

Reaching Out: Archives and the Public

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Introduction

(Slide 1) Ladies and gentlemen, I am honoured and delighted to deliver this keynote address today. The theme of the Conference, on how we archivists communicate with the public and each other, and of how we affirm the value of our collections, is of the greatest relevance in today's increasingly global and e-enabled society.

(Slide 2) This illustration of a plan of the citadel of Barcelona in 1810,¹ from The National Archives, is our backdrop while I start by raising some key issues and questions relating to how best we can reach out to the public. Without ignoring the critical importance of key archival activities such as appraisal, selection, preservation and cataloguing, we archivists are today far more alert to and aware of the needs of our users and of society more broadly than was the case twenty years ago²; but there will always be a tension between our wish to give users what they say they want, and the services we are actually able to provide within our often limited resources. So how do we balance these conflicting priorities? An additional complication is that of what users expect, since the public is increasingly demanding ever better services without necessarily agreeing that they should be better funded. How can we manage such expectations?

Marketing our archival collections and our services is one way of doing this, but as service providers rather than business enterprises we need to tailor commercial techniques to support our work and not to alienate our users and stakeholders. Do we present one message about archives, or several? How do we balance the needs of all our different user groups, to allow us to cater for the general public as well as erudite scholars? And then, how do we fund our improvement programmes and sustain our services in the longer term?

My paper today will cover a number of these issues and questions, using The National Archives of the United Kingdom as an example. Many of these challenges can better be

tackled by working in formal partnerships but also by comparing notes with others. My colleagues and I have gained many of our best ideas for improving our services from other archives and cognate institutions such as museums and libraries. Attending professional conferences is of course one fruitful source of ideas and I am thoroughly looking forward to hearing more of your experiences in Catalonia and Spain.

The National Archives and its users

(Slide 3) The National Archives of the United Kingdom, England and Wales, as was created in 2003 by merging the Public Record Office, founded in 1838, with the Historical Manuscripts Commission, which advises on and supports private archives. It is a government ministry in its own right, reporting to the Secretary of State for Constitutional Affairs rather than the Culture minister. Its high level service goals are to preserve 1,000 years of history and to make it available to a global audience; to offer a world class service with a personal touch; and to focus on online delivery, fulfilling our remit ever more digitally.³

Our headquarters and reading rooms for original records are in Kew, west London, and are pictured on the right of this slide; on the left is the Family Records Centre in Islington, north London, where we make available historic censuses on film and online. We hold 170 shelf-kilometres of public records stretching back to the eleventh century; 30 kms of these are stored in a deep salt mine in Cheshire. Each year we receive around 300,000 onsite visits to our two sites,⁴ and around 160 million page downloads from our own and our hosted websites, equating to around 16 million online annual visitors. These are very large numbers of users, making us one of the busiest archives in the world.

In order to deliver high quality and relevant services we need to reach out to our customers and stakeholders in order to determine that very key question of who they are and what they want from us. In planning our services, we divide customers into categories, a process which in marketing terminology is a 'market segmentation model'. We then tailor some aspects of our services and marketing to reach those groups. These comprise family historians otherwise known as genealogists; personal interest researchers; academic and educational researchers; professional researchers; leisure historians – that is to say the general public

with an interest in history who might participate in events and open days; and fellow professionals such as archivists and records managers.⁵

(Slide 4) Along with other UK archives, we measure our onsite and online readers using a related segmentation model focused on users of our archives and records. Since 1999 the Public Services Quality Group has been carrying out regular surveys of onsite archive users across the UK – this breakdown shows in that first year personal interest researchers and family historians together accounted for 76% of users, the educational sector 9%, professional researchers 7% and others 8%. These proportions have varied little in subsequent years, although The National Archives attracts a higher proportion of academic users – at around 12% - and of professional researchers such as record agents, journalists and legal researchers, at 15%.⁶

(Slide 5) In addition to participating in these national surveys, The National Archives carries out its own regular surveys of online and onsite users – currently three of each every year, and runs a continuing survey of new users. From these we collect a wealth of data, which we can use to measure satisfaction and inform service development. For example we can ascertain that a typical onsite user is likely to be British, male, pursuing personal interest research such as military or family history, and perhaps aged over 60. While we are keen to retain our existing users such as him, we also wish to reach out to younger age-groups,⁷ so we try to develop new services to appeal to those as well. As we also know that older readers often need help with computerised systems, we make sure that we have reading room assistants on hand to assist and encourage the older technophobes.

(Slide 6) We are also able to determine where our onsite users live. Of the 81% who are UK-based, most come, not surprisingly, from London and surrounding areas.⁸ This gives us a real impetus to us to send out teams to more distant parts of the UK, and to develop and enhance our online services, which attract far larger numbers of users from overseas.⁹

(Slide 7) Looking at historical periods which interest our users, we also know that the greatest number of our readers are researching documents covering the years 1815-1914, followed by the short period of 1914 to 1919 and then 1919 to the present day. We use this data in planning services, focusing strongly on the nineteenth century and the First World War.¹⁰

Finding out what services our users want

(Slide 8) This slide of an Admiralty plan of Barcelona and its citadels in 1773¹¹ forms the backdrop to a discussion of how else we can find out what our readers want.¹² Asking them face-to-face is one powerful mechanism. We collect much valuable feedback from our customer groups, for example the regular readers groups at Kew and the Family Records Centre.¹³ Other more specialised groups advise on our cataloguing programmes and our online services.

