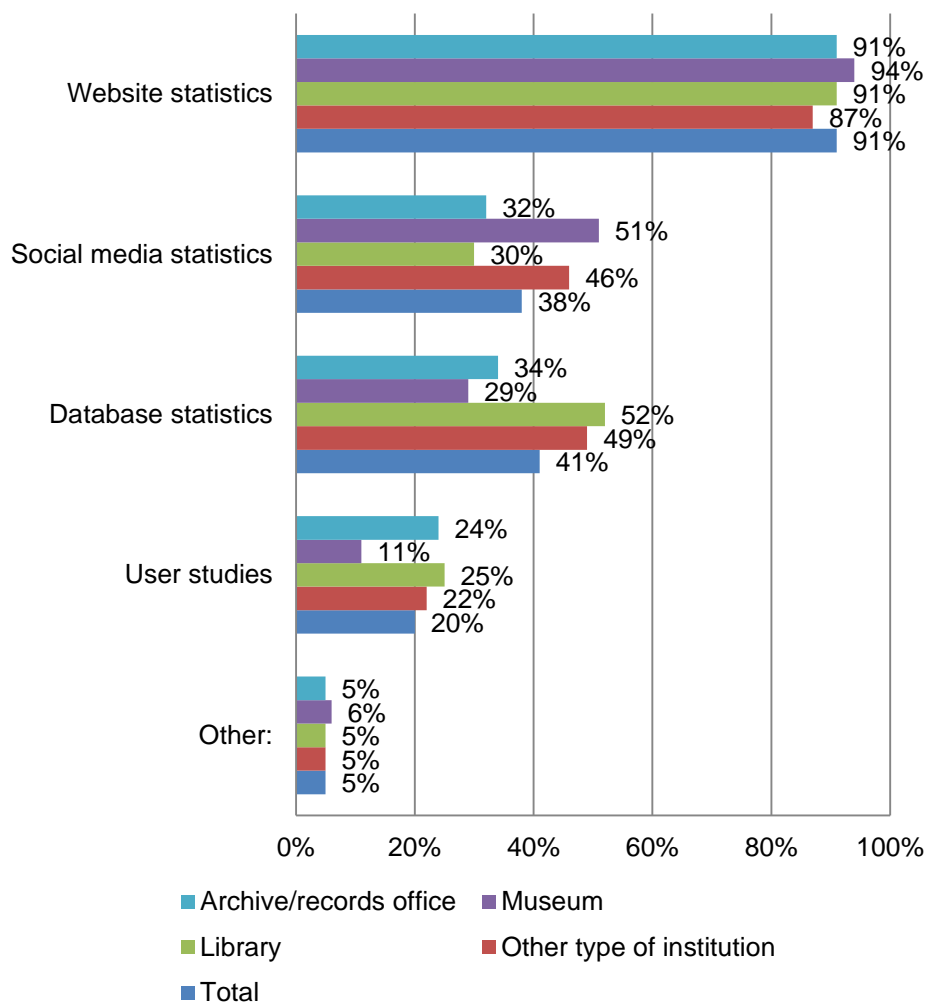
As in *Core Survey 1* and *Core Survey 2* respondents were asked to indicate *how* the use of the digital collections of their institution is measured. The outcomes for this question are fairly consistent over the years.

Website statistics is a widely used way to measure the use of the digital collections. 91% of the institutions that measure digital access use web statistics. This is equal to the percentage we found in *Core Survey 2*. The same question in *Core Survey 1* resulted in a use of web statistics of 85% of the responding institutions.

Database statistics are used by 41% (in *Core Survey 2* this was 47% and in *Core Survey 1* 36%). User studies account in the present survey for 20% (*Core Survey 2* 24%; *Core Survey 1* 16%). Probably these fluctuations are negligible.

In the second Core Survey, for the first time we asked for any measuring of the use of social media statistics. In *Core Survey 1*, this option was not included. The outcome in the 2013-2014 survey was that a percentage of 32% of the institutions made use of social media statistics. In the latest data this percentage is 38% (*Core Survey 3*).

**Figure 4.4.2:** How is the use of the digital collection measured? Total of all institutions in percentages (n=389)



#### 4.5. Channels used to offer access to the digital collections

A large number of access channels is available today. In previous Core Surveys questionnaires there was some ambiguity in the percentages for Offline access: were these about Offline access *only*, or was Offline one of the alternatives and could offline accessible digital objects also be accessible online? In *Core Survey 3* the question was rephrased - *Please indicate the estimated percentage of all digital objects you have that are and/or will be accessible through mentioned access options: ...* - where the options were:

- Offline only (for staff use)
- Offline only (for staff use and visitors on site)
- Online

The highest (average) percentage for *Offline use only* is 51% (staff use). The percentage *Offline only (for staff use and visitors on site)* was only 41% (not all offline accessible digital materials are accessible for visitors).

In a separate question we investigated the popularity of the main online access channels. Again we should keep in mind that this question is only about the *digital objects*. Percentages are not related to that part of the heritage collections that has not been digitally reproduced (yet).

As compared to earlier issues of the ENUMERATE Core Survey the overall pattern of responses in *Core Survey 3* is in many ways similar. In the table below the estimates for the institutional website are compared to those for Europeana and Wikipedia.

