Measuring Social Media Success:
The value of the Balanced Scorecard as a tool for evaluation and strategic management in museums

Thesis submitted for the degree
of Doctor of Philosophy
at the University of Leicester

by

Elena Villaespesa Cantalapiedra

School of Museum Studies
University of Leicester

2015
Measuring Social Media Success:  
The value of the Balanced Scorecard as a tool for evaluation and strategic management in museums

Elena Villaespesa Cantalapiedra

Abstract

This Ph.D. research was triggered by the existing need for an evaluation model that will help museums to measure their social media success. This thesis defines a performance measurement framework that could be adopted to select the set of measures and tools required to carry out this evaluation task. In order to develop the framework, this thesis investigates the strategies and usage of social media based on original data collected from twenty cultural organisations as part of the UK’s ‘Let’s Get Real’ national action research project.

The framework developed in this study and named the ‘Museum Social Media Measurement Framework’, uses the ‘Balanced Scorecard’ as its foundation. A case study approach, using Tate’s social media initiatives, was adopted to assess the validity of the framework and to obtain, during its implementation, a detailed understanding of the evaluation methods and tools that may be applied in this context. The study concludes that not only has the Balanced Scorecard shown itself to be a valuable strategy management instrument for clarifying vision and objectives, but it also provides a good overview of how the museum creates value from both an internal and external perspective. However, it lacks data visualisation guidelines and is not free from implementation challenges. This study reflects on the implications for museums in establishing a performance measurement system in terms of processes, organisational structure and resources.

This thesis contributes to the business studies field with a case study of the application of the Balanced Scorecard. Moreover, this research illustrates the value of applying business theories to museum studies with the proposal of a new tool for the sector. The thesis as a whole makes the case for a better evaluation approach in museums when it comes to measuring the impact and value of social media.
Acknowledgements

This PhD research benefited from a Digital Heritage Award granted by the School of Museum Studies, University of Leicester, which partially funded the fees of the programme.

This research has been possible thanks to the support and guidance of a number of remarkable people whom I am very grateful to. First of all, I would like to express my greatest gratitude to my supervisor Dr. Ross Parry for his invaluable advice at every stage of this journey, helping me to grow as an academic researcher and to enhance my thinking and writing skills. I feel very grateful for having such an inspiring, generous and thoughtful person guiding me every step of the way. Beyond his excellent recommendations, I hugely appreciate his encouragement and motivational support during these years. I would also like to thank my second supervisor, Dr. Giasemi Vavoula, for her support and for her helpful advice and suggestions. Thanks also to Christine Cheesman for her help regarding the administration processes at the University.

I would like to thank Jane Finnis, Chief Executive of Culture24, for the opportunity I had to carry out part of my fieldwork during the ‘Let’s Get Real’ national action research project. My gratitude also goes to all the arts and culture organisations that participated in this project and that provided me with access to their social media analytics tools, responded to survey questions and contributed very useful feedback to the results of the data analysis I presented during the project. The direct contribution from the sector has been an invaluable element to improve and validate this research.

I would like to express my gratitude to the members of staff at Tate. Special thanks are due to John Stack, Head of Digital, for his extraordinary support of my research, providing very useful insights, facilitating the integration of the field research at Tate and for his superb feedback on parts of this thesis. The conversations we had about digital transformation and evaluation culture were very inspiring. I would also like to thank the people I interviewed and especially the people I worked more closely with in evaluating their social media and participatory digital initiatives: Jen Aarvold, Kathryn
Box, Jesse Ringham, Minnie Scott, Corinne Scurr and Sabine Doolin. Thanks to my colleagues Emily Fildes and Maggie Hills for their suggestions and editorial work on some of the publications that resulted from this research. I would also like to express my gratitude to Dr. Jennifer Mundy and Professor Nigel Llewellyn from the Research department for supporting my research while I was working at Tate and subsequently, with a Tate Honorary Research Fellowship from 2015-17.

I am very thankful to the active PhD student community at the School of Museum Studies of the University of Leicester. Despite being a distance-learner, through the use of social media and other regular communications, I was able remain updated with the research activities happening in Leicester and in other parts of the world.

On a personal note, I would like to thank my family who have supported me during this period with visits, calls, messages and a lot of encouragement from back home in Spain. My greatest debt is to my husband, Carlos, for his patience and unconditional support during all these years, for helping me in day-to-day tasks so I could focus on my research and also for cheering me on and celebrating each milestone. I will never forget his enthusiastic words of encouragement and all the things he has done so I could finish this Ph.D.
Dedicated with all my love,
To my parents Aurora & Enrique and
To my husband Carlos
# Table of Contents

Abstract ................................................................................................................................. i
Acknowledgements ............................................................................................................... ii
Table of Contents .................................................................................................................... v
List of Abbreviations ............................................................................................................. ix
List of Figures .......................................................................................................................... x
List of Tables .......................................................................................................................... xv

Chapter 1: Introduction ........................................................................................................ 1
1.1. Origins of this study: The need for an evaluation tool to measure the impact and value of museums’ social media initiatives ......................................................... 1
1.2. Research aim and objectives ....................................................................................... 3
1.3. Research context ......................................................................................................... 4
1.4. Research design ........................................................................................................... 8
   1.4.1. Case studies .......................................................................................................... 8
   1.4.2. Social media tools and methods .......................................................................... 14
   1.4.3. Ethics ................................................................................................................... 15
1.5. Thesis structure ......................................................................................................... 16

Chapter 2: The Opportunities and Challenges of Social Media for Museums ............... 20
2.1. Introduction .................................................................................................................. 20
2.2. What is social media? ............................................................................................... 21
2.3. Digital technology factors and their impact on user behaviour ............................... 27
2.4. Evolution of museums online ................................................................................. 30
2.5. Opportunities and Threats ....................................................................................... 34
2.6. How museums use social media .............................................................................. 39
2.7. Online research methods ......................................................................................... 44
2.8. Conclusion ................................................................................................................. 48

Chapter 3: Culture and Practice of Museum Evaluation .................................................. 50
3.1. Introduction ................................................................................................................ 50
<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.2. The evidence-based model</td>
<td>53</td>
</tr>
<tr>
<td>3.3. What to measure? Impact and value</td>
<td>60</td>
</tr>
<tr>
<td>3.4. Measuring Impact</td>
<td>60</td>
</tr>
<tr>
<td>3.5. Measuring Value</td>
<td>65</td>
</tr>
<tr>
<td>3.6. Evolution of the field of visitor studies</td>
<td>73</td>
</tr>
<tr>
<td>3.7. Digital evaluation</td>
<td>77</td>
</tr>
<tr>
<td>3.8. Conclusion</td>
<td>80</td>
</tr>
<tr>
<td>4.1. Introduction</td>
<td>82</td>
</tr>
<tr>
<td>4.2. The challenges of measuring social media</td>
<td>83</td>
</tr>
<tr>
<td>4.3. Cultural organisations on social media: strategies, platforms and investment</td>
<td>89</td>
</tr>
<tr>
<td>4.4. Social media metrics review</td>
<td>97</td>
</tr>
<tr>
<td>4.4.1. Definition of standard metrics: community, reach and interaction</td>
<td>99</td>
</tr>
<tr>
<td>4.4.2. Social media community</td>
<td>101</td>
</tr>
<tr>
<td>4.4.3. Social media reach and interaction</td>
<td>102</td>
</tr>
<tr>
<td>4.4.4. Social media as a referral to the website</td>
<td>116</td>
</tr>
<tr>
<td>4.5. A ‘Social Media Evaluation Framework’</td>
<td>120</td>
</tr>
<tr>
<td>5.1. Introduction</td>
<td>125</td>
</tr>
<tr>
<td>5.2. Performance measurement</td>
<td>126</td>
</tr>
<tr>
<td>5.2.1. Definitions</td>
<td>126</td>
</tr>
<tr>
<td>5.2.2. Performance measurement frameworks</td>
<td>128</td>
</tr>
<tr>
<td>5.2.3. Choosing a framework</td>
<td>141</td>
</tr>
<tr>
<td>5.3. The Balanced Scorecard in practice</td>
<td>144</td>
</tr>
<tr>
<td>5.3.1. A Balanced Scorecard for museums</td>
<td>144</td>
</tr>
<tr>
<td>5.3.2. A Balanced Scorecard for online evaluation</td>
<td>147</td>
</tr>
<tr>
<td>5.4. The Museum Social Media Measurement Framework</td>
<td>148</td>
</tr>
<tr>
<td>6. Chapter 6: Defining an Evaluation Framework for Tate’s Social Media Activities</td>
<td>156</td>
</tr>
</tbody>
</table>
Appendix 2: Social media data of the Let’s Get Real project participants........274
Appendix 3: Social media metrics questionnaire .................................................279
Appendix 4: Social media resources and measurement survey .................................281
Appendix 5: List of interviewees that participated in the ‘Let’s Get Real’ project
.................................................................................................................................284
Appendix 6: Interview questions for ‘Let’s Get Real’ museum participants ........285
Appendix 7: List of Facebook and Twitter accounts of the ‘Let’s Get Real’ project
participants...............................................................................................................286
Appendix 8: List of people interviewed at Tate .....................................................287
Appendix 9: Questions of the interviews with members of staff at Tate ...............288
Bibliography ..............................................................................................................289
### List of Abbreviations

<table>
<thead>
<tr>
<th>Abbreviation</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ABC</td>
<td>Activity-Based Costing</td>
</tr>
<tr>
<td>ACE</td>
<td>Arts Council England</td>
</tr>
<tr>
<td>AoIR</td>
<td>Association of Internet Researchers</td>
</tr>
<tr>
<td>API</td>
<td>Application Programming Interface</td>
</tr>
<tr>
<td>CASE</td>
<td>Culture and Sports Evidence Programme</td>
</tr>
<tr>
<td>CE</td>
<td>Choice Experiment</td>
</tr>
<tr>
<td>DCMS</td>
<td>Department for Culture, Media and Sport</td>
</tr>
<tr>
<td>EFQM</td>
<td>European Foundation for Quality Management</td>
</tr>
<tr>
<td>EPS</td>
<td>Earnings per Share</td>
</tr>
<tr>
<td>EVA</td>
<td>Economic Value Added</td>
</tr>
<tr>
<td>GIF</td>
<td>Graphics Interchange Format</td>
</tr>
<tr>
<td>GLLAM</td>
<td>Group for Large Local Authority Museums</td>
</tr>
<tr>
<td>GLOs</td>
<td>Generic Learning Outcomes</td>
</tr>
<tr>
<td>GSOs</td>
<td>Generic Social Outcomes</td>
</tr>
<tr>
<td>IC</td>
<td>Income Compensation</td>
</tr>
<tr>
<td>KPI</td>
<td>Key Performance Indicator</td>
</tr>
<tr>
<td>MLA</td>
<td>Museums, Libraries and Archives Council</td>
</tr>
<tr>
<td>NEF</td>
<td>New Economics Foundation</td>
</tr>
<tr>
<td>NMDC</td>
<td>National Museum Directors’ Conference</td>
</tr>
<tr>
<td>ROI</td>
<td>Return on Investment</td>
</tr>
<tr>
<td>RSS</td>
<td>Really Simple Syndication</td>
</tr>
<tr>
<td>SBU</td>
<td>Strategic Business Unit</td>
</tr>
<tr>
<td>SROI</td>
<td>Social Return on Investment</td>
</tr>
<tr>
<td>SWB</td>
<td>Subjective Well-Being</td>
</tr>
<tr>
<td>TCM</td>
<td>Travel Cost Method</td>
</tr>
<tr>
<td>UGC</td>
<td>User-Generated Content</td>
</tr>
<tr>
<td>UK</td>
<td>United Kingdom</td>
</tr>
<tr>
<td>VSA</td>
<td>Visitor Studies Association</td>
</tr>
<tr>
<td>VSG</td>
<td>Visitor Studies Group</td>
</tr>
<tr>
<td>WTP</td>
<td>Willing to Pay</td>
</tr>
</tbody>
</table>
List of Figures

Figure 1: Theoretical framework ................................................................. 5
Figure 2: Steps in the definition and implementation of the Balanced Scorecard during this research ........................................................................................................... 6
Figure 3: Obliteration Room from the Yayoi Kusama exhibition at the Tate Modern in 2012. ©Tate, London 2015 ................................................................................................. 20
Figure 4: Diagram of a museum on social media. Figure created by author .......... 33
Figure 5: Success/Failure matrix for museums, Stephen E. Weil (2005) .......... 72
Figure 6: Social media metrics reported by the organisations. Social media resources and measurement survey ........................................................................................................... 87
Figure 7: Frequency of reporting. Social media resources and measurement survey. ...88
Figure 8: Challenges faced when measuring social media. (Organisations were able to select a maximum of 3 responses). Social media resources and measurement survey . 89
Figure 9: Museum of London, Facebook Post, November 27, 2012, https://www.facebook.com/museumoflondon/posts/298281413622717 ................................. 91
Figure 10: Victoria and Albert Museum, Facebook Post, November 24, 2012, https://www.facebook.com/photo.php?fbid=10151236909423880 ................................. 92
Figure 12: Brighton Museums. Twitter Post, October 31, 2012, https://twitter.com/BrightonMuseums/status/263612502850547712................................. 93
Figure 13: Example of post by Historic Royal Palaces and responses to users’ enquiries. Historic Royal Palaces, Facebook Post, June 16, 2013, https://www.facebook.com/HRPalaces/photos/a.91190783467.81448.46388888467/10151637113698468/?type=1 ................................. 94
Figure 14: Social media platforms. Social media resources and measurement survey .. 95
Figure 15: Number of staff members working on social media. Social media resources and measurement survey ........................................................................................................... 97
Figure 16: Number of hours per week spent working on social media. Social media resources and measurement survey ........................................................................................................... 97
Figure 17: Interaction rate formula .................................................................. 100
Figure 18: Diagram representing the community size, reach and interaction. Figure created by author ........................................................................................................... 101
Figure 62: Balanced Scorecard for Tate’s social media activities. Figure created by author. ......................................................................................................................... 191
Figure 63: Tate’s social media metric dashboard (August 2014). ............................................. 199
Figure 64: Detail of the social metrics dashboard – Facebook metrics. ..................................... 200
Figure 65: Twitter metrics dashboard of Tate Kids (August 2014). ........................................ 208
Figure 66: Photo of the entrance to The Tanks. © Tate Photography. ..................................... 210
Figure 67: Comments wall in The Tanks at Tate Modern. © Tate Photography. ........... 211
Figure 68: Visitor sending a comment with her phone to the comments wall. © Tate
Photography. ........................................................................................................... 212
Figure 69: Number of positive or negative mentions by theme. ........................................... 215
Figure 70: Wordcloud: Adjectives used to describe The Tanks by the users who tweeted
positively. ...................................................................................................................... 216
Figure 71: Wordcloud: Adjectives used to describe The Tanks by the users who tweeted
negatively. ...................................................................................................................... 216
Figure 72: Bloomberg Connects interactive screen on Level 4 at Tate Modern. Photo by
author. ........................................................................................................................... 219
Figure 73: Visitor responding to a question on the Bloomberg Connects interactive
screen. © Tate Photography ....................................................................................... 219
Figure 74: Funnel representing the participation with the interactive screens. .............. 221
Figure 75: Number of responses by question – Interactives in Level 2 (April – July 2014). ........................................................................................................................... 222
Figure 76: Number of responses by question – Interactives in Level 4 (April – Jul 2014). ........................................................................................................................... 223
Figure 77: Average length of the approved responses to the questions on Level 2. ... 225
Figure 78: Average length of the approved responses to the questions on Level 4. ... 225
Figure 79: Coding scheme for interactive comments. ......................................................... 226
Figure 80: Percentage of responses related to prompt question (Level 2). ................. 227
Figure 81: Percentage of high, medium and light engagement responses by question
(Level 2). ..................................................................................................................... 227
Figure 82: Percentage of responses related to prompt question (Level 4). ................. 227
Figure 83: Percentage of high, medium and light engagement responses by question
(Level 4). ..................................................................................................................... 228
Figure 84: Late at Tate event. Photos taken by author. ....................................................... 231
Figure 85: Examples of three GIFs submitted to the 1840s GIF Party project. ............ 232
Figure 86: Volume of traffic to the 1840s Gallery page and artworks. .......................... 233


Figure 89: Screengrabs of some of the tweets posted during the Twitter tours. Tate, Twitter Post, April 16, 2014, https://twitter.com/tate/status/456477465976643585. Tate, Twitter Post, September 9, 2014, https://twitter.com/tate/status/509387156222386176. ................................................................. 237

Figure 90: Visualisation of the tweets from the #TateTour of the exhibition *Henri Matisse: The Cuts-Outs.* ........................................................................................................... 240

Figure 91: Detail of the visualisation showing the tweets sent between Tate and some users who were following the #TateTour. ...................................................................................... 240

Figure 92: Visualisation of the tweets from the #TateTour of the exhibition *The EY Exhibition: Late Turner - Painting Set Free.* ....................................................................................... 241

Figure 93: Digital production phases and evaluation tasks. Diagram created by author. ........................................................................................................................................... 264

Figure 94: Interactive chart of the Facebook likes. .......................................................... 274

Figure 95: Total website traffic from Facebook and percentage of the total website visits. ....................................................................................................................................... 275

Figure 96: Interactive chart of daily website traffic from Facebook. ................................ 275

Figure 97: Interactive chart of Twitter followers. ............................................................ 276

Figure 98: Total website traffic from Twitter and percentage of the total website visits. ....................................................................................................................................... 276

Figure 99: Interactive chart of daily website traffic from Twitter. .................................. 277

Figure 100: Google Analytics social media dashboard. .................................................. 278
List of Tables

Table 1: DCMS – List of Performance Indicators.................................................................57
Table 2: List of social media metrics collected and analysed during the field research. 98
Table 3: Facebook data analysed (November 2012). ..........................................................110
Table 4: Applications of the Balanced Scorecard to the museum sector...........................147
Table 5: Tate’s Facebook and Twitter accounts (number of followers as of December 2013)........................................................................................................................................166
Table 6: Section of the evaluation framework for measuring conversation and interaction. ...............................................................................................................................................195
Table 7: List of the case studies including the methods, tools and visualisation techniques applied........................................................................................................................................196
Table 8: List of prompt questions and hashtags. .................................................................212
Table 9: Comments metrics for Bloomberg Connects interactives. .................................220
Chapter 1: Introduction

1.1. Origins of this study: The need for an evaluation tool to measure the impact and value of museums’ social media initiatives

Museums and galleries embrace social media and use it as a means to communicate and promote their activities and also to interact and engage with their visitors.¹ A large number of museums now have a profile on social media sites such as Facebook, Twitter, Pinterest or Instagram where they post news, promote their exhibitions or disseminate their content on a regular basis. Museums also produce participatory projects or create digital initiatives in order to interact with their visitors and start conversations and debates. Since the inception of these platforms, museums have typically sought to use social media as a means to open up collections, facilitate the transition from a one-to-many towards a many-to-many relationship and enhance the visitor learning experience by implementing participatory activities.² These social elements of the web produce a space with which to expand the audience reach of the museum and where multiple and diverse voices appear, constructing a ‘personal museum’ defined by Parry as ‘a place where authorship and authority could be shared rather than made the preserve of the curator alone’.³ Social media comprise platforms that, because of their nature and functionalities, can furnish the perfect scenario to create, as described by Simon, a ‘participatory museum’.⁴

Evaluating the impact and value of these social media activities is a challenging exercise. Despite the fact that these platforms are a great source of data, museums today still struggle to process and make sense of this information due to the lack of definitive

---

³ Ross Parry, Recoding the Museum (Oxon; New York: Routledge, 2007), 107–110.
⁴ Nina Simon, The Participatory Museum (Santa Cruz, California: Museum 2.0, 2010), 2.
tools and methodologies. Moreover, there are very limited and undefined evaluation guidelines being prescribed by funders. In the United Kingdom (the primary focus of this study), when it comes to evaluating digital activities, museums report the number of their website visits to the Department for Culture, Media and Sport (DCMS) on an annual basis. Likewise, other UK cultural organisations that report to the Arts Council England (ACE) are required to submit and publish the number of followers they have on social media. The national action research project ‘Let’s Get Real’ was initiated in response to these aforementioned reporting requirements. Twenty cultural organisations in the UK, under the leadership and coordination of Culture24, came together to explore the question of how to measure online success. A partnership between the School of Museum Studies at the University of Leicester and Culture24 was established, allowing the author of this thesis to pursue a specific investigation on social media within the context of this wider national project.

This Ph.D. was triggered by the existing need for an evaluation tool that will help museums to measure their social media success. This thesis defines a performance measurement framework that could be adopted to select the set of measures and tools required to carry out this evaluation task. The evaluation model proposed is an adaptation of the ‘Balanced Scorecard’, a framework developed by Kaplan and Norton and presented in the *Harvard Business Review* in 1992. As defined by the authors, the Balanced Scorecard ‘translates an organization’s mission and strategy into a comprehensive set of performance measures that provides the framework for a strategic...”

---


measurement and management system’. The model defined in this research derives from the modified Balanced Scorecard for non-profits developed by Kaplan that proposes to evaluate the performance of an organisation from four different perspectives: learning and growth, internal business processes, customers/ recipients and financial donors. This framework puts the organisation’s strategy and mission at the top of these performance measurement perspectives. The modified framework based on the Balanced Scorecard developed during this research (named the ‘Museum Social Media Measurement Framework’), is, in the second half of the thesis, put into practice within the context of one particular museum environment – that of Tate. This process serves to study the applicability of the proposed new framework, as well as the benefits and challenges that implementing a performance measurement system can bring to a museum. The thesis concludes by demonstrating how the Balanced Scorecard is an effective and helpful tool, not only as a performance measurement framework, but also as a methodology to define and scope the strategic objectives of an organisation operating on social media. However, there are some limitations that come from the framework itself concerning guidelines for the visualisation of the data, and in order to achieve a successful implementation there has to be an investment in resources as well as an alignment towards the framework usage in terms of organisational structure, culture and processes. The thesis as a whole makes the case for a better evaluation approach in museums when it comes to measuring the impact and value of social media.

1.2. Research aim and objectives

The aim of the research is to define a performance measurement framework that may serve as a tool for museums to evaluate the success of their activities on social media. As a result, this thesis specifically addresses the following primary question: how can museums measure the impact and value of their social media activities? Further secondary research questions arose during the different stages of this research, firstly

---

when examining the evaluation needs and subsequently during the framework development and implementation phases. Based on the causation of these evaluation challenges, the questions are: how are museums currently measuring their online and social media performance, and which metrics reported to funders can demonstrate the impact of museums’ work on social media?

In order to define this new framework for measuring museums’ social media success, it is fundamental not only to understand the active presence of museums on social media, but also the strategic goals behind the usage of these sites. For this particular purpose, the research inquiries into the objectives of museums’ social media strategies as well as what types of initiatives and activities they are carrying out on these social media sites. These questions are central to understanding the context to and the demand for evaluation to which the framework needs to respond.

This research takes the form of a case study in the process of implementing the framework. During the field research stage, another series of secondary research questions arose and are critical to assessing the applicability of the tool. Would the Balanced Scorecard work for museums in measuring the impact and value of their social media initiatives? What are the benefits and also the challenges when putting this framework into action? Furthermore, the empirical approach taken in the social media context deals with specific questions about what particular performance measures would need to be included in this framework and identifying the most appropriate methods and tools that can be used to collect and analyse this social media data.