We hold regular meetings with all these groups where we discuss services and developments and encourage suggestions. We then report back to them on how these have fed back into service delivery. For example our specialist group for customers with a physical disability, which may make it difficult for them to use our services, has suggested a number of improvements. These include improved access and reserved car parking bays for wheelchair users.¹⁴

Other forms of dialogue are led by the customers themselves. They send us numerous comments and suggestions, in a variety of formats, which have resulted in many service improvements, for example, providing tables in the cloakrooms to allow papers to be sorted, through to major service changes, such as our new and very successful scheme allowing readers to use digital cameras in the reading rooms.¹⁵

And then there are, inevitably, complaints, which if well-founded may result in changes to our policies and procedures. For example at the Family Records Centre, where we try to keep noise levels to a minimum, complaints from the regular readers about the joyous and loud conversations of visiting coach parties, have led to the establishment of a completely silent zone.¹⁶ We collect and analyse all forms of comments and complaints, along with the survey data, and use the information to track trends and feed these back into our plans for service development.¹⁷

What users of The National Archives' services want from us, both onsite and online, is a friendly, non-threatening research environment, with professional and expert help and support. They want procedures and instructions to be easy to use, enabling them to gain rapid access to information about the records and above all to the records themselves. They

also value an assurance of the authenticity of what they are seeing.¹⁸ In a recent survey of Internet users of cultural resources in the UK, reliability of content was seen as a highly important factor by 92% of respondents.¹⁹

Conversely users do not want to grapple with complex systems, which make them feel stupid or ignorant, and dislike being patronised by experts. When it comes to content, many are well aware of the proliferation of cybertrash, and are quick to inform us of even the smallest mistake in our catalogues or online learning resources.

Measuring the quality and impact of our services

How do we measure the quality of the services we deliver? First of all, the online and onsite surveys already mentioned include a satisfaction question. At the end of 2004, 97% of our onsite users rated us as good or excellent and 95% of our online users would recommend our website to a friend – both are comfortably above the targets.²⁰ We also measure ourselves against an externally-validated public service quality standard known as Chartermark – we have achieved accreditation three times since 1998. And in terms of qualitative feedback, many of our comments are very positive – for example ‘I rate TNA the best organised and managed archive in the world’, and ‘Fast, efficient and above all user friendly’.²¹

(Slide 9) We are also increasingly measuring the impact of our services. For example an impact assessment study in 2002, covering other cultural institutions as well as archives, suggests that we and other archives really can help users to learn and develop new skills. At The National Archives, 98% of the onsite users surveyed found the information they wanted, and in addition 32% had their confidence boosted, and 9% enhanced their IT skills. Around 73% found the experience useful and enjoyable – a particularly pleasing result.²²

However complacency is dangerous, and naturally we do make mistakes. And for the minority of users, things do go wrong.²³ Evidence of a poor customer experience makes us redouble our efforts to be helpful. It must be said however that many users have an unrealistic expectation of what they will be able to find and the ease of doing so – an issue to which I have already referred and will return later. Certainly in the UK, there are ever-higher expectations of what public services can and should be able to achieve, in a climate of budgetary pressures. There is also an increasingly litigious culture, translating itself into

demands for compensation for wasted journeys. Our consumerist society makes it ever more challenging to run a high quality service.

Public services from the researcher's standpoint: online

(Slide 10) So moving from theory into practice, how do we deliver our services to users online and onsite, and what services do we offer them? I will track this process through our website from the standpoint of a non-UK based researcher. She lives in Barcelona, and wants to research for material about Catalonia in UK archives, both The National Archives and others. As well as tracing this user's experience, I will also along the way comment on how we consistently attempt to gear our online services to what users want.

Our researcher could simply telephone us to ask for guidance, and we would explain in outline and send her some basic information through the post. But in practice these days most people would now come to our website: here is the homepage. This website was redesigned and re-launched in July 2004 on the basis of a considerable amount of practical research into the information-seeking behaviours of archive users, a new development in the UK. Since then we have continued to refine and improve the design and the in order to simplify the path through it and to retain as many online visitors as possible.

(Slide 11) From the homepage our researcher will go to this drop down menu giving access to our catalogues (Slide 12), and then on through to the front page of our catalogue of public records, containing well over 9 million items.²⁴

From here, a click on the large Search button leads her to (Slide 13) the search screen, into which she types 'Catalonia'. (Slide 14) The catalogue then returns her search results, ranked in order of the number of hits. Here are the first, and here, (Slide 15) scrolling down, are the rest.²⁵ There are many items returned, from many different historical periods.

