Report on user needs and requirements of cultural heritage professionals to inform product and service development

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Table of contents

Introduction

Background

This report is the first of a planned annual report into the needs and requirements of cultural heritage professionals to inform product and service development. For this inaugural report, the focus will be on a meta-analysis of survey data to establish the needs of professionals, and a direction which can inform the trajectory of product and service development but with the ultimate view to establishing a strategy for gathering more relevant data in the coming years. Data has been selected for analysis where the respondents of those surveys are either; official responses from a professional on behalf of a cultural heritage institution (CHI); or respondents who identified as cultural professionals in our surveys; or respondents who indicated that they work at a CHI. A meta-analysis holds value over individually reported activity results because it allows for a thorough dive into who is responding to various activities. It allows us to build a picture of how things change over time for cultural professionals, as well as within the wider sector, and it gives us a benchmark by which to judge future activities.

The analysis in this report is achieved through aggregation of the responses from each survey. The aggregation of responses has also been used to build a database of data about the responding CHIs (464 entries) which is very valuable and can be expanded over the coming years as we continue to collect data from our cultural professional audiences. In addition we have also collected a list of 534 job titles from survey activities in the last 3 years which we can continue adding to.

Meta-analyses allow researchers to dive into questions which were not necessarily posed by the individual studies and which therefore may not have been reported on. Where similarities exist between conclusions drawn in the meta-analysis and individual activities these are strengthened due to the added data.

Moreover, a meta-analysis allows us to look at the strength of data collected with a fresh approach and consider how these can inform our future data collection strategies. This is of particular importance at present as we see dwindling responses to our data collection activities over the past years. We therefore will use the findings of this analysis to outline Europeana Initiative's strategy for the coming two years with regard to data collection and research into the cultural heritage sector and professionals working within it. We need to make sure collecting data from our audiences is not burdensome for that audience, and useful for our broader understanding of where we need to position our work in future. Therefore this and future versions of this report can inform the offer of both the Europeana Initiative as a whole and also the common European data space for cultural heritage.

Data Selection

Data was selected from activities where we asked respondents if they are a cultural professional and/or where they contributed further details about their role or institution which allowed us to classify their professional background as cultural professional. This was done in addition to those activities where we asked for responses on behalf of an institution. The former are classified in this report as individual responses and the latter as institutional responses. In the former category are two activities (2023 ENA survey and the 2024 Pro user survey - 366 responses from cultural heritage professionals) in addition to job function data gathered via the institutional responses (534 titles). In the institutional category are eight activities of 513 named CHIs - these were analysed and a database of 464 individually identified institutions was created from this data. Figure 1 below shows a breakdown of all the relevant activities.

Activities with cultural heritage institution level responses				
Year	**Activity**	**Description and original aim of activity**	**Overall number of responses (incl. Anonymous responses)**	**No. of responses from a named and verified CHI only**
Activities aimed at establishing specific needs from CHIs with regard to Europeana				
2019	CHI Satisfaction	This survey was fielded in 2019 and aimed to	37	23

	Survey	gather CHI satisfaction with the aggregation process. It was fielded via the aggregators to their data partners.		
2021	CHI Satisfaction Survey	This survey was fielded in 2021 and aimed to gather CHI satisfaction with the aggregation process. It was fielded via the aggregators to their data partners. This version also explored the value and impact in aggregating data to Europeana.	20	19
2023	CHI Satisfaction Survey via Zoho	This survey was fielded in 2023 and aimed to gather CHI satisfaction with the aggregation process and all of Europeana's products and services. It was fielded via an ENA mailing list of individuals working with Europeana's CHIs. It allowed for responses from potential data providers as well.	23	15
2023	CHI Satisfaction Survey via Pop-up on Pro	This pop-up survey was fielded in 2023 on Europeana Pro and allowed for responses from potential data providers as well as gathering satisfaction on the aggregation process for Europeana's existing	88	28

		data providers.		
2021	Publishing digital collections online survey	This survey was fielded in 2021 via Europeana's aggregators, especially via Archives Portal Europe. It was aimed at digital collections more broadly and therefore included existing Europeana data providers and potential data providers. It was complimented by an interview process.	86	79
Activities aimed at understanding specific themes in the cultural sector				
2022	ENUMERATE	This survey was fielded via the ENUMERATE self assessment tool in 2022 and aimed to gather responses from any CHI with digital or physical collections or that worked in a data aggregation capacity. Some data was lost due to the malfunction of the tool.	225	225
2023	Persistent Identifiers Survey	This survey was fielded in 2023 with a view to getting responses from Europeana's data providing CHIs and aggregators and to discover what their practices are with regard to assigning identifiers to digital collections items. It was fielded via Europeana's	79	79

		mailing lists, and accredited aggregators.		
2023	Environmental sustainability practice survey	This survey was fielded in 2023 with a view to getting responses on a CHI level or on a individual professional level. The aim was to understand how far environmental and sustainability practices are implemented at CHIs and when working with digital collections.	130	45
2019-2023	**8 activities**		**688**	**513 named CHIs (of which 456 non duplicate CHIs and 282 individual job titles)**[1]
Activities with individual cultural heritage professional responses				
Year	Activity	Description	Overall number of responses from those of all backgrounds	No. of responses from cultural professionals only
2024	Europeana Pro User Survey	This survey fielded this year as a pop-up on Pro aimed to get a better understanding of all of Pro's users and their needs.	526	233

[1] As discussed below some of these organisations are from outside of Europe.

2023	ENA survey	The ENA survey in 2023 aimed to understand the impact of the ENA and also gather data needed around the requirements for communications tools.	229	133
2023/ 2024	**2 activities**		**755**	**366 individual CH responses**[2]

Figure 1. Table of all activities included in the report

Representativeness of the data

Assuming that the entire European cultural sector contains around 7.7 million employees,[3] a basis of 385 responses are required to make significant assumptions about the data on an individual level (with a 95% confidence).[4]
By aggregating the responses for the individual activities we have 366 responses which is just shy of the basis but still gives us 94% confidence in the results. For the professional titles, we have gathered 389 responses which can be considered representative.

For the Cultural Institutions in Europe we estimate there are c.14.281.[5] We would therefore be looking for 375 responses in order to reach statistical significance with a 95% confidence rate. For the CHI survey activities we have a total of 513 responses from 464 separate institutions which is certainly a significant sample.

Therefore through aggregating the data from various activities we can gain firmer insights into who makes up our active audiences even where data from

[2] 20% of the Pro segment are ENA members so there is a chance of a small amount of double reporting. We could not segment by country as discussed below but this can be changed in future.
[3] See Eurostat: https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Culture_statistics_-_cultural_employment#Characteristics_of_cultural_employment_in_2022
[4] Based on industry standard Z-score/Central Limit Theorem, and the law of large numbers.
[5] Based on 2022 Eurostat figures from Business demography by size class (from 2004 onwards, NACE Rev. 2) dataset accessed July 2022.

individual efforts is lower than we would need for the estimated population size. If we build on this foundation then year after year we can increase the data gathered into our database and lists of activities and CHIs and solidify these insights to learn from them further, and also to help us to refine our future data gathering efforts to make them more effective and efficient.

Ultimately we want to gather more data that brings more value and this can be best achieved by understanding exactly what data will bring the most value and what worked and did not work with previous attempts. In general, responses to survey activities in our sector tend to be sparse - and survey and digital fatigue are two major culprits. There are a vast number of survey activities taking place in the cultural sector and circulated on Europeana's mailing lists frequently. In addition the number of voluntary contributions requested from cultural heritage professionals related to the data space or the Europeana Initiative may feel overwhelming to some who are already working full time. Moreover, since the pandemic more activities have moved online which in turn may have increased the workload of some cultural heritage professionals who are juggling both an in person and an online presence.

Qualitative insights

As mentioned above, one of the benefits of meta-analysis is being able to aggregate smaller responses to gain greater quantitative insights. Another benefit is diving into the small number of qualitative responses. Some of our activities - responses which may be in very small numbers and on an individual study level are not so powerful, but when aggregated together they can give us a new insight into previous studies and validate more commonly mentioned issues. In regard to the CHI level surveys we will also look at the responses which have been spontaneous such as in free text questions. These spontaneous comments may not seem relevant in some surveys (where for example there is only one or two comments on a certain theme) but when the same sentiments are echoed across various studies and this data is offered spontaneously these gain more weight. Such insights are an excellent compliment to quantitative data and afford deeper insights into the issues affecting respondents but that cannot be captured in the quantitative data alone.

Who are the cultural professionals responding to Europeana's surveys?

Professional status

We segmented data by cultural professionals from the Pro User Survey (2024 - 233 cultural heritage professional respondents) and the ENA survey (2023 - 133 cultural heritage professional respondents)[6]. Of these cultural heritage professionals 77% identified themselves as such in the questions we asked. Therefore 23% of the cultural heritage professionals did not class themselves as cultural professionals using the question we asked but they did indicate elsewhere that they work at a CHI. These professionals make up 44% of all Pro users surveyed and 48% of the total ENA respondents.

Looking at all the cultural heritage professional data together: 31% of the cultural heritage professionals identified themselves as researchers (in most cases combining with cultural professional), 17% as educators and 9% as designers/artists/creatives. Students were well represented in the Pro survey but not in the ENA survey. The chart in Fig. 2. outlines these results. The data shows that c.%27 of the cultural heritage professionals did not class themselves as cultural professionals using this question despite indicating that they were elsewhere (either using the other option or through their place of work). The total no. of CH respondents to the Pro survey was 44% and 48% of all the ENA survey respondents.

[6] In 2023 we changed the standard question in order to allow people to select more than one professional role and place of work, and simplified the options.

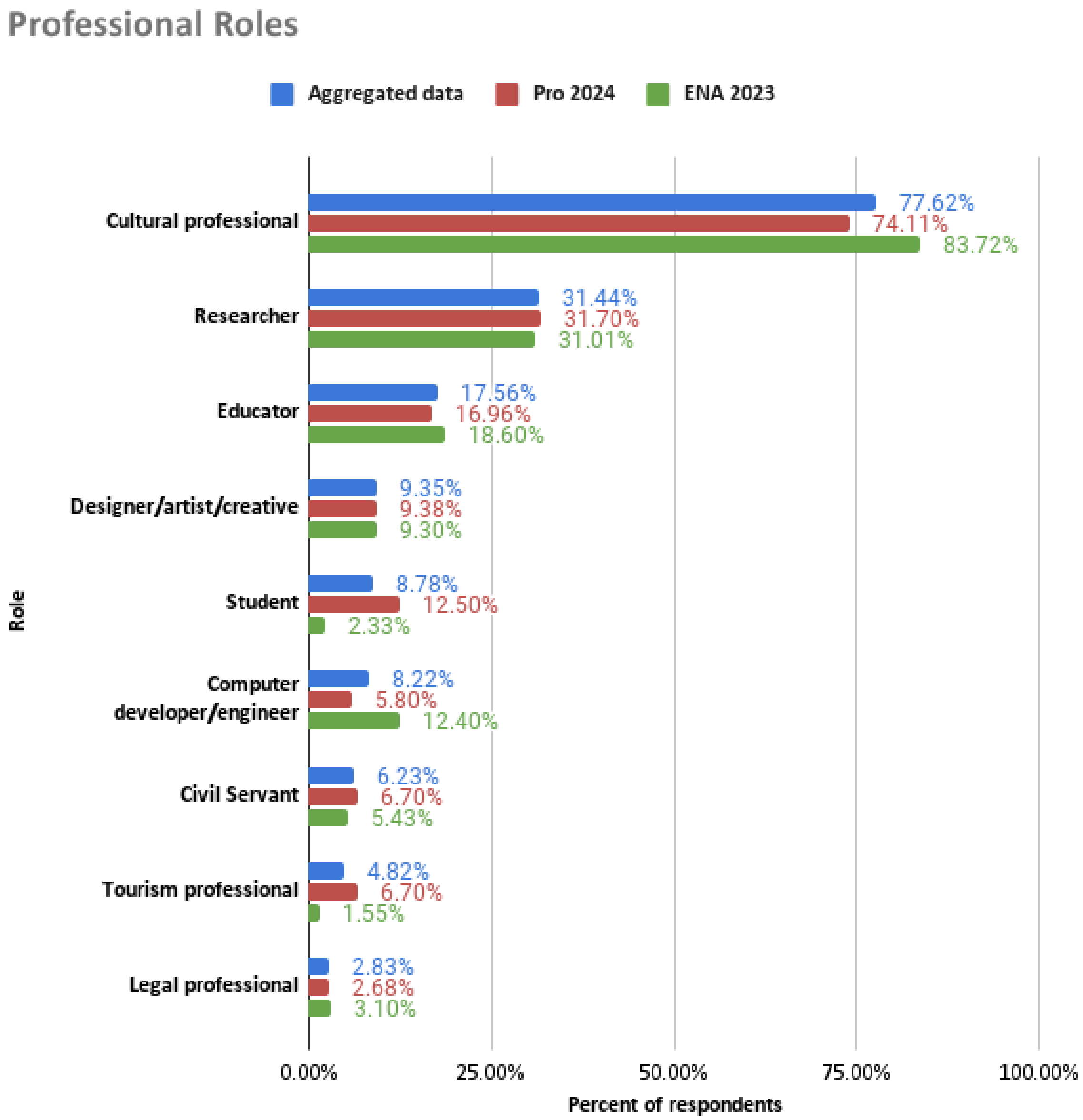

Figure 2. Professional roles based on the aggregated data of the Pro and ENA surveys. This shows the aggregated figures with the total percent of each role selected by those identified as cultural heritage professionals (based on their selection in this question - including 'other please specify' options where CHI-based - or based on the institution they work in).