1.3. Research context

The main research question of this thesis combines three theoretical areas: performance measurement, museum studies and social media, making this research interdisciplinary in nature. These research areas and the results of their intersection form the theoretical framework of this research which is represented in Figure 1.
The literature review first covers the theorisation of social media (in Chapter 2) to then look, from a historical perspective, into the culture and practice of museum evaluation (in Chapter 3) focusing primarily on the UK, but also paying attention to the theories of some key authors from museum studies in other countries. The social media environment represents a new evaluation challenge for museums concerning how to best measure the impact of these digital participatory and interactive experiences. Nevertheless, this is not the first time that the field is in the position of having to find a way to demonstrate the impact and value of their activities. Different methods and tools have been used to respond to cultural policy demands\textsuperscript{11} and in parallel, the field of

visitor studies has evolved, increasing museum’s knowledge of their visitors and using a range of evaluation methods.\textsuperscript{12}

In order to seek a response to the main research question, a review from a theoretical-historical angle was conducted (in Chapter 5) by analysing performance measurement theories and models from the field of business studies that could be applied to museum studies. This thesis is based on the methodology of a specific performance measurement framework, the Balanced Scorecard developed by Kaplan and Norton\textsuperscript{13} and specifically, the non-profit version defined by one of the authors, Kaplan.\textsuperscript{14} The literature review identified empirical research that supported its potential application to this context and, in the case of museums, it has to be noted that several authors have already proposed this model, including building a particular case for the impact assessment of digital resources in cultural and educational institutions.\textsuperscript{15} Based on museums’ social media strategies and usage, a Balanced Scorecard is defined for this specific situation and named the ‘Museum Social Media Measurement Framework’, and then tailored (in Chapter 6) to a specific organisation, Tate, for its practical implementation (in Chapter 7). The following diagram shows the sequence of steps carried out during the research, leading from theory to practice.

\begin{figure}
\centering
\includegraphics[width=\textwidth]{balanced-scorecard-diagram.png}
\caption{Steps in the definition and implementation of the Balanced Scorecard during this research.}
\end{figure}

\textsuperscript{13} Kaplan and Norton, ‘The Balanced Scorecard - Measures That Drive Performance.’
\textsuperscript{14} Kaplan, ‘Strategic Performance Measurement and Management in Nonprofit Organizations.’
This research contributes to both business and museum studies. On the one hand, it offers scholarly literature another case study of the application of the Balanced Scorecard, and on the other it illustrates the progression of museums towards adapting theories from other disciplines. Moreover, the evaluation of the online scenario permits another intersection of fields. In order to define the measures that will be included in the Balanced Scorecard, traditional evaluation and audience research methods from the field of visitor studies are applied to social media, but these online platforms, being a source of data, also bring new methods to the table.

There are a series of terms related to the research questions that will be explored and defined during the thesis based on the literature review and field work. These are impact, value, engagement and success, which are key in demonstrating evidence of the results of the social media initiatives in the evaluation process.

‘Impact’ and ‘value’ are both frequently-used terms in museum evaluation practice. Their definitions and typologies will be investigated during Chapter 3. While impact refers to the changes caused as a result of an action or activity, value arises from the visitor’s or user’s attribution of how significant and important these museum activities are for them. There are different methods for determining and calculating impact and value, and depending on the assessment criteria these are categorised primarily into economic, social and cultural impact and value.

‘Engagement’ is a widely-used term in museums and is also popular in the digital arena. This term is analysed in this thesis during a series of interviews with a selection of participants on the ‘Let’s Get Real’ project as well as during the fieldwork at Tate. Engagement is an ambiguous term and the responses from museum professionals demonstrate how this term can be interpreted in a variety of ways, meaning different things for different museums and even different staff members within the same museum. From fostering inspiration and creativity in the user, originating a change of behaviour, increasing the user’s knowledge, receiving interaction from the user in the form of a like or a comment, influencing the user to physically visit the museum, participating in a user-generated content activity or producing advocacy from the user that shares the museum experience on their own networks, engagement can be defined
as the creation of a meaningful digital experience that impacts upon the relationship of the user with the museum.

‘Success’ is another term used in museums’ evaluation practices, mainly to describe an organization that achieves its strategic objectives by meeting or exceeding its targets. Again in the exploration of this term during this thesis the responses from museum practitioners will show how, when asked for examples of success stories, these are varied in their range of outcomes.

1.4. Research design

1.4.1. Case studies

The field research included in this thesis consists of two studies. The first piece of fieldwork emerged as a result of a partnership between the School of Museum Studies of the University of Leicester and Culture24. The latter has been leading a series of national action research projects in the UK called ‘Let’s Get Real’, which involve the participation of around twenty cultural organisations in a discussion on how the sector should define and measure online success. This collaboration allowed the author of this thesis to participate as an observer in the meetings and also to take an active part in collecting and analysing the social media data across the group during the second ‘Let’s Get Real’ project. This project took place from July 2012 to May 2013.

This study included conducting a social media strategic review across all the cultural organisations involved in the project via an online questionnaire distributed to the participants. The aim was to identify the relevant factors in organisational approaches to social media across the group and included the following: a summary of each organisation’s social media objectives, details of the various platforms used, a comparison of the investment made towards social media and a summary of the challenges faced when measuring the impact of these interactive and participatory

---

16 See list of organisations that participated in the first and second ‘Let’s Get Real’ projects in Appendix 1.
activities. To explore these questions in-depth, a series of semi-structured interviews were carried out with some of the museums that participated in the project.\textsuperscript{17}

A social media metrics analysis of the participants was also carried out during the project. This was undertaken in two principle ways; firstly as a benchmarking exercise seeking to identify trends across the group and secondly, as a deeper exploration of each organisation’s own data, followed by further discussion across the group centred on the most useful metrics. Furthermore, a qualitative analysis of the perceived engagement relating to social media content was pursued. This sought to examine, on the one hand, how cultural organisations are using social media by looking more closely at the message, objectives and type of activity and on the other, to examine audience responses, by analysing their depth and theme.

After the presentation of this social media analysis plan and subsequent agreement upon the scope of the work, all the organisations gave the author access to their analytics tools, including Google Analytics. A Facebook account linked to the University of Leicester’s email account was created especially for the purpose of this fieldwork and all the organisations added this user as an analyst on Facebook Insights. The social media data is publicly available online, which means that users without login details can view the interactions and comments from other users on a specific page, and there are various tools which allow the capture of this information. These tools and the method of data collection were explained to the project participants. All the raw data and a series of graphs and dashboards to visualise the results were shared with the group. To assist and provoke the interrogation of the data, a list of questions was sent to each individual organisation. The key findings of the overall social media research and the results of the benchmarking exercise were presented to the group by the author in May 2013. These findings informed the definition of a ‘Social Media Evaluation Framework’ based on the strategic themes that arose during the fieldwork.

The data presented in Chapter 4 exclusively represents the author’s research and findings during the ‘Let’s Get Real’ project. This study was written by the author and included in the project report published in September 2013: ‘Let’s Get Real 2: A

\textsuperscript{17} See list of interviewees in Appendix 5.
journey towards understanding and measuring digital engagement,’ in a section of the report entitled ‘Understanding social media behaviours’. The charts created for this study and detailed analysis, which are shown in Chapter 4, were also included in the appendix of the report. The conclusions of this fieldwork have also been partially published in the book *Library Analytics and Metrics*, and the Social Media Evaluation Framework was edited as an online resource for Audience Finder.

The second study of this research was carried out at Tate where the Balanced Scorecard was defined based on its specific social media strategy and then applied by testing a range of methods and tools to analyse the social media data. Tate is a national art gallery formed of four sites: Tate Britain, Tate Modern, Tate Liverpool and Tate St. Ives, which also includes the Barbara Hepworth Museum and Sculpture Garden. Tate’s collection, which holds over 70,000 artworks, represents the national collection of British art from 1500 to the present and also international modern and contemporary art. Tate has a wide presence on social media with profiles on Facebook, Twitter, Pinterest, YouTube and Instagram, among others. Interactive activities are also being established on the Tate website through a blog, social media buttons or users’ collection albums, and digital participation is, likewise, increasing in the galleries. While this fieldwork was being carried out, Tate went through a process of digital transformation which aimed to embed the usage of social media across all the activities of the organisation.

---

The research was conducted following the sequential logic of the components of the strategic planning and Balanced Scorecard methodology found in the literature. Therefore, in order to capture the strategic thinking behind social media at Tate, the field research started with a review of Tate’s mission, vision and social media strategy. This task included the analysis of strategic documents such as strategies and policies (published and unpublished), a mapping of Tate’s current activities and a series of semi-structured interviews with staff across Tate who were working on social media platforms. The interviews included a number of questions aimed to address each of the perspectives of the Balanced Scorecard.

After the definition of the Balanced Scorecard for Tate’s social media initiatives, the next step was to put the framework into action in order to assess its usefulness and analyse the challenges and advantages that emerged as a result of formalising the evaluation process. Iterative in nature, this part of the fieldwork has been a process of trial and error to test various methods and tools aiming to analyse and visualise the data from different digital activities. The implementation of the Balanced Scorecard focused on developing the metrics and working with different methods to collect, analyse and visualise the data to measure the interaction and conversation created while using these platforms. Several case studies were selected, including a mix of ongoing activity from the most active and followed Tate accounts on different social media sites and the analysis also included more specific targeted and secondary accounts in these sites, as well as some social media activities based on projects with a limited duration. The latter activities were: the Twitter activity of Tate Kids and Tate Collectives, The Tanks comments wall at Tate Modern, Bloomberg Connects interactive touchscreens at Tate Modern, the 1840s GIF Party at Tate Britain and the #TateTour of two exhibitions on Twitter. The data collection and analysis included both quantitative and qualitative data. Quantitative data included metrics such as the number of ‘likes’, followers, comments and impressions as well as traffic to the website. Qualitative data focused on an analysis of the content, sentiment and quality of the user-generated content on these social media sites. The specifics of the user research and evaluation methods applied are discussed in detail in each of the case studies presented.

24 See list of Tate staff members interviewed in Appendix 8.
25 See interview questions in Appendix 9.
This research has been able to test the application of the Balanced Scorecard and experiment with different methods of working with the data. Using several case studies of social media activity at Tate, this work has set out to consider the extent to which the Balanced Scorecard is fruitful in measuring the success of the museum’s social media activities. The application and analysis of various tools and methods to explore the social media data provided some important insights in assessing which are the best methods and tools and in understanding how the data can be turned into visualisations and actionable pieces of information that inform the museum’s decision-making process.

The fieldwork was carried out while the author of this research was employed by Tate as a Digital Analyst in the digital department, which provided a unique position through which to implement some of the dashboards for the ongoing activities of Tate’s social media accounts. This situation also enabled the author to present the results of the case studies to the members of staff who managed these projects and to gather direct feedback on which metrics were useful and which visualisation techniques were more effective.

This thesis is influenced by the author’s experience of working in museums during the past eight years. This research also emerges from the author’s professional practice, interests and the challenges encountered when evaluating digital projects. Firstly, in her position as a Digital Producer at the Museo Thyssen-Bornemisza in Madrid, the author led a project entitled ‘Bringing art and people together,’ creating a new education site based on social web functionalities and initiating various social media accounts. Her former role as a Digital Analyst at Tate for five years and her current position as a Digital Media Analyst at The Metropolitan Museum of Art in New York also influenced this research, as the topic is directly related to the tasks involved in these roles, including audience research and the evaluation of different digital initiatives such as websites, social media, mobile apps and gallery interactives, among others. This professional experience has provided the author with a broader insight and understanding of the topic and with a comprehensive view of the implications for museums and galleries of establishing performance measurement practices in terms of processes, organisational structure and resources. While employment at Tate facilitated
access to data and staff due to the support from the museum, the author clearly communicated during her field work what was being collected, analysed and published as part of the Ph.D. programme. Moreover, the author’s position was independent of her work at the museum which allowed her to conduct this research in a critical and objective manner.

Towards the end of this research, the author presented the final findings of her research at the Museum and the Web conference in April 2015 in Chicago and her paper on the application of the Balanced Scorecard at Tate was selected for publication in the printed proceedings of the conference. Moreover, during the course of this research, the author has published and presented other sections of the research included in this thesis at various international conferences, notably the case studies of the evaluation of the following digital projects: the Twitter activity for The Tanks at Tate Modern, the 1840s GIF Party and Bloomberg Connects Interactives. The questions and comments following these publications and presentations have also contributed to this research. Another source of feedback from the sector comes from the publication of

---


28 The evaluation work of the 1840s GIF party was presented at the following conferences: Public culture, museums and online communities seminar, King’s College London, June 2014 (‘Art touring along museum online communities’), Cultural Value and the Digital: Practice, Policy and Theory conference, Tate, London, May 2014, (‘Understanding and developing audiences through social platforms’) and Digital dimensions: University museums group annual conference, Bristol, June 2014, (‘The Post Digital museum: Post Digital communication, how can museums measure their impact on the Social Web?’).

fragments of the research on the author’s personal blog, *Arts & Metrics*. In addition, the publication of some of the original templates generated by the author’s research have, to date, received a significant number of downloads and comments from museum practitioners in different parts of the world.

### 1.4.2. Social media tools and methods

One of the challenges of evaluating the social media encountered in this fieldwork is how to collect the data. The selection of tools is one of the main considerations for museum evaluation practice and the conclusions of this research will reflect upon this fact. The lack of standard tools across platforms and the cost and expertise needed to set up some of these tools can sometimes pose difficulties. Most social media sites feature their own analytics tool, but at the time of this research some were very limited. Facebook Insights includes a comprehensive and detailed list of metrics, as does YouTube or Twitter, but this is not the case for Instagram or Google+. There is the option to gather the data automatically through the Application Programming Interface (API) when available, but technical skills are needed to develop the script to connect to the API and obtain the data. In addition, some sites such as Twitter have a cap on the number of calls that can be made to the API and these are limitations to be taken into account in the sample. Furthermore, a tracking and setting process needs to be implemented in advance in order to gather the correct data that best suits the research. For instance, depending on the platform, in order to track specific campaigns on social media in terms of clicks, a custom link with a tracking code will have to be created, or when it comes to Twitter, the query that will track a hashtag or specific terms in real time needs to be set up in advance, before using the hashtag.

This fieldwork used the standard analytics tools available for each of the social media platforms (Facebook Insights, Twitter Analytics, Pinterest Analytics, Tumblr Analytics and Iconosquare) and for website metrics, the tool used was Google Analytics. In order to analyse and present the results a range of tools were used, including spreadsheets and graph tools, NVivo for coding and analysing the content and sentiment of social media.

---


posts and comments, and Gephi, a social network analysis open source tool. The tools and methods utilised are explained in detail in each case study and the outcomes of their application are part of the research as their exploration also helps to determine the most suitable tools and methods for this evaluation context.

1.4.3. Ethics

The research complied with the University of Leicester’s research ethics code of practice, and clearance was received to pursue the fieldwork. All the interviewees during the field research, both the participants from the ‘Let’s Get Real’ project and the staff members from Tate have provided written informed consent. The author was a member of staff at Tate and her role involved having access to the social media data. At Tate, John Stack (Head of Digital Transformation) and Professor Nigel Llewellyn (Head of Research) gave full formal consent to the researcher for using this data. Although the author is no longer working at Tate, they continued to provide full support to this thesis research with a Tate Honorary Research Fellowship.

The characteristics of the online environment raise a series of ethical issues related to anonymity, consent and privacy. These aspects have been carefully considered and addressed during this research. Online data can be divided into different classifications: public and private, published and unpublished, and finally, identified and anonymous.\(^{32}\) Depending on where the data sits within these classifications, the need to obtain consent varies. There are no standard detailed and accepted worldwide ethical guidelines, and furthermore, regulations may change depending on the country. However, these ethical challenges have been contemplated following the recommendations of the two ethics guides published by the Association of Internet Researchers (AoIR).\(^{33}\) A key recommendation made in their reports is to distinguish between those who are the


subject in a research project (e.g. people participating in a chat), and those who are the 
authors of the content intended to be made public (e.g. websites, email posts in large list 
servers). According to the AoIR, in the latter situation, into which social media would 
fit, the obligation to protect privacy, autonomy and confidentiality is lower.

There are other factors which have been taken into consideration. The information on 
these social media platforms is not sensitive because the content distributed on these 
platforms and the projects that involve user participation are about art. Moreover, the 
social media and web analytics tools aggregate the data of all the users and display it 
anonymised. In terms of the analysis of comments and responses from users, this 
content is publically posted on social media channels. On social media sites there are 
terms and conditions that users accept when they create an account. For example, the 
Facebook and Twitter terms of service inform users that personal information will be 
collected and may be used by the platform. They also state what particular information 
is always publicly available and what can be modified by the user in the settings. 
However, even though this content is already in the public domain, to reduce any 
ethical issues, when online content posted by these individuals is used for illustrative 
purposes in this thesis, their identity has been anonymised. Moreover, in the particular 
case of this research, including the names of the individual users who comment or 
respond to a post on social media is not, by itself, a decisive element.

1.5. Thesis structure

This thesis comprises eight chapters and nine appendices. The literature review chapters 
help to identify the requirements that the performance measurement framework would 
need to fulfil in order for museums to evaluate the social media initiatives. Chapter 2 
examines the concept of social media along with its main theories and characteristics, 
aiming to identify the external factors that affect how organisations establish their 
activity in this online environment and the opportunities and challenges that these 
platforms offer to museums. The chapter also investigates, based on a review of 
published materials, how museums are currently using social media, exploring various 
examples and identifying the platforms utilised, their strategic objectives and the type 
of activity undertaken. The framework requirements analysis continues in Chapter 3
with an examination of the practice and culture of museum evaluation. This chapter provides an overview of the evidence-based model in the UK and looks at how museums need to justify their funding, including a review of the performance indicators required to report to the government. This chapter also examines the concepts of impact and value, largely used in the sector, as well as the different methods used to calculate them. Furthermore, this chapter offers a review of the historic evolution of museum evaluation practices and highlights the importance of the field of visitor studies. The audience research and evaluation methods emerging from the museum field can be applied to this new online environment, but the field is also adapting by using new digital research methods to understand and evaluate the museum visitor experience both online and onsite.

Chapter 4 deepens the research initiated in Chapter 2 on how museums use social media, drawing upon original data from the work carried out in collaboration with the art and cultural organisations that took part in the national ‘Let’s Get Real’ project. This work includes a social media strategic review, a benchmarking of the main metrics and a qualitative analysis of the activity produced by a select number of museums that participated in the project. The strategic review identifies relevant factors in the organisational approaches to social media across the group. The chapter then summarises the findings of an exploration of social media behaviours carried out across the group analysing metrics for community size, reach and interaction, as well as website visits originating from social media referrals. Finally, in response to the findings from the overall analysis of social media behaviours, a ‘Social Media Evaluation Framework’ is presented as a key outcome of this work. This framework proposes a series of relevant social media measurement methodologies, metrics and tools that organisations should consider using and which relate to their organisational goals. The main learning outcomes of this fieldwork help to provide an in-depth picture of how museums are using social media and to assess whether there is a standard performance measurement framework that can be applied across the sector or whether, on the contrary, this framework needs tailoring based on each museum’s specifications. This chapter explains that even if there are some key common themes in how institutions use social media, when examined in more detail, priorities, objectives and type of activity are seen to vary across the group of museums. Moreover, the findings of the study point to a lack of maturity in the social media strategies utilised, with a loose
definition of objectives, targets and audiences. The evaluation challenges of selecting social media metrics are partially the result of social media work still being in an experimental phase and demonstrate the need for a clearly specified and concrete strategic direction.

Taking into account museum evaluation practices, specifications and the variables of the social media context outlined in previous chapters, Chapter 5 examines the field of performance measurement by analysing different frameworks from business studies to determine which of these best fits the evaluation criteria. The literature review includes a discussion of the theory and practice of these frameworks; that is to say, how some of these frameworks have been implemented in profit and non-profit organisations and even museums. The chapter concludes by proposing to use the Balanced Scorecard, a multidimensional evaluation framework developed by Kaplan and Norton. This model is refined and adjusted based on the evaluation requirements outlined in the literature review and in the field research on the ‘Let’s Get Real’ project, in order to introduce the ‘Museums Social Media Measurement Framework’ at the end of the chapter.

Subsequently, the next two chapters (Chapter 6 and Chapter 7) consist of a practical assessment of the proposed new framework through its testing within one particular organisation: Tate. This field research evaluates its feasibility and the practical considerations resulting from its application. Chapter 6 shows the process of defining the framework for Tate’s social media activity. Following a summary of the evolution of social media at Tate, a further examination of the strategy behind this area of practice is carried out to identify the strategic objectives. This audit is based on the analysis of documents such as strategies and policies, a mapping exercise of the current activities and semi-structured interviews with staff members across various departments at Tate who are working on social media platforms. The chapter presents a Balanced Scorecard for Tate including the measures for each of the objectives identified and proposes potential methods for data collection and analysis.

The validation of the framework continues in Chapter 7, where part of the framework developed in the previous chapter is applied. The field research includes the evaluation of six digital activities at Tate through the use of various methods and tools to measure interaction and conversation. The chapter summarises the final results of the framework
application, concluding how it works in this context and what its benefits are seen to be, as well as the challenges of putting it into practice. Specifically, the lessons learned in this study reflect on the implications for museums to establish a performance measurement system in terms of processes, organisational structure and resources.

This thesis ends with a conclusion (Chapter 8) which reflects, primarily, on the success of the evaluation framework but also upon its practical consequences. It is concluded that not only has the Balanced Scorecard shown itself to be a valuable and beneficial strategy management instrument for clarifying vision and strategic objectives but it also provides a good overview of how a museum creates value from both an internal and external perspective. The final chapter suggests that for museums to become learning organisations they will need to make internal changes towards implementing an insights-driven culture as well as invest in resources and internal processes. It is also suggested that future research will need to continue testing the framework with a full integration in the organisation and exploring further tools and methods, especially those emerging from this digital environment. The thesis also concludes with the evidence that emerged from the research responding to the funders’ reporting requirements and criticising their limitations to offer an actual vision of the impact and value of social media in museums. Finally, the conclusion reflects on how social media should be evaluated in the future not in isolation, but contributing to and being integrated within part of the main functions of the museum.
Chapter 2: The Opportunities and Challenges of Social Media for Museums

2.1. Introduction

Yayoi Kusama’s *Obliteration Room* is an artwork in which colourful round stickers are given to visitors so they can place them on the white walls and white furniture of the room. During the time the installation is open to the public, the sofa, the table, the lamp, the vase and any other white spots in the room are gradually covered by the distinctive dot-shaped stickers of the Japanese artist. The result is a single and unique piece of art created at each of the spaces and galleries that host this installation, and all of them are ultimately a product of the visitors as they interact with the art and with each other. There is a sort of parallelism between the *Obliteration Room* and the present use of social media in museums. This artwork is simple but powerful, the use of a sticker is natural and easy and so are social media and its functionalities. Furthermore, as will be demonstrated in this chapter, the impact that these platforms are making on their users is having an exponential role in creating experiences, connecting people and co-creating content. This co-creativity and interactive element are key in Kusama’s piece. At the same time, the *Obliteration Room* represents the shift that museums are currently making towards becoming more social and participatory institutions.

![Image of Obliteration Room](image-url)

**Figure 3: Obliteration Room from the Yayoi Kusama exhibition at the Tate Modern in 2012. ©Tate, London 2015.**
This contextual chapter has been written with two main objectives in mind. The first objective is to understand social media as a concept along with its main theories and characteristics in order to identify the external factors that impact on how museums put this activity into practice. The complexity of these external factors and of social media itself must be taken into account when evaluating the online success of a given organisation. Determining who the users are, their motivations to take part in social media and how they get involved and participate are key elements in understanding this environment. The literature on this topic comes from various sources; on the one hand, we find studies ranging from psychology, sociology and computer science aiming to explain how social networks work, their impact on information communication and the consequences they have on human behaviour. On the other hand, as these social platforms are considered a medium for organisations to meet their audiences, literature is also emerging from marketing, communication, public relations and advertising covering the challenges and opportunities of acting on these social platforms. As we are dealing with a quite new and rapidly changing environment, the literature in this field is very recent, theories keep being updated and not many publications have been written to date on how to measure success within this new environment. The second objective of this chapter is to investigate how museums are using social media based on a literature review. This will provide an initial examination of the platforms utilised and the type of activities undertaken, drawing upon some examples to illustrate this trend. Subsequently, Chapter 4 will deepen the analysis of the usage of strategies for and investment in social media by several museums and cultural organisations in the UK based on the fieldwork carried out during the ‘Let’s Get Real’ project.