I'm now going to show you some examples of what happens when you click through to the next level down (Slide 16). Let's start with a medieval example – here our researcher has clicked through to more detailed information about one of the items, in this case some royal accounts from the fourteenth century, chronicling a rather unusual event – King Edward I paying back some of his debts to the merchants of Bayonne, England, Spain, Aragon and

Catalonia. (Slide 17). This is what the record itself looks like though it's not yet available directly from the catalogue – she'd need to order it.²⁶

(Slide 18). Back at the catalogue returns, here are some more details about my next example, a proforma bill of health given to a ship, *La Consapsis* at the port of Palamos, Catalonia, in 1719. (Slide 19) And here is what this one looks like²⁷ – there are some lively illustrations of religious figures to enliven it. (Slide 20) Moving forward to the twentieth century and Foreign Office records, here are the details of a statement to the 1919 Peace Conference, in Spanish, relating to the status of Catalonia (Slide 21), with an interesting seal.²⁸ Finally (Slide 22), here is an analysis by the British treasury of the economic state of Catalonia in 1936, following the establishment of the collectivisation system. (Slide 23) This file²⁹ contains some hard-hitting critiques, which may provide an interesting angle on a complex period of Catalonia's history.

(Slide 24) Our researcher might decide to order customised scans of these items online, using the order form reached from this screen, and paying online by credit card. The scans could be e-mailed to her within two weeks, at a cost of about £15 sterling or 22 euros each. Demand for these services has grown exponentially since they were introduced in 1998, and is now running at 30,000 scans each year.³⁰

(Slide 25) Our researcher might also decide to see what relevant information we have in our Documents Online database, containing complete series of popular records. These include military medal rolls and wills dating from the thirteenth to the nineteenth centuries. Usage of this site is very strong, having recently peaked at 6.3 million page downloads in November 2004.³¹

(Slide 26) Our search in the Documents Online website brings up several wills relating to Catalonia, and here is an image of the will of Joachin Roberto de Olivier from Barcelona, dated 1838. Our researcher has downloaded it at the cost of £3.50 – around 5 euros. This charge, the equivalent of a copying fee, is accepted as reasonable by most online users. But for onsite users, these images are available free of charge, in accordance with our principles of free onsite access to our records. In this case we do not have to get the original records out, a major contribution to the preservation of these popular documents.

(Slide 27) If our researcher is considering a visit to the UK to look at the originals herself, she might also like to check in advance what other sources are available, and here she could search the Access to Archives (A2A) partnership site, a collection of online catalogues from a great variety of English archives, which we host on The National Archives' site.³² (Slide 28) Holding more than 7 million catalogue entries and sustaining more than two million page downloads each month, A2A is a treasure trove of information: here is its home page. We pay for the central team, which manages and co-ordinates the site, but content creation is funded by the participating archives, often with grants from charities and in particular the UK's Heritage Lottery Fund. (Slide 29) Here is a search return from A2A on Catalonia, which produced 30 items from a variety of archives.³³ (Slide 30) One relates to the papers of George Orwell, held at the archives of University College London, and including the manuscript of his novel *Homage to Catalonia*. Here is the catalogue description from the website.

Public services from the researcher's standpoint: onsite

(Slide 31) Our researcher has now decided to visit the UK, and starts at The National Archives – by consulting our website she is able to obtain detailed directions, instructions about our rules and a list of local hotels. She is also able to order documents in advance via the website so that they are waiting for her when she arrives. (Slide 32) When she reaches us, has presented her identification and has collected her reader's ticket, she is able to pick the documents up from one of these self-service lockers, which we brought in to cut down queues in the reading rooms.

(Slide 33) She can use our new self-service copying facilities – here are the overhead scanners - or she can bring in her own digital camera. Having signed a copyright declaration and an agreement that the images she will take will be used only for her personal research, she will be able to take as many shots as she wishes in the reading room. To optimise her time she will be able to visit us on Saturdays and on two evenings a week, and use the cybercafe to check her e-mails. All these service enhancements emerged from consultations with or suggestions by users, but we had to prioritise them and to look for savings from

elsewhere in order to fund them. This has often involved hard choices and there are some enhancements which we would like to bring in, but which it is unlikely we will be able to afford.

(Slide 34) While spending her time with us, our researcher could also participate in our services for visitors not using the reading rooms, which attract more than 20,000 people a year. She could visit our onsite Museum, perhaps attend document workshops or lectures, (Slide 35) and even see behind the scenes through special tours or our annual Open Day, which attracts up to 2,000 visitors each September. (Slide 36) She will very probably be dodging the many exuberant school groups who now visit us each year, introducing more than 7,000 children to our archives for the first time. This picture shows one of the very few surviving World War One veterans in conversation with a school group, in 2003.

(Slide 37) She could also purchase some of the 20 academic and popular titles we publish each year, including a successful popular magazine for family historians, *Ancestors*. All these may be obtained online from our Internet bookshop and help to widen access to information about our holdings worldwide.