71% of those who identified in the surveys as cultural professionals also opted to combine this with another role, see the chart in Fig. 3. Other commonly combined roles were those of researcher (42% of cases), civil servant (40%), student (35%), computer developer/engineer (27%) and educator (22%).

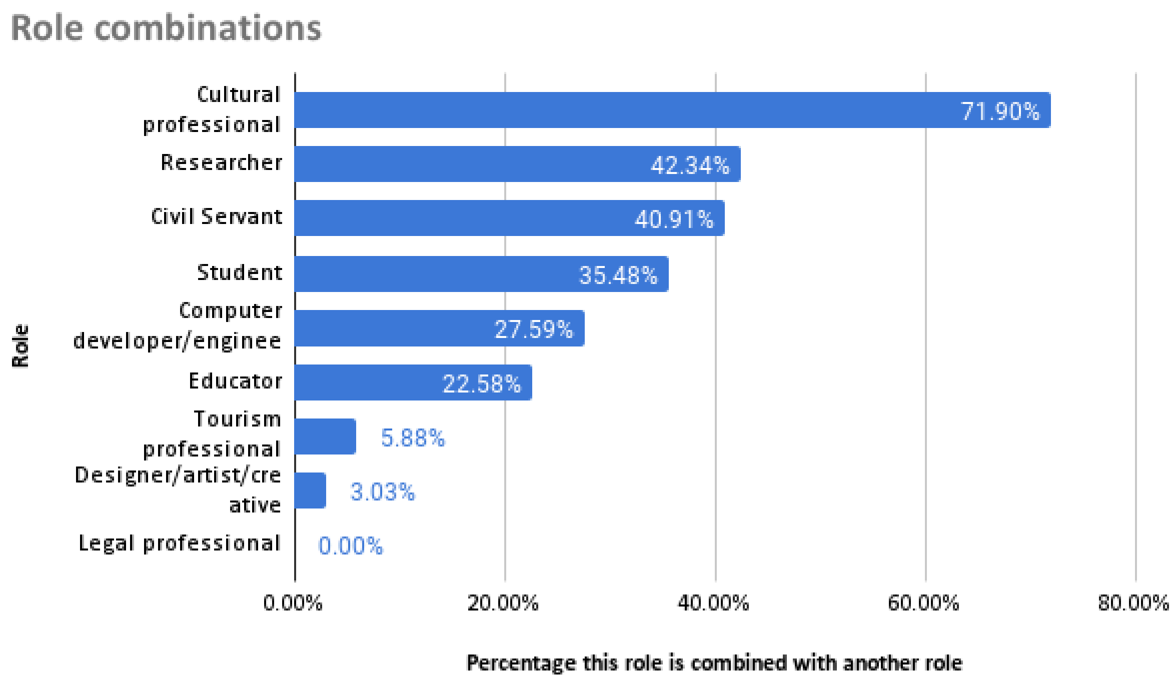

Figure 3 Percentage of each professional role combined with another based on responses per individual, also based on the aggregated data of the Pro and ENA surveys

Looking specifically at the ENA survey 2023 and all responses - not just those from cultural heritage professionals - the option cultural professional was the role *least* likely to be combined with another role in this survey but is still combined in 48% of cases (there educator is also combined in 48% of instances). The roles *most* often combined with another role in this survey are designer/artist/creative (85% of respondents), followed by researcher (78% of cases) and civil servant (75% of cases). The change in percentage when looking at the aggregate data indicates that although designer/artist/creative is least likely to combined with cultural professional when segmenting in this way, it is still combined very often with other professional roles - so the phenomenon is not only relevant to those working in the cultural domain but also with cultural heritage more broadly.

The picture we can therefore begin to build of our professional audience (to Pro and also that make up the ENA) is of a group of people who are multidisciplinary and who fulfil more than one role. Three or four role combinations are not unusual in this data. This may indicate that the individuals who are using the Europeana Initiative's products and services fulfil diverse functions within a CHI or they act in various capacities within the same organisation, or they may be employed by distinct organisations in varying roles. From the wider ENA survey data we can also see this is not restricted to cultural heritage professionals but to many other professionals in our Network.

Associated institutions and domains

We see similar findings when asking respondents to report where they work. In most cases respondents reported many organisation types when asked 'where do you work?'. Libraries (21%), Museums (18%), CHIs (of 'other' type - 16%), archives (14%) and universities (from 14% of respondents) top the list looking at the total number of named institutions, see Fig 4 below.

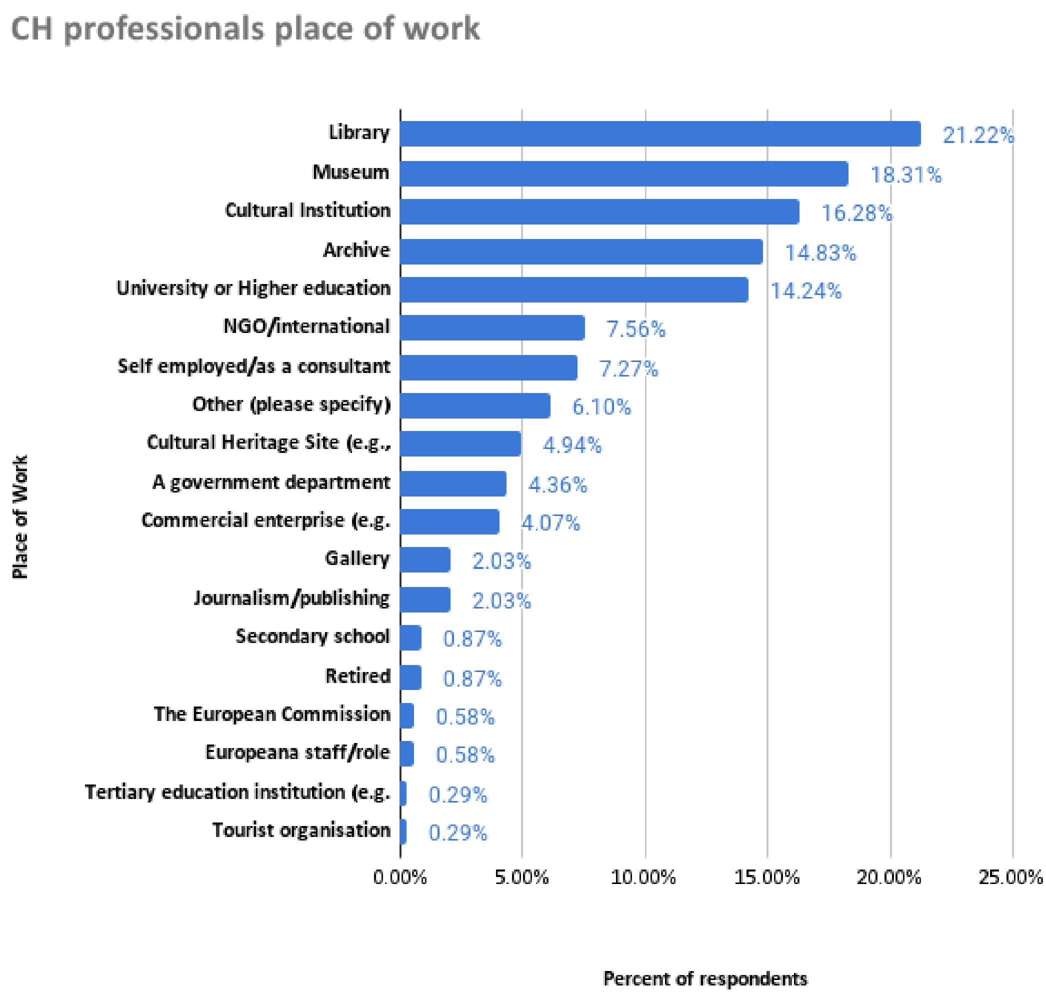

Figure 4. Place of work by percent of all responses

When looking at how often these places of work are combined with other options we can see that these organisations are combined with at least one other organisation type very frequently. It is not clear whether these combinations are due to the fact that some organisations combine various domains in one e.g. a library within a museum within a university, or if the respondents work in various organisations of differing types. Most institution types are found in combination with another type with libraries and cultural institutions each being combined by 81% of respondents.

Self-employed/consultant work and museum work are each combined in 70% of cases. As can be seen in Figure 5 below, almost all of the main institution types were found in combination with at least one other, but it is not unusual to see three or four institutions within a single response. There are no observable trends with regard to a specific domain.

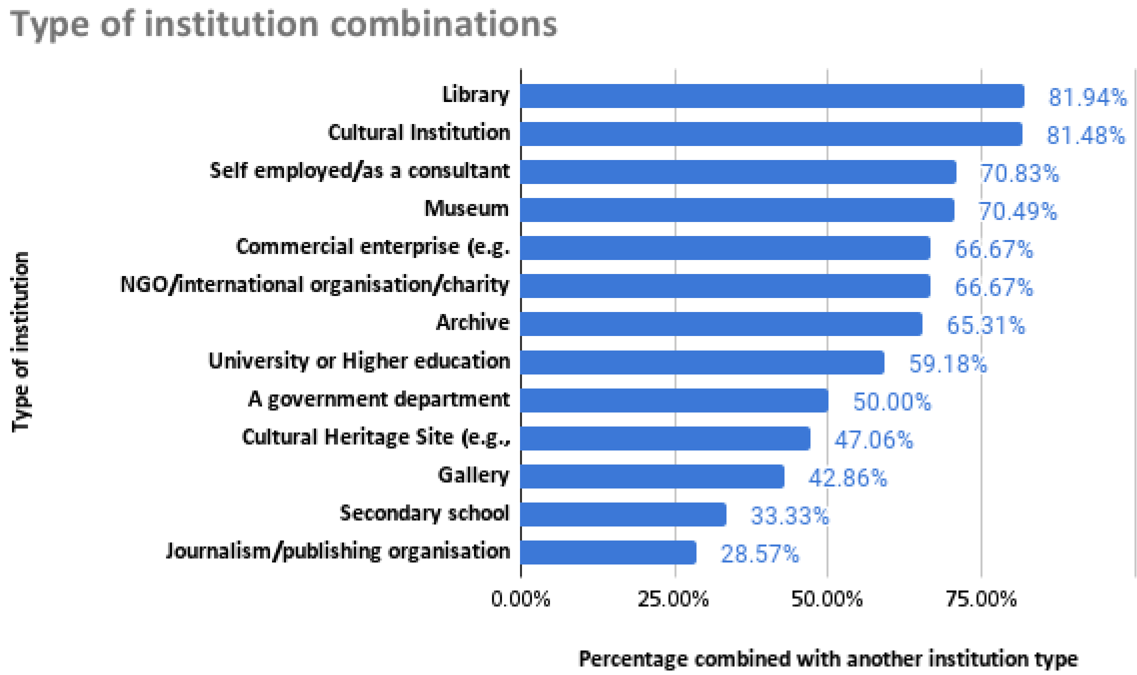

Figure 5. Illustrates the percentage of institutions combined with at least one other institution per response.