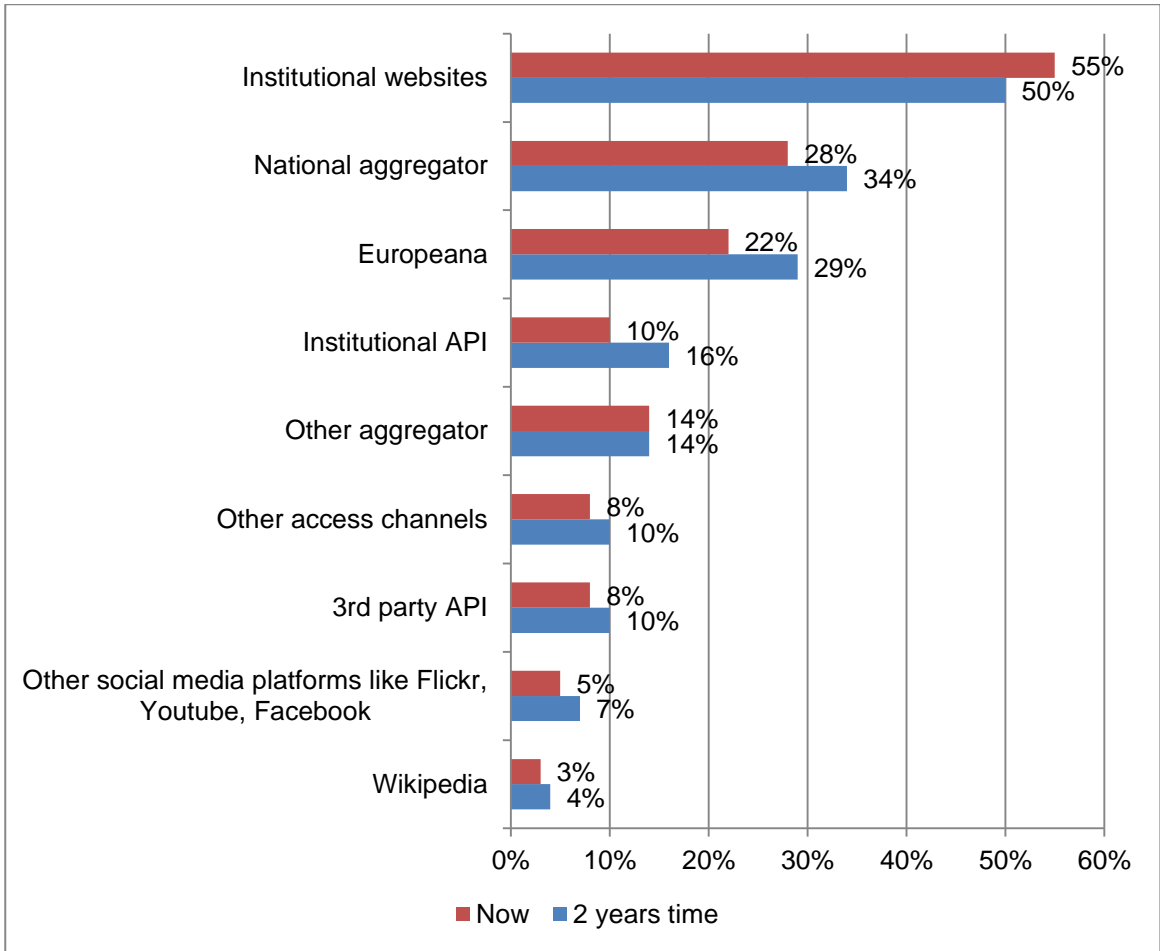
**Table 2.1:** Three access options compared

	Core Survey 1 (2012)		Core Survey 2 (2014)		Core Survey 3 (2015)	
	<i>Estimate 2012</i>	<i>Prognosis 2014</i>	<i>Estimate 2014</i>	<i>Prognosis 2016</i>	<i>Estimate 2015</i>	<i>Prognosis 2017</i>
Instit. website	31%	47%	34%	42%	55%	50%
Europeana	15%	31%	10%	18%	22%	29%
Wikipedia	3%	7%	2%	3%	3%	4%

Due to the precariousness of the estimates it is not possible to jump to firm conclusions here, but if we focus on the relative connection between estimate and prognosis it is remarkable that in *Core Survey 3* respondents foresee a reversal for the institutional website.



**Figure 4.5:** Estimates of the percentage of all digital objects that are and/or will be accessible through a number of leading access channels (n=594<sup>6</sup>)



<sup>6</sup> The n in this graph is compiled of all institutions that provided a number for at least one of the channels for one of the categories.