Marketing and its impact

(Slide 38) So far I have shown how The National Archives has engaged with and learned from onsite and online users in order to shape archival services; some of the challenges and advantages that this has created; and what the outcomes are in terms of service development. Marketing is how we can make people aware of the services we offer as well, more broadly, as promoting our standing and reputation with our numerous stakeholder groups.

(Slide 39) Let us now look at how we can apply marketing techniques to archive service delivery, with this plan of Barcelona in 1814 to beguile us while we do so.³⁴ Since 2001 The National Archives has had a formal marketing strategy, based on a number of different market segments and stakeholder groups.³⁵ These are fellow professionals; professional researchers including journalists; personal interest researchers and genealogists; academics and people in higher education; school pupils and teachers; and people with a general interest in history – the last comprising some 76% of the UK's adult population.³⁶

(Slide 40) Within these segments we create special resources of interest to particular groups of people. This website, Moving Here,³⁷ is for and about groups of people who have settled in the UK – initially East Asian, Caribbean, Jewish and Irish. Funded by the Lottery, and with contributions from more than 40 partner bodies including museums and community-run archives, it also allows individuals to contribute their own stories, a popular and well-used feature which we are currently expanding. 72% of its visitors are first-time users, compared with around 50% of those who use our other websites.³⁸

Marketing archives: cultural and educational dimensions

How can we best reach these all these market segments and groups within them? What unites them is a fascination with archival content. An ever-growing tide of press coverage of newly-released and newly-discovered documents has begun to overcome a relatively low level of awareness of archival institutions in UK society,³⁹ and has brought us many new secondary users who read about us in the newspapers, for example.⁴⁰ Beyond this, the more engaged people will wish to acquire information about and from the documents, and ideally copies of the documents themselves. They place a high value on the authority and authenticity of the records, and are often keen to create their own personal collection of treasures from the archives. In addition, they increasingly identify archives with public value and cultural value.⁴¹

(Slide 41) They are not so interested in stories about archival institutions – unless there is a major mishap which becomes a news story in its own right, as when in January 2002 we released the 1901 census returns for England and Wales on the Internet.⁴² Fuelled by strong global press coverage, more than 30 million attempts to access this site were made in 24 hours, from round the world. (Slide 42) The site was overwhelmed, and crashed – and this in itself became the press and TV story for several weeks.⁴³ It had to be taken offline and rebuilt to withstand higher levels of demand – but was brought back within six months in a low-key way and has been running well ever since. Despite the problems, this episode demonstrated the vast potential of putting images of original records online, and many other sites containing similar material have subsequently sprung up in the English-speaking world.

But there is a challenge in the maturing of this market and the proliferation of websites providing genealogical resources. Many of these have become competitors to us, drawing on our own content, which we have to provide and licence to them through government rules. In few cases we have come to arrangements with licensees to provide co-branded services,⁴⁴ where the costs of digitising material are well beyond our reach. But even if we do come to such arrangements, since there are so many alternative commercial providers, we archivists are at risk of losing our profile in cyberspace.

(Slide 43) We therefore need to focus on our core markets and our core values of being authoritative and expert as well as accessible. Our aspiration as formulated in our latest marketing strategy is about reliable access, ease of use, openness to all and enjoyment by a worldwide audience.⁴⁵ To meet these ambitious goals, we are emphasising the value of our brand, by aiming for consistent messages and adopting a consistent visual identity.⁴⁶

How can we actually reach these audiences who have so many competing demands on their time and a relatively low recognition of The National Archives? We are trying out new ideas to see what works well, using a publicity company to help create stories, holding regular press events and feeding through good stories from newly transferred records to the newspapers and TV companies. Online, we are using banner advertisements on Google and creating numerous hypertext links to ensure a high placing in online search engines on searches for words such as archives, history and family history.

The obvious danger of this sort of marketing is that we run the risk of alienating our existing user groups if we simply go for a 'one size fits all' approach. This danger can I believe be greatly reduced by ensuring that our basic messages exude high quality rather than being 'dumbed-down', building on our reputation for delivering authoritative content.⁴⁷

(Slide 44) We also need to continue our focused marketing to individual groups. This is our online newsletter, which has more than 50,000 subscribers from around the world. It is a very powerful way of driving website hits to new online services through hypertext links. Academic users have asked us for a similar e-newsletter specifically for them, which we are in the process of creating. We also produce a magazine for professionals, *Recordkeeping*, which we make available online.⁴⁸

Publicity campaigns: working in partnership

(Slide 45) The National Archives plays an active role in the UK's archives and records management scene, and working in a concerted and consistent fashion, in partnership with our fellow professionals, is a powerful way of getting the archives message across. The UK's Archive Awareness Campaign started in 2003 and ran successfully a second time in 2004 – here is its website.⁴⁹