In order to understand this data better in future it would be useful to ask 'what best describes your present place of work?', and allow the respondents to select only one option. If respondents feel that a single option is inadequate then they will perhaps explain their place of work in the other field so we can gain a better insight into their complex work situation. We can also add 'including digital' to a lot of our institution types but especially archive, museum and library. Many respondents chose the other option to tell us they worked at a digital library, or digital archive for example.

Job function

In many of our survey activities we asked respondents 'what is your job function?' in order to better understand who is responding and what activities they might be undertaking within a CHI. The data from the ENA and Pro surveys (252 roles specified) showed that technical and digital roles make up 23% of those collected. 18% of the roles referenced libraries or librarian (including digital roles), and looking into other cultural heritage domains we see archival roles making up around 4% of responses, and curatorial roles at 3%. Higher education and research job titles account for 9% of all those recorded.

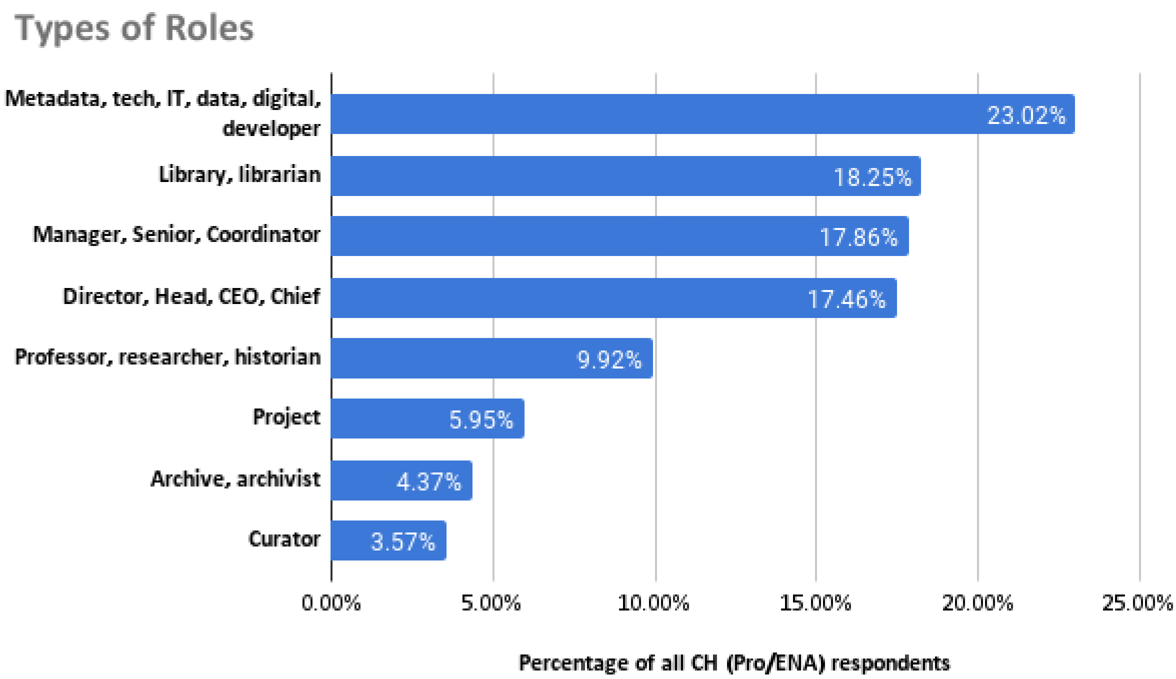

Figure 6. shows the percentage of roles of certain types including the keywords indicated on the vertical axis.

Some titles give a further insight into the seniority of the respondents, with 17% of the titles belonging to senior management/director level of the institution. Senior roles, coordinators and management titles make up a further 17%.

2023 was the first year that we have asked about job function in both the Pro user survey and ENA surveys. The new questions on professional roles and job functions will be kept as the Europeana Initiative's standard questions for other activities where relevant, such as the ENA sign-up form and sign-ups for events and trainings and other products and services. In this way we can build a picture of which products and services are used by which professionals and who we are reaching with these activities. The data from 2023/4 was analysed including all types of roles, not only cultural professionals, and so this can be segmented further in future reporting, for example for educators or researchers. Some of those in the Network, and users of Pro also work outside of Europe, so this is another important point to consider - so we should also ask respondents to record their country of residence where possible, for example in future Pro user surveys. In turn the insights we gain can help us to understand which roles within the sector, and which domains and countries we should target with our offer - for example if there are specific needs in specific countries which could feed into our work on country groups.

Turning to the data gathered via the institutional responses and the individuals who responded on behalf of these, job titles were extracted for 282 individuals. Some of the data is multilingual and so has not yet been fully analysed, but exploring the 282 titles we can see a prevalence of the roles also common to the ENA and Pro user survey. The main distinction is fewer people mentioning a research/higher education role (2%), a slight increase in the number of senior management (19%) and middle management/senior roles (18%), so 37% of those responding. Also increasing are those with a digital function making up 29% of respondents with functions related to (meta)data, IT or digital. 20% of the individuals are librarians or working in the library domain, compared to archivists (6%) and curators (3%). Furthermore, 5% of individuals reported a function tied specifically to projects or a single project - projects perhaps connecting CHIs to Europeana as data suppliers.

The total list of job functions (both the institutional responses and the aggregated Pro/ENA responses) numbers 534 and can be seen in this word cloud showing some of the job titles which account for the smaller numbers of data - including those in languages other than English:

Figure 7. Word cloud of 534 job titles collected over the past several years of activities.

Needs and requirements for the individuals who form part of Europeana's cultural heritage professional audiences

Topics of interest

We asked why people came to Europeana Pro and segmented the data by cultural heritage professionals only. The most popular choice was for 'information on digital collections management' (chosen by 43% of respondents), followed by 'professional development training opportunities' (40%) - closely followed by 'information about the data space' (39%) and then by those looking for 'information or events on the latest trends in the cultural sector' (36%). Comparing these with the least popular choices (each chosen by less than 20% of respondents) are 'EU projects information and funding opportunities' (9%), and 'help publishing my organisation's data on Europeana' (17%). 'I'm looking for help and resources for digitising cultural heritage collections' also performed comparatively poorly with only 25% of cultural professional visitors indicating this is what they are interested in. See Figure 8 below for all the other options..

Figure 8 -showing what cultural heritage professional visitors to Pro are looking for.

The analysis indicates that many of these cultural heritage professionals are interested in digital collections management - perhaps already working with their own digital collections (though around 25% may be beginning with digitisation and creating a digital collection), and perhaps looking for further training opportunities or guidance for themselves or individual staff at their institutions - as well as looking to find out more about what is offered by the data space. In terms of Europeana's offer - we could look to surface the tools, information and resources that we do have on digital collections management and target these towards individuals visiting Europeana Pro. A good basis for this would be to use the annex of the 'Mapping of products and services offered to CHIs and their professionals' which includes most of our tools classified by topic. The mapping report also contains guidance on how we can best reach interested audiences. In addition to repositioning existing tools we can leverage trending topics in the sector, for example 3D, and AI. 3D is also among the most popular searches on Europeana Pro over the 3 past years (Built with bits, 323 searches - data space, 183 searches - 3D, 156 searches). With regard to training, Europeana's new training platform will likely appeal to this audience who are looking for professional development opportunities. Likewise, the new data space website will likely fulfil the interest of those looking for specific information on this initiative.

The comparative lack of interest in publishing data on Europeana and funding opportunities indicates that the majority of these visitors came to Europeana Pro for individual reasons rather than to represent their institutions. In this case we should tailor our offer to the individual rather than the institution and have a separate area for institutions - as visitors come to us on behalf of themselves and may not be interested in our B2B propositions, and even though they can advocate for Europeana within their own organisation this could be viewed as an added benefit and not the key goal. In particular the areas on Europeana.eu and Europeana Pro called share *your* data, these should really include the word institution to make it clear to users that this section relates to a data provider or potential data provider offer (e.g.: *share your institutions data/collections*).

In both the Pro survey (2024) and the ENA survey (2023) we asked 'What topics would you like to receive more information, training, or opportunities for collaboration in?' and this confirms what we see in the above analysis of what people come to Pro for, and furthermore can give us a deeper insight into the type of topics of interest to our cultural professional audiences which can be curated for these audiences. The top topics are: Digital curation chosen by 43%

of respondents, Digital preservation (40%), Audience engagement (incl reuse of cultural heritage) (38%), Artificial intelligence (37%), Digitisation/photography (34%), Copyright/Open access (32%), Digital storytelling (30%), Research (29%). The least popular topics on aggregate are: VR/XR/AR/3D environments (14.48%), Programming/IT (11.99%), Legislation/policy making (9.50%). These are all important topics to investigate and to consider how to promote existing and new content in these areas, for example on Europeana Pro, in a way that is appealing to cultural heritage professionals and will meet their needs. There are also more ways we can express reuse of collections, or variations of this, with relevance to individuals - in future we can consider if other options should be added to the list.

In terms of interests of the audience coming from the cultural heritage professionals from Pro alone we see: Digital Storytelling (chosen in 40% of responses), Digital preservation (38%), Audience engagement (incl reuse of cultural heritage) (37%), Digitisation/photography (34%), Cataloguing metadata (32%), and Artificial intelligence (30%). Digital curation performs somewhere in the middle in this group. For all the options and percentages for each activity see Figure 9 below. The least popular choices are similar to the aggregated data.

From the ENA survey 2023 we had 106 responses to the same question with Digital curation being of most interest to those respondents - for 60% of the cultural professionals, followed by Artificial Intelligence (59%), Digital storytelling (47%) and Digital preservation (44%), Copyright/Open access (44%), Audience engagement (incl reuse of cultural heritage) (43%), and Cataloguing metadata (38%) all with significant support. What is interesting is that among the ENA group data aggregation performs quite poorly (16%) as the second least popular option - the least popular being Programming/IT chosen by 14% of respondents. On the other hand - VR/XR/AR/3D environments, though an unpopular choice on aggregate, is more popular in this group chosen by 30% of respondents.

Topic	**Aggregated Data (274 responses)**	**Pro 2024 (168 responses)**	**ENA 2023 (106 responses)**
Digital curation	43.89%	28.40%	60.38%
Digital preservation	40.05%	38.69%	44.34%
Audience engagement (incl reuse of cultural heritage)	38.91%	37.50%	43.40%

Artificial intelligence	37.78%	30.95%	59.43%
Digitisation/photography	34.16%	34.52%	33.02%
Copyright/Open access	32.35%	28.57%	44.34%
Digital Storytelling	30.77%	40.48%	47.17%
Research	29.64%	29.17%	31.13%
Cataloguing metadata	24.89%	32.74%	38.68%
Data aggregation	24.43%	26.79%	16.98%
Education/pedagogy/didactics	23.98%	22.62%	28.30%
Evaluation and or impact assessment	23.08%	20.83%	30.19%
Data analysis	23.08%	23.81%	20.75%
Marketing and communications (incl social media)	21.04%	20.83%	21.70%
Photogrammetry/laser scanning/3D modelling	20.81%	21.43%	18.87%
Climate Action	20.14%	18.45%	25.47%
Data information/science	18.55%	24.40%	29.25%
Machine Learning (engineering)	18.55%	17.86%	20.75%
Tourism industry	18.33%	17.86%	19.81%
VR/XR/AR/3D environments	14.48%	19.05%	30.19%
Programming/IT	11.99%	11.31%	14.15%
Legislation/policy making	9.50%	12.50%	25.47%

Figure 9 - showing data from the two activities and in aggregate in answer to the question; 'What topics would you like to receive more information, training, or opportunities for collaboration in?' with the possibility to select various options.