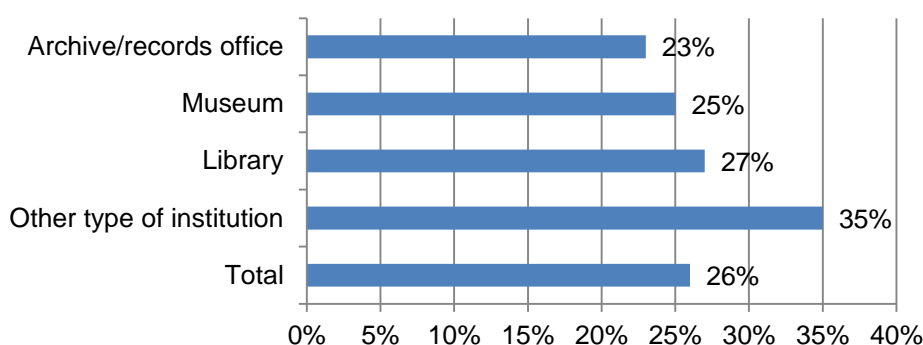
## 5. Digital preservation

### 5.1 Digital preservation strategy

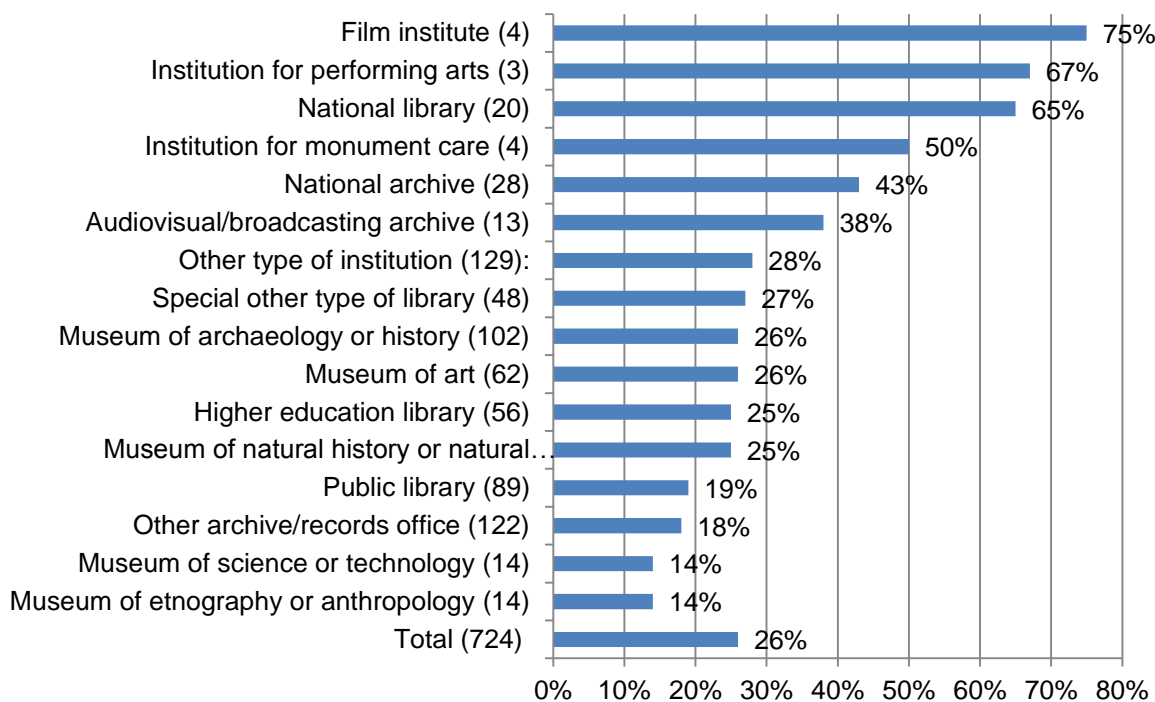
It is remarkable that the percentage of institutions having a written digital preservation strategy, endorsed by the management of the organisation was 26% in both *Core Survey 2* and *Core Survey 3*. In *Core Survey 1* 23% claimed to have a written strategy, but the question was slightly differently phrased at that time.

The percentages for libraries, museums and archives are fluctuating around 25%. The percentage for Other types of institutions are clearly higher. But overall it is clear that the majority of memory institutions in Europe do not have a formal strategy for digital preservation.

**Figure 5.1.1:** Does your organisation have a written Digital Preservation Strategy, which is endorsed by the management of your organisation? (n=724)

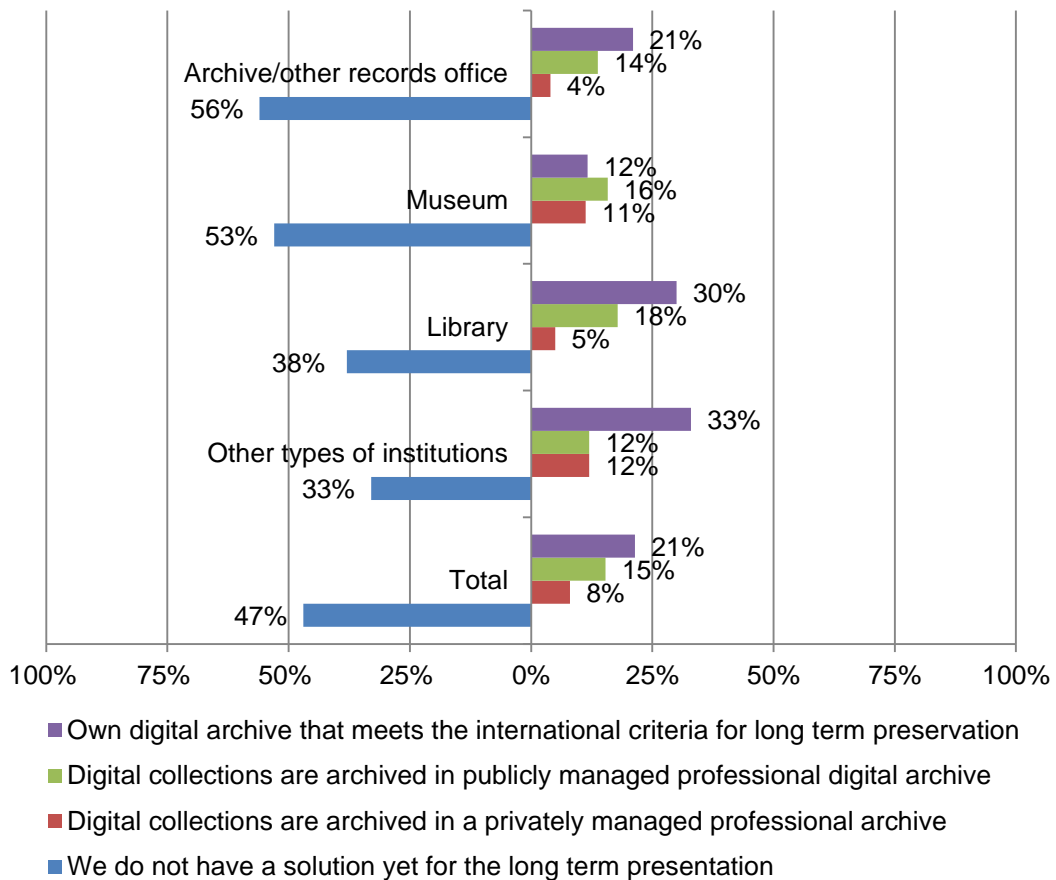


**Figure 5.1.2:** Does your organisation have a written Digital Preservation Strategy, which is endorsed by the management of your organisation? (n=724)



## 5.2 Use of international standards for digital preservation

**Figure 5.2.1.:** Are (parts of) your digital collections stored in digital archives that have been set up according to international standards for digital preservation? (n=722)