2.2. What is social media?

The digital space grows and changes at a very fast pace and the web is constantly evolving with social media sites in different life cycles, some new ones appearing, some transforming and others disappearing. The first social media sites were launched at the end of the nineties and during the first decade of the present century. SixDegrees, considered the first modern social network, was launched in 1997, Blogger, the first blog service, in 1999 and two years later, in 2001, Wikipedia made its appearance.
From that year onwards, many social media sites started sprouting, but nevertheless some will disappear. Nowadays, among the top sites visited globally and ranked by the benchmarking site Alexa, we can find Facebook, LinkedIn, YouTube, Wikipedia or Weibo among others.\(^{34}\)

Numbers are good indicators of usership and they illustrate this quickly evolving environment. There has been an exponential traffic increase on social media sites, and therefore, the numbers supplied in this chapter will soon be outdated. Facebook reached 936 million active users on average for March 2015\(^{35}\) and Twitter reported in 2015 that they had 302 million monthly active users and that 500 million tweets are sent per day.\(^{36}\) The volume of content per user uploaded to the internet increases every single second. YouTube, the most popular social media site focused on video, has over one billion users and 300 hours of video are uploaded to this site every minute.\(^{37}\) Wikipedia increases its content every day with over 800 new articles.\(^{38}\) Instagram, one of the social media platforms that is experiencing a tremendous increase in 2015, reported 300 million active users and an average of 70 million photos posted per day.\(^{39}\) The numbers relating to social media sites are striking and unpredictable. What is even more remarkable about these numbers is how they have changed and revolutionised the way content is created and distributed across the internet, as well as how these sites have impacted on users’ behaviour.

Social media has evolved very rapidly, so fast that it does not have a stable or broadly accepted definition in academia or the professional field. Concepts such as social media, social web, the participative web, collaborative web, web 2.0, online communities, social networks and user-generated content are used interchangeably in journal articles, papers, books or blogs with a very similar meaning. As a consequence, there is a lack of consensus on the typology of sites and as to which of them can be


truly considered social media and which cannot. There have been attempts to find a
definition within different fields ranging from communication, public relations,
sociology and computer science among others. Platform characteristics also continue
evolving and the distinction between the different sites is becoming more and more
blurred.

The concept was born in 2005 at a conference organised by Tim O’Reilly, in which a
list of the new web 2.0 technologies or collective intelligence applications was created,
as opposed to those used by web 1.0. For instance, personal websites evolved into
blogs, content management systems into wikis, directories into tagging and mp3.com
into Napster. The conference recognised the shift that the web was experiencing as it
was becoming more social and participative. For Kaplan and Haenlein, this ‘group of
Internet-based applications which build on the ideological and technological
foundations of web 2.0, and allow the creation and exchange of user generated content’,
defines social media. A definition frequently found in the literature is that of Boyd
and Ellison who define social network sites as

[…] web-based services that allow individuals to (1) construct a public or semi-
public profile within a bounded system, (2) articulate a list of other users with
whom they share a connection, and (3) view and traverse their list of
connections and those made by others within the system.

The focus on people and the ability to create connections is also captured by Howard
and Parks, who define social media as follows:

[…] (a) the information infrastructure and tools used to produce and distribute
content; (b) the content that takes the digital form of personal messages, news,
ideas, and cultural products; and (c) the people, organizations, and industries that produce and consume digital content.\(^{43}\)

While there are some similarities in these definitions, the scope varies as some focus on the technological functionalities and others on the human capabilities for action on these platforms. In an attempt to create a more complete and stable definition that can be used over the coming years, Carr and Hayes characterised social media as ‘internet-based channels that allow users to opportunistically interact and selectively self-present, either in real-time or asynchronously, with both broad and narrow audiences who derive value from user-generated content and the perception of interaction with others’.\(^{44}\)

As with their definition, there is no standard classification of types or categories of social media sites, nor a standard distinction between social media and non-social media sites. Their rapid and complex evolution makes creating a classification an even more complicated task. While some platforms like Facebook or Twitter are commonly accepted as social media, others such as virtual worlds, wikis or a newspaper website that allow users to create an account, comment and submit their content blurs the delimitation of what social media is even more. For Kim, Jeong and Lee, there are two categories of site: social network sites and social media sites. Whereas in the first one the main objective is to allow people to connect with other people, forming online communities (MySpace, Facebook), in the second type, the objective is to be a platform for sharing user-created content (YouTube, Flickr). This shared content can include different types of media sites: blogs, bookmarks, consumer reviews, music, news, photos, videos, etc.\(^{45}\) However, the evolution of features in both types is reducing this difference, as, for example, a photo can be uploaded to Facebook and people can connect with other users and create a group on a specific photo topic using their Flickr account. An increasing number of websites are integrating social features such as ranking, voting, tagging or buttons (e.g. Facebook’s like or share features, Pinterest’s


pinning options or Twitter’s tweet) and other tools that allow content aggregation and syndication. Kaplan and Haenlein identified six types of social media based on two dimensions: self-disclosure, the way users present themselves and the information they share, and media richness. The six categories that result from the combination of these dimensions are: collaborative projects, blogs, content communities, social networking sites, virtual game worlds and virtual social worlds. These types have been evolving since the authors created this classification, but some characteristics define these platforms across time. For Walther and Jang, for instance, there are four elements that define these participatory sites. The first is the proprietor content generated by the user or organisation that owns the profile or site and controls what is posted, and the second comes as the result of the reactions to this content; this is the user-generated content such as comments in response to the video, text or images. The two other elements are the aggregate user representations, the visual representation of the users’ total number of votes, comments or other interactions and the way of displaying this information can be deliberate or incidental, depending on whether the user intended to show this information or, on the contrary, it was driven by algorithms that show the information automatically.

Although there is no agreement on what is and what is not to be included within the category of social media, based on the definitions and analysis of the top social media sites, we can enumerate some key features and characteristics. First of all, social media is about people; these are user-centred platforms where people can create a profile by choosing a name, uploading a photo, adding a biography or a short description. Users are able to personalise their presence and the content they consume is, in some of the platforms, based on the preferences selected or the user’s previous behaviour. This is the key aim of some sites such as StumbleUpon whose opening message on its homepage is: ‘StumbleUpon is a giant collection of the best pages on the Internet. You tell us your interests. We recommend great websites, photos and videos. Simple’.

the profile may be displayed in a different way and it may also have other features compared to the rest of the individual personal users. For example, on Facebook, organisations create a ‘page’, and on Twitter and Pinterest they get their accounts verified to reassure users that they are on the official profile of the organisation.

Following intrinsic social characteristics allows the establishment of networks where users create an open or closed list of friends, follow other users, join groups etc. When creating an account for the first time on these sites, users normally have the option to find which friends or other connections have already an account. Users also have the opportunity to browse by topic or interests in order to connect with other users that share similar interests or organisations with content that fits their criteria. ‘Social’ is the main adjective that characterises these platforms and the functionalities available allow users to interact with each other in the network in different ways, including simple actions such as clicking a like or sharing button to uploading content or participating in conversations on an online community. One of the main causes of the huge impact of the social web is the possibility to share content in a very easy and fast way. Digital technologies are becoming easier to use and people are acquiring more digital literacy. This trend is clearly demonstrated by the 10-year study carried out by Ofcom on adults’ media use and attitudes in the UK. The report for 2014 highlights some statistics, such as 72% of people having at least one social media profile or that 81% of mobile users take photos with their devices. These types of actions are now accessible for many users via their mobile devices. To summarize, this User-Generated Content (UGC) is one the key characteristics included in the definitions of social media analysed earlier in this chapter and has the potential to be the core of museums’ activities on these channels.

In conclusion, besides the lack of a standard definition, for the purpose of this thesis research the scope will establish an evaluation framework with measures that can capture the impact of the key actions of social network users. Besides the variety of sites, there are some commonalities in the type of actions available even if these are named differently on each of the platforms. The speed of change asks for standards on

50 Ibid., 128.
the methods of measuring impact and value that can be applied to current and future social media platforms. The definition of social media in museums remains quite open in this thesis, as it refers to those digital platforms that allow museums to connect and interact with users. The analysis of the usage of social media in museums will help to establish the scope of the research and the actual measurement needs to arise from within this sector.

2.3. Digital technology factors and their impact on user behaviour

Social media is a new environment in which museums are exposed to their users and it is fundamental for museums to understand the opportunities and threats that come with it. External factors influence the success or failure of a social media presence and within this context, technological trends and the consequent social changes that occur, have a crucial impact. The normalisation of social web technologies has empowered users to form groups and distribute content very quickly and without borders. Some common adjectives used to describe these tools are ‘easy’, ‘intuitive’ and ‘accessible’, and that has engendered a shift from a ‘one-to-many’ to a ‘many-to-many’ communication model, turning users into content authors and distributors within their communities.

The speed of technology affects the usage of social media. These technologies allow simple online social features (tagging, aggregation, sharing, commenting), that foster participation and interaction. There are other technological factors that have also played a role in the evolution of social media such as the spread of internet access and mobile usage. In 2014, 77% of adults had broadband in the UK and 57% used their mobile devices to access the internet. These figures and the increasing usage of social media (57% of UK adults who use the internet at home or elsewhere say they access social

---

networking sites) are close to what O’Reilly and Battelle predicted five years earlier. The ‘Squared Web’ will follow the web 2.0 and that will be the time in which the web meets the world and in which real time becomes a key factor in this environment. People are becoming more and more connected, and user-generated content creation, consumption and distribution in real time is increasing its impact.

Social media has caused a stir, not only as a form of technological change, but also as a social phenomenon that has affected people’s behaviour, impacted businesses and changed industries. Garrent Camp, founder of StumbleUpon, affirms that web 2.0 ‘is really about the user experience and not the underlying technologies’. There has been a behaviour shift on the web, transforming users from passive consumers of information and content on web 1.0 to active ones on web 2.0, where they not only buy, read, listen or watch but also give opinions, recommend, share and rate. Making decisions about what cultural activity to attend or which exhibition to see may be influenced by other users’ comments and ratings. Potential museum visitors have direct access to the ratings of other visitors under the site description on Google search results and their comments and even photos are uploaded to sites such as Yelp and TripAdvisor. This leads to a certain brand risk because of this exposure and as a consequence, museums need to establish moderation guidelines on their platforms and react quickly to others in order to respond to negative interactions.

Looking now at the users and how active they are on these sites we can see that, based on a number of statistics, the level of social media participation and engagement varies between users. At the beginning of social media usage, the 1% rule seemed to validate the actual number of contributors on the internet. In a review of this percentage, the

56 Bradley Jones, Web 2.0 Heroes: Interviews with 20 Web 2.0 Influencers (Indianapolis, IN: Wiley Pub., 2008), 192.
BBC conducted a survey over an 18-month period starting in September 2010, which included 7,500 participants representative of the UK population which almost reversed the percentage. It concluded that 77% of internet users are active and the interactions were divided between ‘easy’ (60%) and ‘intense’ (17%). In 2010, Forrester Research created a more complete overlapping typology of internet users depending on their degree of participation, in decreasing order: creators, conversationalists, critics, collectors, joiners, spectators and inactives. They developed an online customer profile tool in which user segment filters by age, country and gender can be applied to this classification. The use of social media varies depending on age, gender, location, income and education. When applying Forrester’s consumer profile tool to the UK, we can see that at the time of the study, the percentage of inactives decreases from 46% in the group of people from 45-54 years old to 13% for the group of people aged 18-24 years old. Demographics are a very important factor in the social media strategy of an organisation. Museums and cultural institutions need to take into account where to reach the different audience segments and how to interact and engage with them.

It can be argued that the usage of social media has actually changed human behaviour, both when it comes to personal interactions and also with organisations. People have multiple social media accounts and ways to communicate with each other. A large volume of content posted by organisations as well as personalised ads and recommended content appears non-stop on users’ feeds. Attention becomes, as described by Sreenivasan, the new currency of this century. Museums have to compete for user attention against other organisations that users follow and find the best way to adapt the message to each medium. While getting on a new platform is not a barrier from a technological point of view, providing the right content to attract users’

attention represents one of the challenges of this new environment. Museums will need to offer some added value to their audience in order to get them engaged in their online community. The attractiveness of social media for museums is to find potential changes to the agents playing in this environment. The rapid growth of potential customers and the low barriers to start creating a presence make social media very attractive. Museums need to develop a strategy with which to compete on it.

2.4. Evolution of museums online

Social media sites are, as per the characteristics described in the previous section, designed for the users. These are sites where people connect to other users creating groups, sharing content and leaving their comments. Therefore, the social web environment provides a space for museums to create their profiles, but in fact, social media has revolutionised the online presence of museums. Their content is no longer just confined to their websites, but has expanded to also include social networks, third party websites or even the personal sites of their users, both public and private. Museums are increasingly including social features on their websites, such as comment or share options, but also, most museums have a profile on social media sites such as Facebook or Twitter. This fact is supported through statistics and several reports. In the United States, the report ‘Arts Organizations and Digital Technologies’ by the Pew Research Center’s Internet & American Life Project published in 2013, states that 96% of the arts organisations that participated in the survey had a social media presence in which 45% posted updates on a daily basis. In a similar study from the UK, a report on how arts organisations use technology commissioned as part of the Digital R&D Fund for the arts stated that 82% of the 91 museums surveyed in 2014 were publishing content on social media and that figure was expected to increase by 8% in 2015. In regard to blogging, 35% of the museums had a blog with comments and in this case, the figure was predicted to increase to 43%.


In 2010, the museum edition of *The Horizon Report* forecasted that social media was a trend which would enter into mainstream use in museum practice within the following year.\(^6^5\) That same year, social media was added as a new category for the ‘Best of the Web’ awards at the *Museums and the Web* conference.\(^6^6\) Social media was definitely gaining more and more ground and its benefits and challenges were the object of discussion in the sector. Taking this same conference as an example of the ongoing conversations on social media and museum practice, the sessions held in 2010 reflected that this new digital tool was increasingly being embraced by museums. Chan and Russo conducted the session ‘Planning social media in museums’,\(^6^7\) and another, titled ‘Social media: Reconstructing the elephant’,\(^6^8\) included short talks on the potential usage of social media and how it had started to impact on people’s jobs. In the following years, the conference included case studies from museums around the world which demonstrated how to use different social media sites,\(^6^9\) as well as how museums were working towards this internally by developing strategies, internal policies\(^7^0\) and

---


producing internal organisational change. 2012 was an inflection point in which a panel of museums started to question the impact of social media on the sector, looking at its evolution in past years in a session titled: ‘What do we really know about social media?’ Subsequently, the conversation also turned to discussions about evaluating the impact of these activities, the topic of this thesis, the main findings of which were presented in 2015, contributing to the discussion in a session titled ‘Social media metrics’.

Apart from their profiles on social media sites, museums collaborate in participative projects with other cultural institutions featuring their collections and content on other websites, such as Your Paintings or the Google Art Project. Furthermore, users also

---


75 ‘Your Paintings,’ BBC, accessed August 26, 2015, http://www.bbc.co.uk/arts/yourpaintings/. This site comes from a partnership between the BBC, The Public Catalogue Foundation and thousands of museums in the UK and features over 200,000 oil painting objects. Users can create their own collection and tag the paintings available on the website.

have their own blogs, websites or profiles on social networks, where they aggregate and share the museum’s content. They may also add museum content and information on collaborative sites such as Wikipedia and so some museums have benefited from these public contributions. As an example, The Cooper-Hewitt, Smithsonian Design Museum, has included links to Wikipedia on the artwork collection pages and included a list of artists with an article on Wikipedia. This user activity becomes an important element that impacts the museum’s online presence, especially in this social context. As shown in the diagram below, we can differentiate between those activities that are initiated by the museum and those by the users or the community. The evaluation model needs, therefore, to take into account this whole online ecosystem while providing a way to differentiate the museum’s own initiatives from those generated by users, so we can understand the cause-effect of each and offer an overall picture of their impact and value.

Figure 4: Diagram of a museum on social media. Figure created by author.

collaboration between several hundred cultural institutions and Google in which users can browse selected artworks from these collections, navigate the museum in a virtual tour and create and share a gallery saving different artworks available on this website.


‘Social’ was the adjective added to media to describe all these platforms that provided easy communication and interaction with other members of the community. In this digital context, what would it take for a museum to become a ‘social museum’ making full use of all these opportunities to engage with audiences in the digital space? Museums have become more open and participative in the last three decades and although they still retain their aim of collecting and preserving, they are transitioning towards an expansion of their educational and social functions. Simon defines the ‘participatory museum’ as ‘the institution that serves as a platform that connects different users who act as content creators, distributors, consumers, critics and collaborators’. 79 Simon points out how these web 2.0 platforms can be used to create participatory experiences and move from a ‘museum to me’ to a ‘we in museum’ where the community socially interacts with the museum content. 80 On a similar note, Black qualifies the museum for the twenty-first century as an engaging museum, where one of the tangible elements of the experience is a social media presence and the visible presence of the user’s voice on-site and online. 81

2.5. Opportunities and Threats

The opportunities to use social media in museums have been sought since the beginning as a way to open their collections, influence the communication as they progressed towards a many-to-many relationship and impact on the learning of visitors with participatory experiences. 82 Social media represents a series of opportunities for museums but it may also pose some threats that could influence their activities. This section, based on a literature review, enumerates those external factors that could be considered both threats and opportunities, depending on their given use and how the museum adjusts and responds to this environment.

82 Russo et al., ‘Participatory Communication with Social Media.’
When museums started to create their own websites they harnessed another way to make their content available beyond the physical boundaries of their building and that constituted, as Parry describes it, ‘a new space, time and mode of experience for museum audiences’.

Social media amplifies that effect even further, as museums can use these platforms to reach out to new audiences where they already are. Based on the demographics and characteristics of each platform, museums can target specific audiences according to their strategic goals. These audiences may be different when examined case by case. Two contrasting approaches when it comes to targeting and reaching audiences are those adopted by The Metropolitan Museum of Art and the Brooklyn Museum. While the first one is trying to bring their collection to people all around the world by using social media, the Brooklyn Museum sees these platforms as a way to connect with the audiences of its surrounding neighbourhood.

In regard to reach, the ways of consuming content are changing. Social media statistics demonstrate that there is an increasing number of users on these platforms and this represents a tremendous opportunity for museums to get to new audiences that may have never heard about a particular museum or subject, whether is art, science or history, while providing content that is likeable, shareable and fit for these platforms. Museums can take advantage of how viral information can travel through the different nodes of the online network. Social word-of-mouth can spread the museum’s message even further, reaching a huge volume of users. The Rijksmuseum, for instance, staged a flash-mob in a shopping centre in the Netherlands where actors re-enacted a scene depicted in the museum’s famous Rembrandt painting The Night Watch (1642). The flash-mob was recorded and uploaded to YouTube to promote the reopening of the museum. As of April 2015 the video has over five million views.

However, this rapid information transmission can also become a threat if not managed properly. The fact that all of this happens in real time plus the tremendous speed of

---

83 Parry, *Recoding the Museum*, 97–98.
content going viral may represent a challenge, as now organisations have less time to react, as compared to traditional media. Organisations have realised the importance of tracking in real time what is being said about them over the internet, so they can react as quickly as possible and defend themselves from critics or negative comments.

Moderation plays an important role when users upload their own content as there may be offensive or disrespectful comments. However, organisations do not always have control over everything that is published. Internet users can recommend or criticise a product with a tweet, review the museum’s restaurant food on Yelp, write about their experience on TripAdvisor and spread it quickly. They influence and impact the organisation’s strategic development, either positively or negatively, as people are using social networks to express their feelings and opinions on specific products and organisations and the general public has open access to such reviews. An example from the museum sector of how information can generate quick and viral online reactions is provided by the Natural History Museum’s decision to make public their intention to remove Dippy, the diplodocus skeleton displayed at the entrance hall of the museum for over thirty-five years. The responses on Twitter made the story a trending topic on this platform. People responded to the news with a campaign called ‘Save Dippy’, which included the creation of social media accounts to complain about this decision and an online petition that was supported with over thirty thousand signatures. The museum responded directly on social media; this included posting an interview with the Collections manager, a compilation of the tweets of the day with a mix of reactions and Dippy also responded to the fans from the dinosaur’s own Twitter account.

Moderation can face some more complicated scenarios, particularly when it comes to the sensitivity of some museums’ collections and the consequences of their open exposure on social media, particularly around the issues of trust and authority. Amelia Wong, social media manager of the United States Holocaust Memorial Museum

interrogates her own work. Deleting a racist or violent comment on their YouTube channel follows the museum’s guidelines but she questions whether it is a good idea to have a commenting feature at all to protect the victims, or the opposite: not only allowing comments, positive or negative, but also keeping a record of them for historical and research purposes as they reflect the present society we live in.89

Apart from the option to share content on social media with just a click, another key characteristic described earlier in this chapter is the fact that users have the opportunity to interact with each other and also with an organisation. Organisations have never been so close to their audiences, and this context presents a good opportunity to humanise the brand. Kelleher and Miller concluded in their research based on comparing organisational websites and blogs, that the latter provide a good platform for building relationships, since that form of human voice is perceived positively by users.90

Reaching audiences on these platforms and these interactions can take the user to a next level of engagement with the museum, deepening the relationship with it. To illustrate this fact, the next chapter section includes some examples of how museums are creating interactive projects.

Although this represents great opportunities for museums, it does not come free of threats and they have to be carefully considered. Privacy and security are concerns for users who will think twice before uploading certain content and personal information. There is a lot of personal information contained in profiles and a possible misuse of that information has raised many concerns among users. As an example, the social media policy of the National Museum Wales contains a list of potential risks related to information management and it also recommends the creation of clear terms and conditions for contests and other related UGC activities on these platforms.91 Another

potential risk is that the majority of social media platforms are owned by for-profit organisations so museums are operating under the rules created by these companies.

Social media has provided organisations with the opportunity to obtain feedback from users, get to know them better and create online communities to interact with them. Three cases were presented at the Museum Computer Network conference in 2013 about what museums can learn from users’ comments on social media. The Virtual Museum of Canada, Palazzo Madama-Museo Civico d’Arte Antica in Turin, Italy, and Tate were the examples used to explain methods of analysing tweets tagged with exhibition hashtags, responses on digital interactives or comments on social media.92

This section has enumerated several potential opportunities and threats that social media offers to museums and provided examples of how museums operate in responding to these. Social media is a new space that helps museums to make their collections and their content more accessible in a participatory way due to the increasing number of users who have accounts on these platforms. These external factors can impact marketing, advertising, education, curatorial practice, research, customer service and communications, among other areas. Museums need to develop a social media strategy and establish a plan to take advantage of the opportunities of this environment, but they also have to figure out how to respond to some of the challenges that accompany it. As seen at the beginning of the chapter, the online ecosystem has changed very quickly in the last ten years and will probably continue to do so. These external elements such as the platforms’ characteristics, the users’ profiles, the diversity of the online offer, the large volume of content uploaded every second to the internet and the types of interactive features, create a very particular and challenging operational context. Therefore, the evaluation framework needs to be proactive and flexible enough to monitor and predict these changes in order to react to them in real time. In this respect, museums need to be able to respond to those changes with adequate and specialist staff who are up-to-date with media and also capable of carrying out these tasks. Working with social media requires a continuous process where museums need to

be active and interact with the user, since they cannot just limit themselves to creating social functionalities or a profile on a social network. Implementing a process and having qualified staff are both key factors to ensure a fluent and enriching interaction with the users and to be able to innovate in this environment. The evaluation model will need to include measures to capture the level of efficiency required to act in this rapidly changing environment.