A central team based at The National Archives supports and co-ordinates a series of events and publicity campaigns in the English regions and in Scotland, Wales, and the whole of Ireland. These events are delivered by the archivists themselves, from public and private organisations, large and small.⁵⁰

Before the first campaign, in 2002, many UK archivists were sceptical, as they regarded it as a potential diversion from their core work and were not convinced that the effort would pay off. But many too responded magnificently, and in 2003 the first campaign promoted more than 500 events, around the theme of *'Love and Hate in the Archives'*, and achieved substantial media coverage. The archivists themselves then pressed for a second campaign, which would draw on the lessons of the first. The key one of these was that we needed a major media partner.⁵¹

(Slide 46) So as well as running the events as in the previous year, we teamed up with the BBC, the UK's national public broadcaster on a genealogical theme, *'Routes to Roots.'* The BBC commissioned and broadcast a series of high quality and compelling programmes based on celebrities tracing their family origins and setting them in a wider historical and social context.⁵² The programmes touched a nerve with the public, and achieved the highest viewing figures on the BBC2 channel for the whole of 2004, outperforming programmes about football, wife-swapping and gardening. The first programme was broadcast on 12 October 2004, and attracted 5.8 million viewers, a 24% share of the audience on all terrestrial channels.⁵³ (Slide 47) It also caused an almost ten-fold surge in the use of The National Archives's websites, as this graph shows.⁵⁴

The level of usage continued to peak just after each programme was broadcast, and has settled down at 30% above its previous total.⁵⁵ The programmes also resulted in a doubling in numbers of The National Archives's remote enquiries (that is to say e-mails and letters),

and an increase in onsite user numbers of around 40%. The BBC's research suggests that before the series, 53% of the viewing public was interested in family history, but after it, this rose to 63%, which explains the surge of interest.

These figures have been replicated in other archives across the UK. The 2004 Archive Awareness Campaign registered and supported some 500 events, including major family history fairs held in the UK's regions and home countries. The Campaign evaluation shows that these, promoted by the might of the BBC's website, attracted 46,000 new visitors, an increase of 36% on the previous year.⁵⁶

These spectacular figures considerably outstripped our expectations, and are in some ways a mixed blessing. To meet the demand and maintain the quality of our services we have had to make hard choices and to take some of our staff off other work. Thus we have been unable to make as much progress with our programme of catalogue enhancements or to create as many online research resources as we might have wished.

Marketing archives: legal and evidential dimensions

(Slide 48) This new popular interest focuses on archives as cultural and educational artefacts, but their other vital dimension is legal and evidential, underpinning the accountability of their creating organisations. This has always been of key significance to the creators of archives and to the 5-10% of our users who are seeking legal evidence in our collections. However, an increased demand in that sphere is now being created in the UK, through the Freedom of Information Act⁵⁷ which came into force in January 2005 and requires all public bodies to open up information not excluded by specified exemptions. It covers enquiries in historical archives as well as recent files, so we have reshaped our services to comply with its obligations.

So far the level of enquiries has been about what we predicted, and our processes, although needing some streamlining, are in the main coping well. More than 50,000 previously-closed government files, which were already in our custody, were opened early, in December 2004, in anticipation of the Act, and the UK press ran numerous stories about them. Many were serious political stories, but not all - one favoured topic being the saga of the official cat, which lived in the Treasury and was given an allowance for catching mice.⁵⁸

UK government ministries are also opening up some of their very recent and significant files in response to Freedom of Information requests from journalists and members of the public, and putting information about these records on their websites. These we are capturing and preserving in partnership with the US-based Internet Archive, as a way of ensuring that these new very contemporary records, whether selected in the longer term for permanent preservation or not, are all traceable in the longer term through our own website.⁵⁹

Resourcing and sustaining our services

(Slide 49). Looking now at an early plan of Barcelona's citadel, from 1726,⁶⁰ let us consider a key question - how can we fund and such developments and sustain them for the future? Some of this extra work is paid for by streamlining our services elsewhere and freeing up resources, and some by modest additional grants of money from government. But most of the developments are paid for through grants and awards from lottery funders, charities and higher education funding bodies. There is considerable competition from other cultural and educational bodies, and, although our track record is good, replenishing the funding pot requires a considerable investment of time and effort.⁶¹ Increasingly too we bring in funding from the royalties we draw from licensing our material to commercial users and from our own online products.

All these sources provide us with some funding, around £1 million sterling each year, to invest in resource creation, creating and improving catalogues and in putting up series of records on the Internet. But how do we sustain this level of activity? An ever- growing website with a variety of databases attached requires considerable management and a robust preservation strategy. From the point of view of the users, it also needs a good versatile search engine to mine all the different databases and collections and return a single list of prioritised hits – this we are developing at present.

But meanwhile out there in cyberspace, many large not-for profit organisations, which rely on sponsorship to fund their hardware and software and volunteer labour to create the resources, are putting up similar content free of charge. And large multinational companies are hoovering up key archive content and placing it on their very successful websites.