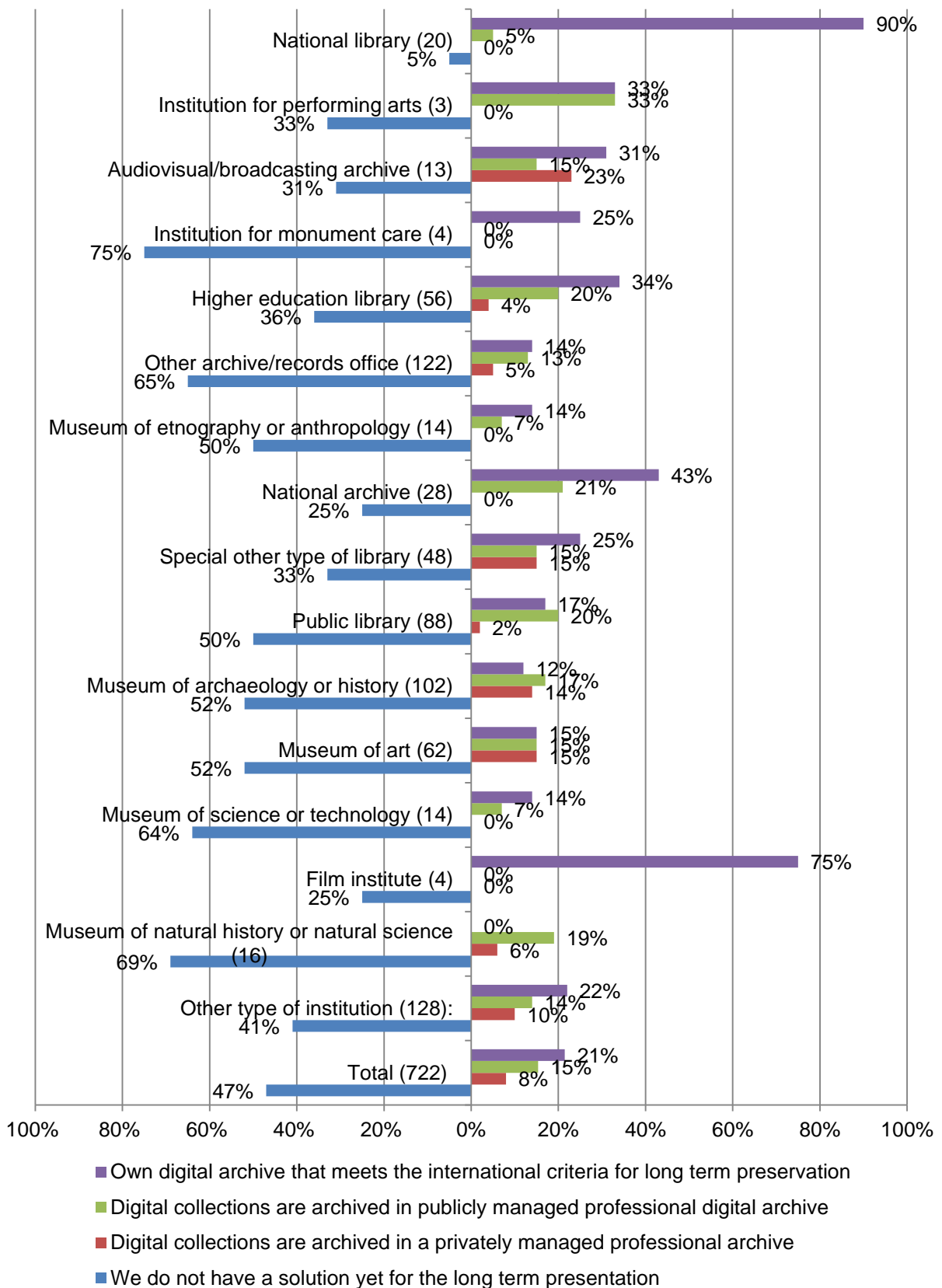


The percentages in each row do not sum up to 100% because of the category 'do not know' which is not presented in the figure.

About 47% of the respondents do not have a solution yet for long term preservation based on international standards for digital preservation. In *Core Survey 2* this was 48%. This percentage might be even a bit higher as about 8% did not know the answer to this question.

Large differences are visible if the institution types are compared, for instance national libraries are clear 'front runners', while other institutions still have a long way to go.

**Figure 5.2.2:** Are your digital collections stored in digital archives that have been set up according to international standards for digital preservation? (n=722)