2.6. How museums use social media

Since the start of this research, the adoption and usage of social media has rapidly evolved from being an isolated activity on specific sites to becoming an internal transformative movement in the way that museums are operating and how they present their content, not only online but also in physical spaces. Social media has shifted from simply being an add-on role for some digital staff to having dedicated people specifically working in this field (community managers, social media managers, etc.), and has ultimately become an activity that is transforming practice across the whole museum including curatorial, learning, retail, membership and research among other activities. This shift, as analysed in the thesis, represents a challenge from an evaluation perspective concerning how to accurately set the boundaries between social media and non-social media activities and how the reporting process fits the evaluation in context with other activities. This evolution and its implications will be discussed during this chapter section which looks at the different ways social media has been used. Moreover, this research will continue in the fieldwork carried out as part of the ‘Let’s Get Real’ project explained in Chapter 4, contributing to the discussion based on the analysis of the activity of twenty arts organisations in the UK.

Social media can be used in different ways at the museum and the model of participation varies from project to project. Several studies have investigated how museums are using social media. In their research, Fletcher and Lee carried out a study in American museums using 315 online surveys and nine in-depth interviews as part of their method. They concluded that the main use of social media by museums is still one-way, as it is used in an informational and promotional way to announce activities such as exhibition openings or events. However, they also saw signs of how museums
are starting to put their efforts into moving towards a more two-way interaction by creating quizzes, competitions or asking questions of their followers on various topics. There are other studies supporting the same fact. Langa focused her research on a specific platform, Twitter, and by collecting tweets from forty-eight American museums she found that its primary use is as a marketing tool and therefore the response from followers is low. In contrast, when museums used Twitter in a more interactive way, for games, live tweeting and co-curating projects, the data showed a higher level of participation. The different modes of usage and models of participation are classified by Kidd in three frames of acting on social media: the marketing frame where museums use social media as an extension of their brand presence in promoting their activities, the inclusive frame used by museums to create communities of interest around them and the collaborative frame where people actively participate in the telling of museum stories by taking part in crowdsourcing or story-making activities among others. This degree of user involvement is mapped by Simon in a pyramid representing a hierarchy of social participation which includes five levels, from the user just receiving the content to a museum where the users socially interact with each other in relation to the museum’s content. For Simon, web 2.0 is already at level four of the pyramid, as it opens participation to all users. However, it could be argued that besides opening a profile on social media, just posting something on it and not facilitating, looking at or responding to users’ reactions could be downgraded to level one, despite these platforms’ functionalities.

In terms of context, social media started as a unique online activity but is now becoming increasingly integrated into the physical visit to the museum. The Pew Research project includes some statistics which state that 82% of arts organisations in the United States use social media to engage with their audiences before, during and after events. As social media is used as a marketing tool, a common usage is to promote what’s on at the museum by giving practical information or sharing content

---

93 Fletcher and Lee, ‘Current Social Media Uses and Evaluations in American Museums.’
95 Kidd, ‘Enacting Engagement Online: Framing Social Media Use for the Museum.’
96 Simon, ‘Hierarchy of Social Participation.’
97 Thomson, Purcell and Rainie, ‘Digital, Arts Organizations and Technologies,’ 3.
related to events or exhibitions. While the visitor is in the museum they can use their mobile devices to take pictures and share them on social media and this is encouraged by many museums as it helps to increase public awareness. Nowadays it is common to see a screen in the museum’s hall or entrance with the list of social media accounts so visitors can connect with the museum and share their experiences.

While the full usage of the opportunities offered by social media is questioned by empirical research, there are certainly good examples in which museums take advantage of the opportunities of social media and become a participatory museum as described by Simon, where users take an active role as content creators, distributors, consumers, critics and collaborators.

We can find, for instance, many examples where the user becomes a creator by submitting content in different ways. Social media has been used in numerous museums in user-generated content activities in a range of formats and categories. Submitting images has been a popular initiative, including professional competition submissions such as the annual ‘Photographer of the Year’ at the Royal Observatory, Greenwich, which starts on Flickr and winners’ photos are later on display at the museum.98 Another example is found in image submissions at a more amateur level of mass participation and mobile devices have made participation a lot easier. An example is the ‘Museum Selfie’ worldwide initiative where visitors in museums around the globe are encouraged to take a selfie in a museum and then share it on social media using the hashtag #museumselfie.99

Museums use social media to distribute content and just a simple click on an image or video transforms the user’s role to that of a consumer. Apart from the more common way of posting a video, a photo or sharing a link, the format of these platforms has allowed museums to tell their stories and deliver content to users in ways that traditional media could not. Giles Miller, curator of Micropalaeontology at the Natural

History Museum in London, reflects on how their activity on Twitter, posting facts and images of their microfossil collection, is reaching new audiences, going beyond the academic community and bringing these objects to people that live in other places of the world or to those that may have skipped this part of the museum’s collection during their visit.\(^\text{100}\)

This content is also shared and distributed by users from the social media page or using sharing buttons on the website. Social media has also allowed users to act as critics, breaking a barrier in this practice as before there was only one opinion, one voice, one story of an exhibition or a collection object: that of the museum. The content on specific objects is not only confined to the museum’s website; it is also found on other sites such as Wikipedia, curated by millions of internet users. An example of users acting as critics can be found in a simple tweet. Guillermo Solana, Director of the Thyssen-Bornemisza Museum, uses Twitter to communicate his work with his followers at the same time as asking them for feedback and opinions that may directly impact some of his decisions. He posted two images of the possible design of the cover for the catalogue of the *Pissarro* exhibition asking users for feedback on their favourite one, and the one that received the most votes became the actual cover.\(^\text{101}\) Yet other examples can be found on a larger scale. At the Brooklyn Museum, Shelley Bernstein, Manager of Information Systems in 2008, organised a photography exhibition called *Click!* in which, after an open call under the theme ‘The Changing Faces of Brooklyn’ where anyone could participate, the submitted photographs were uploaded to the website for an open voting. At the end of this process, the top twenty percent of photographs were put on display at the museum.\(^\text{102}\)

Collaboration with the museum can be achieved in various ways and these social media activities are having an impact on the core functions of the museum. There are several


projects that perfectly illustrate this fact. The ‘Fill in the Gap’ project helped the curators of The Luce Foundation Center for the American Art of the Smithsonian American Art Museum to select an artwork from the storage to replace another that had been temporarily removed due to loan or conservation reasons.  

From the museum’s perspective, there are clear advantages to using social media in different ways to engage with users and the examples seen in this chapter illustrate this fact. It is important to understand why people use these platforms and what motivates them to follow a museum on Twitter, become part of their online communities or subscribe to their blog RSS. Motivation is a variable that has been used by museums to define and segment their on-site visitors. In the online arena, several museums have also applied motivation as a key factor to understanding their website users’ needs and expectations to improve their experiences. However, not much research has been published on the topic of motivation to follow museums on social media and interacting with them and other members of the community. The research conducted by Bonacchi and Galani on fifteen institutions in North East of the UK, showed that the primary two reasons why people followed these institutions on Facebook was to support and promote the museum (79%) and to obtain more information about what was on at the museum (78%). The Postal Museum (Smithsonian Institution) posted a survey on

---

their Facebook and Twitter channels and most of their users followed the museum because they have an interest in the subject and want to learn more about it by using these channels. Another example is the work by Dudareva who based on 311 responses on the Facebook pages of three Danish museums, The National Gallery of Denmark, The National Museum of Denmark and the David Collection, defines five types of relationships that users have with museums on social media, in increasing order of willingness to interact and emotional involvement with the museum: informational, interested, contributor, connected and enthusiast.

In conclusion, the examples provided in this section present some real usage of the opportunities offered by social media which were previously reviewed in this chapter. The projects and initiatives presented illustrate how museums can reach users in a dynamic manner, cultivating interactions, conversations and content. However, an initial analysis of the usage of social media found in the literature concludes that this usage is still rather niche in nature, and that in many cases these platforms primarily comprise marketing and promotional messages, thus reducing the opportunities for participation. This discussion will continue to be addressed throughout this thesis as the actual strategic usage of social media is a decisive element in the definition of the evaluation framework. Apart from understanding the types of initiatives carried out on these platforms, another relevant topic that has to be taken into consideration is the type of data emerging from this online scenario, as well as the tools and methods that museums can apply to measure their social media impact.

2.7. Online research methods

For the definition of the framework in this thesis, the social media environment needs to be taken into account to influence the definition of the measures that will be included in


it, as well as the tools and methods that will be used to collect and analyse the data. This chapter section examines one of the elements of the methodological framework outlined in the introduction (Figure 1), the area in which evaluation and social media are pieced together.

The internet is a medium that offers new opportunities to collect data and apply a diverse range of quantitative and qualitative methods. This becomes even more evident with social media, where people create their identities online and display their behaviours and offline activities, hence building a rich bank of data for researchers.

Online research, also called communication-mediated or internet-mediated research, has evolved in the last decade from being a new platform on which researchers used traditional methods to become, by itself, the object of study.\footnote{Christine Hine, ‘Internet Research as Emergent Practice,’ in \textit{Handbook of Emergent Methods}, ed. Hesse-Biber Sharlene Nagy and Patricia Leavy (New York: Guilford Press, 2008), 528–537.} There are two different ways to utilise the internet in social research. Firstly, as a space where the data generated is used to examine users’ behaviours and secondly, as a new methodology. We can find traditional methods such as surveys that have been adapted to the online environment but also new methods such as social network analysis or web analytics.

The methods that use or study the Internet come from a range of different disciplines including linguistics, sociology, communication, marketing and computer science.

Online research methods provide some advantages in terms of time, money saving, reach and anonymity.\footnote{Alan Bryman, \textit{Social Research Methods} (Oxford: Oxford University Press, 2012), 658.} However, apart from the limitations that offline methods already have, it must be noted that the online environment also features some others that are particular to it. Due to the virtual nature of online methods, the main problem is the lack of a personalised contact and the underlying impossibility to ask questions in the event of doubt or if the researcher is not able to capture some important visual or auditory aspects.\footnote{Ibid.} There are two types of method: synchronous, if the information is collected in real time (e.g. online interviews) and asynchronous, when otherwise (e.g. discussion forums, email distribution lists).\footnote{Matt Henn, Mark Weinstein and Nick Foard, \textit{A Critical Introduction to Social Research} (London: Sage, 2009), 202.}
Among the traditional methods that have been adapted to the internet we can find: online surveys, online interviews and focus groups or observations. The latter is an unobtrusive technique that is growing especially within social media where researchers can examine ‘how people shape their identities, how they interact with one another, and importantly, how they shape their environment’. Many authors argue that the internet has specific characteristics that require new methods and techniques to gather and analyse the data. Web analytics is an example of new methods and tools that are used to understand website behaviours. These are the statistics portraying the visits to a particular website. There are different analytic packages, some of them provided for free such as Google Analytics, which reports metrics such as the number of visits, referrals, pages visited, organic traffic, device type, browsers and visitors’ location among many others. To study websites in a wider context, some researchers are using Webometrics. This is ‘the study of web-based content with primarily quantitative methods for social science research goals using techniques that are not specific to one field of study’. This includes link analysis, web mention analysis, blog analysis and search engine evaluation.

When it comes to social media, equivalent methods can be found. There are a range of social media analytics tools and depending on the platform this data is provided in their own analytics system (e.g. Facebook Insights, Twitter Analytics, Pinterest Analytics, YouTube Analytics) or with third party tools developed by commercial firms. A technique with increasing usage is social network analysis. A social network is a ‘series of nodes (such as people, organisation or web pages) and the specific links between two of these nodes’. Analysing social networks helps in the understanding of online social interaction. Hogan proposes the use of visualisation and statistics to map the

---

113 Ibid., 205.
network, measure the density and cluster and identify the centrality of the nodes among other metrics.\textsuperscript{117}

Social media, as the object of the research, has led to the application of methods from various fields. A classic technique that is experiencing an increasingly important role in internet research is content analysis. Content analysis is ‘an approach to the analysis of documents and texts that seeks to quantify content in terms of predetermined categories and in a systematic and replicable manner’.\textsuperscript{118} Herring questions whether content analysis is a suitable technique for online research. She argues that the traditional concept is too limited for this new context and proposes an ‘expanded paradigm of web content analysis’ that will include the analysis of images, themes, features, links, exchanges and languages among other types of analysis.\textsuperscript{119} An example of the application of content analysis is the study of about 9,000 tweets made by airline customers in order to enquire about their flights and the interaction between the airlines and their users. The authors used content analysis in classifying the user tweets in different types of updates such as personal information sharing, information seeking, or grievances and airline tweets (e.g. polls, contests, apologies, news, marketing, help). Apart from analysing the frequency of updates, using content analysis helped to identify the themes and patterns and they concluded that while most users tweeted in order to share their personal experiences, the airlines mainly used Twitter for marketing purposes. They also found out that some airlines did not respond to users’ enquiries.\textsuperscript{120}

Another example of the use of content analysis was the study conducted by Banya analysing travel blogs written by tourists who visited Stratford (Canada). The objective was to learn about tourists’ experiences and compare these to the promotional activities of the Stratford Tourism Alliance. She identified the 40 most frequently used words referring to Stratford which helped analyse the most blogged topics. These were linked to quotes from bloggers in order to gain an understanding of their perceptions and

\begin{flushright}
\textsuperscript{117} Ibid., 149–150. \\
\textsuperscript{118} Bryman, \textit{Social Research Methods}, 291. \\
\end{flushright}
feelings. Another method used online is sentiment analysis that has attracted a lot of attention from both commercial organisations and academia because social media offers a reflection of people’s opinions. Automatic tools to analyse the sentiment in text have been developed but some researchers are critical of this analytical approach, questioning its validity and arguing that no algorithm has yet been developed that can replace human analysis.

From a linguistics angle, Page uses narrative analysis to understand the storytelling generated by people using different social media platforms. She analysed over fifty thousand tweets from the accounts of thirty British and American celebrities that had a large number of followers. She found that celebrities provided behind-the-scenes information about their work and some of them even tweeted about their private lives, creating a sense of intimacy with the follower. In the text analysis, she compared the use of temporal terms employed by ordinary Twitter users and celebrities, concluding that they were a lot more prominent among the latter, particularly the words ‘today’, ‘tonight’ and ‘tomorrow’ and the adverbs ‘here’ and ‘now’. Although this may create a feeling of presence between the celebrity and the follower, the author concluded that in reality celebrities use Twitter as a broadcasting tool to promote their activities, turning that alleged intimacy into publicity.

2.8. Conclusion

The search for a definition of social media has demonstrated the complexity of these platforms as well as the speed of change of this environment. The definition of social media in museums in this thesis will refer to those digital platforms that allow museums to connect and interact with users. For the evaluation framework, this therefore means a requirement to be flexible and include standards on the ways of measuring impact and

---

value that can be applied to current and future social media platforms. The evaluation framework will need to include metrics from the different platforms on which museums have a presence.

This chapter has explored the challenges and opportunities that social media offers to museums as well as drawing upon some examples to illustrate how museums are making use of these platforms. Among the opportunities explored we have found how these platforms can increase the reach of the museum’s message connecting with people and distributing collection and exhibition information through various forms of content. The social aspects of the platforms enhance this opportunity because of the way content can circulate across networks, with users expanding this reach. Moreover, further engagement with audiences can be generated thanks to the interactive functionalities available on these platforms that provide a space for expressing opinions, having a conversation with museums and other users or responding to initiatives with users’ own content. However, this openness and exposure may become a threat for the museum if not managed appropriately. The case studies found and presented in this chapter illustrate how some museums have embraced these platforms, creating participatory projects that have given the user an active role in contributing, sharing, commenting or creating content. This represents a change for museums that need to adapt in order to act on these platforms, defining strategies, allocating resources and implementing internal processes. Therefore, the metrics of the evaluation framework will need to capture these interactions and the outcomes produced by these social media activities as well as how the museum is transforming digitally. A more detailed analysis with data from the fieldwork phase will be conducted in Chapter 4 to examine in depth the strategies of museums in this arena in order to develop the evaluation framework.
Chapter 3: Culture and Practice of Museum Evaluation

In a climate of changing priorities combined with decreasing resources, the museum must fight its corner alongside other claims to funds. This means an effective and business-like approach to management, a very clear perception of the opportunities for the future, and an ability to explain the social use of museums to anyone who asks.124

3.1. Introduction

The ongoing debate about the value and impact that museums have on individuals and society has been on the table for many years. Nowadays, given the cultural policy in place in the UK, demonstrating the value and impact of museums is becoming an increasingly vital factor in deciding how to allocate resources to the sector. What are museums currently reporting to funders? How are the key concepts, impact and value, defined and measured? How does the museum field respond to the reporting requirements? In terms of digital activities, what are the indicators required to report? These are the questions targeted by this chapter, and which aim to inform the subsequent development of the evaluation framework for museums in order to capture the impact and value of their social media activities. The responses and conclusions of the literature review can be illustrated with the following example. This data corresponds to Tate Modern:

- £100 million in economic benefits were contributed annually.125
- 3.5 million people took part in learning activities in ten years.126
- 5,035,000 visitors in 2010 – 2011.127
- Property prices and commercial investment levels are increasing faster in Southwark than the London average.128

---

127 Ibid., 47.
128 Tate, ‘Press Release: The Economic Impact of Tate Modern.’
• It has created 467 jobs. ¹²⁹
• It has been one of the major factors in the regeneration of the South Bank and Bankside. ¹³⁰
• Online visitors figures 2012 – 2013: Google+: 388,752; Twitter followers: 832,906; Facebook: 538,391; Tate website visitors: 13,669,195.¹³¹
• Visitors’ comments on the Gerhard Richter: Panorama exhibition blog: ‘As a newcomer to Richter’s work, I was most struck by the combination of contrasts (vivid colour, grey tones, huge abstracts, intimate representational works) and a clear sense of a consistent underlying something – vision? voice? An absorbing exhibition which I hope to come back to soon’, ‘I am an Art History student in NL currently working on a term paper concerning Richter’s artwork in regard to the debate about disinterested aesthetics. This exhibition has become the highlight of my research in so far, that it finally allows the approach to place the October cycle within Richter’s oeuvre – to take his body of work for what it is and to free it from clinching all too closely to convention. Thus it enables me (and hopefully many other visitors) to see and appreciate Richter’s art on a new level’.¹³²
• Visitor comment on Tate’s Facebook post about Francis Bacon’s Three Studies for Figures at the Base of a Crucifixion: ‘I first saw this painting in a copy of the ‘Man Myth and Magic’ book series. It made such an impression on me, this is the reason I started to paint later in life. Seeing it live is breath-taking.’¹³³
• Feedback comment on a survey about visitors’ motivations for visiting the online collection: ‘To see what is on now at Tate and look at interesting works of art. I am a fan of wonderful Tate website. Thank you Tate for the wonderful

¹²⁹ Ibid.
¹³⁰ Ibid.
opportunities to experience the great world of contemporary art and you enrich my everyday’. 134

- Tate Paper on the evaluation of the experience of learners during visits to the Schools Programme at Tate Modern: ‘A broad set of characteristics of the learning experience can be suggested: looking as a skill, learning as a social and dialogical process, the value of experimentation, interpretation as a creative act, engaged responses and engagement with the Artist Educator’. 135

All of the above data corresponds to the same museum but has been obtained through different methods, offering a very different perspective of the gallery’s achievements. The first points on the list are the consequence of applying economic valuation and impact methods and are expressed in account units or monetary terms. The last four points on the list form an articulation of the cultural value of the gallery, but they include elements that are very difficult to express in numbers. We can also find some of the performance indicators reported to the DCMS, such as the annual number of visitors and also other facts and figures obtained in different timeframes, showing a longer-term impact. Tate’s mission is to ‘increase public knowledge, understanding and enjoyment of British, modern and contemporary art through the Collection and an inspiring programme in and well beyond our galleries’. 136 The question that arises is: which of the facts from this list relate to the gallery’s mission? Reporting based on funder requirements, for example when demonstrating the economic impact of the museum as established by one of the DCMS objectives, does not necessarily correlate with the fulfilment of the museum’s mission statement and objectives.

The purpose of this chapter is to review the literature on the culture and practice of museum evaluation, in order to inform the design of an appropriate evaluative framework specifically for museum social media. The first section provides an overview of the evidence-based model as well as how museums need to justify their


funding, which performance indicators are required to be reported to the government and how museum evaluation has evolved over time based on the political party in office. Subsequently, there is an analysis of the concepts of impact and value largely used in the sector, as well as the different methods used to calculate them. Furthermore, this chapter will examine the historic evolution of museum evaluation practices and highlight the importance of the field of visitor studies. The evolution of cultural policy and the field of visitor studies provide some context for the current digital evaluation requirements which triggered this research. Moreover, this review considers the current practice of visitor studies, the methods that can be applied to the online environment and how the field can use new digital methods to understand and evaluate the museum visit experience.

The literature review necessitated research on official cultural policy documents, research reports from professional museum organisations, evaluation reports published by museums and scholarly publications on museum studies focusing on museum evaluation and audience research. The continuous search for a method to demonstrate impact and value has been well documented for the past two decades and has led to several reviews of museum evaluation practice.137

3.2. The evidence-based model

Most museums in the UK receive funding from the government, and therefore, a great level of accountability is required to demonstrate that taxpayers’ money is being well spent and to provide evidence of the impact they are generating. The literature review in this chapter shows that cultural policies vary depending on the government in office and the economic situation and thus, cultural indicators also change. We can find indicators appearing at the beginning of the 1990s, when the Conservative Party was in power and during this mandate some organisations such as the National Audit Office and the Audit

Commission tried to establish the standards for performance measurement. The National Audit Office developed a framework to evaluate museums’ performance and to show their value for money, generated income and customers’ satisfaction.\(^\text{138}\) The Audit Commission defined a performance measurement system based on what was known as the ‘Three Es’: economy, or the calculation of how much money is spent with the aim of minimising costs; effectiveness, which describes the relationship between the objectives and the results achieved; and efficiency, referring to the relationship between the outputs and the resources used to obtain them. The objective was to maximise productivity with the resources provided.\(^\text{139}\) In 1991, The Audit Commission published ‘The road to Wigan Pier? Managing Local Authority Museums and Art Galleries’, a report that recommended the use of a series of indicators ‘to compare achievement with objectives and to assess the efficiency and effectiveness of both the authority’s own museum and the ones receiving grant aid’.\(^\text{140}\) These indicators were divided into several variables: collection (number and value of acquisitions, percentage of the budget devoted to acquisitions), stewardship (cost of storage, documentation, proportion of the collection documented), scholarship (expenditure on research, number of publications) and access (number of attendances, days and hours open per day, visitors’ views).\(^\text{141}\) All the indicators were quantitative except for the last one, visitors’ views, in which market research had to evaluate whether the layout and quality of the displays were attractive for visitors and were of a high standard. However, the application of these recommendations in museums was not very successful as Stuart Davies’ study of strategic management and planning concludes. Only a third of the 105 local museums surveyed affirmed that they had carried out any kind of review of their performance.

---


indicators and less than half were asked by the District Audit to report as a result of these recommendations.\textsuperscript{142}

The indicators included in these frameworks create a relationship between the inputs, the resources that the museum has at its disposal to carry out its activities, and the outputs, that is, the activities, programmes or projects. This model was criticised by Peter M. Jackson, Professor of Management at the University of Leicester, who proposed to include and evaluate another series of ‘Es’ in what he felt qualified as a ‘narrow’ framework.\textsuperscript{143} The new type of metrics added were: equity, which regards the consumer’s views and values equally, excellence in terms of quality, entrepreneurship in seeking other funding sources, expertise to implement the evaluation framework, and electability, to include the role of politics in ensuring the museums’ high performance.\textsuperscript{144} A very detailed framework came from Peter J. Ames who in 1990 published the first table featuring performance formulae and ratios organised by museums’ functions: access, admission, security; finance, facilities; fundraising; human resources; marketing, ancillary; and programming including exhibits, collection and education. He also established a target for some of these with the aim of helping museums to demonstrate their accountability. As Ames mentions, the list is just a starting point for future improvement and encourages museums to determine their own formulae based on the nature of their objectives.\textsuperscript{145}

When New Labour came to power in the UK in May 1997, there was a shift in the arts policy agenda towards social inclusion as a role that museums would need to contribute to as well as show evidence of the work they achieved in this arena.\textsuperscript{146} The Department

\textsuperscript{143} Jackson, ‘Performance Indicators: Promises and Pitfalls,’ 161.
\textsuperscript{144} \textit{Ibid.}, 162.
of National Heritage was changed and renamed as the Department for Culture, Media and Sport (DCMS) which currently sponsors sixteen museums in England. In 1999, the DCMS carried out a review of efficiency and effectiveness of the sponsored museums and galleries with the objective of developing a framework that could improve performance management. This framework featured a list of performance indicators for each museum activity. According to Selwood’s review, a first list was made, including twenty-two performance indicators, but it was then reduced to ten in the DCMS Funding Agreements of 2001–2002, featuring the following: user numbers, loan venues, quality of environment, electronic access, percentage of time open, uptake of educational programmes, social inclusion, annual savings achieved, grant-in-aid as a proportion of total operating expenditure and average number of days lost through sickness. New elements to evaluate success were added to the ‘Three Es’ framework, such as quality and the ability to meet diverse audience needs.