Because they work in bulk their charges are increasingly competitive. These challenges mean that in order to maintain and grow our markets, we need to ensure that we have a unique service to offer online users.⁶²

Conclusions

(Slide 50) This is why it is so vital to maintain not just what might be termed our market brand, but to ensure that the values and the services which underpin it remain of the highest quality. This is so that The National Archives maintains its strong reputation for delivering excellent archival content to users worldwide. Of course our collections are key to this endeavour. Here is a fascinating and colourful map, from 1938, recently discovered by a reader in a Foreign Office file.⁶³ It is attached to a plea to Viscount Halifax from Luis de Arana Goiri for Britain's help in establishing an independent Basque state. Such gems frequently come to light and can be used to promote the value and interest of archive material to wider audiences.

(Slide 51) So back with Barcelona in 1767,⁶⁴ and in conclusion, these audiences come to us all, as archivists, not just to see such documents but also for advice about them. This is because they value our knowledge of and expertise in our records, and this is surely where the future of our profession lies in an ever-more competitive world. Valuable as outreach and marketing may be to shape and promote our services, they are worthless without the knowledge to underpin them.⁶⁵ We therefore need to value, develop and enhance the expertise of our staff, archivists, records managers and historical researchers, so that they can reach out to the public with authority and conviction, and sustain our collections and services for the future.

¹ The National Archives (TNA):PRO MR 1/552(04)

² Elizabeth Hallam Smith, 'Customer focus and marketing in archive service delivery: theory and practice,' *Journal of the Society of Archivists*, 24(1), 2003, pp. 35-53. See also the background research papers carried out for the Museums, Libraries and Archives Council's Archives Task Force, 2004, at <http://www.mla.gov.uk/action/archives/atf.asp>

³ Our functions are promoting awareness of the nation's official and private archives and encouraging their use; developing professional standards, guidance and support for archives and records managers; and ensuring that there is an effective system for selecting, preserving and giving access to the rich and extensive collection of public records which we hold. Thus we act as the Nation's Memory. TNA, *Corporate and Business Plan, 2005-06-2008-09*. See <http://www.nationalarchives.gov.uk/about/operate/reports.htm>

⁴ <http://www.nationalarchives.gov.uk/>

⁵ G. Yeo, 'Understanding users and use: a market segmentation approach,' *Journal of the Society of Archivists*, forthcoming.

⁶ <http://www.nationalarchives.gov.uk/archives/psqg/>; TNA Onsite Visitor Survey, 2003-04

⁷ 15-24 year-olds are the least alert to the value of archives: see annex D at

<http://www.mla.gov.uk/action/archives/atf.asp>

⁸ And also from the more prosperous outlying parts of the country.e.g. Kent, Oxfordshire, Devon and Cheshire: TNA, OnsiteVisitor Survey, November 2004

⁹ In 2004, for example, 28% of our online users were from overseas, compared with 19% of onsite visitors; overall, 67% of online users have never visited us. The US accounted for 17%, Australia 4% and Canada 3% of online users; onsite however the US accounts for 8% followed by the EU at 6%. TNA Onsite and Online Visitor Surveys, 2003-04

¹⁰ The strong interest in the nineteenth century is because our most popular records, the censuses, fall into this historical period. However since the First World War is a very short time period compared with the others, it is clear that this is now the focus of interest for a very high number of our onsite users – 43%. This is because our collection of World War One soldiers' service records is very popular and well-used on microfilm. This is one of our top candidate series for digitisation and putting on the Internet, but meanwhile we have created a number of online resources for military researchers and family historians to support, including the records of medals awarded to service personnel in World War One. This has attracted very high numbers of users: 2.8 million page downloads in October 2004 and 6.3 million in November 2004. We have therefore collected a considerable amount of data about National Archives and UK archive users, which we can use to inform service development.

¹¹ TNA:PRO MR 1/552(06)

¹² E Hallam Smith, C Cooper and C Owens, 'Keeping the customer satisfied? Developing onsite and online user services to meet user needs: a case study from The National Archives of the UK,' *American Archivist*, forthcoming. My thanks to Chris Cooper, Head of Reader Services at TNA, on whose work much of this section draws.

¹³ These act as critical friends, and let us know when they feel there are any problems with our services, as well as often lending other less experienced readers a hand.

¹⁴ They also include training some of our staff to use sign language to communicate with readers with hearing impairments; and text enlarging equipment and large screen PCs for those with sight impairment.

¹⁵ Hallam Smith, 'Customer focus', pp. 40-46; and see recent *Public Record Office/National Archives Annual Reports*, HMSO, London, continuing.

¹⁶ Another rich vein of complaints relates to charging. Although we do not charge for onsite access, we do get complaints about the costs of paper copies and of food in the restaurant onsite, and about the charges we levy for downloading most images from our website. Many are founded on unrealistic expectations, but others have resulted in the introduction of more cost-effective processes, such as self-service scanning of documents for which we charge less than operator-provided services. However, given our over-riding need to preserve our records for the long term and the statutory requirement to cover our copying costs in full, in some cases there is nothing we can do other than explain why the charges for our copies are substantially more than customers would at commercial copying shops on the local high street.