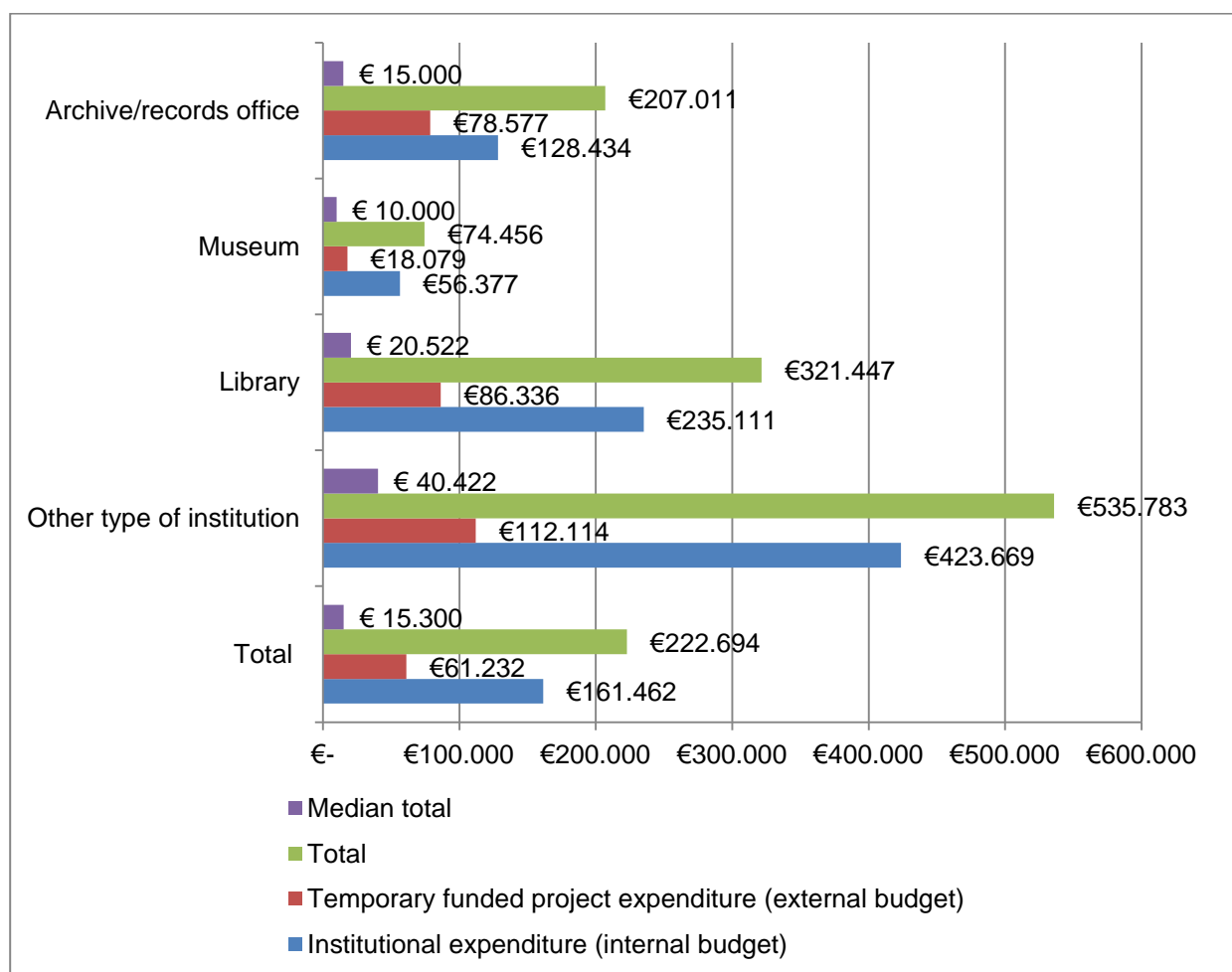
## 6. Digitisation Expenditure

### 6.1 Internal and external budgets

Costs made on an annual basis on creating, acquiring, maintaining, enhancing and preserving the digital collections can be funded by internal budgets and external budgets. On average the costs related to having digital collections are quite substantial, summing up to €276,471 (this was € 245,000 in *Core Survey 2*). The median for the total costs is much lower: €13,867 (€15,600 in *Core Survey 2*).

This sum is an estimate of all the costs related to the initial creation, ongoing maintenance, enhancement and preservation of the digital collections. The cost of the staff time devoted to such activities is included in this estimate.

**Figure 6.1:** Estimate your annual expenditure on creating/acquiring, maintaining, enhancing and preserving your digital collections. Average costs (n=694)



### 6.2 Incidental and structural costs

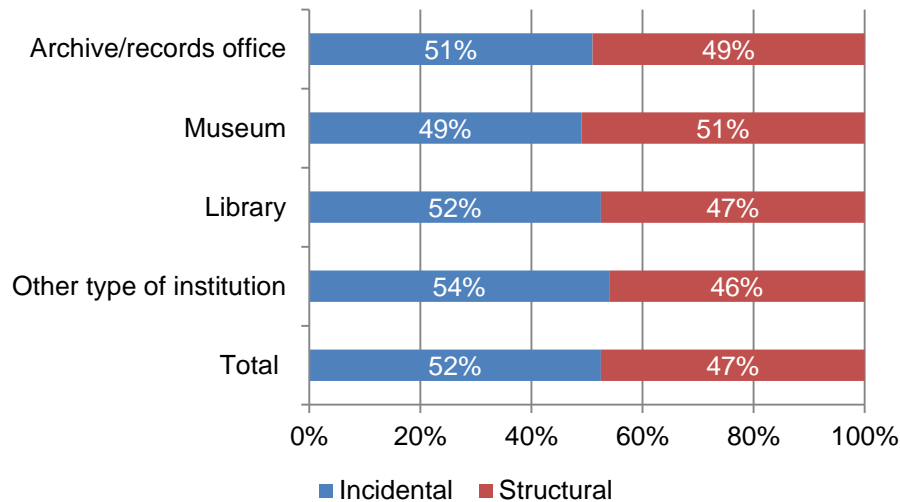
About 52% of the costs are qualified as being incidental cost (this was 53% in *Core Survey 2*) and the remainder are structural costs.

- **Incidental costs** are defined as the costs involved with the initial creation or acquisition of a digital collection. Examples: selection of materials, acquisition of digital born

materials, scanning, descriptive metadata creation, project management.

- **Structural costs** are the costs needed for the ongoing maintenance, enhancement and preservation of a digital collection. Examples: activities concerning the preservation of digital collections, licences, maintenance of web servers, user outreach and support, management.

**Figure 6.2:** Estimation of the percentage of the total annual expenditures on creating/acquiring, maintaining, enhancing and preserving digital collections. Incidental costs compared to structural costs. (n=675)

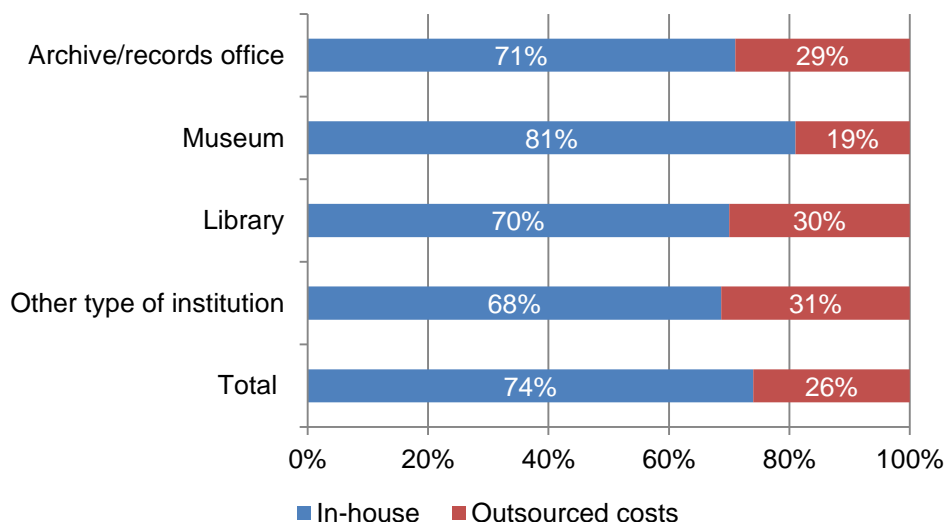


On the whole the results are very similar to the results in *Core Survey 2*.