In 2007, the DCMS commissioned a review of the Performance Indicator Framework which proposed a partnership instead of a transactional relationship:

 […] while all stakeholders accept that it is perfectly proper to monitor value for money from the public purse, the new framework is more about transparency than just scrutiny; more about effectiveness than just efficiency; more about impact than just outputs; and more about advocacy than justification.  


An analysis of the performance indicators was conducted in this review to determine their usefulness and as a result, the ‘Performance Indicator Guidance’ was published in 2008, including the following indicators classified by the DCMS’s objectives.\(^{150}\)

| Access          | Number of visits to the museum (excluding virtual visitors)  
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Number of unique website visits</td>
</tr>
<tr>
<td>Audience profile</td>
<td>Number of visits by children under 16</td>
</tr>
<tr>
<td></td>
<td>Number of visits by UK adult visitors aged 16 and over from NS-SEC groups 5-8</td>
</tr>
<tr>
<td></td>
<td>Number of visits by UK adult visitors aged 16 and over from an ethnic minority background</td>
</tr>
<tr>
<td></td>
<td>Number of visits by UK adult visitors aged 16 and over who consider themselves to have a limiting long-term illness, disability or infirmity</td>
</tr>
<tr>
<td></td>
<td>Number of overseas visits</td>
</tr>
<tr>
<td>Learning and outreach</td>
<td>Number of facilitated and self-directed visits to the museum/gallery by children under 16 in formal education</td>
</tr>
<tr>
<td></td>
<td>Number of instances of children under 16 participating in on-site organised activities</td>
</tr>
<tr>
<td></td>
<td>Number of instances of children under 16 participating in outreach activities outside the museum/gallery</td>
</tr>
<tr>
<td></td>
<td>Number of instances of adults aged 16 and over participating in organised activities at the museum/gallery</td>
</tr>
<tr>
<td></td>
<td>Number of instances of adults aged 16 and over participating in outreach activities outside the museum/gallery</td>
</tr>
<tr>
<td>Visitor satisfaction</td>
<td>Percentage of visitors who would recommend a visit</td>
</tr>
<tr>
<td>Income generation</td>
<td>Admissions</td>
</tr>
<tr>
<td></td>
<td>Trading income</td>
</tr>
<tr>
<td></td>
<td>Fundraising</td>
</tr>
<tr>
<td>Regional engagement</td>
<td>Number of UK loan venues</td>
</tr>
</tbody>
</table>

| Table 1: DCMS – List of Performance Indicators. |

These indicators are reported on annual basis to the DCMS and published on its website. They are almost all quantitative indicators expressed in absolute numbers, and therefore, it does not allow for comparing museum performance by relating these numbers to museum size or budget, as relative data would. There is only one qualitative indicator; satisfaction, measured by the percentage of visitors who would recommend a visit. These performance indicators are based on an output approach that calculates museums’ production. Each year the publication comes with a highlight of the main trends that includes the data aggregated for all museums, but does not provide many insights about the potential causes of the changes in these numbers.

The UK General Election held in 2010 led to the formation of a coalition Government and in October of that year, the Spending Review was approved, triggering a twenty-five percent reduction of the DCMS budget. During the four years which have elapsed since the approval of this plan, the museum sector has operated under the most restricted budget of its recent history and these cuts are having repercussions on museum activities according to various studies. The survey on the effects of these cuts carried out by the Museums Association showed that museums have reduced the number of exhibitions and events, as well as their opening hours, and have also decreased their staff. Various collective movements have come together with the aim of showing the impact and value of the arts. ‘I Value the Arts’, by the National Campaign for the Arts, asks citizens to join the campaign against the budget cuts to ‘show the decision-makers that they are vital and valued’. Another similar initiative is ‘Save the Arts’ which also aims ‘to advocate, promote and publicise the exciting and engaging work it delivers’, and was supported by arts organisations and British artists including Anish Kapoor, Damien Hirst, Richard Hamilton and Tracey Emin among many others. The Museums Association campaign ‘Love Museums’ provides a set of

facts and figures divided into economic impact, visitors, communities, collection and tourism to help provide evidence and make the case for museums.¹⁵⁵

The Government launched a plan to promote philanthropy with the aim of encouraging individual and corporate giving to the culture sector.¹⁵⁶ The funding model is changing and as a consequence, museums also need to attract private and corporate funding to cover operating and development costs.¹⁵⁷ As a consequence, museums also need to report to private donors and have new requirements aimed to control and oversee that the money has been well spent. This evidence-based model and the indicators that need to be reported have caused some scepticism within the sector given the limitations of capturing the full impact by just using some of these numbers, such as the volume of visits and the use of instrumentalism. Holden warns in his report entitled ‘Capturing cultural value: How culture has become a tool of government policy’ of how evaluating from this perspective may influence museum activity.¹⁵⁸

In summary, performance indicators required by public or private funders, as a way of demonstrating museum efficiency, have sparked a debate on what needs to be measured to provide evidence of the worthiness of these investments and which indicators are valid for this purpose. This discussion will be examined in detail in the next section, after the review of the definitions of impact and value and the divergent ways in which they are expressed.

3.3. What to measure? Impact and value

There are two key terms which constantly appear in the museum evaluation literature to indicate what needs to be measured: impact and value. Each of these two concepts has different definitions and typologies and a diverse range of methodologies has been used for their measurement. This chapter section analyses some of the methodologies used to measure impact and value, their advantages and disadvantages and some cases where they have been applied. This review helps to understand how different these concepts are depending on the methods implemented and the existing level of tension between cultural policy and museum practice.

3.4. Measuring Impact

Impact evaluation is a ‘management tool used to assess changes that can be attributed to a particular intervention, programme or policy’.\(^{159}\) There are different types of impact including economic, social and cultural and their methods and applications are discussed in this section.

**Economic impact**

Cultural statistics such as the percentage that corresponds to gross domestic product, the number of people working in the sector, arts participation or cultural tourism are a result of applying economic impact studies to the sector and analyse the economic activity generated by a museum or cultural institution. There are many studies that have used the field of economics to measure the impact of cultural activities, such as the opening of new museums and the nomination of cultural cities or festivals. For example, according to economic impact studies, visits to Liverpool as European Capital of Culture in 2008 generated a total income of £753.8 million.\(^{160}\) The Chicago Cultural Plan 2012 also illustrates this type of study and how the city’s arts offer is currently


creating more than $2 billion a year and providing jobs for 150,000 people.⁶¹ Looking at a museum example, the Metropolitan Museum of Art carries out a biannual economic impact study to evaluate the revenue that the museum and its exhibition programme brings to the city of New York. According to the study published in 2014, the museum estimated a $753 million in spending in the city as a consequence of people’s motivations and plans to visit the museum.⁶²

The methods of calculating economic impact mainly consist of cost-benefit, multiplier effect and input-output. The first of these, the cost-benefit method, measures the net result obtained by deducting the costs of implementing the museum activity from the benefits produced by it. Along the same lines, the financial Return on Investment (ROI) is the ratio or percentage obtained from dividing the revenue by the expenses.⁶³ The second method is one of the most common evaluation techniques to assess economic impact. The multiplier effect method consists of a formula that calculates the total economic impact as a result of the direct and indirect impact, obtained by a multiplier.⁶⁴ The direct impact is, for instance, the spending of a visitor, the number of volunteers working at a cultural event or media coverage, whereas the indirect impact includes the employment created or taxes paid. The methodological difficulty resides in estimating the multiplier correctly.⁶⁵ Finally, the third one, the input-output method also tries to calculate the indirect impacts; in this case, the input-output effects are deliveries of goods and services from the local community to the project.⁶⁶

---


⁶⁵ Ibid.

example would be the Guggenheim Museum in Bilbao which opened in 1997 with the aim of revitalising the city and as its mission states, ‘to become a symbol of the Basque Country’s vitality’. The ‘Guggenheim effect’ has been the object of various studies as it soon became the symbol of the city and attracted millions of visitors. Since its opening, the museum publishes an annual report showing the impact of its activities on the Basque Country economy. Using an input-output methodology, the study includes the direct visitor expenditure in the museum and also in hospitality, retail, transportation and leisure, as well as the indirect and induced impact on the macroeconomic measures, gross domestic product, tax collection and job creation generated by the museum activity in a given year.

Social impact

Museums can impact positively on the lives of disadvantaged or marginalised individuals, act a catalyst for social regeneration and as a vehicle for empowerment with specific communities and also contribute towards the creation of more equitable societies.

The economic impact methods help to demonstrate that museums are a potential profitable investment in monetary terms. However, museum professionals have also claimed for the recognition of other types of impact, especially the social impact on individuals and on the community. Matarasso created a list of fifty social impacts which he classified in six categories: personal development; social cohesion; community empowerment and self-determination; local image and identity; imagination and vision and health and well-being. Similarly, the Group for Large Local Authority Museums

---

(GLLAM) report published in 2000 on museums and social inclusion, identifies seven areas on which museums may have an impact: personal growth and development; community empowerment, representation of inclusive communities, healthier communities, educational achievement, lifelong learning and tackling unemployment and crime.\(^{172}\) The research conducted on the social role of museums has produced reports and studies such as ‘The impact of the arts: some research evidence’\(^{173}\) published by ACE in 2004, ‘Valuing Museums: Impact and Innovation among National Museums’\(^{174}\) by the National Museum Directors’ Conference (NMDC) in the same year and ‘Museums and Galleries in Britain: Economic, social and creative impacts’\(^{175}\) by the NMDC and the Museums, Libraries and Archives Council (MLA) in 2006.

The economic impact methods could demonstrate that allocating funds to build a museum or cultural institution is economically beneficial in monetary terms and therefore in financial terms, the ROI is positive. Based on this concept the MLA proposed to apply the Social Return on Investment (SROI) to the museum sector, a concept developed by the New Economics Foundation (NEF), London Business School and Roberts Enterprise Development Fund, which adds the social and environmental benefits to the financial ROI formula, translating them into financial measures.\(^{176}\)


Cultural impact

Selwood, in an essay for the National Museum Directors’ Conference (NMDC) in 2010, brought another type of impact to the classification, cultural impact, which is ‘related specifically to the difference that museum programmes make to individuals and organisations’. The museum sector has created some frameworks to measure this impact, such as assessing the learning outcomes of the museum experience. The role of the museum has shifted from a collection focus to a visitor focus, and thus, the concept of learning increasingly appears in the funding justification and evaluation methods. As mentioned earlier in this chapter, ‘learning and outreach’ is one of the categories of the DCMS performance indicators and it mainly measures the number of programmes and the amount of people with different demographic profiles participating in the learning activities organised by the museum. However, these performance indicators do not capture the outcomes; in other words, what the visitor has learned during the visit.

During 2001 and 2004, the MLA developed a framework called ‘Inspiring Learning for All’ which was intended to be used by museums in order to improve performance and provide evidence of the impact of their activities through learning and social outcomes. In regard to learning, the Generic Learning Outcomes (GLOs) framework helps to identify learning outcomes generated from the interaction with museums, libraries and archives. These outcomes are divided into five categories: knowledge and understanding; skills; attitudes and value; enjoyment, inspiration and creativity and activity, behaviour and progression. When it comes to providing evidence of social impact, the Generic Social Outcomes (GSOs) framework helps to measure the impact on communities in relation to priorities of government policy: stronger and safer communities, health and well-being and strengthening public life. The MLA also provided tutorials and examples available online on how to collect and manage quantitative and qualitative data within these frameworks. This toolkit included various

---

methods; for example, response cards, questionnaires, drawings, observation, video or graffiti walls and vignettes.\textsuperscript{180} The usage of the GLOs framework has proved to still be successful years later and among its positive influences, the framework has helped not only with evaluation practices but also in the creation of learning policies and programmes in museums.\textsuperscript{181}

3.5. Measuring Value

While impact studies try to measure the effect of the museum, valuation methods assess its worth; in other words, how relevant and significant the museum is for the visitor or the community. As with the definition of impact, the concept of value is categorised by different types and diverse methodologies attempt to calculate it.

Economic valuation

Within this evidence-based model, museums in the UK need to provide a comparable and tangible value, and for that purpose, several economic study models have been implemented. Having a monetary value allows art policy makers to draw a comparison with other sectors during the investment decision process.

According to Throsby, economic value includes the use value and the non-use value of the product or service. The economic use value of a museum visit is a combination of the ticket value and the surplus stemming from the enjoyment produced by the visit. If the museum is free, then the value will just be the aforementioned surplus.\textsuperscript{182} The non-use value is categorised by three types defined in Holden’s review of concepts as follows: option value (although the individual has not visited the museum, they value the possibility of doing so in the future), existence value (the individual values the

\textsuperscript{180} Museums, Libraries and Archives: Generic Learning Outcomes.’
\textsuperscript{182} David Throsby, Economics and Culture (Cambridge; New York: Cambridge University Press, 2001), 35–38.
existence of the museum although they have not planned to visit it) and bequest value (people value the idea that the museum will be used by future generations).\(^{183}\)

Economic value includes both the market and non-market values.\(^{184}\) However, in the case of museums, a monetary transaction is not always associated with the use value of the visit. The efforts to assign a value have come from the field of economics by using different techniques, largely discussed in the academic literature, and which have also been put into practice in museums. According to the review carried out by Pearce and Özdemiroğlu, the economic value can be calculated using various methods to attribute the final figure mainly through two types of economic valuation techniques: stated preference techniques, where the value is given by asking people how much they would be willing to pay for their visit, or revealed preference techniques, where instead of creating a hypothetical situation, the value is given by the actions of the visitors.\(^{185}\)

The two best-known stated preference techniques are the contingent valuation and choice modelling. The contingent valuation method consists of asking people how much they would be willing to pay (WTP) for particular goods or services, thus attributing a price to non-market goods or services and estimating the demand price.\(^{186}\) Critics of this model state that respondents may not tell the truth or may not be able to correctly estimate a price in an open question, and as a result, the tendency is to overestimate the amount. This is known as the ‘free-rider’ issue in which the method of providing information to the respondents may affect their judgements, so questions need to be carefully planned and formulated in order to eliminate the existence of bias.\(^{187}\) For example, in the UK admission to many museums is free and since visitors know that they will not be charged for their visit, they may exaggerate the price they are


\(^{184}\) Ibid., 31.


\(^{187}\) Snowball, ‘Measuring the Value of Culture Methods and Examples in Cultural Economics,’ 87–121.
willing to pay. Furthermore, WTP does not take into account the opportunity cost of buying other goods.\textsuperscript{188} In fact, the respondents may have a limited budget, and although they may be willing to pay a certain amount to visit the museum, they may have other needs to satisfy first, or simply have other preferences.

Another stated preference method is the choice experiment (CE), also known as the conjoint analysis method, where respondents are asked to choose between the different attributes of cultural goods or services.\textsuperscript{189} This method has been applied at the British Museum, which has free entry, to see whether people would be willing to pay to access the museum. Five hundred people were interviewed including both visitors and non-visitors, giving them three options of opening times, exhibition programmes, new technologies available, services and the price that would correspond to each option. Answers varied depending on respondents’ income, age, education and motivations, so segmentation was advised in order to apply the different price measures.\textsuperscript{190}

Among the revealed preference techniques, we can find the travel cost method and hedonic pricing. The first of these, the travel cost method (TCM), determines the value based on the amount of time the visitor is willing to spend to travel to the museum. This method is indicative for museums as to which visitors need to travel for their visit; however, if the distance to the museum is short, this cost will not exist. Furthermore, when it comes to other types of visitors such as tourists, their total travel cost may include not only the trip to a single museum, but also to other leisure sites.\textsuperscript{191} A tourist may come to London willing to visit the museums, but also other city attractions and therefore, calculating the percentage of the travel cost corresponding to an individual museum visit is not an easy task. The results are more robust and significant when the study focuses on an isolated museum. For instance, this method was applied to four cultural heritage sites in Castilla-León, Spain: the Museum of Burgos, the Cathedral of Palencia, the Urueña walled ensemble and the Iberian Organ Festival. All of these sites

\textsuperscript{188} Ibid.
\textsuperscript{189} Ibid., 178–190.
are located within small towns and, therefore, most of their visitors travel from other areas. The value was estimated based on transportation, accommodation and meal costs.\textsuperscript{192} There are two travel cost techniques: visitation frequency methods, which count how many times a visitor goes to a particular museum, and the site choice method, which presupposes that although the visitors had different leisure options to choose from, they decided to go to the museum because the attraction was higher in this case.\textsuperscript{193} The second revealed preference technique is that of hedonic pricing, which tries to analyse whether there is a correlation between housing prices and proximity to the museum.\textsuperscript{194} The major issue when applying this method is isolating the factor of housing prices, primarily because many museums are located in city centres and the price may be linked to the short distance to other facilities and services. The restrictions in applying this method explain the low number of applications.\textsuperscript{195}

These economic models have their limitations as they show only part of the total value of the cultural goods or service. The economic value obtained in applying these four methods expresses the value in monetary units, but does not always measure the non-use of the museum. Furthermore, these estimated market prices do not capture the value of the benefits produced for the user as a result of the cultural activity. An alternative to the economic valuation methods, though still aiming to offer a value in monetary terms, is subjective well-being (SWB) as a consequence of cultural activities, which has been studied by the DCMS. A project that investigated this potential evaluation method was the Culture and Sport Evidence (CASE) programme.\textsuperscript{196} This was a three-year joint research programme led by the DCMS in collaboration with ACE, English Heritage, the MLA and Sport England. CASE’s report aims to respond to the following question:

\begin{itemize}
\item \textsuperscript{192} Ana Bedate, Luis César Herrero and José Ángel Sanz, ‘Economic Valuation of the Cultural Heritage: Application to Four Case Studies in Spain,’ \textit{Journal of Cultural Heritage} 5, no. 1 (2004): 101–11.
\item \textsuperscript{194} O’Brien, ‘Measuring the Value of Culture: A Report to the Department for Culture, Media and Sport,’ 29–30.
\item \textsuperscript{195} Ibid.
\item \textsuperscript{196} ‘CASE Programme,’ Department for Culture, Media and Sport, accessed July 1, 2015. https://www.gov.uk/case-programme.
\end{itemize}
'What is the value of engagement in culture and sport?' To answer the question, it divides the economic value of engagement into two different segments: short-term individual value (subjective well-being and the monetary value of these impacts) and long-term economic value to society. The report recognises the methodological challenges that this new method presents and states that further research is needed. The first studies on the matter are starting to emerge. A study undertaken in Norway, for which 50,797 adults were interviewed, found a positive correlation between the attendance of cultural activities and good health, satisfaction with life, low anxiety and depression. Although the project was carried out over three years, a longer period of time would likely be needed in order to verify the cause-effect relationship between culture and well-being. 

**From instrumental to intrinsic value**

The economic valuation of a museum, which estimates the monetary value of the visit or impact studies, which calculate the instrumental value; that is, the economic and social externalities of the museum, have largely been criticised for being limited to capturing the actual impact or value. The economic impact and valuation approach does not really provide the value of the emotion caused by an artwork, what the visitor has learned during a guided tour or the enjoyment of playing with a mobile application in the museum. These experiences have been named by the sector as the intrinsic value. This concept appeared in 2003 during the conference *Valuing Culture* as the alternative to the instrumental value which was not able to capture the visitor experience. The report carried out by Holden as a result of the conference enumerates the characteristics of this concept proposed as the ‘overarching principle for cultural funding’.

---


198 Ibid., 34.

199 Ibid., 36–38.


value includes the affective elements of the culture experience, as well as the economic and numerical data, which means that the value of culture derives partly from the subjective experience of participants. In a second report, he defines intrinsic value as the ‘set of values that relate to the subjective experience of culture intellectually, emotionally and spiritually’. However, when it comes to measurement, the problem is that this value is subjective and related to an individual experience and therefore, more complicated to express in terms of an overall outcome.

Turning now to looking at some attempts to understand this subjective value and categorise it through different typologies we find, for instance, the study carried out by ACE entitled ‘What people want from the arts’. The sample included 1,500 people, comprising arts organisations, artists, a diverse public (engaged or not with the arts, and based in different locations and from a range of demographics) and stakeholders. The value expressed by the respondents was divided into three categories. The first is capacity, as the arts can increase knowledge, inspiration and open people’s minds; the second type of value is the experience that generates different emotional states and the third are the applications providing learning outcomes and personal development. Scott carried out a similar study in Australia with the objective of understanding the different types of values and set up indicators that would allow their measurement. She used an interpretivist method to gather people’s opinions on the contributions they thought museums made. She also labels these values as ‘intangible’ values and contributes a new concept to the discussion: the intrinsic value for the individual (cognitive, well-being, empathetic) and the intrinsic value for the community (historical, social, spiritual). Leading to rather similar results, the review of research on intrinsic value conducted by the Research Centre for Museums and Galleries (RCMG) concluded with a taxonomy of user experience in museums divided into three

---

202 Ibid.
204 Ibid.
areas: engagement, wellbeing and connectedness. In 2012, another initiative started to investigate intrinsic value generated in individuals and the community. Funded by the Arts and Humanities Research Council, the Cultural Value Project aims to define a framework to measure intrinsic value and has been funding several research initiatives since then to investigate this concept.

The quantification of the value of culture and the arts is not exclusive to the UK. For instance, the use of visitor numbers as one of the main metrics has been criticised by museum practitioners and museums have tried to explain the limitations of these statistics. In her well-known blog in the sector, Nina Simon, Director of the Santa Cruz Museum of Art and History, argues that when counting visitors, their intentions are not captured and that the focus should be to include the learning impact in the reporting to funders, accounting both the first museum connection and the lifelong learning impact. In his paper published in 2004 by the Getty Leadership Institute, Maxwell L. Anderson, who has been director of the Whitney Museum, Indianapolis Museum of Arts and Dallas Art Museum, criticised the primary indicators used by museums in the US: the number of special exhibitions, number of visitors and number of members. In his opinion, metrics should be directly connected to the museum’s mission, measure long-term organisational and financial health and be easily verified and reported. Following these criteria, he defines eleven indicator categories that will help museums to measure the fulfilment of their mission and contribution to their communities: quality of experience, fulfilment of educational mandate, institutional reputation, management priorities and achievements, calibre and diversity of staff, standards of governance, standards of governance,

---


scope and quality of collection, contributions to scholarship, contributions to art conservation, quality of exhibitions and facilities’ contribution to the core mission.  

Other museum professionals also call for an evaluation of outcomes, the beneficial impact to the visitor produced by the museum experience. For Stephen Weil, who was Emeritus Senior Scholar at the Smithsonian Institution’s Center for Museum Studies and deputy director of the Hirshhorn Museum and Sculpture Garden, museum success is ‘the ability to bring some beneficial changes for individuals and/or populations that participate in its programs’.  

This idea is emphasised even further in his paper on outcome-based evaluation, where he states that ‘the museum that does not prove an outcome to its community is as socially irresponsible as the business that fails to show a profit. It wastes society’s resources’. In a practical way, he represented success based on a four-dimensional matrix.