In terms of expertise in the network we see the following topics well represented among cultural heritage professional respondents: Research (46%), Cataloguing metadata (41%), Digital curation (40%), Digital Storytelling (37%), Digital preservation (37%), Digitisation/photography (35%), and with slightly under a third of responses, Copyright/Open access (32%). All of these areas of expertise are also high on the list of topics of interest indicating that some people are looking to engage within their area of expertise. In some cases, such as with Artificial intelligence for example respondents are likely looking to gain expertise in a new area for them - only 13% of individuals reported an expertise in this field.

The areas where cultural heritage professional network members had less expertise are: Machine Learning (engineering) (5%), Photogrammetry/laser scanning/3D modelling (4%), and the Tourism industry (9%). None of these are reported in the top few topics of interest. Expertise in data aggregation is reported by 21% of ENA members - with the aggregated interest in this topic at 25%.

This analysis of the topics cultural heritage professionals have indicated are of interest in both the ENA and Pro surveys, and of the expertise they have according to the ENA data, reinforces what was inferred from the responses to the Pro survey question about what people are interested in and are doing in their professional roles, and is quite logical: that visitors to Pro are looking for resources mostly for themselves (rather than on behalf of their institution - although according to this data around one quarter of our professional audience will likely be interested in this material)[7] and that the ENA, which is aimed towards the individual, does not necessarily include many cultural heritage professionals who are either interested or involved in data aggregation. This is perhaps also why we do not see a huge amount of response to surveys where we aim to gather CHI responses when using a list drawn from ENA members - this is elaborated on below in the discussion of CHI satisfaction surveys. The value for Pro and for the ENA come primarily via what is offered to individuals in our sector, rather than what is offered to organisations.

Knowledge of Europeana's products and services among respondents

In 2023 (Zoho CHI satisfaction survey) and 2024 (Pro User survey), we asked if the respondents had heard of or used Europeana's products. We found that for the Zoho satisfaction survey - which was mailed to a list of data professionals sourced from our Europeana Network Association members - many respondents had not heard of some of our products and services, or they have heard of them but have never used them. Every respondent had heard of Europeana.eu but still 8% of respondents have never actually used

[7] We also asked on Europeana.eu in October 2023 if visitors worked for an institution that shares data with us - and 25% of respondents said that they did, indicating that such individuals make up around a quarter of our audience. As the figure is similar in the Pro and ENA data we can be confident in its accuracy.

Europeana.eu, and 20% stated that they had never heard of Europeana Pro and a further 17% said they had heard of Pro but never used it. Considering that the ENA sign up run's through Europeana Pro we would imagine that all members have visited Pro, therefore this data perhaps speaks to the fact that these cultural heritage professionals are not aware of the different brands of our products.

Examining all the data from this survey, see Figure 10 below, it is still the case that Europeana.eu and Europeana Pro are the best known and most used products among this sample of respondents. Training and events are also well used with 34% of respondents indicating that they are regular users but 30% of individuals also said they had never heard of these, with a further 8% reporting they had heard of events and training but had not used them. The most essential products, according to this survey, are Europeana.eu, Europeana Pro and Events and trainings (each considered essential to 4% of responders).

The least known products are the APIs, 60% of respondents have never heard of them and 81% of respondents do not use the products but 4% of respondents are regular users. This is followed by the Data statistics dashboard which 43% of respondents said they had never heard of with the product not being used overall by 91% of users. The Metis Sandbox is also a less used product, not used by 82% of respondents but 74% of individuals were aware of it, with 4% being occasional users and 8% regular users.

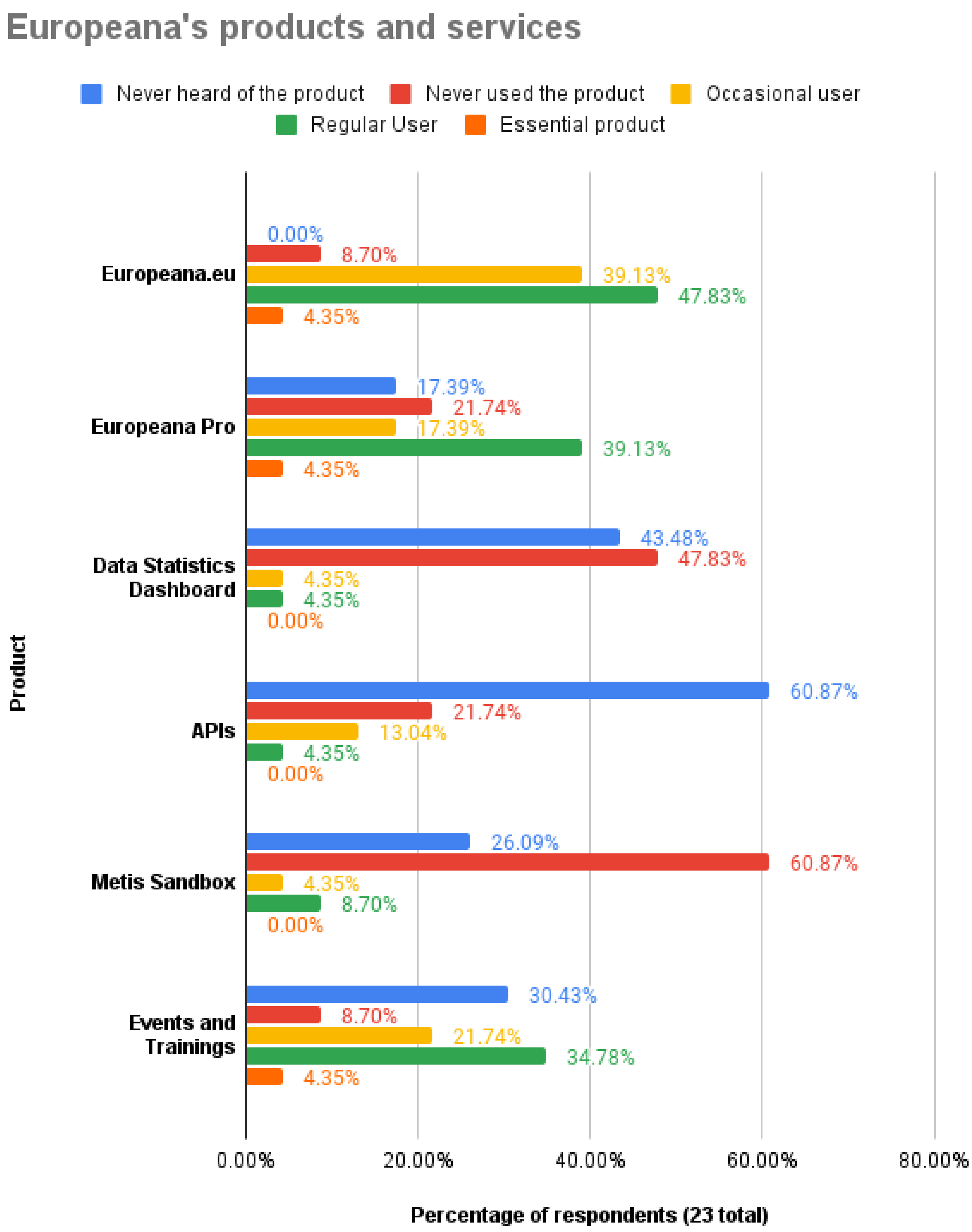

Figure 10 - showing responses to the CHI satisfaction survey 2023 ranked by usage.

In the Pro survey segmenting by cultural heritage professionals (Figure 11 below) 43% of users reported that they were using the site for the first time. More respondents (63% in total) use Europeana.eu than Europeana Pro (57%). 20% of respondents are also ENA members and 16% use our capacity building services.

Fewer than 7% of those responding use any of the other products and services we asked about: aggregation services from the EAF (6%), the data statistics dashboard (6%), Europeana APIs (6%), the usage statistics dashboard (5%) and the Metis Sandbox (4%). Three of these products are aimed towards the CHI as data supplier (aggregation services, usage statistics dashboard and metis sandbox), one at a more general audience but which also reports on CHI data - the data statistics dashboard - and the APIs mostly targeting a reuser/data focused audience. Therefore we see products aimed at the CHI as data supplier as less popular with the cultural heritage professionals coming to Pro. This is perhaps unsurprising considering the topics of interest which emerged in the previous section.

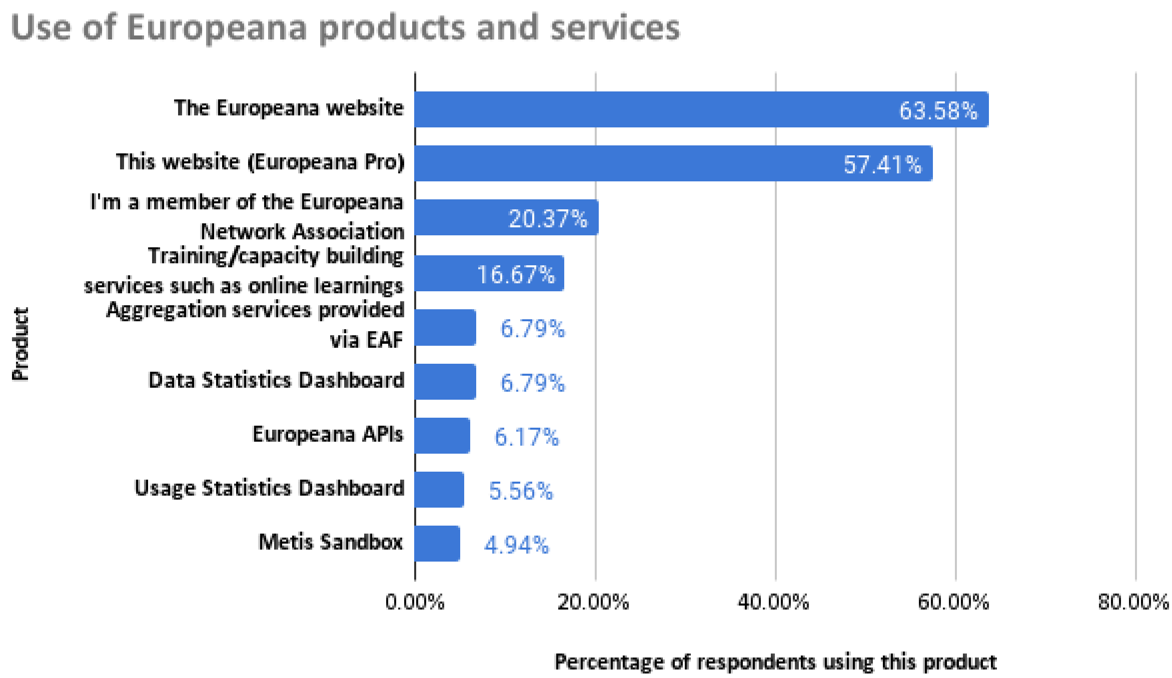

Figure 11 - percentage of respondents to Pro survey 2024 using Europeana products and services.

From the analysis in this section a picture comes across that some of Europeana's professional audiences are not aware of all the different products and services that are offered by Europeana but that these may be of interest to them. Therefore we can consider how best to market these to our professional audiences coming from the cultural sector, for example exploring ways to better group, surface and promote existing tools and products to individuals who would find them valuable.

Who are the cultural heritage institutions represented by the Europeana Initiative's survey data?

Domain

For analysis in this section data has been drawn from eight diverse activities and responses from individuals at 464 distinct CHIs, of which 28% are libraries, 20% museums and 15% archives - see figure 12 below. Galleries make up less than 1% of the total and other institutions make up 35%. These other institutions include aggregators (such as but not exclusive to Europeana's accredited aggregators), research institutes and private companies active in the heritage sector - all either involved in the provision of data to Europeana or holding digital collections of some kind and therefore representing potential data suppliers.