### 6.3 In-house costs and outsourced costs

74% of the costs are spent internally, 26% are out-of-pocket costs for external suppliers. These results are very similar to results in *Core Survey 2* (72% and 28% respectively).

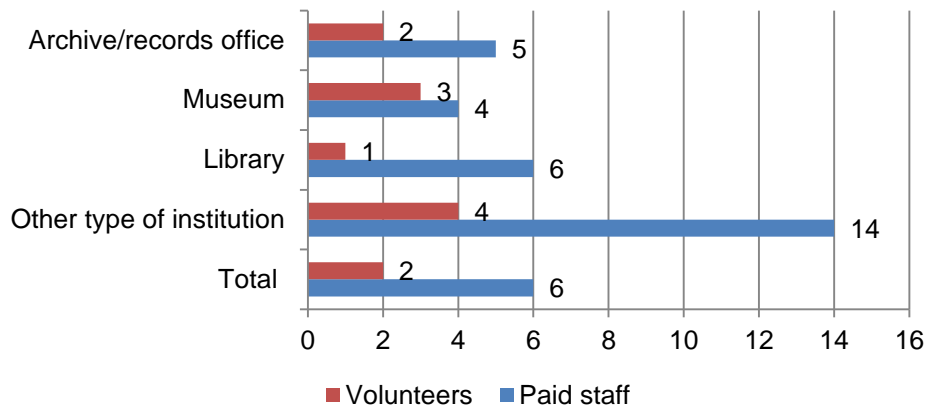
**Figure 6.3:** Estimation of the percentage of the total annual expenditure on creating/acquiring, maintaining, enhancing and preserving digital collections. In-house costs compared to outsourced costs (n=668)



### 6.4 Paid staff and volunteers

An average of 8 people are involved on a full-time basis in the digital collection activities. 6 people are paid staff and 2 are volunteers. The absolute number (8 fte) is the same as in *Core Survey 2*, but the ratio in *Core Survey 2* was different (5 fte paid staff; 3 fte volunteers).

**Figure 6.4.1:** What is the total number of paid staff (n=668) and volunteers (n=669) (in full-time equivalent) in means engaged in creating/acquiring, maintaining, enhancing and preserving your digital collections on an annual basis?

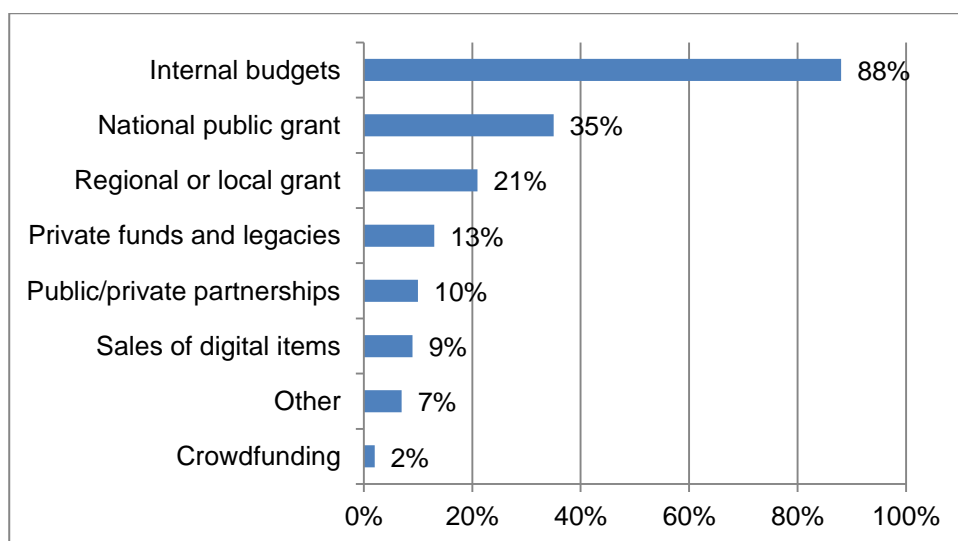


### 6.5 Funding

By far the largest number of institutions mention internal budgets as the financial source for digital collection activities. National public grants are available to almost 35% of the respondents (*Core Survey 2*: 40%). 21% receives regional or local public grants (in *Core Survey 2* this was 22%).

The answers to this question do not indicate the amount of money in the funding. They only refer to the different sources. The results are very similar to *Core Survey 1* too. Crowd funding was not mentioned in *Core Survey 1*. In *Core Survey 2* 2% of the institutions mentioned this as a source. In *Core Survey 3* this was exactly the same.

**Figure 6.5:** From what sources are your digital collection activities funded? Percentages of institutions, **not** the percentage of the average budget from the average institution (n=668)



## Appendix – Core Survey 3 Questionnaire

### SECTION 1/7: Organisational Information

1. Name of institution / organisation

[input box]

This information will not be published in the ENUMERATE report.

2. Type / Domain of institution / organisation

Specify the primary heading you would assign to your institution.