<table>
<thead>
<tr>
<th>Purpose</th>
<th>Resources</th>
</tr>
</thead>
<tbody>
<tr>
<td>Efficiency</td>
<td>Effectiveness</td>
</tr>
</tbody>
</table>

**Figure 5: Success/Failure matrix for museums, Stephen E. Weil (2005).**

The variables at the top of the table depend on museums’ governing authorities and those at the bottom depend on their staff and internal processes. The ones on the left represent what the museum wants to achieve; that is, the outcomes or ‘the positive changes in the audiences’, and the ones on the right represent the means to achieve this. The objective of this matrix is to identify the institutional factors that will cause museums to succeed or fail.

---

213 *Ibid.*.  
In conclusion, the two key terms in evaluation practice, impact and value, have very distinct definitions depending on their typology and a range of methods are being applied to calculate and add a figure to these concepts. This literature review demonstrates several attempts to compile previous research and case studies by the DCMS, ACE or in academic cultural policy research but so far, there are no official guidelines for museums to evaluate their impact and value. However, there is a need to demonstrate that museums have an impact and that they are worthy of investment. The research so far has tried to define the concepts, test methods in case studies both individually in specific museums and as aggregate, compiling the data from all museums together, but the results are still inconclusive and no accepted method is applied across the board. So far, this chapter has focused on understanding the evolution of cultural policy, the reporting requirements and the main concepts measured. This is an important step in contextualising the research presented in this thesis, firstly because museums are required to show the impact of their digital activities and secondly, because this evaluation strand fits within the wider discussion concerning the methods and tools that can help to capture and measure that impact. The following section will look into how museums have responded to these evaluation requirements with the creation and evolution of the field of visitor studies.

3.6. Evolution of the field of visitor studies

The measure of a museum’s worthiness is no longer an internal assessment of what it might possess – a superior collection, a talented staff, splendid facilities, a hefty endowment – but an external consideration of the benefits it provides to the individuals and communities it seeks to serve.\(^{216}\)

This quote from Weil exemplifies the switch that has occurred in the ethos of museums from a collection-based to a visitor-centred perspective.\(^{217}\) This has also been reflected in the inclusion of performance indicators related to visitors. In parallel to the definition of the performance indicators related to audiences carried out by the government, the field of visitor studies has developed within the museum sector, implementing

---

\(^{216}\) Weil, ‘Beyond Big and Awesome: Outcome-Based Evaluation.’

\(^{217}\) Ibid.
evaluation and research methods to better understand museum audiences and measure the success of their activities. Hooper-Greenhill states that museums must research who their visitors are for accountability and managerial purposes; specifically, how to evaluate the level of success achieved, how they are being used and how they are perceived by the visitors.\textsuperscript{218} As Kelly points out: ‘It is a strategic management tool providing data to assist museums more effectively plan and develop exhibitions and programs, meet their corporate goals, as well as to learn as organisations.’\textsuperscript{219} In visitor studies, the definition of evaluation has been seen to imply measuring the visitor experience, for, as Bicknell states, ‘evaluations are statements of worth from the visitors which are mediated via the evaluator or via the method or methods used to gather this information’. She further adds: ‘but evaluation reports do not just deal with whether the exhibition, or whatever, was worth the visitors’ time, money or attention: they are also instruments of change’.\textsuperscript{220} Using visitor studies techniques and methodologies may help with the problem of capturing the intrinsic or intangible value and also the impact that it has on the visitor, as Kelly affirms: ‘through monitoring and measuring success audience research can demonstrate that museums make a difference’.\textsuperscript{221} The direct consequence of this research need is that museums spend an increasing amount of resources on understanding their visitors and evaluating the impact and value of their exhibitions and programmes. This work can be outsourced or implemented in-house; a person or a department in charge of visitor research and evaluation is becoming the norm in many museums and examples can be found in museums in the UK such as the Natural History Museum,\textsuperscript{222} the Science Museum,\textsuperscript{223} and the Victoria and Albert Museum.\textsuperscript{224}

\textsuperscript{218} Hooper-Greenhill, \textit{Museums and Their Visitors}, 54.


\textsuperscript{221} Kelly, ‘Evaluation, Research and Communities of Practice: Program Evaluation in Museums,’ 68.


Looking back at how this field has evolved in the UK, we can find a valuable summary in Hooper-Greenhill’s book *Museum, Media and Message*, which situates the first visitor surveys in the 1960s. These focused mainly on demographics, trying to figure out the profile of visitors and this information is now collected in the field as standard. The research carried out in the 1970s started to look at the experience of visitors and how the findings could be utilised for exhibition design. During the 1980s a number of participation studies were carried out and in the 1990s, with the introduction of marketing in the museum, the focus was shifted to audiences and their needs, a fact which drove the application of qualitative methods to museums and the creation of target groups. The field of Visitor Studies has matured and its professionalisation has also resulted in the creation in 1990 of the Visitor Studies Association (VSA) in the US along with an annual conference and what is now the *Visitor Studies* journal. The equivalent organisation in the UK, the Visitor Studies Group (VSG), was created in 1998.

This recapitulation shows that the field of museums is moving from counting numbers to a more qualitative approach to measuring the visitor experience. In this matter, Falk provides both an in-depth analysis and a model that has become a well-known tool for understanding why people come to museums and identifying the context for meaning creation which results from the visit to the museum. The ‘Visitor Experience Model’ considers three contexts that influence the visit; these are the personal, physical and sociocultural contexts. Furthermore, Falk defines five types of motivations to visit a museum: explorer, facilitator, experience-seeker, professional hobbyist and spiritual pilgrim. Creating segments based on these motivations helps to improve programmes, as well as to measure the real impact and value for specific audiences. For example, the satisfaction of the visitors is linked to their needs and expectations. A visitor whose intention is to go to a museum with an intellectual purpose to learn about a specific art movement is very different from a visitor in a social mode who goes there

---

to spend an evening with friends. Motivation has been a key variable used by different researchers and museums as a means of creating a segmentation of their visitors.\(^\text{229}\)

While segmenting visitors by their motivation helps to understand the context of their visit, this model is limited in terms of marketing to target and attract visitors. Market segmentations have been developed and a recent example is provided by ‘Cultural Segments’, created by the firm Morris Hargreaves McIntyre, which classifies the population based on their cultural preferences,\(^\text{230}\) and some museums including the Museum of London\(^\text{231}\) and the British Museum\(^\text{232}\) have started to adopt this model.

The development of visitor studies has resulted in the adoption of standard methods to evaluate the visitor experience. Three different types of evaluation are mainly carried out during the different phases of a project such as an exhibition, collection display or learning activity: front-end, formative and summative evaluation. The front-end evaluation is carried out while the project is being conceptualised, understanding visitors’ knowledge and expectations. The formative evaluation, undertaken during the design and development stage, involves testing some parts of the project by monitoring the potential reaction of visitors so improvements can be introduced. This method is used, for example, in exhibitions to write the labels, modify the display or test the usability of interactives. Summative evaluation aspires to see how the objectives of the project have been achieved, what has been the impact on visitors and what could be improved for future projects. In these three stages, a range of research methods are used for capturing visitor data including exit interviews, feedback forms, surveys, focus groups or observation to measure the impact and value of the museum visit.\(^\text{233}\) The British Museum for instance, implements these three evaluation stages during their

---


\(^{231}\) Robbins, ‘Segmenting a Cultural Audience.’


exhibition process. For the exhibition *Journey through the afterlife: The ancient Egyptian Book of the Dead* the museum tested, in a formative evaluation, the theme, visual elements, title and content with an audience forum to assess their reactions and levels of attraction to these components. For the same exhibition, they also carried out a summative evaluation to understand the profile of the visitors, their behaviour and outcomes, as well as the use of interpretation material and family offer among other provisions. For this type of evaluation the museum used several methods including exit surveys, observations, focus groups and interviews.

As the fieldwork chapters will show, some of these traditional methods can be applicable to the evaluation of the impact of digital and social media in museums, but some new methods will be also added to the field. The field of visitor studies continues evolving to adapt to new methods and environments and the 2015 VSG conference titled *Visitor Studies: Embracing change?* included the role of digital in the visitor experience as the main topic. This thesis research fits within this context. The origin of this research is presented in the next chapter section and the field research chapters and conclusion will return to look at the visitor studies field and will reflect on the changes taking place at the moment in museums to evaluate the digital offer and understand how visitors are using digital within the museum experience.

### 3.7. Digital evaluation

There is a correspondence between what happens when evaluating the physical presence of the museum and the impact on in-gallery visitors to the practice of

---


evaluating the online presence of museums and the impact on online users. The following is a summary of the reporting requirements when it comes to measuring online activities and the response from the sector which will be discussed in detail in Chapter 5. As described earlier in this chapter, the DCMS requires national museums to report the number of unique website visits, described in the Performance Indicators Guidance document as follows:

A website visit (sometimes known as a user session) is a series of one or more page impressions, served to one user, which ends when there is a gap of 30 minutes or more between successive page impressions for that user. A visit is effectively a near continuous burst of activity by a valid user. A visit is determined when a unique user enters or re-enters a website during a specified period. A visit is determined by counting bursts of activity (page impressions) made by valid unique users that have not re-entered the site within the past 30 minutes. Visits from spiders and robots should be excluded from this measure. Visits are a better indicator of total site activity than unique users since they indicate frequency of use.238

The first parallel with the in-gallery requirements and the number of visitors is that external factors, such as the economic climate or tourism figures may have a negative or positive impact regardless of museum management. The same occurs with online figures. This treatment of visitor data becomes even more evident in the case of the internet, where different external factors, not directly related with the museum’s performance, may create large fluctuations in this number. A mention on an influential blog, a link from a popular Twitter account or news of an artist whose works feature in the museum’s online collection, may create occasional spikes in website traffic. The website segmentation work carried out by Tate shows that trends depend on factors such as the academic year or the impact of blockbuster exhibitions and, therefore, traffic changes due to multiple factors.239

239 Stack and Villaespesa, ‘Finding the Motivation behind a Click: Definition and Implementation of a Website Audience Segmentation.’
The second evident similarity between what has been examined in this chapter in the evolution of the museum field is that these numbers do not measure the experience of the user on the website. Drawing again upon Tate’s website segmentation, users come to the website with different motivations including research, learning, inspiration, visit planning and enjoyment among others. The number of visits does not capture the aesthetic experience of zooming into the details of an artwork online, the usage of the online collection for University research or whether planning a visit to the museum is a successful experience in which the user finds all the necessary information. Related to this, it has to be mentioned that this metric is categorised as ‘Access’, which can be placed in question as a museum’s website has various functions. Looking at the Tate’s website, for example, we can find various sections including visit information, a calendar of exhibitions, the online collection, learning resources, research and scholarly papers, membership information, kids’ games and an online shop among other content. The objectives of each of these individual sections are very different and cannot be measured in the same way.

Finally, there is a clear conclusion that can be drawn from the previous chapter and the analysis of the whole social media ecosystem. The number of website visits does not record all of the visitor presence online; it only includes how many people the website has reached. This limitation is precisely the subject of an email conversation on the Museums Computer Group list in August 2009 with the subject title ‘Better metrics?’ in which Mia Ridge, former Lead Web Developer at the Science Museum, raised the issue that although the museum had content on other sites such as the BBC or New Scientist, the hits on these pages were not included in the official count. The reply from Jane Finnis, Chief Executive of Culture24, called for a workshop to discuss online metrics in the sector.\footnote{Mia Ridge and Jane Finnis to Museums Computer Group Email Distribution List, ‘Better Metrics?’ August 11, 2009, https://www.jiscmail.ac.uk/cgi-bin/webadmin?A2=MCG;5246c4be.0908.} This led to the initiation of the ‘Let’s Get Real’ project in which twenty cultural organisations in the UK, under the leadership and coordination of Culture24, came together to explore how to measure online success.\footnote{Chan, Clements and Finnis, ‘Let’s Get Real: How to Evaluate Online Success?’, 5.} This also led to a collaboration with this Ph.D. research programme, and the work completed during this project is presented in the next chapter.
3.8. Conclusion

The literature review on the culture and practice of museum evaluation helps in the definition of the performance measurement framework for museums on social media from two angles. On the one hand, this review contributes an understanding of the evidence-based model, the definition of the key concepts, impact and value, and the current evaluation requirements with regards to digital activities. On the other hand, this review considers the current practice of visitor studies and which methods can be applied to the new online environment.

This chapter has described how museums are required to justify both their private and public funding and also demonstrate the economic and social impact they have on society. During both the Conservative and Labour administrations museums have had to report their performance; in the first case, the focus was more on value for money and customer satisfaction, whereas in the second case, other factors such as audience diversity, social impact and learning, were also taken into account. When a new administration takes office, evaluation requirements may change since the agenda and the priorities are usually different. Museum evaluation should aim to measure the success of the museum against its objectives, help to inform the decision-making process, gain a better knowledge of the visitors and learn from past failures and mistakes. However, as we have seen in this chapter, since museums must secure their funding and, therefore, report to their funders, the evaluation process may end up focusing more on satisfying the requirements established by the funding entities, instead of providing a set of tools that can help them improve their performance. Besides the high volume of reviews, case studies, research projects and other documentation concerning the value and impact of museums, there are no agreed shared standards as to what to measure and how to do it.

In the last two decades there has been a shift in focus as to what to measure within museum evaluation, from accountability and outputs to evaluating outcomes, impact and intrinsic value. Each technique analysed in this chapter gives a different result. Impact-based studies try to quantify the effect that a museum has on its visitors, and
subsequently, on the community, before and after each visit. Although a diverse range of methodologies exists to capture the value of the museum, most of them present certain drawbacks when capturing all of the use and non-use value or fail in their methodology when they are put into practice. While the positive externalities of museums cannot be ignored, only including them in the arts policy decision process will yield a limited value and impact. Using only economic impact and value has been criticised by museum professionals who complain of the instrumentalisation of the sector.

This chapter has included an overview of the evolution of the field of visitor studies, showing a range of methods and techniques developed across time. Qualitative methods developed by the field are being implemented with the aim of demonstrating a more meaningful insight into the value of the museum experience and its impact on the visitor. There has been an evolution in combining qualitative and quantitative indicators to gain a complete picture of the museum performance. However, there is a great challenge ahead in measuring the museum experience because, as Falk says, ‘it is not something tangible and immutable; it is an ephemeral and constructed relationship that uniquely occurs each time a visitor interacts with a museum’.242

242 Falk, Identity and the Museum Visitor Experience, 158.
Chapter 4: Strategies and Evaluation of Social Media in the Culture and Museum Sector in the United Kingdom

4.1. Introduction

The previous chapter introduced the origins of this research and the need for a better method to measure the success of social media in museums. In order to establish an evaluation framework it is important to understand beforehand how museums use social media and therefore, while Chapter 2 presented the literature review on this topic, this chapter digs deeper into it using original data. The analysis is based on the fieldwork carried out by the author in collaboration with the national ‘Let’s Get Real’ action research project and includes a discussion of the findings which emerged from benchmarking the social media data of the twenty-two cultural organisations in the UK that participated in the project (see list of participant organisations in Appendix 1). The partnership between Culture24 (leaders of the ‘Let’s Get Real’ project) and the School of Museum Studies of the University of Leicester, allowed the author to participate as an observer in meetings and also to take an active role in collecting and analysing the social media activity and metrics across the group. In parallel to this research work, a series of semi-structured interviews were carried out with some of the digital managers of the museums that participated in the project (see survey list of interviewees in Appendix 5 and interview questions in Appendix 6).

The work conducted during this project included a series of analytical stages. Firstly, a social media strategic review was conducted across all organisations via an online questionnaire distributed to the participants (see Appendix 3 and Appendix 4). This sought to identify relevant factors in the organisational approaches to social media across the group that included: a summary of each organisation’s social media objectives, details of the various social media platforms used, a comparison of the investment made (in terms of time and resources) towards social media objectives and a summary of the challenges faced when measuring social media. Secondly, an exploration of social media behaviours in connection to common social media metrics was undertaken across the group, and this was done in two main ways. The first was a benchmarking exercise seeking to identify trends across the group and the second, a
deeper exploration of each organisation’s own data, was followed by further discussion across the group on the most useful metrics. All of the raw data and a series of graphs and dashboards visualising the results were shared with the group. To help and provoke the interrogation of the data a list of questions was sent to each individual organisation (see Appendix 2 and Appendix 3). The key findings of the overall social media research and the benchmarking exercise were presented to the group by the author in May 2013 and the presentation was followed by a wider group discussion. Furthermore, a deeper qualitative analysis of the perceived engagement relating to social media content was undertaken. This sought to examine, on the one hand, how cultural organisations are using social media by looking more closely at the message, objectives and the type of activity and on the other, examining audience responses by analysing their depth and sentiment. Due to the time intensity of this task and the specific focus that this research has on the museum sector, it was conducted as a museum case study only.

Finally, in response to the findings from the overall analysis of social media behaviours, a suggested ‘Social Media Evaluation Framework’ and a Google Analytics dashboard were produced as a key outcome (see the example of the dashboard template in Appendix 3). The framework explained at the end of the chapter summarises the relevant social media measurement methodologies, metrics and tools that organisations should consider using when investigating social media behaviours, and relates these to various relevant organisational goals.

4.2. The challenges of measuring social media

‘@mw12social: Do you have goals, but not the right tools to measure them? #musesocial #mw2012’

How to measure the success of museums’ online activities is a current discussion topic in the museum sector and it has been featured in a number of recent conferences and

---

professional meetings, such as *Let’s Get Real*, the Annual Meeting of the American Association of Museums, *Museum Next* and *UK Museums on the Web* among others. In April 2012, at the *Museums and the Web* conference held in San Diego, there was a professional forum on ‘What do we really know about social media in museums?’ Museum professionals from different institutions, including the Smithsonian American Art Museum, US Holocaust Memorial Museum, National Museum of Natural History, Smithsonian Center for Education and Museum Studies and the National Air and Space Museum discussed social media in museums. One of the topics for consideration was the evaluation of the success of social media activity. People acknowledged the difficulty of measuring social media and the lack of consistent or definitive tools.

There are a few initiatives which aim to play with the available data. Jim Richardson, Managing Director of the arts marketing company SUMO and Sean Redmond, former Web Developer at the Guggenheim Museum, created an automatic updated ranking list of all the museum profiles on social networks, including the number of Facebook likes, Twitter fans and Klout score. Another website, Museum Analytics, also pulls the number of likes and followers from these two popular social networks creating


248 ‘Museums and the Web 2012 Conference: What Do We Really Know about Social Media in Museums?’


various graphs and highlighting, on a weekly basis, the most engaged posts from around 3,000 museums all over the world. The engagement criteria are based on the absolute number of likes or retweets.

Returning briefly to how museums need to demonstrate the accountability of their activities, (reviewed in Chapter 3), regarding their digital activity, museums in the UK report the number of unique web visits to the DCMS on an annual basis. In the case of those organisations that have to report to ACE, they need to send the following digital metrics annually: number of unique browsers, number of page impressions, number of visits, time spent on site in seconds and whether the organisation has specific content for children, young people or teachers. This way of measuring success has been questioned by the museum sector. Chan, for instance, raised in a detailed technical paper regarding online metrics in museums that some of the common metrics such as unique visitors were calculated in various ways depending on the analytics packages and how cookies work. Chan also noted that the same happens with page views, as they do not include certain types of content such as video plays or PDF downloads by default and they are also counted differently based on the code language used to develop the site. Apart from raising the methodological challenges inherent in counting numbers, Chan also explained, just at the point when museums were starting to open social media profiles, how metrics to measure these activities would need to be developed. Peacock and Brownbill proposed likewise that museums move away from using Google Analytics as the default measuring tool and suggested other methods such as surveys, observations, usability testing or interviews with users to understand the whole experience. They also proposed to create user segmentations and not to look at

255 Ibid.
museum online metrics in isolation, but instead to compare these with the whole market.\textsuperscript{256}

This search for better online metrics was, therefore, the focus of a collaborative approach between a range of organisations in the culture sector. The first action research project ‘Let’s Get Real’ led by Culture24 that took place from June 2010 until September 2011, and in which seventeen cultural organisations participated,\textsuperscript{257} aimed to define new standards of online metrics and tools, since those proposed by the Government did not capture information about online activity outside the museum’s website and the real usage of online content.\textsuperscript{258} The recommendations emerging from the first project, included using Google Analytics to report consistently and to customise this tool by implementing segments to gain better insights, and, more importantly, setting up goals that stemmed directly from the museum’s strategy.\textsuperscript{259} As far as social media is concerned, a week of social media data was compared across the group. While the data timeframe was limited to be able to draw significant conclusions, the actual data collection process showed the challenges of this environment as it required a lot of manual work.\textsuperscript{260} The report mentioned that, at present, there is no single tool to collect and measure the data but instead, cultural organisations ought to set up measurement frameworks to better demonstrate the value of these activities.\textsuperscript{261}

The second ‘Let’s Get Real’ project started in July 2012, and ran for eleven months. The project focused on three areas that explored visitors’ digital engagement with cultural organisations: understanding website behaviours, especially motivations to visit websites, understanding mobile behaviours and understanding social media behaviours – the latter being carried out by the author. This research aimed to explore how to

\textsuperscript{257} The organisations that took part in the first ‘Let’s Get Real’ project are listed in Appendix 1.
\textsuperscript{258} Chan, Clements and Finnis, ‘Let’s Get Real: How to Evaluate Online Success?,’ 5.
\textsuperscript{259} \textit{Ibid.}, 26.
\textsuperscript{260} \textit{Ibid.}, 16–21.
\textsuperscript{261} \textit{Ibid.}, 21.
evaluate the success of social media activities. According to the survey distributed to the participants, the internal reporting of social media metrics has begun to take a more comprehensive approach. Apart from tracking the number of followers, the number of comments, mentions and other interactions are also increasingly being taken into account – at least by the institutions involved in the study (Figure 6). That said, the majority of these organisations were still formally reporting only quantitative measures. According to the survey responses, approximately half of the organisations gathered these numbers by making use of free tools and the other half by using a mixed of free and paid-for tools. At the time of the study, most organisations involved were evaluating and reporting social media results on a regular basis (Figure 7), some deploying a more formal reporting structure than others, ranging from annual reports and monthly dashboards circulated to all staff, to emails including main highlights for the team. However, at the time of this study, the majority of the organisations did not have defined targets.

![Figure 6: Social media metrics reported by the organisations. Social media resources and measurement survey.](image-url)
Eighty-six percent of the participating organisations said that the main challenge they faced was the lack of time and staff resources available to measure the impact of their social media activities. The second challenge they mentioned had to do with the metrics themselves, as despite of the amount of data available through the analytics tools, choosing the most appropriate ones and making sense of them represents a big obstacle in evaluation. Another challenge has to do with the tools and with the current lack of standards; for instance, aggregating data from all social media sources can become very time-consuming. The list compiled by the author for the ‘Let’s Get Real’ project\(^{262}\) contained a range of tools available on the market, both free and fee-based, but some of the latter are beyond the budget of the majority of museums. Finally, it is worth noting that, in certain cases, some senior managers observed that they did not have enough information at their disposal and, furthermore, that they lacked the necessary expertise in the field to work with this data (Figure 8). Some of the participants reflected on this issue with comments in the survey: ‘I would say no one is asking the right questions. No one is sure what they want to find out from it, therefore we are not monitoring anything regularly as the questions are not being asked’. Another participant raised a similar concern with how social media measures also varied widely from the organisations’ goals: ‘Analysis is always first to fall off the to do list when teams are

busy. As we don’t tie social activity directly back to ROI, it is difficult for managers to allocate resources for analysis’. Therefore, despite all of the available data, the results from this research found that museums are struggling to make use of it to provide evidence of the value and impact of these activities.