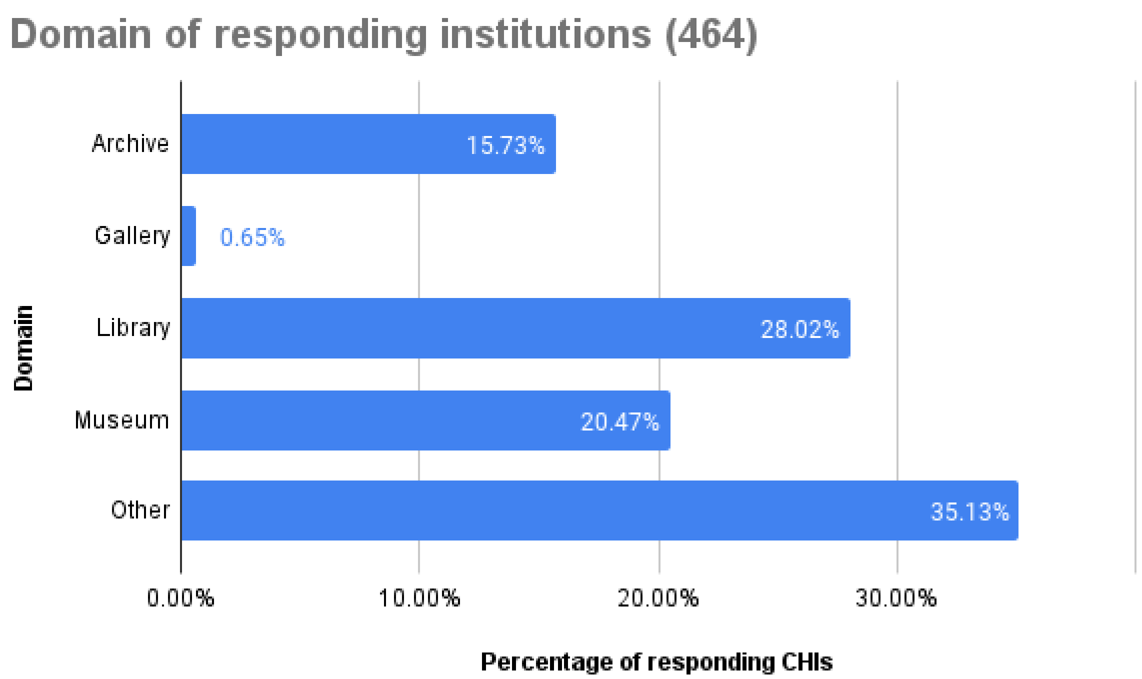

Figure 12 - showing the distribution of CHIs according to domain.

Country

The institutions come from over 54 countries internationally - 408 from the EU member states, a further 28 from geographical europe and adjoining areas, and 18 countries from outside Europe entirely - as can be seen in figure 13 below.

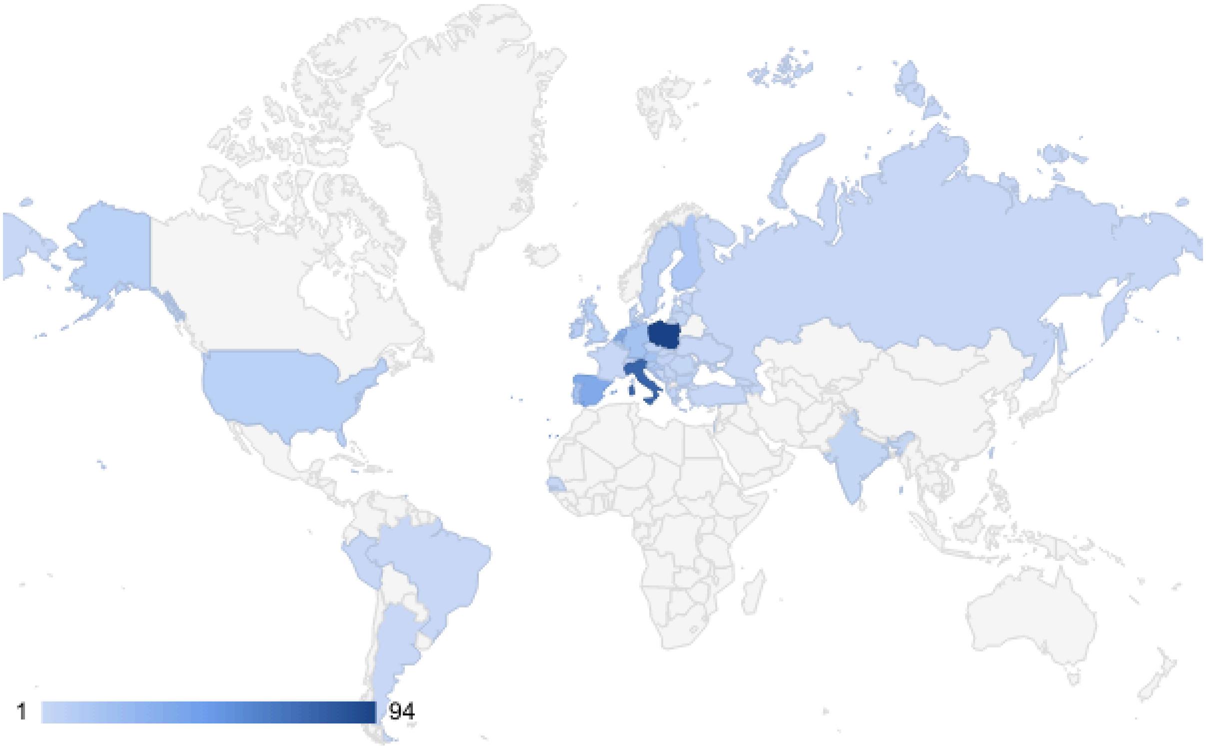

Figure 13 - showing a heat map illustrating which countries have the most responding CHIs.

The greatest responses come from the following 10 EU member states: Poland (20%), Italy (16%), Spain (8%), Netherlands (7%), Portugal (3%), Germany (3%), Austria (3%), Belgium (3%), France (3%) and Finland (2%). All other countries each making up less than 2% of the responding CHIs.

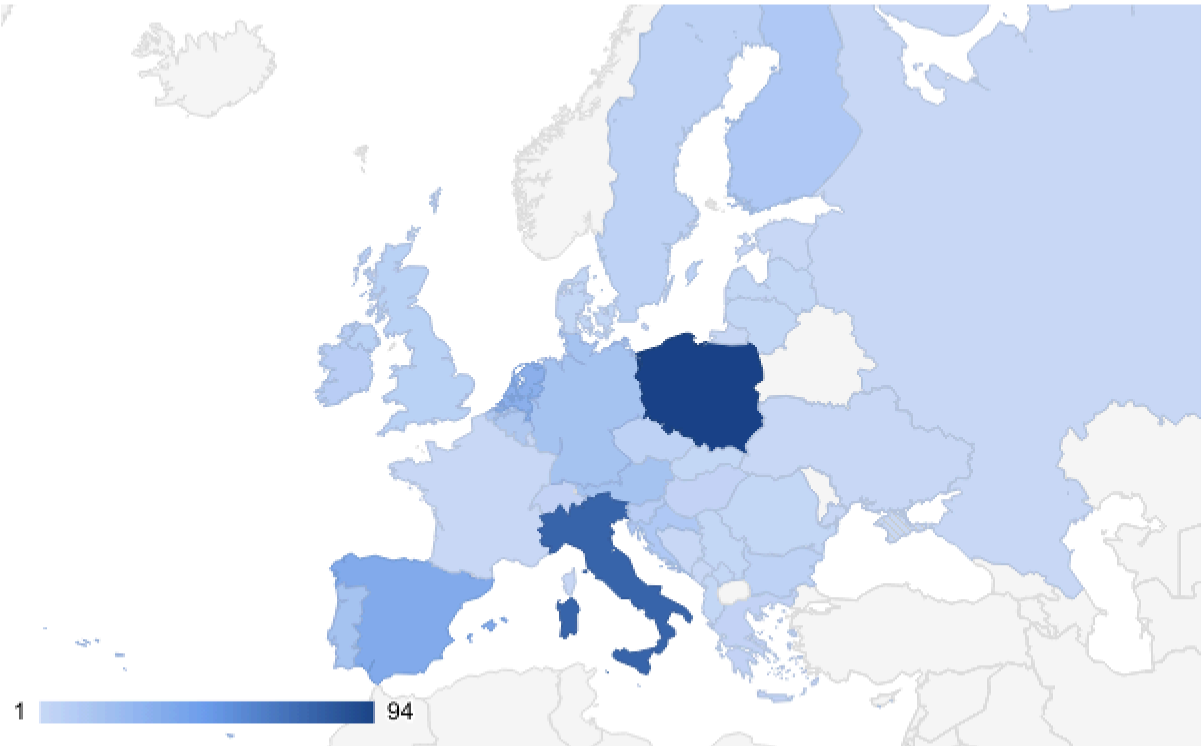

Figure 14 - shows a close up of Europe from figure 13.

The prevalence of respondents from the library sector and CHIs from Poland and Italy is as a result of the ENUMERATE data from 2022, where the main response was from those two countries and 39% of responses came from the library domain.

An insight into the digital transformation of the cultural heritage sector

At present the aggregated findings of the database are focused on the country, domain and professional background of those responding on behalf of the institutions. However in future the data we collect at the Europeana Foundation can be used to gain an insight into the maturity levels of, and therefore challenges faced by, cultural heritage organisations across Europe. In order to collect more comparable data we are working this year with a question bank based on the ENUMERATE 2022 questions. This will allow us to standardise the questions asked in our activities, including those across the wider Initiative, and where possible in project activities. The advantage of this approach is in adding data to the database of responding CHIs and identifying trends in the sector - for example analysing maturity scores in certain areas and segmenting according to particular domains, countries, and sizes of the institution by no. of staff members. This report shows the value of the approach which is in its infancy. We have started doing this with many of our 2024 data gathering activities, for example the recent persistent identifiers activity and the activity on 3D repositories. By continuing to build on the data in future these insights can be shared with a wider audience - for example via an interactive dashboard aimed at policy makers, member states and other key stakeholders.

Every survey we undertake at Europeana Foundation, which is aimed at gathering responses from an individual acting on behalf of a CHI, should contain a maturity scale to reflect the topic of the activity - with standard questions then drawn or added to the question bank (as required) - all contributing to easier aggregation and analysis. Such insights can be gathered in the proposed database and added with each following activity to be reported on in aggregate, on a yearly basis in this report. These activities can be run to gather data from CHIs on certain topics to complement the ENUMERATE data gathered in 2022 and any such ENUMERATE campaign that we may run in future. If there is an opportunity to run an ENUMERATE style campaign in one or various member states that would help us to gain further responses to increase our understanding of the sector and its needs. We can trial an approach around gathering data on 3D digitisation in Europe in Y3. Therefore in future this data can give a broad insight into the needs of the cultural heritage sector in Europe - brought together with the ENUMERATE data for 2022 for example.

Needs and requirements of CHIs as data supplier

Background to the activities analysed in this section

In the following section the 2019, 2021 and 2023 CHI satisfaction surveys are analysed - spanning the last five years. The 2019 and 2021 surveys aimed to investigate the satisfaction of Europeana’s data suppliers. Therefore they were sent out via Europeana’s accredited aggregators with a view to gathering responses from their data providing institutions - unfortunately this activity has always suffered from low response rates from individuals at CHIs. In 2020 no survey was fielded due to the pandemic as the aggregators felt this would be inappropriate. In 2022 the CHI satisfaction survey was fielded as part of the ENUMERATE self assessment tool in order to capture CHIs that perhaps were not actively being reached via an aggregator - and in response to the very low response rate to this survey in the past. Unfortunately the data from this year was lost due to technical problems with the survey tool.

When re-assessing our CHI satisfaction activities in early 2023 and knowing that we could not tie the activity to the ENUMERATE self assessment tool for that year we decided to try two parallel approaches - one a survey to the cultural professionals we had identified from our professional network (via the ENA), and the other as a pop-up on Europeana Pro. The idea behind these approaches was to gather data not only from our data suppliers but also from potential data providers and cultural professionals working with data. This was a very useful exercise for gathering data from potential data suppliers (CHIs with digital collections) but it did not yield much data from those who use our products.