Please choose **only one** of the following:

- National archive
- Other archive / records office
- Audio-visual / broadcasting archive
- Film institute
- Institution for performing arts
- Museum of art
- Museum of archaeology or history
- Museum of natural history or natural science
- Museum of science or technology
- Museum of ethnography or anthropology
- National library
- Higher education library
- Public library
- Special or other type of library
- Institution for monument care
- Other (specify below)

Other type of institution: [input box]

3. Country in which your institution is located

- Albania
- Andorra
- Armenia
- Austria
- Azerbaijan
- Belgium
- Bosnia and Herzegovina
- Bulgaria
- Croatia
- Cyprus
- Czech Republic
- Denmark
- Estonia
- Finland
- France
- Germany
- Greece



## D1.2: Report on ENUMERATE survey

- Hungary
- Iceland
- Ireland
- Italy
- Latvia
- Liechtenstein
- Lithuania
- Luxembourg
- Malta
- Republic of Moldova
- Monaco
- Montenegro
- Netherlands
- Norway
- Poland
- Portugal
- Romania
- Russian Federation
- San Marino
- Serbia
- Slovak Republic
- Slovenia
- Spain
- Sweden
- Switzerland
- Turkey
- Ukraine
- United Kingdom
- Former Yugoslav Republic of Macedonia
- Other country (specify below)

Other country: [input box]

### 4. Website of your institution

[input box]

Provide the address of your institution's main website that is accessible for the general public.

This information will not be published in the ENUMERATE report.

### 5. Your name

[input box]

This information will not be published in the ENUMERATE report.

### 6. Your job title

[input box]

The role or position of the main person completing this survey.

### 7. Your e-mail address

[input box]

## D1.2: Report on ENUMERATE survey

This information will not be published in the ENUMERATE report.

### 8. What is your institution's total annual budget?

Please choose **only one** of the following:

- < 10,000 €
- 10,000-50,000 €
- 50,000-100,000 €
- 100,000-500,000 €
- 500,000-1M €
- 1 - 10M €
- > 10M €

Provide the annual budget for the entire cultural heritage institution as indicated in the last published annual account. If your institution is part of a larger organisation (e.g. a higher education library that is part of a higher education institution) only provide the budget of the cultural heritage related unit.

The total annual budget may include government funding, project funding, revenues from commercial activities, etc. If your budget occurs in two categories (e.g. 50,000 €), please choose the lower category.

### 9. Total number of paid staff (in \*full time equivalents\*, not in number of people)

[input box] [only 1 decimal accepted, e.g.: 3,7]

The number of \*full time equivalents\* should represent the total staff employed by your institution, including permanent and temporary staff, but excluding contractors and volunteers. Part-time staff needs to be added up to represent a full working week. If your institution is part of a larger organisation (e.g. a higher education library that is part of a higher education institution) only provide the numbers of the cultural heritage related unit.

Note: the number of staff engaged in \*digitisation activities\* will be asked for later in the survey (see below).

## SECTION 2/7: Digitisation Activity

### 10. Does your institution have \*collections\* that need to be preserved for future generations?

Yes

No

Answer this question with 'No' if your institution does not hold heritage collections or if you only have collections (for example of books, films, music) that can be lend by or sold to users.

###If the answer is No, automatically proceed to o-o-o at the end of the survey.###

### 11. Does your organisation have \*digital collections\* or is it currently involved in collection \*digitisation\* activities?

Yes

No

###If the answer is No, automatically proceed to questions 13, 14, 15, 16, 17, 18 and after that to the end of the survey.###

### 12. Does your organisation have a \*written digitisation strategy\*, endorsed by the management of your organisation?

Yes

## D1.2: Report on ENUMERATE survey

No

Do not know

The strategy may be for any period up to 2020.

### 13. Does your organisation collect \*born digital heritage\*?

Yes

No

Do not know

Answer this question with 'yes' if your institution collects any kind of \*born digital heritage\* materials (i.e. software, digital documents, digital art, harvested web content, etc.) with the explicit intention of preserving these born digital materials for future generations.

### 14. Please select the collection types that are part of the heritage collections of your institution

###NOTE: Table will not be presented as it is here. The table can be folded out selectively, starting from the high level collection type classes in the left column.###

Please specify the object types that are part of the heritage collections of your institution. The digital collection consists of digitally reproduced analogue objects and born digital objects. An object that has been catalogued in a database with metadata records only, is not considered to be part of the 'digital collection'.

Collection type	Object type	In analogue collection y/n	In digital collection y/n
<b>(01) TEXT BASED RESOURCES</b>			
<b>(02) VISUAL (2D) RESOURCES</b>			
<b>(03) ARCHIVAL RESOURCES (not included in 01 or 02)</b>			
<b>(04) 3D MAN-MADE MOVABLE OBJECTS</b>			
<b>(05) NATURAL RESOURCES</b>			
<b>(06) GEOGRAPHY BASED RESOURCES</b>			
<b>(07) TIME BASED RESOURCES</b>			
<b>(08) DIGITAL INTERACTIVE RESOURCES (EXCLUSIVELY DIGITAL)</b>			

## D1.2: Report on ENUMERATE survey

Tests have indicated that answering the questions about the size of collections are rewarding, but may be challenging. Some institutions will want to be more specific than is possible here; others may find it difficult to give even the high level estimates asked for. We are convinced that all institutions will benefit from an exercise in mapping out digital collections. Please send us an e-mail if you want to take up the challenge: [den@den.nl](mailto:den@den.nl)

15. Estimate the percentage of your entire heritage collection that has been catalogued in a collection database:

[input box]

The estimated percentage of your entire heritage collections that has been catalogued in a collection database concerns item level descriptions (metadata records) of analogue and born-digital heritage objects.

16. Estimate the percentage of your analogue heritage collections that has already been digitally reproduced:

[input box]

A digital reproduction is a digital surrogate of an original analogue object. Please note that an object that has only been catalogued in a database with metadata records is not considered to be "digitally reproduced".

17. Estimate the percentage of your analogue heritage collections that still needs to be digitally reproduced:

[input box]

## SECTION 3/7. Digital Access

18. What percentage of your descriptive metadata (as recorded in your collection databases) is available online for general use:

[input box]

This concerns the estimated percentage of the metadata records in your collection database(s) that is available for immediate use on demand by any internet connected person or system, without human intervention.

19. Estimate the percentage of your digitally reproduced and born digital heritage collections that is available online for general use:

[input box]

This concerns the estimated percentage of the digitally reproduced and born digital objects in your heritage collections that is available for immediate use on demand by any internet connected person or system, without human intervention.

20. Collections are made accessible to the public for various reasons. How important is each of the following types of use for your institution?