**Figure 8: Challenges faced when measuring social media. (Organisations were able to select a maximum of 3 responses). Social media resources and measurement survey.**

4.3. Cultural organisations on social media: strategies, platforms and investment

Social media platforms can be used in different ways and depending on the organisation they are also managed by different departments that set their own goals and targets. It is an evaluation principle that performance measures need to be defined based on strategic objectives. Therefore, the first step before looking at any data is to have a clear definition of what the organisation is trying to achieve on social media and align these objectives with the organisation’s mission. As every organisation establishes their own strategy, they should also set up their own evaluation framework and although all the participating organisations had a profile on social media, the maturity of their presence on these channels at the time of the study varied across the group. Some of the organisations had a social media strategy, policy or working plan; however, for some others, the definition of objectives was still a work in progress and for the majority of the organisations the definition of target audiences was vague. This fact was evident in the metrics analysis phase and some participants also commented on the work in progress they were carrying out in this area. For instance, the Bristol Museum & Art
Gallery had just hired their first member of staff in charge of social media, and so the objectives were still to be defined:

[...] we recruited an Audience Development Assistant and her first task was to review our online and social media platforms. On the back of that going forward we are planning to develop a social media strategy under the online strategy, so following on the social media aspects of it and the online aspect of it, so all of this kind of stuff is slightly new really, so we don’t have a strategy in place yet.263

The Photographers’ Gallery was in a comparable position: ‘We are in the process of putting together a social media strategy and to date we have a sense of what we use, which different platforms we use and what information goes on them’.264 Similarly, the National Museums of Scotland were reviewing their digital strategy dated 2010 to embed social media, thus creating an internal document with a working strategy for each of the platforms they had a presence on. As a consequence, this lack of formalisation of the social media activity had an impact on establishing an evaluation plan and talking about this issue a participant indicated in the survey comments: ‘At the moment we are working on a social media policy, therefore as it stands there is no defined statement of purpose to be able to measure against’.265

In the study, the objectives differed across the group, mainly depending from which department the strategy originated. While in the case of some participants the strategy came from the digital media, web or marketing departments, interestingly enough, it could also be embedded within broader museum actions such as public engagement. In the particular case of the Victoria and Albert Museum, although they did not have an official strategy, there were two active social media initiatives running in parallel. While the first was more focused on marketing, the second directed all the attention to their website by including user content or creating blog content to ultimately open up the museum by having a ‘space where the public can react and by giving curators the

264 Healy, Jo. Interview by author. March 1, 2013.
opportunity to have a voice. There is therefore a question as to how to use social media, as it could be regarded as a platform aimed for marketing activity or as a social space for engaging with users. There were also discrepancies as to which departments should be in charge of the social media activity, and some participants even called into question the entire organisational structure of social media within their own institutions.

While the objectives varied across the group, from the participants’ responses during this study it is apparent that these can be grouped and summarised under six key strategic themes:

1. **Community.** Depending on the target audiences, cultural organisations wanted to develop a local, national or international community. Social media was regarded by the participant organisations as a space to reach new audiences.

2. **Brand.** Having a presence on social media was seen as a way to build brand awareness, increasing profile visibility and the position of the organisation. Moreover, the virality characteristics of these platforms offered an opportunity to get users to act as advocates of the brand.

3. **Marketing and communications.** This was clearly one of the main strategic themes mentioned in the responses across the group. Social media was meant to increase awareness and knowledge of the collection, promote exhibitions and events, drive ticket sales, generate revenue from ecommerce activities, convert the online users into physical visitors, increase footfall to the venue, publicise news and press items and, on occasion, use these channels as a crisis communication tool. The following (Figure 9 and Figure 10) are examples of this type of promotional activity.

![Figure 9: Museum of London, Facebook Post, November 27, 2012, https://www.facebook.com/museumoflondon/posts/298281413622717.](image)

---

266 Lewis, Andrew. Interview by author. February 8, 2013.
4. **Interaction.** Although the participants used an array of different words to refer to this concept in their responses, all the organisations agreed on the fact that one of the key advantages of social media was the engagement opportunity that it represents to foster dialogue and conversations, create participatory activities to engage with the collection and venue programme and support learning activities. The concept of generating engagement when analysed in detail is, in reality, too broad and it was mentioned in a range of activities having different meanings including, for instance, users sharing comments about an exhibition or having a conversation with people attending an event at the organisation. Thus, the interaction with an organisation’s post content can be very varied.
5. **Content distribution.** One of the objectives that consistently emerged in the responses across the group was to use these channels to drive traffic to the website and also distribute blog posts, videos, images and articles. Moreover, apart from bringing traffic to the website they could also be used to link to other online channels or platforms. This objective can overlap with the previous four as sometimes the marketing on these channels comes with a video or a blog and these can also be produced to encourage interaction. However, it is categorised separately due to the high number of mentions of this objective by the organisations. Moreover, content distribution is linked to the potential reach of audiences on social media for various strategic purposes. The following tweet (Figure 12) is an example of how Brighton Museum made use of this platform to promote and link to a blog post on their website.

![Figure 12: Brighton Museums. Twitter Post, October 31, 2012, https://twitter.com/BrightonMuseums/status/263612502850547712.](image)

6. **Visitor services.** Social media is increasingly used as a customer service tool that allows the organisations to obtain feedback from the visitors. Organisations need to proactively monitor what is being said on these platforms in order to provide visiting information and to respond to enquiries. An example of this visitor service on Facebook is shown in Figure 13 in which Historic Royal Palaces responds to questions from users about an exhibition.
A list of the organisation’s most commonly used social media accounts was assembled at the beginning of the project, but as all of them had a profile on Facebook and Twitter, the metrics review was narrowed down to these two platforms. Besides, most of the organisations also had more than one account on Twitter and Facebook; in some cases, because they have more than one physical venue and in others, because these were accounts created for different streams of activity (film, press, shop) and targeting specific audience segments such as members and teachers (see Appendix 7 for the list of Twitter and Facebook accounts of each organisation mapped at the beginning of the study).

The results obtained from the survey about the platforms used are shown in Figure 14. From the data we can see that of the other social media platforms apart from Facebook and Twitter, YouTube and Flickr were the most commonly used. A lower percentage had opened a profile on the newest platforms such as Google+ or Pinterest and other platforms used by these organisations included Foursquare, SoundCloud, Spotify, Delicious and Audioboo. As each platform is very different and has its own features and characteristics, in order to experiment and finally open a profile on a social media site, organisations need to first establish their own objectives and target audiences. This was the case for some of the participating organisations that had specific objectives for each of the platforms, which emphasises the importance of tailoring the evaluation framework depending on the organisation’s goals for each particular activity.

Figure 14: Social media platforms. Social media resources and measurement survey.
The activity on social media and the number of platforms continues to increase, having an impact on the volume of resources invested by these organisations in managing this area. The number of people and the time invested in these platforms varies per organisation, something that in most cases is tied to their size. Social media management is increasingly becoming a shared task among people from different departments and, therefore, estimating the investment in staff resources is rather complicated. According to the comments on the survey, while in some of the participating organisations there was a dedicated person or team managing the accounts, in others, this task was just one of many duties assigned to certain members of staff (Figure 15 and Figure 16). Although the most common scenario is to just have a small team working on the updates and monitoring the different channels, the number of content contributors across the different departments of these organisations is steadily increasing. It was also noted in the responses that the number of staff members varies depending on programming; for instance, live tweeting during an event. Furthermore, as some organisations have more than one account on these platforms, there are specific departments in charge of managing each of these different accounts. During the project, some organisations had the objective to increase staff engagement and competence in using social media, which revealed the importance of putting forward organisational changes and internal processes in order to achieve an effective presence on these platforms. Some of the internal work involves keeping up with the technology, creating and editing content, monitoring and responding to users’ comments and educating stakeholders so they understand and appreciate the value of this work.

Therefore, engaging audiences on social media requires significant time and resources and this effort or expenditure will not become worthwhile if the organisations do not have an effective method of measuring its impact. However, as measuring the impact also takes time and resources, it is critical to understand that while social media may feel like an affordable and efficient opportunity to reach out to audiences, to do so effectively requires significant investment.
4.4. Social media metrics review

A key part of the fieldwork was to collect and analyse the social media data of the cultural organisations that took part in the project and the results of this work are presented in this chapter section. This research regarding social media behaviours was carried out with a dual purpose; on the one hand, it was a benchmarking exercise of social media metrics that allowed the identification of trends and the comparison of the main metrics across the cultural organisations involved on the project. On the other, it
was a practical exercise carried out in conjunction with the organisations in which they also analysed their own data, followed by a further discussion that took place during one of the meetings held by the group, thus facilitating the exchange of findings and making it possible to identify the most useful metrics. During the project, an array of different social media metrics was collected, taking a mixed-method approach and including both quantitative and qualitative data. Table 2 summarises the data collected and analysed during this field research, as well as the tools used for this purpose. The time frame of the data varies per platform, depending on the data collection tool limitations and on the organisations’ analytics settings.

<table>
<thead>
<tr>
<th>Platform</th>
<th>Tool</th>
<th>Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facebook</td>
<td>Facebook Insights</td>
<td>Likes (fans), Reach, Impressions, Type of post (links, status update, video, share, question), Likes, Shares, Comments, Clicks (photo, link, video), Top 10 posts with higher interaction rate</td>
</tr>
<tr>
<td>Twitter</td>
<td>Museum Analytics</td>
<td>Followers</td>
</tr>
<tr>
<td>Website</td>
<td>Google Analytics (Social media dashboard)</td>
<td>Visits from social media sites (Facebook, Twitter, Pinterest, Tumblr, YouTube, TripAdvisor, Reddit, StumbleUpon...), and Wikipedia</td>
</tr>
<tr>
<td>NVivo (NCapture browser extension)</td>
<td></td>
<td>Posts, Type of post (objective, type of activity, content), Type of comment, Length of comments, Sentiment, Message direction, Number of tweets, Retweets, Top 10 tweets with higher virality rate</td>
</tr>
</tbody>
</table>

Table 2: List of social media metrics collected and analysed during the field research.

There were some limitations in this benchmarking exercise and, as the group featured a great diversity of organisations in terms of art forms, type of collection, funding structures, size and audiences, the results were more useful when analysed by groups of similar organisations. Moreover, the maturity of their definition and implementation of strategy also varied and ultimately, the most important element, their objectives, were also different. For that reason, the charts created for the benchmarking were interactive.
and the organisations were able to select other organisations they wanted in order to compare their data (see screengrab of the interactive charts in Appendix 2). Therefore, the findings presented here do not primarily focus on the benchmarking results, but rather on the learning outcomes that took place during the project as a result of applying different metrics to measure the impact of social media.

4.4.1. Definition of standard metrics: community, reach and interaction

This field research included the analysis of a series of social media metrics regarding community size, reach and interaction, as well as website visits originating from social media referrals. Although the benchmarking exercise was carried out through Facebook and Twitter, two platforms used by all the participating organisations, it was important to define a series of metrics that could be applied to any given social media platform. Chapter 2 showed the range of platforms that can be included under the social media umbrella and how quickly they are launched, evolve and sometimes disappear. Nevertheless, as we will see in this practise stage, these metric definitions vary per platform and depend greatly on the methods and tools used to collect and analyse the data. For the purpose of this research, the definitions of the social media metrics based on the characteristics examined in Chapter 2 and on the description of key metrics on the top social media sites (Facebook, Twitter and Pinterest), are as follows:

- **Online community size.** As we saw in Chapter 2, one of the main characteristics of these platforms is that people can connect to each other, and this functionality also applies to organisations as people are able to subscribe to the content posted by an organisation. Increasing the online community is one of the main strategic themes identified in the strategy review. In order to measure the completion of this objective, the main metric is the number of users who follow the


organisation on a social media platform (depending on the platform, these are known as fans, subscribers, likes or followers).

- **Reach.** Another strategic theme that resulted from the review is that cultural organisations use these platforms to distribute content and promote the collection or current and forthcoming events and activities at their venues. In this case, reach could be measured by the number of users who have seen the posted content. There are normally three ways of reaching users: organic (those who follow the organisation), viral (users that see the content because it was shared by followers of the organisation) and paid (promoted campaigns or featured content). In consequence, depending on the impact of the number of shares and the influence of the people sharing content, campaigns and other variables, the actual reach of the content may differ from the number of people that follow the organisation.

- **Interaction.** Referring back to Chapter 2, the social functionalities that characterise these platforms allow users to interact with each other and provoke this type of engagement, which is the key strategic objective to emerge from the first part of the strategy analysis of the participants. The metrics to measure this interaction include the total number of actions such as likes, comments, shares, clicks to view images or videos, and favourites on the published post. The interaction rate is measured in different ways by different social media analytic tools. While most calculations normally divide by the number of followers, this number is not equal to the people who have actually seen the content. Therefore, the following formula (Figure 17) is proposed, calculating the percentage of actual users who see the content and also interact with it:

\[
\text{Interaction Rate} = \frac{\text{Number of interactions (unique)}}{\text{Reached users (unique)}}
\]

**Figure 17: Interaction rate formula.**

---

270 Campaigns are available for some of the platforms, for instance Facebook (sponsored posts, ads), Twitter (promoted tweets) and Pinterest (promoted pins).
The following graph (Figure 18) represents these three metrics. The size of the circles will vary depending on the community size, type of reach and finally, the degree of interaction with the posted content.

![Diagram representing the community size, reach and interaction](image.png)

**Figure 18: Diagram representing the community size, reach and interaction. Figure created by author.**

However, as we will see in the next sections, it is not always possible to put this theory into practice as social media analytics tools do not always provide these exact metrics. While the ideal scenario would be to apply the formula above, for this exercise it will be adjusted in the interaction analysis of each platform.

### 4.4.2. Social media community

The number of users in an online community, in this case study the number of Twitter followers and the number of Facebook likes, are metrics that organisations normally measure and report internally and, in some cases, externally, to their funders and sponsors. Although knowing the size of the community is useful to a certain degree, this number tells us little about the conversations and the actual level of engagement on social media. The analysis, therefore, needs to go beyond this simple count of users. Moreover, as seen in Chapter 2, not all of the platforms work in the same way and in some cases such as Pinterest, the consumption of content is based on interests or followed topics instead of following specific organisations. The following two figures show the number of Facebook likes (Figure 19) and Twitter followers (Figure 20) of the organisations that participated in the project at the end of 2012. The organisations received this information in an interactive chart which allowed them to select and
compare their data with similar organisations. The graph also included the growth trend for the whole year and the percentage of growth compared to the previous year (see all charts produced in Appendix 2).

![Figure 19: Number of Facebook likes (December 2012).](image1)

![Figure 20: Number of Twitter followers (December 2012).](image2)

### 4.4.3. Social media reach and interaction

In order to dig deeper and get a better understanding of the level of engagement we can measure, for instance, clicks on a link to a blog post, shares of a photo or comments on the information posted about a particular exhibition or collection object. For the Facebook analysis the following interaction rate formula (Figure 21) was applied, where ‘people talking about this’ is defined on Facebook as the number of unique
people who created a story by interacting with your page post (unique users). According to Facebook’s definition, stories include: sharing, liking or commenting on a post, answering a question, responding to an event and claiming an offer. The analysis included the interaction rate of 9,725 posts from the organisations in the group in 2012.

\[
\text{Facebook Interaction} = \frac{\text{People talking about this}}{\text{Reached users}}
\]

Figure 21: Facebook interaction rate formula.

![Facebook Interaction Rate Chart]

Figure 22: Interaction rate of organisation’s Facebook posts in 2012.

The breakdown of the type of interactions was obtained for this study from Facebook Insights. As can be seen from Figure 23, the interaction distribution shows that 76% of these actions are likes, which is the easiest type of interaction, while shares and comments account for 15% and 9% respectively. This type of breakdown is interesting to compare with the degree of participation of users on social media and the different levels of effort which implies each of the types of interactions discussed in Chapter 2.

\[271\] ‘Facebook Help Center: Page Post Metrics.’
The analysis of the interaction was calculated by content type and the results presented in the chart below (Figure 24) clearly show that images on posts and photo albums are popular on Facebook and bring a higher interaction rate than other types of post. This analysis demonstrated to the participants the relevance of the type of content posted on these platforms and they commented on how this finding may influence future work:

Photographs seem to be very popular content on Facebook, but it’s particularly interesting that the photographs that had the greatest impact were not official press shots, but fun shots taken by, and often of, colleagues. There is perhaps some interest in getting more of an insight into the people and the work backstage at Warwick Arts Centre amongst our Facebook fans.  

Comment on the Warwick Arts Centre’s Social Media Metrics Questionnaire, May 2013.
In the case of Twitter the interaction rate formula would ideally count all the possible actions available in response to a tweet (retweets, replies, favourites, shares via email or embeds) divided by the number of users reached. However, this data was not easy to track and when this research was carried out, only the organisations that ran paid campaigns had access to Twitter Analytics. Therefore, for the benchmarking of the Twitter activity this research only examined the virality of content, as this information was publicly available for all participating organisations. This was calculated using the following formula (Figure 25):

\[
\text{Virality rate} = \frac{\text{Number of retweets}}{\text{Number of followers}}
\]

**Figure 25: Virality rate formula.**

At the time of this analysis, the major limitation of Twitter was that it did not provide information on impressions or actual reached users. Using followers instead of users reached has an impact on the results, as the number of followers may include inactive or spam users. The analysis included 8,135 tweets (excluding retweets) posted by the organisations from September to December 2012 and the results are shown in Figure 26.

**Figure 26: Twitter metrics: followers, retweets and virality rate (September - December 2012).**
The interaction and virality rates were metrics that were very positively received by the group. These are the metrics that can help to monitor and evaluate the most and least successful posts, allowing organisations to dig deeper into the results and to understand which types of content drive a higher level of engagement. The organisations were provided with the top 10 most shared tweets during this period. This list provided a context for the results and helped to identify the type of content users were more willing to share. Individual analysis of the most successful posts helped to determine the factors that influenced these results, such as calls to action, tone or use of hashtags. Several organisations reflected on the questionnaire on the usefulness of this type of analysis. For the National Museums of Scotland, this analysis showed the impact of some specific types of posts such as prize giveaways and the tone of the tweets:

Seven of our top ten tweets were to do with prize giveaways so a call to action seems to be a key factor. Nine of the ten top tweets make use of a hashtag, either self-generated or joining in with other tags in use. Tweets that are light-hearted/quirky in tone seem to carry well – exclamation marks, use of informal language.²⁷³

![Twitter post by National Museums Scotland](https://twitter.com/NtlMuseumsScot/status/255968854210125825)

**Figure 27:** Twitter post by National Museums Scotland with a high virality rate. National Museums Scotland, Twitter Post, October 10, 2012, [https://twitter.com/NtlMuseumsScot/status/255968854210125825](https://twitter.com/NtlMuseumsScot/status/255968854210125825).

In the case of the Warwick Arts Centre, the top 10 tweet analysis also highlighted the importance of the tone of the message and although Twitter was not generating direct sales, social media could bring future benefits to the centre. In the words of the team:

²⁷³ Comment on National Museums Scotland’s Social Media Metrics Questionnaire, May 2013.
The content from Lyn Gardner that generated the most retweets was arts-focused, but not specifically related to Warwick Arts Centre. It may therefore be worth exploring more content that places Warwick Arts Centre in the conversational role - engaging with our audiences as peers with common interests rather than broadcasting marketing messages. Because Twitter generates a relatively low amount of traffic towards our website, such a paradigm shift is unlikely to negatively affect ticket sales and engagement, and could potentially help nurture the organisation’s online voice and reputation to our long-term benefit.  

Figure 28: Twitter post by the Warwick Arts Centre with a high number of retweets compared to the average. Warwick Arts Centre, Twitter Post, September 19, 2012, https://twitter.com/warwickarts/status/2484418425078584.

A third example of successful tweets and the factors that contribute to a high interaction rate came from the analysis by the Science Museum:

Comment on the Warwick Arts Centre’s Social Media Metrics Questionnaire, May 2013.
The top tweets are to do with Ada Lovelace and her birthday, a tweet on Christmas day about Sir Isaac Newton and also a reminder about the Geminid meteor shower. This is positive to see because it is still our content and relevance to contemporary science that our audience engage with.\textsuperscript{275}

\begin{figure}[h]
\centering
\includegraphics[width=\textwidth]{tweet.png}
\end{figure}

An interesting finding of this research on the topic of how museums and cultural organisations use social media to generate interaction was the usage of the specific features of each platform; for instance, hashtags on Twitter. The word cloud below (Figure 30) shows the range of hashtags used in tweets during the analysis period. We can see how organisations make use of their own hashtags for different topics such as exhibitions (e.g. #HollywoodCostume, #TurnerPrize) or a series of tweets (e.g. BMAAdventCalendar, #ScotPortrait, #LunchtimeReading, #SpookyShakespeare) but also join initiatives such as #Askacurator or the use of generic hashtags such as #FF, #Halloween, #Movember. In the final group discussion some participants commented on their interest in measuring the impact of the use of hashtags to create conversations and to reach other users beyond their profile feed activity, as hashtags are also promoted on the website and during the physical visit to the venue. This implies, as mentioned in Chapter 2, how relevant it is for the evaluation framework to include measures that capture what happens on the profile or page of the organisation, but also

\textsuperscript{275} Comment on the Science Museum’s Social Media Metrics Questionnaire, May 2013.
what users are saying about the organisation on their own channels, in this case for instance, how users include these hashtags and what they say on those posts.

Figure 30: Word cloud of the hashtags used in tweets (September - December 2012).

In summary, these results indicate that interaction and virality rates are a useful means of evaluating which social media posts users like to engage with. These rates can help to monitor and evaluate the success of social media posts, and represent useful measures when understanding what type of content drives higher engagement.

Analysing the tweets and posts with higher interaction and also those creating peaks in traffic to the website was valued highly by the group as it provided further insights into the most successful activities based on these metrics. This was one of the main learning outcomes expressed by one of the organisations:

The interaction rates are very interesting as they tell a different story from the basic visit data, a story that we need to understand more. Interaction rates could have an effect on how we structure posts in the future and more broadly, we need to consider a more strategic approach to social media activity.

However, other participants argued that these quantitative metrics are limited when it comes to capturing the total value of social media as commented on by one of the participants:

Qualitative information is something we still need to work on capturing. The numbers are useful and sometimes revealing in themselves, but this needs to be
hooked up to a deeper understanding of why we see different kinds of behaviour on different social media channels, and in order to understand that we need to work out the right questions to ask.

A further analysis during the fieldwork dug into the qualitative aspect of the interactions and tested how to link these metrics to the strategic objectives. This part of the research sought to examine, on the one hand, how museums are using social media by looking closer at the message, objectives and the type of activity and on the other, it linked this activity to the degree of interaction, while examining user’s comments and analysing the type of responses generated, their depth and sentiment. Due to the time intensity of this task, this research was carried out by tracking the Facebook activity of a sample of eight museums and galleries during one month (November 2012), featuring a total of 220 posts and 867 comments (Table 3).

<table>
<thead>
<tr>
<th>Museum</th>
<th>Number of comments</th>
<th>Number of posts</th>
</tr>
</thead>
<tbody>
<tr>
<td>Birmingham Museum and Art Gallery</td>
<td>84</td>
<td>52</td>
</tr>
<tr>
<td>Museum of London</td>
<td>18</td>
<td>51</td>
</tr>
<tr>
<td>National Galleries of Scotland</td>
<td>43</td>
<td>29</td>
</tr>
<tr>
<td>National Museums Scotland</td>
<td>59</td>
<td>18</td>
</tr>
<tr>
<td>Tate*</td>
<td>531</td>
<td>20</td>
</tr>
<tr>
<td>The Photographers’ Gallery</td>
<td>3</td>
<td>10</td>
</tr>
<tr>
<td>Victoria and Albert Museum*</td>
<td>91</td>
<td>15</td>
</tr>
<tr>
<td>Wellcome Collection</td>
<td>38</td>
<td>25</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>867</strong></td>
<td><strong>220</strong></td>
</tr>
</tbody>
</table>

*Table 3: Facebook data analysed (November 2012). (*Due to the high volume of comments, the numbers analysed for the V&A and Tate comprised one week of data)*

The posts and comments were coded into different categories using content analysis (see coding scheme in Figure 31 and Figure 32). The categories were defined based on the museums’ strategic objectives for social media and the actual activity on Facebook. The post-coding scheme records the primary objective of the post, as well as the type of activity created by the museum. Regarding comments, the categories were created after a first examination of the data and modified as coding was completed. Some of these categories enabled the transformation of the posts and comments into numbers and
percentages, but others also provided the opportunity to code the text by themes or sentiment in order to understand the user’s perceptions and feelings in response to the post, expressed through words or emotions.