¹⁷ The results are reported back every three months to our management board. To ensure that we deal with complaints in a fair manner we employ an Independent Complaints Reviewer, a lawyer, but it is rare for any issues to be referred to her.

¹⁸ E Hallam Smith, 'Open Sesame? The challenges and opportunities of meeting users' needs on-line.' At <http://www.britarch.ac.uk/heirnet/conference.html>.

¹⁹ This was followed by quality of content at 91%. Other factors included the reputation of the organisation, at 75% overall, with 89% trusting the information provided by a museum, library or archive: *Understanding the Audience, Final Report*, MORI, London, 2005, available online at <http://www.common-info.org.uk/docs/mori-report.pdf>. Another study of the relative 'stickiness' of websites, as measured by numbers of page downloads per user visit, put

archives, at 14, above museums and libraries, at 10: unpublished research by the National Council on Archives for the Linking Arms Consortium, 2000

²⁰ TNA Onsite and Online Visitor Surveys, November 2004

²¹ On a lighter note, some comments are simply peculiar, such as 'a National Archives ticket in one hand, a beautiful woman in the other – the historian's dream!' and 'I haven't got time – just going for a drink!' TNA 'Your Views Matter to Us' forms, 2003-04

²² Survey carried out by TNA and MLA in 2002: information from TNA's Public Services Development Unit.

²³ For example, our Documents Online system was recently unable to cope with demand and suffered breaks in service, resulting in several hundred angry e-mails. Onsite, an adverse comment was: 'not much help for first time users – a daunting prospect.'

²⁴ <http://www.catalogue.nationalarchives.gov.uk/default.asp> . This vast resource, attracting 4 million page downloads each month, was created using Encoded Archival Description, to improve the chances of cross-searching at item level, and in accordance with international rules and descriptive standards: ISAD (G) and ISAAR CPF. Good reliable information about records is of course one of the things that archive users really want, and this catalogue is reasonably comprehensive and a great improvement on the paper lists it replaced. But any project on this scale inevitably has to draw on those earlier lists, which are of varying quality. As a result we are running a cataloguing enhancement project to try to improve it further.

²⁵ Of course, the search results return depend on the depth of cataloguing, and in the case of this search, we get a very large number of State Paper returns, because we have detailed cataloguing to folio level for many of these volumes.

²⁶ Note that Catalonia appears in the heading of this parchment roll. TNA:PRO E 403/1320, m.1

²⁷ TNA:PRO HCA 65/42

²⁸ TNA:PRO FO 608/123/8

²⁹ TNA:PRO T 160/686

³⁰ E Hallam Smith, 'To digitise or to microfilm?', presentation to the International Congress on Archives, Vienna, 2004 : see <http://www.ica.com>

³¹ *Annual Report of The National Archives, 2004-05*, HMSO, London, 2005, forthcoming; information from TNA's Strategic Marketing Department.

³² <http://www.a2a.org.uk/>; this website sustains around 2 million page downloads each month.

³³ Despite its rapid growth and success, A2A contains fewer than half of the existing or potential catalogues which are known to be out there in England alone, and to enhance our users' experience even further, we need to be able to cross search against other archival networks and catalogues in the rest of the UK. Working with others, we are therefore starting to develop new sophisticated search engines to try to achieve this.

³⁴ TNA:PRO WO 78/1017(20)

³⁵ Hallam Smith, 'Customer focus.'

³⁶ Public Record Office Marketing Strategy 2002; TNA Marketing Strategy 2004; Hallam Smith, 'Customer focus,' pp. 46-49. Fellow professionals are archivists and records managers in both the public and private sectors, with whom we work closely and for whom we provide a number of professional services. The segments relating to onsite and online visitors map onto those we use for our surveys. A very large group comprises personal interest researchers and genealogists, of whom some 4 million are active in the UK alone; increasingly, they are becoming more sophisticated and are moving beyond family trees and into social history and local history. A further 10 million people in the UK have a more general interest in accessing genealogical resources online. Academic users and potential users, comprising university teachers and students, number some 35,000 in the UK alone, and are a vocal, well-connected and demanding group who account for 15% of our onsite users: for a recent study of information seeking behaviour of this group, see H R Tibbo, 'Primarily history in America: how historians search for primary materials at the dawn of the digital age', *American Archivist*, 66 (2003), 9-50. School pupils and teachers, and adult learners, number well over one million people in the UK. They have a relatively low proportional onsite presence, at around 8%, but use our online teaching resources worldwide. The final segment consists of people with a general interest in history or archive resources – an opinion poll we conducted in 2002 (Research for the Public Record Office on potential archive users, MORI, 2002) suggested that 76% of the UK population had participated in a historical activity the previous year, whether visiting a historic site or an archive, watching television programmes about history or

archaeology, or reading historical books. This gives us a potential user base of 35 million adults in the UK alone.