To the CHI satisfaction data from 2019-2023 we added the responses from the publishing digital collections online survey in 2021 which gathered data about the value, challenges, and motivations for digital collection holding CHIs to share their collections with Europeana and more broadly. It explored the impact that sharing data with Europeana had on the practices within the institution itself. This survey was also fielded via the aggregators but not exclusively for Europeana's data supplying institutions.

Benefits of sharing data with Europeana

When asked in the CHI satisfaction survey 2021 which of the following value propositions Europeana brought to the responding CHIs (20 responses), more than 75% of respondents agreed to the following propositions: increasing traffic to our digital collections website; reaching new audiences (e.g. by having our digital objects included in Europeana blogs, galleries, exhibitions); part of Europeana Generic Services projects; part of other Europeana Initiative projects; collections reuse for education purposes; collections reuse for research purposes; being part of an international network of cultural heritage institutions with shared standards. The only option which performed at less than 75% agreement rate was "Collections reuse for creative purposes" but which was still agreed upon by 72% of respondents. Therefore, in 2021 most of our value propositions had support from the CHIs who responded to this particular activity. Adding to this the data from 2023 where we asked a question with similar options we see fewer options picked from this sample and one respondent reported that they had not yet seen any observable benefits. Exposure of collection performs the poorest with 33% of support from respondents (though this is mentioned in free-text answers), with project partnerships a benefit reported by slightly more institutions (43%). Being part of an international network of CHIs is still the top benefit (with 95% agreement) followed by reaching new audiences - chosen by 89% of respondents. Reuse topics also perform well. We discussed above that reuse topics such as Audience engagement (including reuse of cultural heritage) and digital storytelling are of interest among individual cultural heritage professionals indicating these topics are of key importance in the sector currently and that they hold an interesting and demonstrable value proposition for CHIs as our data suppliers or potential data suppliers. We should consider how to demonstrate how inclusion in Europeana leads to exposure for CHIs and in which ways, for example reuse case studies showcasing a CHI's collections could help to demonstrate the added value that Europeana brings in attracting a wider audience. An area for further research here would be to look at KPIs institutions are using and to consider how Europeana helps them to meet these and to capture these in testimonials.

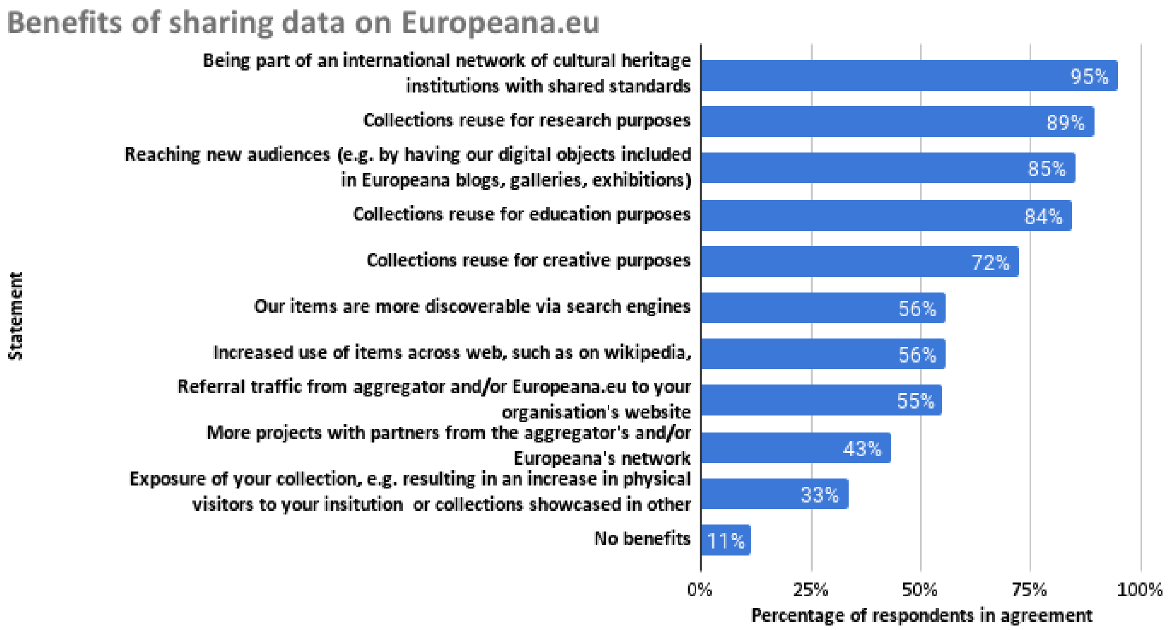

Figure 15 - the percentage of respondents (29 total) in agreement with the statements regarding the benefits of sharing data with Europeana (across two activities in 2021 and 2023).

Over the five studies we also gathered qualitative data from free text options in our surveys on the values that CHIs had seen in being a part of Europeana. These are very important insights because their answers were not given in response to various options but offered freely over several activities and spanning several years. On their own some of these comments would not seem actionable but when aggregating the data they are very insightful. Of these, the most common is collaborations with other institutions/projects, mentioned by eight respondents, see Figure 16 below. This is followed by increased traffic to CHIs' collections in four cases. Exposure was important to three respondents and two respondents mentioned the importance of finding new audiences for their existing collections. In addition, two respondents also recorded that being part of Europeana had driven technical developments at their CHI. The following benefits were also observed by a single respondent across the eight activities: that they had observed more requests for higher resolution data; that content was used to illustrate blogs, galleries, presentations; that the CHI valued being part of a national community.

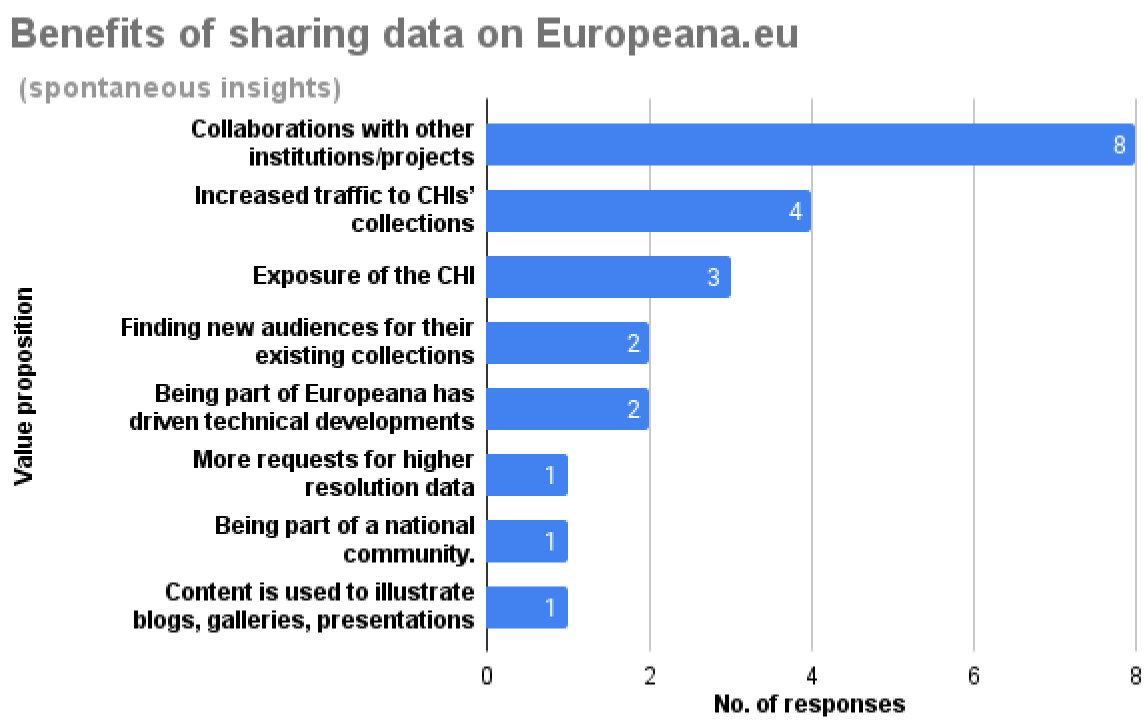

Figure 16 - showing the spontaneous insights of 9 individual respondents across four of the five studies from 2021 to 2023.

Therefore some of the lower scoring propositions in the main questions gain additional support from these free text responses including increased collaborations, traffic to collections and exposure. In our future survey efforts we can use these options to improve upon the wording in the main question and add other options for example around increasing the quality of the institution's digital collections or driving technical innovation at the CHI. We should also ask if CHIs are interested in being contacted by Europeana so we can also interview a select number in order to understand their needs in more detail and perhaps also work on testimonials if they found their work with Europeana to be of value.

Regarding technical innovation, as noted above, CHIs expressed a value in being part of a wider community with shared standards. In the 2021 CHI satisfaction survey CHIs were asked about Europeana's standards and frameworks. In the free text responses CHIs reported experiencing benefits when using the Europeana Licensing framework, the Europeana Data Model, and the Europeana Publishing Framework - including technical innovation with the institution.

The Licensing Framework was described as useful by two CHIs. Two more reported that it improved the accessibility of their collections. One respondent also said that it made their data more transparent for end users and another stated that it had resulted in cross-departmental discussion within their organisation. With regard to EDM three CHIs mentioned that EDM was useful for standardising their internal metadata, and one described it as a useful tool for validating metadata. The EPF was described by four respondents as a useful tool for CHIs to further internal discussions about quality with a view to increasing the quality of data and accessibility for end users. The free text responses in this survey reinforce what has been surfaced in other free text responses across various surveys that aggregation in Europeana drives data quality, accessibility, and technical developments within the CHI and is an important value proposition which can be used to attract potential data providers and leveraged so that a CHIs data being included in Europeana and the data space can be considered as meeting a certain standard within the sector.

Difficulties faced by CHIs regarding digital collections management

In the 2021 digital collections study, CHIs were asked a free text question: “Are there any constraints that prevent your organisation from investing in the quality of digital objects and/or metadata (for example financial, legal, or other)?”. In answer to this question, nine respondents mentioned that financial barriers were an issue for them, six mentioned that staff time was in short supply, and four mentioned legal issues. The following difficulties were each mentioned by a single respondent: difficulties with storing objects, lack of skills within the CHI, and with the general organisational strategy - for example issues with making cross-departmental agreements within the CHI itself.

For ENUMERATE 2022 we used this data as the basis for an analysis of concerns that CHIs faced. Here we see that funding for digital collections work in particular is a major concern for responding CHIs, followed by funding in general. It is also the case that the project-based nature of funding for digitisation and digital collections work is very concerning to this group of CHIs. The other topics where CHIs are moderately or very concerned regard staff (capacity, training, and the number of staff).