Using a 10-points scale - where 1 equals "not at all important" to 10 "highly important" - please select only one number per row.

D1.2: Report on ENUMERATE survey

<i>type of use</i>	1	2	3	4	5	6	7	8	9	10
Academic research										
Creative reuse/Remix										
Educational use										
Ideological, religious and commemorative use										
Personal enjoyment										
Reducing the use of the physical originals										
Sales, commercial licencing										
Other types of use (specify below)										

Other types of use: input box

21. Does your organisation measure the number of times digital metadata and/or digital objects are being accessed by your users?

Yes

No

Do not know

In order to be able to answer this question with 'yes' any manner of measurement will suffice.

22. If Yes, how?

- \*Website statistics\*
- \*Social media statistics\* (e.g. Facebook, Flickr, Youtube, Wikipedia)
- \*Database statistics\* (if not included in Website statistics and Social media statistics)
- \*User studies\*
- Other: [input box]

Please indicate all ways in which the access of digital metadata and objects is measured.

23. Please indicate estimated percentage of all the digital objects you have that are and/or will be accessible through the mentioned access options:

- Offline only (for staff use) [input box]
- Offline only (for staff use and visitors on site) [input box]
- Online [input box]

## D1.2: Report on ENUMERATE survey

*For the online part, please indicate through which channels in the table below.*

Access channel	% of digital objects currently accessible (estimation is OK)	% of digital objects accessible 2 years from now (estimation is OK)
*Institutional website*		
*National aggregator*		
*Europeana*		
*Other aggregator*		
*Wikipedia*		
Other *Social media platforms* like Flickr, Youtube, Facebook		
Institutional *API*		
3 <sup>rd</sup> party *API*		
Other Access channels (specify below)		

Other Access channels: [input box]

Multiple access options for your individual digital collections are a possibility (i.e. Europeana and Wikipedia). Consequently, the sum total of your answers does not have to be 100%.

## SECTION 4/7. Digital Preservation

24. Does your organisation have a \*written Digital Preservation Strategy\*, that is endorsed by the management of your organisation?

Yes

No

Do not know

The answer of this question will be 'yes' when your institution has a formal document that describes the strategy for the \*digital preservation\* and permanent access to your digital heritage collections.

25. Are (parts of) your digital collections stored in digital archives that have been set up according to \*international standards\* for \*digital preservation\*?

Yes, we have our own digital archive that meets the international criteria for long term preservation

Yes, our digital collections are archived in a publicly managed professional digital archive

Yes, our digital collections are archived in a privately managed professional digital archive

## D1.2: Report on ENUMERATE survey

No, we do not have a solution yet for the long term preservation of our digital collections based on international standards

Do not know

Answer this question with 'yes' if your institution is actively involved in safeguarding the digital heritage collections for future generations, based on international standards or best practices.

### SECTION 5/7. Digitisation Expenditure

26. *Please estimate your annual expenditure on your \*digital collections\* (\*total cost of ownership\*)*

	Please estimate the budget concerned (€):	Please specify the year concerned:
Institutional expenditure (internal budget):		[drop-down list: 2010, 2011, 2012]
Temporary funded project expenditure (external budget):		[drop-down list: 2010, 2011, 2012]

These budgets should be estimates of the costs related to the initial creation, ongoing maintenance, enhancement and preservation of your digital collections. Please attempt to include the cost of the staff time devoted to digital collection related activities in these estimates. If budget year does not coincide with the calendar, please choose the calendar year that fits best (in terms of the number of months)

Costs can be divided into incidental (upfront) costs and structural (ongoing) costs:

- Incidental costs are defined as the costs having to do with the initial creation or acquisition of a digital collection. Examples: selection of materials, acquisition of digital born materials, scanning, descriptive metadata creation, project management.
- Structural costs are the costs needed for the ongoing maintenance, enhancement and preservation of a digital collection. Examples: activities concerning the preservation of digital collections, licences, maintenance of web servers, user outreach and support, management.

27. *Please estimate what percentage of the total annual expenditures on creating/acquiring, maintaining, enhancing and preserving your \*digital collections\* can be assigned to \*incidental costs\* and what percentage can be assigned to \*structural costs\*:*

	Incidental costs:	Structural costs:	
Percentage [should add up to 100%]	... %	... %	100 %

28. *Please estimate what percentage of the total annual expenditures on creating/acquiring, maintaining, enhancing and preserving your \*digital collections\* is spent \*In-house\* and what percentage is \*Outsourced\*:*

## D1.2: Report on ENUMERATE survey

	In-house costs:	Outsourced costs:	
Percentage [should add up to 100%]	... %	... %	100 %

29. What is the total number of paid staff (in full-time equivalent) engaged in creating/acquiring, maintaining, enhancing and preserving your \*digital collections\* on an annual basis?

[input box]

Include the time of your own institution's staff engaged in activities related to creating/acquiring, maintaining, enhancing and preserving your \*digital collections\*, including: planning and managing in-house and contracted projects; preparing and digitising materials; enhancing digitised output to widen accessibility.

30. What is the total number of volunteers (in full-time equivalent) engaged in creating/acquiring, maintaining, enhancing and preserving your \*digital collections\* on an annual basis?

[input box]

Include the time of your institution's unpaid staff. Volunteers who receive compensation for their expenses (like travel costs) should also be included.

31. From what sources are your digital collection activities funded?

- \*Internal budgets\*
- \*Crowdfunding\*
- \*National Public grant/subsidy\*
- \*Regional/Local Public grant/subsidy\*
- \*Private funds and legacies\*
- \*Public/private partnership\*
- \*Sales of digital items\*
- Other: [input box]

Indicate all the sources from which your digitisation activities are funded.

## SECTION 6/7. General Notes

32. Please include any information that was not asked for above and that you think is relevant for understanding the nature of activities related to your digital collections

[free text field]

Comments on the questionnaire itself can be given in the next question (33)

## SECTION 7/7. Questionnaire Evaluation

33. Please include any comments that would help us to improve future issues of this survey.

[free text field]