³⁷ Moving Here was funded by a grant from the New Opportunities Fund, from the proceeds of the UK's National Lottery, and is being developed with money from another similar body, the Heritage Lottery Fund.

³⁸ <http://www.movinghere.org.uk/>; TNA Moving Here Visitor Survey, 2003. In 2004 the website sustained around 400,000 page downloads each month.

³⁹ <http://www.mla.gov.uk/action/archives/atf.asp>

⁴⁰ In 2004, 31% of our users were prompted to visit us onsite by reading a newspaper article about newly-released documents or new services which enhance access to archival resources, for example. This was almost as many as those who were prompted to visit us through reading magazine articles (36%) or specialist publications (40%) or through a TV or radio programme (38%): TNA Onsite and Online Visitor Surveys, 2003-04

⁴¹ *Creating Public Value: an Analytical Framework for Public Service Reform*, Cabinet Office Strategy Unit, London, 2002; *Challenge and Change: Heritage Lottery Fund and Cultural Value*, Demos, London, 2004

⁴² This was the first time such a UK-based resource had been made available online with images of the documents as well as a full transcript. There was something there for all our market groups, since it catered for the casual user trying out the latest trend as well as the dedicated genealogist and the academic social historian – a spread of interest which we had not fully appreciated. Family history temporarily overtook financial services and pornography as the hottest online topic, and the word 'census' was more popular in online search engines than Manchester United football club. This vastly outstripped our estimate of a peak of 1.2 million users a day – we experienced that number of users each hour.

⁴³ *Annual Report of the Public Record Office, 2001-02* HMSO, London 2002; *Annual Report of the Public Record Office, 2002-03*, HMSO, London 2003.

⁴⁴ e.g. <www.ancestry.co.uk>

⁴⁵ *The National Archives will be widely known as the Google for history. Its online services will offer reliable access to a very wide range of UK digital records. It will be easy to use, open to all and enjoyed by an expanding national and world audience.*

⁴⁶ We are also developing services of interest to some of the new groups we are seeking to engage with, including parents and teachers, ethnic minority groups and government opinion-formers.

⁴⁷ For example in a recent study, 89% of respondents rated the information provided by a museum, library or archive as meriting the highest level of trust: MORI, *Understanding the Audience, Final Report*, London, 2005, at <http://www.common-info.org.uk/docs/mori-report.pdf>

⁴⁸ <http://www.nationalarchives.gov.uk/services/recordkeeping.htm>

⁴⁹ <http://www.archiveawareness.com>

⁵⁰ Attached to the National Council on Archives, this team plans and co-ordinates the annual theme of the campaign, gives advice, guidance and media training for archivists, runs the website, and brokers partnerships with the print and broadcasting media. The events and publicity campaigns are based in the regions and home countries and are planned and run by both individual record offices and groups of archives working together. They bring in sponsorship and grants and attract local and regional as well as national interest

⁵¹ K Norgrove, *Archive Awareness Campaign, 2003, Impact Assessment*, National Council on Archives, London, 2004, at <http://www.archiveawareness.com>.

⁵² A brief didactic section at the end described how to carry out genealogical research, and directed people to archives.

⁵³ Usage of the BBC's website pages on family history peaked at a massive 1.9 users in November 2004. C Sumpner, R Roberts, U Armitage and J Cross, *Evaluation of Who do You Think You Are*, MC&A for the BBC, 2005

⁵⁴ Source: TNA Strategic Marketing Department.

⁵⁵ This maps onto the 29% of Internet users who stated that the programmes had prompted them to visit The National Archives's website.

⁵⁶ Of these, almost 100% thoroughly enjoyed themselves, and 93% of those who had not already started genealogical research went away vowing to do so. K Norgrove, *Archive Awareness Campaign, 2004, Impact Assessment*, National Council on Archives, 2005 at <http://www.archiveawareness.com>.

⁵⁷ <http://www.nationalarchives.gov.uk/foi/>

⁵⁸ TNA:PRO HO 223/43; <http://www.nationalarchives.gov.uk/releases/2005/januaryfoi/list.htm>.

⁵⁹ <http://www.nationalarchives.gov.uk/preservation/webarchive/>

⁶⁰ TNA:PRO MR 1/552(02)

⁶¹ These grants and awards are listed in recent *Annual Reports of the Keeper of Public Records*, HMSO, London.

⁶² E. Hallam Smith, 'Lost in cyberspace? Cultural heritage and the electronic age,' in L. Burrows (ed), *Beyond the Screen, Capturing Corporate and Social Memory, Australian Society of Archivists Proceedings, 2000* (Melbourne, 2001), pp. 72-81

⁶³ TNA:PRO FO 371/22699

⁶⁴ TNA:PRO MR1/552(01)

⁶⁵ This knowledge is in turn underpinned and enriched by a strong research culture. For example, in a cognate sphere, see *Understanding the Future: Museums and 21st Century Life*, Department for Culture, Media and Sport, London, 2005.