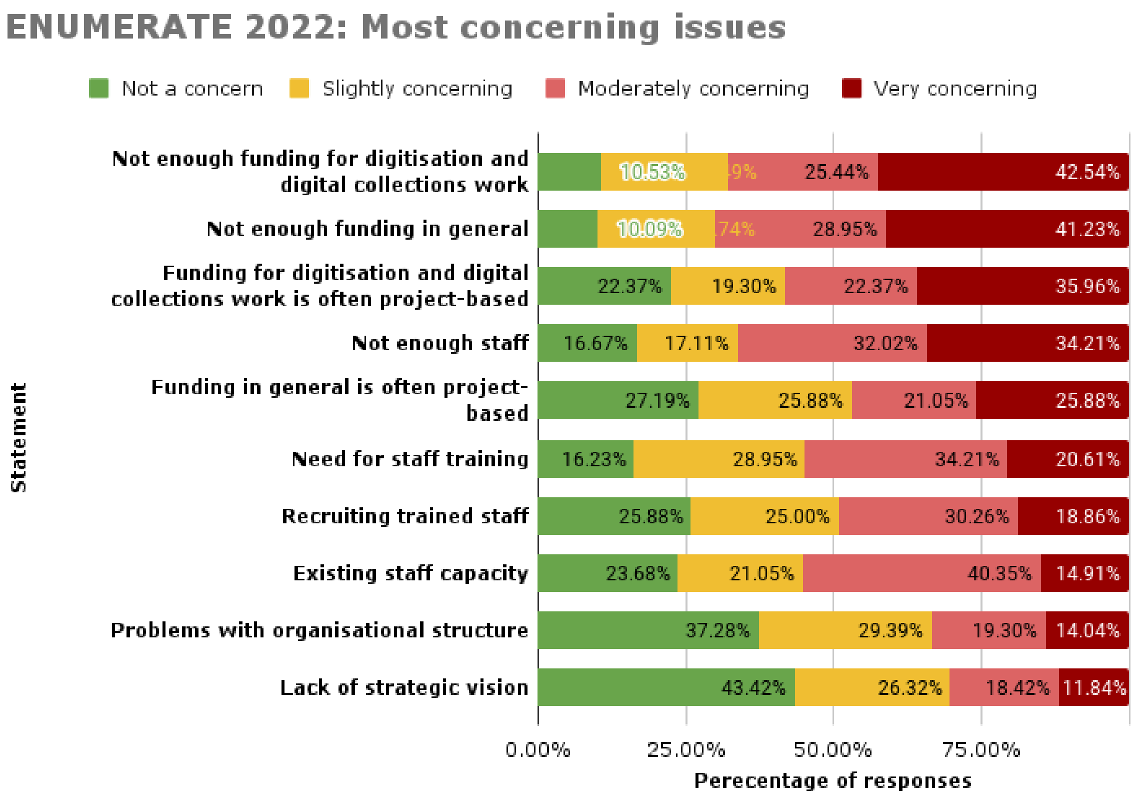

Figure 17 showing the concerns of 228 respondents from ENUMERATE 2022.

This data tells us that CHIs struggle to find money and staff capacity for digital collections work in particular, so finding staff time to also work on sharing data to Europeana could be challenging and a simple process would likely be more effective. In future CHI user/satisfaction surveys we can ask a version of this question which also specifically addresses staff time to work on digital collections which was absent from the original study. This question can help us to ascertain general needs that CHIs have.

In the 2021 study we also asked those CHIs who had intended to become data providers to Europeana but had not yet done so: ‘what are the reasons that your organisation never published digital collections on the Europeana Collections website?’ The most common reasons mirror the above findings - financial reasons were cited in 61% of responses, staff capacity in 51%, and technical infrastructure in 55% of cases. Expertise was an issue for 33% of respondents, while IPR was the issue for the remaining 20%. Lack of interest was an issue for 5% of institutions.

Looking specifically at the institutions who are not yet Europeana's data providers and who responded to the satisfaction surveys fielded in 2023 we can see similar trends, see figure 18 below. Technical infrastructure tops this list, followed by financial reasons and lack of staff time. Issues with the digital collection/making the collection available are also mentioned as is resistance from the management level of the organisation.

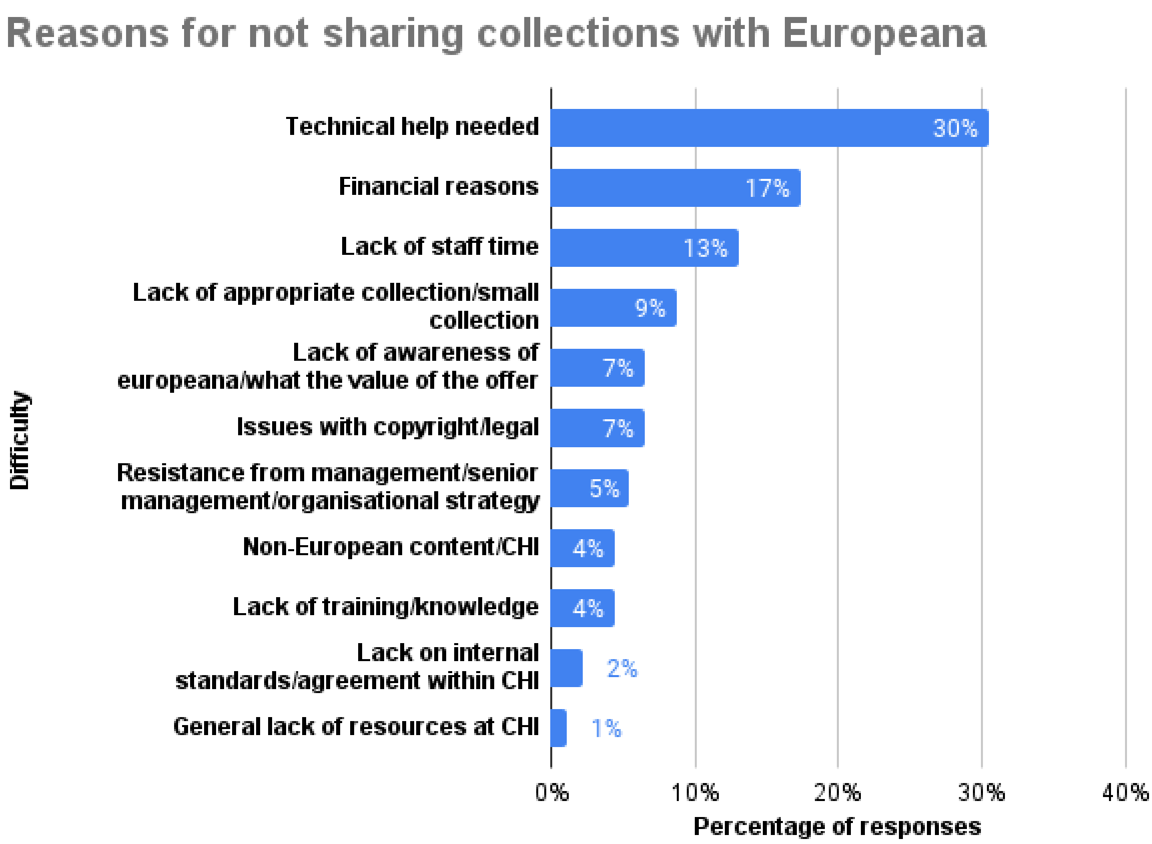

Figure 18 - showing the responses from CHIs who are not yet providing data to Europeana.

Needs of CHIs who do share data with Europeana

There are a number of spontaneous contributions to the CHI satisfaction surveys in 2021 and 2023 and the publishing collections online activity in 2021 and which can be analysed in more detail for a greater understanding of some specific needs our data providing CHIs have. As in the above sections, the number of responses are low, however as these are spontaneous answers provided in free text and come specifically from Europeana's existing data supplying institutions they do provide a key qualitative insight into our CHI needs.

Several issues or difficulties with aggregating to Europeana are presented in these insights: that it takes a long time to process data and/or change data previously ingested (four responses), that CHIs have difficulty with metadata mapping (three respondents), that there is a disconnect between aggregator requirements and Europeana requirements (one respondent), and that there are infrastructural issues at the CHI (one respondent) and also issues with technical capacity (one respondent). More use of AI was also requested by one respondent - with a view to improving data and processes around aggregation. Therefore we see that for some CHIs publishing on Europeana is a time consuming process, involving grappling with a different data model (one which is not generally employed by CHIs for their own purposes), and that meeting Europeana's requirements can be blockers for our data providers. On the other hand these standards and requirements also ensure that the data in Europeana is of a certain quality which in turn can drive the infrastructural and quality changes within a CHI - and that can maintain the value proposition that having data in Europeana means that the data meets a certain standard. High quality data is of course also of paramount importance to Europeana's audiences and supports reuse which is also a key value proposition for CHIs. As the last respondent hints at - in future we can attempt to harness technological developments to simplify and speed up ingestion processes while maintaining the standards which are also of value, and therefore work to support the needs of both suppliers and their audiences.

In terms of support needed to help with aggregating to Europeana - one respondent also stated that they would like to see their ministry of culture being more supportive of their efforts of the Europeana Initiative. This is an issue which can perhaps be addressed with campaigns such as TwinIt which bring together CHIs and ministries.

Another respondent mentioned they are looking for more networking and up to date information about ENA members. For the latter we can assume this is for peer support issues or perhaps to find project partners - both themes surfaced earlier in this report.

With regard to capacity building one individual requested asynchronous or online training and events so that people can join on evenings and weekends, and another indicated they would like to see Europeana events within CHIs -

similar to the national workshops Europeana have run in the past. One respondent also mentioned that they are looking for more relevant training programmes for those working digitally in heritage management. A request for more information on digital preservation was put forward by a further respondent. These needs would likely be met with the highlighting of topics relating to digital curation and preservation discussed in the section above relating to topics of interest to cultural heritage professionals.

One respondent requested translation of metadata and advanced searching in the portal and another requested that more is done to enrich metadata. The first two issues are now addressed on Europeana.eu (these insights come from the survey fielded last year before advanced search was released) and for the latter issue Europeana Initiative offers tools that enrich metadata so this respondent would likely be able to find something of interest to them but they are perhaps not aware of what is on offer - this could therefore be made more explicit in future.

Furthermore one CHI mentioned that they would benefit from more direct communication with the Europeana Initiative - again something that is difficult to achieve at present but that which may be partly achieved by providing a clearer offer to CHIs. Eventually this offer when combined with technological advancements and a more seamless connection between the aggregator and Europeana can bring CHIs closer to Europeana and all that we offer. The requirement for Europeana to have more direct contact with CHIs was also a major take away from the dissemination of archival collections study produced by Europeana in 2021 and which combined the data from the survey analysed in this report with qualitative interviews with CHI representatives.

Lastly, two respondents mentioned that they felt that the Europeana Initiative does not fully address or reach smaller or middle-sized organisations - very likely due to all of the insights drawn from the above analysis and which may adversely affect smaller CHIs compared to larger ones which may have more resources in terms of financing and staff.

Ultimately, having a dedicated place among our products for individuals acting on behalf of CHIs to find tools and topics of interest to them and relating to data aggregation would likely help to focus our audience's attention on what they are looking for - either a CHI related offering or an offering to an individual. For individuals the offer need not include tools and information about data aggregation (as established above this is likely relevant for around one quarter of the cultural heritage professionals using our products and services) but for data providing CHIs these will be of key importance and should be packaged as an added value of being part of the Europeana ecosystem. These findings should be verified in future through a combination of qualitative data gathered via interviews with key cultural heritage professionals alongside analysis of qualitative insights from various future surveys in the same manner as has been presented in this report. The results can help shape the development of the offer of the data space marketplace, for example.

Delivering value for Europeana's data supplying CHIs

Based on the data analysed in the section above, some issues are apparent for institutions. These include a lack of funding, a lack of staff time, a lack of support for pursuing aggregation to Europeana.eu from senior level management within the organisations, and, to a lesser extent, a lack of awareness about what the Europeana Initiative can provide for the CHI. However, value propositions are also clear for these CHIs - relating to the wider network and audience Europeana offers, more exposure in general, increased traffic, attracting new audiences and project partnerships. In our activities (with the exception of ENUMERATE and the environmental sustainability survey 2023) we did not ask what the size of the responding CHIs was (in terms of staff numbers). As a result we cannot yet fully analyse the needs of different sized institutions. This is a question we should add to surveys in future, where relevant.

However these issues were examined in the *dissemination of archival collections through Europeana paper (2021)* which included several CHI interviews, including one with a small CHI in Malta who run a digital archive of performing arts. They expressed difficulties at that time with aggregating data to Europeana due to the fact that they could only afford to employ one staff member who at that time was not a specialist in digitisation, metadata or archiving but who was responsible for creating and maintaining the digital collections of the institution. In this case aggregating to Europeana was out of the question due to funding, lack of capacity and staff time which clearly would already be stretched in creating the collections in the first place. Despite the fact that it may be more difficult for smaller institutions to share data with the Europeana Initiative, the benefits in doing so are perhaps greater than at larger institutions which already have a more robust infrastructure and digital presence of their own. Europeana can provide smaller CHIs with an advanced website to display their digital collections alongside those of other institutions.

Larger institutions may not need Europeana/an aggregator's help to reach their audience but they are still attracted to the idea of reaching a wider audience than that they can find organically and they are interested to connect to a wider audience also via other aggregators, such as Wikipedia, & Google Arts & Culture. Reuse and the Europeana Initiative's successes in facilitating digital collections reuse on a larger scale and differently than the other initiatives mentioned are a key value proposition for all sizes of institutions.

In the dissemination of archival collections through Europeana paper (2021) interviewees from a large Swedish archive specifically mentioned they do not expect dissemination through Europeana would help them increase traffic in any significant way and were planning to work with Wikimedia to achieve better user statistics. If Europeana can demonstrate innovative reuse through our existing activities like Built with Bits, Gif it up and the digital storytelling festival it can provide a unique selling point for CHIs looking to gain further exposure - not necessarily in clicks to the CHI website but in the reuse of their collections in ways that could not be achieved on their site alone. The most significant reason for the large Swedish archive to engage with Europeana is to build digital capacity internally. They appreciate Europeana's network events, task forces and working groups through which professionals share opinions, experience, exchange ideas and knowledge. In their opinion in 2021, the main value of Europeana is capacity building and knowledge exchange. Based on the analysis in this paper - they are more interested in the CHI value of technological advancement and the value for their staff as individuals in accessing trainings, knowledge and improving their skills.

In some form or other exposure for the CHI is of pivotal importance. It is universally mentioned by providers in every study included here - primarily in qualitative comments. To many CHIs, exposure could be important for attracting income, either in the form of in person visits (and ticket sales, or money spent onsight), or visits to an online presence which may also involve paid services, or via attracting project funding through introductions or access to consortia, and this is what is reflected in the analysis. Exposure online can also lead to more in person visits for the CHI which is an important KPI and income generator for them. For example, examining common KPIs that CHIs use coming from a key data source - namely ENUMERATE 2022 - we know that the most common KPI in that survey was in-person visits to the CHI.[8] We also see this as an important KPI e.g. in the UK where museums are required to report figures to the government by law and in the Netherlands where this data is presented as part of the culture monitor (Erfgoedmonitor).[9] The European Group on Museum Statistics (EGMUS) also uses this as a major topic in their data, alongside income and expenditure.[10]

Therefore a key value proposition for the Europeana Initiative to communicate to their data providers and potential data providers is that Europeana not only introduces the CHIs collections to new audiences but also a different kind of exposure which can lead to more visitors and more opportunities for the CHI. In our marketing efforts to CHIs - on a B2B level - we should be clear about these benefits and explore how we can connect our data providing CHIs to each other and other organisations, as well as reusers, that work in our wider initiative and sphere of influence. This could be an area where we can leverage the Network Association. As mentioned above testimonials would be helpful here and could fit well into a CHI specific area in our products selling the benefits of sharing collections with Europeana. This, for example, could be an interesting proposition for the future development of the Welcome Pack and our data space Marketplace for tools that we can make available to our cultural heritage professional audiences - on an individual level and a business level.

[8] In-person visits to the institutions was the most common indicator reported by 42% of institutions, online social media engagement is also seen as important in this study (used by 37% of institutions). On the collections side, the most commonly used KPIs measure the quality of digital reproductions (40%), with items catalogued (39%) and items digitised (33%) also featuring in the top results.
[9] https://www.gov.uk/government/statistical-data-sets/museums-and-galleries-monthly-visits and https://erfgoedmonitor.cultureelerfgoed.nl/mosaic/dashboard/museumbezoek
[10] https://www.egmus.eu/en/statistics/choose_by_topic/

Conclusions

Examining the data we have collected in the past at Europeana Foundation and using a meta-analysis approach, in addition to bringing together previous research we have undertaken into CHIs and cultural heritage professionals, allows us to surface and understand some of the needs and requirements of these audiences from the research in a new way. This data is of key importance to Europeana's future trajectory - helping to shape our product and service development - and should be considered as an important product of Europeana itself. The data can also be anonymised and made available to Europeana's stakeholders in future - such as contributing countries or member states, aggregators, and policy makers in our sector.

It has often been challenging to collect data, and in the past it has not always been collected at the point of contact with a product or service, and instead taken as a separate and discrete activity, when those audiences are more removed from our offer. Whilst this data has value, in future we should explore how we can get more data from these audiences, at the point of contact with Europeana or the data space, and using standardised questions wherever possible to ensure we can cross-reference results and create a big picture across our data collection activities. Moreover, campaigns on the member states/pan-European level (such as ENUMERATE) would boost our reach and allow us to gather even more data when supported by major stakeholders who can influence CHIs and encourage their participation in our activities. This would be seen as mutually beneficial as the data we could then make available to member states can be used for their own purposes.

The analysis in this document helps us to understand that Europeana can hold clear value for cultural heritage professionals and institutions acting as our data providers but that these values are not always clearly understood by our audiences and oftentimes the messages we send to this wider audience represent a mixture of a B2B and a B2C offer. We could assess the effectiveness of each offer more accurately if these were clearly separated. Europeana has many products and services and potentially more could be done to explore, demonstrate and communicate where and when these products and services are designed for the CHI and cultural heritage professionals audience, and to demonstrate how they meet some of the needs surfaced in this report. We can then target the right professional audiences with products and services of interest. Further research into the needs of professionals and institutions and the creation of audience profiles for them will help us to direct the offer even more successfully.

In particular it is important that we do not make assumptions that our wider cultural heritage professional audiences (including those in the ENA) are interested in data aggregation or are employed in a capacity to influence what their institution does or can do with its digital collections. If individuals can do this then it ought to be viewed as an added value of our offer but not the key goal. Data in this report suggests around one quarter of the cultural heritage professionals would be attracted by this type of material. Information and tools around data aggregation should therefore be aimed at those within a CHI who can influence the official partnership with Europeana (such as those in the director level of the CHI) who can then make them available to relevant staff in the organisation. Surfacing tools, products, training and other services by key topics of interest would likely be more appealing to individual cultural heritage professionals and ought to be considered while developing the marketplace.

On the other side - CHIs need an offer for CHIs (for example via the Welcome Pack) with separate content and associated messaging that can be aimed at those working in the senior management level of the institution and that clearly outlines the value that Europeana holds for these institution in terms of exposure and innovative reuse of collections (not excluding traffic to the CHI website but certainly not limited to it). This would be a compelling offer for potential data partner CHIs and could exist alongside a separate institutional area on our products for existing data providing CHIs. There CHI representatives could curate their institution's profiles for example, or get access to relevant information they need regarding sharing data, or access tools and services like their institution's dashboard which shows the usage statistics for the institution's items on Europeana. This could also include training for CHI staff on topics relating to data aggregation, for example, or on collections reuse which would be specifically targeted towards them. Once the distinction between the offers is clearer it will also be easier for us to assess the overall relevance and satisfaction of this offer at the point of the services. In the future the satisfaction surveys we run can help us to monitor this in addition to our ongoing user survey activities.

Recommendations

Short Term recommendations - to be implemented in Y2

Align ongoing CHI and cultural heritage professional data gathering activities to ensure that data is gathered to continue to feed the type of insights that are in this report.

In particular:

- Use the term 'cultural heritage professionals' universally to capture the role of respondents
- Use the question: 'What best describes your present place of work?' And allow only a single select answer.
- Ask the size of CHI using 'how many staff members (FTE) work at the institution?' and also 'how many staff members (FTE) work on digital collections at the institution?' where relevant
- Ask country of residence
- Continue to work on the CHI list database - standardising insights gathered and anonymising data to be shared more widely
- Use maturity scales where possible when asking questions that give an insight into the digital transformation of the CHI
- Ensure standardised questions/data collection is used for ENA sign-up form and sign-ups for events and trainings and other products and services so that data can be aggregated from these sources in future as well
- Reflect these changes in the new CRM and ensure consistent data is present for future reporting (on the ENA and data providing CHIs, aggregators and other contacts).

Change the way we gather satisfaction data for CHIs with the data space products and services and use two methods 1) a survey to user of products aimed solely at CHIs in the B2B model (e.g. the usage statistics dashboard and the Metis sandbox) and 2) on the point of use of any Europeana product aimed at least in part to cultural heritage professionals (e.g. Europeana Pro, events and trainings etc) and segment the data by those who identify as a 'cultural heritage professional'.

The understanding behind this change is that method 1) will attract more qualitative responses and 2) can help us to rate the various products according to this key audience who we know use them.

Medium Term recommendations to be implemented in Y3

Create cultural heritage professional (B2B and B2C) audience profiles
These profiles will help us to understand the needs of different sizes of CHIs as well as of specific individuals within the sector. See the recent mapping of products and services report for more details. These findings should be verified in future through a combination of qualitative data gathered via interviews with key cultural heritage professionals alongside analysis of qualitative insights from various future surveys in the same manner as has been presented in this report.

Align our terminologies
Update our glossary to reflect the learning in this report, the data we gather more generally (aka the phrasing of the questions we ask) and align with the data space terminologies.

ENUMERATE

- Continue working on the standardised question bank and aligning with ENUMERATE questions.
- Use the standardised questions in all surveys and aggregate data on the CHI level where the name of the CHI is collected
- Consider a strategy to assist member states with data collection to increase response rates in particular to understand more about the digital transformation of the sector and the needs of the responding CHIs

Explore how the learnings from this report, and future, standardised data collection activities can inform how we develop, position and promote our offer to cultural heritage professionals and CHIs. This could include:

- Explore how the data space as a marketplace can have a clear value proposition for these audiences and how to better group, surface and promote existing tools and products to individuals who would find them valuable.

- Look to surface the tools, information and resources that we have on digital collections management and target these towards individuals visiting Europeana Pro, the data space market place as it develops and our audiences who identify as cultural heritage professionals
- Consider separating our offer between the individual (as a cultural heritage professional), and the institution (as represented by the professionals who visit our platforms), tailoring our B2C and B2B offer appropriately. Specific topics can be used to help users deep dive into key areas but access to the content should have a broader appeal.
- Consider renaming the Europeana.eu and Europeana Pro sections titled 'share your data', to make it clear to users that this section relates to a B2B data provider or potential data provider offer (e.g.: share your institutions data/collections). Work on this on Europeana.eu is already underway with changes to be visible by the end of Y2.
- Consider differentiating the messaging in the welcome pack for existing CHIs as Europeana's data providers (and what we can offer them, such as the usage statistics dashboard) versus an appeal for new CHIs to register an interest with Europeana (showing what they could gain from sharing their data).
- Explore how to find, source and showcase positive use cases from CHI professionals (individually and on behalf of their institutions) based on their experience sharing data with Europeana and the data space
- Ensure training is available for CHI representatives on Europeana's products and services to support (potential) data providers in sharing their data with - and stimulating reuse through - the data space.

Longer Term recommendations to be implemented in Y4 and beyond

Consider cultural heritage professionals as customers and cultural heritage institutions as suppliers

It is important to separate the offer on a data provider (B2B) level from that of an individual cultural heritage professional (B2C) so we can evaluate the suitability of our overall offer and tailor content to the right audiences. We should further validate working on a proposition for professionals that is not specifically related to their data supply but that assists in the digital transformation of the sector which ultimately will help Europeana and the data space to aggregate more and better quality data. The two propositions are interlinked but we should not take for granted that the majority of cultural heritage professionals that use our products and services will be interested in sharing data with us.

A direct offer from Europeana to the CHI
Develop an approach for working with CHIs more directly while involving aggregators who are the needed experts in the country or domain. This ideally could be approached both with technological solutions to assist in data aggregation more directly but at least in terms of Europeana's direct offer to CHIs as data providers - further developing services such as the usage statistics dashboard and organisation pages which are offered to CHIs directly from Europeana/the data space.

Bringing together CHIs and their audiences
We can also bring CHIs in contact with their reuser audiences from other communities such as education and research - this is a unique value proposition that Europeana holds given that our network association consists of cultural heritage experts, data suppliers, and cultural heritage reusers. The reuser groups may also be able to help in making resources that CHIs can use in their own institutions, for example EuroClio's educational resources.