Figure 31: Coding scheme for the Facebook posts.

Figure 32: Coding scheme for the user comments on Facebook.

The following charts (Figure 33, Figure 34 and Figure 35) show the result of this qualitative analysis. It is apparent from these graphs that social media is clearly used by museums as a marketing tool, as 66% of the posts included the promotion of exhibitions, events or products such as shop items or membership subscriptions. Only 13% of the posts analysed were using Facebook solely for engagement, creating posts such as glimpses behind the scenes or topical conversations not directly linked to the promotion of an exhibition or collection object on display. The results show a more or less mixed message approach depending on the museum. This data also provides interesting information on the different ways of promoting the museum programme, which takes advantage of the medium and is regularly achieved with a more informal and conversational voice. In fact, the analysis of the type of activity showed the importance of content, such as blogs, videos or articles in promoting the programme, providing further context to the collection objects and serving as a way to engage with users.
Figure 33: Facebook posts categorised by objective (November 2012).

Figure 34: Facebook posts categorised by objective and organisation (November 2012).
The final part of this review was to analyse the interaction rate of these posts based on the objective and type of activity. The results below (in Figure 36 and Figure 37) are quite revealing as they demonstrate that when the museum creates more engaging activities and links to content, the interaction rate is higher. It is worth noting how much higher the interaction with a post on Facebook is when it includes an image, as is clearly shown from the posts about collection objects which, for the most part, feature an image. By linking the interaction to specific posts and reading the comments we can see how the tone and type of content strongly influences the level of interaction.
Looking in more detail at the quality and content of the user comments in response to the posts on Facebook allowed the researcher to understand the interaction generated from a qualitative perspective (Figure 38). The results obtained from the analysis of the type of comments show that 59% of the users expressed their opinion or emotions about the posted content; for example, how much they liked an artwork, how their experience visiting a particular exhibition was or their feelings while watching a video. Sentiment analysis can be applied to this type of opinionated comment to understand what people think about the organisation, the exhibition programme or the specific posted content. Regarding more conversational responses, 23% of the comments represent a direct interaction with the museum, in most cases in response to a question or debate posted by the museum. The analysis of the comments also highlights the importance of the museum’s presence on social media in responding to users’ questions about visiting hours, works on display or exhibition dates. Another use of comments function as a social space was identified in the examination of the comments, as 2% of the users were tagging their friends in their comments to share the museum’s content, recommending it or proposing, for example, a plan to visit an exhibition.
Another metric explored during the fieldwork and that could help to measure the depth of the engagement is the length of the comments. The histogram below (Figure 39) shows the distribution of the length of comments measured by the number of words. Approximately half of the comments analysed comprise less than five words and the average is nine, a figure regarded by the group during the discussion as a very light engagement.
Overall, this part of the fieldwork was an experiment carried out to test data analysis methods combining quantitative and qualitative metrics, assessing the information available and the social media analytic tools as well as testing a range of metrics with the data of these cultural organisations. Although this study was based on a small sample of participants, the findings demonstrated that the type of post and content used on social media influences the level of engagement. This exercise was very highly valued by the group as it drills down into the type and degree of interaction compared to a mere count of numbers. The creation of a coding scheme that could work for eight museums gave rise to some difficulties in defining standard categories. A coding scheme can be developed based on the specific museum objectives with the aim of measuring the impact of different types of activities. The main drawback is that this exercise is extremely time-consuming as content analysis and sentiment analysis are difficult to automate. In conclusion, while the benchmark of data provides insights into trends, a more in-depth analysis of the results of a sample of posts will greatly increase the understanding of which are the most and least successful activities to accomplish the strategic objectives.

4.4.4. Social media as a referral to the website

As previously discussed in the strategic review at the beginning of this chapter, driving traffic to the online content is one of the main objectives. Moreover, a common usage that emerged during the qualitative analysis of the type of Facebook posts was also the distribution of blogs, videos, games or articles available on the organisation’s website. Thus, the part of the analysis presented in this section aimed to explore the impact that social media has on the website in terms of the volume of visits and to understand user behaviour on the website compared to other traffic sources. For this purpose, a dashboard was created by the author on Google Analytics for each of the organisations and the template was shared with the participants. Figure 100 in Appendix 2 provides an example of the Google Analytics dashboard which includes the

---

276 This link was shared with the project participants. When opened, it allows the user to import this dashboard to the Google Analytics account of any organisation. The dashboard will be automatically updated with the web analytics data of that account:
https://www.google.com/analytics/web/template?uid=HKFxLRq1SkiF4K-6xDNA
following metrics related to social media: volume of visits, the percentage of traffic compared to other sources, traffic by device, the top ten most visited pages from social media, average number of pages per visit, visits by platform, usage of social media buttons on the site and revenue generated from direct traffic coming from these platforms.

In 2012, traffic to the organisation’s website from social media represented, on average, 5% of the total (Figure 40). The only notable exception was REcreative which had a high percentage as it was a new project that needed to create and establish its brand presence and focused primarily on young people. The first ‘Let’s Get Real’ report also included data from different sources and these numbers showed again, one year later, that the volume of traffic from social media is quite low compared to organic search traffic.

![Figure 40: Percentage of website traffic from social media (2012).](image)

Organisations were also able to see the daily traffic from Facebook and Twitter using the shared dashboard document and to identify peaks in traffic, which brought very interesting findings about the most successful posts and tweets. This analysis led to the discovery of some interesting stories of how the content had been shared by users. While the number of visits from the most shared links normally came from the organisations’ own social media channels and pertained to subjects such as exhibitions, big events and job advertisements, other content shared by users outside those sources also brought a significant volume of visits. This can be seen in the case of the Warwick Arts Centre which discovered that some popular pages included student-run events and volunteer opportunities, in which students acted as advocates sharing content on their
own networks and generating a great amount of traffic. The Science Museum discovered that a link from StumbleUpon brought an enormous amount of traffic to an old game called *Cracker and Tate*, and detected that almost every week one of the most watched videos on their website came from a screen capture that had gone viral on Pinterest.

The Google Analytics reports run for this study also allowed the researcher to delve into more detail and to understand the online behaviour of the different traffic sources. The most striking result that emerged from this data is that among the most commonly used platforms, Facebook and Twitter have a higher bounce rate\(^{277}\) and a lower average time on site than other traffic sources (Figure 41 and Figure 42). Users from social media mostly arrive directly at the content, the final destination, and a broad exploration of the site does not follow beyond this landing page. This fact raised a discussion within the group about whether or not some changes could be made in order to keep these users navigating on the website or, on the contrary, this was just the way users from these two platforms preferred to consume the content and therefore, immediately after viewing it, they would normally return to their social media site to continue reading their feeds. Interestingly, the percentage of returning visits from Facebook and Twitter is higher than from other social media sites, which evidences the fact that there are users who follow the organisation and regularly engage with it and with its website.

---

\(^{277}\) The bounce rate, according to Google’s definition, is the percentage of users who only visit one page on a website and then leave. ‘Google Analytics Help Center: Bounce Rate,’ Google, accessed August 31, 2015, https://support.google.com/analytics/answer/1009409?hl=en.
Figure 42: Average pages per visit and average visit duration by traffic source (2012).

Figure 43: Percentages of new and returning visitors by traffic source (2012).

Another objective that is linked to website traffic is the conversion in monetary terms. For some organisations, one of the objectives was to drive up sales for exhibition tickets or shop products among others. As not all of the organisations had ecommerce activities or the analytics settings to track traffic across subdomains, this part of the analysis was based on the few responses given regarding this aspect. Social media was not a significant direct source for sales since it represented a small percentage compared to other sources. However, social media may be part of the conversion process. Publications from Google show that social media acts more as an assistive channel
which creates awareness and builds intention in the customer journey.\textsuperscript{278} This can be analysed using the multichannel reports on Google Analytics. Nevertheless, there are some limitations as to what can be measured, as some users may find information about a particular exhibition on social media and then decide to buy the ticket at the venue. It is thus more complicated to track visits to the venue resulting from social media activity when there is no transaction involved, so its measurement needs to be complemented with on-site research methods, such as surveys.

4.5. A ‘Social Media Evaluation Framework’

As pointed out in the strategic review undertaken during the project, organisations have different objectives when it comes to using social media and although some of them overlap, it is important for the definition of the evaluation framework to select those metrics that will serve to measure the achievement of the specific objectives. In addition, the interviews and qualitative analysis of the type of activities undertaken on social media from a sample of museums that participated in the project emphasised this point. Moreover, each organisation also has its own target audiences or multiple accounts on social media, each with different objectives.

A ‘Social Media Evaluation Framework’ (Figure 44) was proposed by the author at the end of the project based on this field research and on the feedback gathered from the group as part of the benchmark exercise and through the application of a range of metrics. As mentioned earlier in this chapter, choosing the right metrics and methodologies is one of the main challenges for organisations seeking to analyse the social media behaviours of audiences against their various organisational goals. The lack of a definition for standard metrics represents an obstacle for social media teams in demonstrating the value of their activities and for senior management in understanding the results and making decisions based on this data. Furthermore, choosing the right set of tools to report the data represents another immense difficulty, as data needs to be collected from different sources and again, each tool has its own metric definitions. The

Social Media Evaluation Framework offers a way to navigate these obstacles by summarising the relevant social media measurement methodologies, metrics and tools that organisations may consider using and relating to their organisational goals.

The Social Media Evaluation Framework lists six main social media strategic themes at the top, the same as those discussed at the beginning of the chapter: community, brand, marketing and communication, interaction, content and visitor services. These represent the kinds of broad organisational objectives identified during the fieldwork that may relate to the usage of social media. Under each of these themes there are examples of standard performance indicators (e.g. message reach, interaction rate, revenue, satisfaction) that illustrate what to measure in relation to a specific theme. Further information is then supplied as to how to measure these indicators via details of the data source and data capture methods utilised. The formula and reporting frequency needs to be defined for each individual metric and finally, a tool to collect, analyse and report this data needs to be selected. This is a guide to framing the objectives and selecting metrics but not a definitive list of social media metrics. Since there are many different social media strategies, the success of each should be measured with a different set of metrics.
Figure 44: A ‘Social Media Evaluation Framework’, Elena Villaespesa (2013).

4.6. Conclusion

The fieldwork carried out for this thesis as part of the ‘Let’s Get Real’ project allowed for an in-depth investigation into how cultural organisations and museums in the UK use social media and, crucially for this thesis, what metrics they currently use to evaluate the success of these activities. Although all the organisations that took part in

---

279 This ‘Social Media Evaluation Framework’ was presented by the author in Chapter 9 of the project report ‘Let’s Get Real 2: A Journey towards Understanding and Measuring Digital Engagement,’ 37.
the study had a profile on social media, the degree and maturity of the definition of strategic objectives varied across the group. Most of the venues had a strategy, policy or working document but when their objectives were investigated in detail, it was found that they were not specific and did not have clear target audiences. Therefore, looking forward to the next part of this thesis, the most crucial factor in implementing a performance measurement framework is to have clearly defined objectives, something which evidently was not yet the case for the majority of museums involved in the study. Another missing strategic element is that organisations did not have defined key performance indicators and targets to measure and evaluate their activities. All the organisations were counting the number of followers on social media and some of them had started to look at interaction numbers but these figures were, in most cases, not normalised based on actual reach and they were normally analysed in isolation without looking at trends or linking to the objectives. The findings of the fieldwork also suggest that in general, although organisations claim to use these platforms to engage and interact with users, their actual main goal on social media, particularly on sites such as Facebook or Twitter, is to promote exhibitions or events. These cultural organisations and museums were not, on the whole, using social media strategically. And yet, as demonstrated by the qualitative analysis performed in the study, when social media is used in a more informal and engaging way the interaction results tend to be higher.

The social media metrics review enhanced the understanding of user behaviour on these platforms. With the growth of image-based platforms such as Instagram or Pinterest, visual content is playing an increasingly key role in engaging users on social media platforms. The analysis of interaction by type of posts identified that the presence of imagery in the group’s social media posts significantly impacted on their popularity. The metrics also showed how social media traffic brings quick visits to the organisations’ websites in comparison to other traffic sources and also how user engagement occurs outside of the organisation’s channels. Brand mentions and conversations around a hashtag occur beyond the organisation’s own wall or feed. These are activities initiated by the users and not by the organisation. Understanding how content is distributed across social media, beyond the usual organisational channels, gives a true indication of its relevance. Therefore, finding these stories and tracking and analysing their reach helps to better demonstrate how valuable this content is to audiences.
This study raises important discussions about which types of metrics are more relevant in capturing the impact of social media and which should be included in an evaluation framework. Quantitative metrics do not tell the full story; numbers tell what is happening but not why. Adding qualitative metrics to the measurement mix will provide a different perspective with which to analyse social media behaviours by adding context to the numbers. A more in-depth qualitative analysis of a sample of social media posts and their interactions can significantly help organisations to increase their awareness of which activities are working best in engaging with their audiences, rather than simply drawing on numbers. As this type of analysis can be very time-consuming, the best way to narrow it down is by selecting a sample of messages on social media or from a single campaign, marking their objectives, categorising the different types of activities and finally, measuring the most helpful metrics.

These findings have crucial implications in defining the best way to measure the success of social media activities. The most relevant outcome of this collaboration during the ‘Let’s Get Real’ project was an attempt to define a Social Media Evaluation Framework. This framework summarises the relevant social media measurement methodologies, metrics and tools that organisations should consider using when investigating social media behaviours and relating them to the main strategic themes and goals that were identified. The existing variety of strategic objectives demonstrated the need to customise the framework for each organisation – which will be the focus of Chapters 6 and 7.
Chapter 5: The Museum Social Media Measurement Framework

5.1. Introduction

The preceding chapters mapped the requirements that the performance measurement framework developed in this research needed to fulfil. Chapter 2 reviewed the characteristics of social media, listed the opportunities and challenges for organisations in operating in this environment and explored through published materials and online examples how museums are using social media. It was noted, in particular, how museums are taking advantage of these platforms to create participatory experiences from different museum functions including learning, marketing, research and curatorial practices among others. Chapter 3 then focused on understanding the culture and practice of museum evaluation by exploring key concept definitions in this area and by discussing the methods employed. This chapter also outlined the evidence-based model existing in the UK and included information on how museums currently need to justify their funding and which performance indicators are needed to report to the funders in relation to their digital activities. Chapter 4 then delved deeper into this topic by analysing the strategies implemented by museums and cultural organisations specifically in relation to the usage of social media. An original study (carried out by the author as part of the national ‘Let’s Get Real’ project) benchmarked the activities of a sample group of museums, and tested the usefulness of different types of metrics for assessing the success of those social media activities.

Crucially, the study identified six key strategic themes in the usage of social media (community, brand, marketing and communications, interaction, content and visitor services) but indicated that museums and cultural organisations were still maturing in the implementation and measurement of their social media strategies. In the last section of the chapter, a Social Media Evaluation Framework was presented with immediate practical applications. However, the framework’s major limitation is that it only includes metrics and methods to measure the external impact of social media. As discussed during this project and also pointed out in Chapter 2, social media has triggered significant internal changes within the organisations which need to be
captured in the value creation chain. It is also important to note that another weakness of this framework is the lack of a solid theoretical basis.

Drawing upon the groundwork and findings of these preceding discussions, the present chapter now attempts to define a performance measurement framework which can help museums to define the set of measures and tools required to evaluate the impact and value of their social media activities. For that purpose, this chapter will analyse different frameworks from the field of business studies with the aim of assessing which works best in this particular scenario. The literature review includes the theory of these frameworks and also their practice; that is to say, how some of these frameworks have been implemented in profit and non-profit organisations. This is a very important step in order to assess their potential applicability to museums’ activities on social media. Based on this review, the ultimate goal will be to select and define a framework that enables museums to establish a set of measures capable of evaluating their success on social media.

5.2. Performance measurement

5.2.1. Definitions

The field of performance measurement has been applied to different disciplines, including accounting, economics, human resources, marketing, operations, psychology and sociology among others.280 There has been a great interest in this subject from both academics and practitioners, especially since the mid-nineties. According to the citation analysis carried out by Neely, among the 1,352 papers that contained the words ‘performance measurement’, 84% were written in an exponential way since 1995.281 Besides the high volume of publications, there are only a few authors that are consistently cited in the literature,282 and therefore, despite the substantial amount of published materials on this topic, only a limited number of models have been developed

282 Ibid., 1269.
and applied in organisations. The citations review conducted by Marr and Schiuma concluded that the authors who clearly dominate the field of performance measurement are Kaplan, Norton and Neely.283

In the literature we can find various definitions of what performance measurement is. One of the most cited publications is that of Neely, who states that performance measurement is the ‘process of quantifying the efficiency and/or effectiveness of past activities’.284 In consequence, a performance measuring system is that which ‘enables informed decisions to be made and actions to be taken because it quantifies the efficiency and effectiveness of past actions through acquisition, collation, sorting, analysis, interpretation, and dissemination of appropriate data’.285 Moullin criticises this definition, arguing that it does not include what an organisation should measure and the reasons for doing so.286 Moullin defines performance measurement as ‘evaluating how well organisations are managed and the value they deliver for customers and other stakeholders’.287 Elg and Kollberg include in their definition an articulation of the end goal of performance measurement as the ‘process of collecting, computing and presenting quantified constructs for the managerial purposes of following up, monitoring, and improving organisational performance’.288 In a paper seeking a definition of the term, Lebas describes a ‘performing business’ as ‘one that will achieve the objectives set by the managing coalition’,289 and therefore in this case, the measures require a comparison with the organisation’s goals in order to interpret the data and determine the results and insights. Along this line of placing the strategy as the starting

285 Ibid., 5–6.
and continuous reference point in the performance measurement process, it is highly likely that more definitions will appear in the literature. In a more recent definition, Bititci, Carrie and McDevitt explain that this is the ‘process by which the company manages its performance in line with its corporate and functional strategies and objectives’. As we will see in the evolution of the frameworks outlined in the next section, as a result of the context of usage and evaluation needs, the field has moved from measuring the effectiveness of production towards measuring the accomplishments of strategic goals and capturing the value created for the users and stakeholders. Therefore, performance measurement is the process of monitoring how the organisation is achieving its objectives and also determining the impact and value of their results.

5.2.2. Performance measurement frameworks

Organisations have evaluated their performance during decades based on financial measures. The ‘Du Pont pyramid’ of financial ratios developed in the 1920s is a common reference when it comes to assessing financial performance. Based on accounting systems, this pyramid organises ratios obtained from the balance sheet in a hierarchical structure to finally obtain the Return on Investment (ROI). The concept of this model had a great impact and it was applied for decades. It was not until the 1970-1980s that other financial frameworks emerged. The new models proposed other financial measures such as economic value added (EVA), earnings per share (EPS), cash-flow and activity-based costing (ABC).

These models, based on financial measures, were valid during the industrial age when productivity and mass production were the means of competing in the market.

---

However, in the information age other factors became more relevant and since the end of the 1980s, these models have been criticised for not taking into account other variables that may determine organisational success. The financial measures only indicate the results of past activities, but they do not make any prediction of future success or failure. As a consequence, in the 1980s and especially in the 1990s, different frameworks were developed combining both financial and non-financial measures. The latter were aimed to measure intangible assets such as employee motivation, customer loyalty, process capabilities or innovation. These multidimensional frameworks measure how organisations are working towards their strategic goals, combining both quantitative and qualitative measures, and taking into account different stakeholders’ interests.

One of the first frameworks was the performance measurement matrix, elaborated by Eiler and Keegan in 1989. It included measures classified into two different typologies, non-cost or costs and internal or external (Figure 45).

Two years later, a new framework by Lynch and Cross called the ‘Strategic Measurement and Reporting Technique’ (SMART) was developed, also known as the performance pyramid. It continues with the separation of internal measures, which are represented on the right of the pyramid, and external measures on the left. These are

---


represented from a hierarchical point of view, from the individuals to the departments, to, finally, business units. The different cells of the pyramid represent the type of performance measures. At the top of the pyramid, the market and financial measures are displayed to offer an overall view of the organisation’s performance (Figure 46).\textsuperscript{295}

![Figure 46: The SMART pyramid, Richard L. Lynch and Kelvin F. Cross (1991).](image)

In the same year, Fitzgerald \textit{et al.} proposed the ‘Results-Determinants framework’ which classifies the measures into two categories: results, for which the dimensions of measurement are financial performance and competitiveness, and determinants, which include quality, flexibility, resource utilisation and innovation. According to this framework, the results depend on past performance and they are linked to specific determinants.\textsuperscript{296} This cause-effect relationship was the key contribution of this framework.

A sequential process-based measurement framework was developed by Brown in 1996. His ‘Macro Process Model’ of an organisation classifies the metrics into four types: input, process, outputs and outcomes (Figure 47).\textsuperscript{297} Similar to the previous model that attempts to find out the determinants of an organisation’s results, Brown presents a model that measures operations and processes, affirming that good performance in these


production steps results in the desired products or services. The main outcome measures are related to customer satisfaction, for which the author proposes to include a mixture of what he calls hard and soft metrics including, for example, market share and repeat customers in the first category and opinions, feelings or perceptions in the second.  

![Macro Process Model](image)

**Figure 47: ‘Macro Process Model’, Mark G. Brown (1996).**

These four frameworks made a clear point as to what the field wanted to evolve into, as financial measures alone were not enough to assess the real performance of an organisation and, therefore, other types of measures were needed. The frameworks analysed so far in this paper aim to help organisations to build their performance measuring system. There are other kinds of frameworks developed during the same time period for organisations to self-assess their results and measure overall excellence. These frameworks come from awards such as the European Foundation for Quality Management (EFQM) Excellence Model launched in 1988 and the Malcolm Baldrige National Quality Award launched in 1987. To be eligible to participate, organisations need to submit the results of a self-assessment process. Following this step, there is an expert review and an audit of the veracity of the results. Finally, an award is given to the organisation with a performance measurement system in place that ensures

---


continuous improvement and customer and stakeholder satisfaction. The EFQM Excellence Model is a self-assessment and continuous improvement model based on nine elements classified in two criteria: enabler, which represents those elements that an organisation can modify and results, which are those that the organisation achieves. The Malcolm Baldrige National Quality Award is a US award based on the following criteria: leadership, strategic planning, customer focus; measurement, analysis and knowledge management; workforce focus; operations focus; and results.

What is now the most popular framework, the ‘Balanced Scorecard’, also emerged during the nineties, and had a great impact on the field and on how organisations measure their success. The Balanced Scorecard developed by Kaplan and Norton was presented in the *Harvard Business Review* in 1992. A series of articles in the same publication followed, becoming the most cited papers in the field of performance measurement. As the authors define it, the Balanced Scorecard ‘translates an organization’s mission and strategy into a comprehensive set of performance measures that provides the framework for a strategic measurement and management system’. The Balanced Scorecard measures performance towards the organisation’s strategic mission and goals from four perspectives: financial; internal business processes; learning and growth; and customer. As shown in Figure 48, each perspective of the Balanced Scorecard includes objectives, measures and targets that need to be directly linked to the initiatives carried out by the organisation in each of these particular areas.

---


From the financial perspective, an organisation needs to respond to this question: ‘How are we regarded by the shareholders?’ The measures proposed are normally related to the profitability of the organisation, for instance, ROI and EVA. As mentioned before, the financial perspective measures the economic impact of past actions; therefore, the organisation also needs to be able to respond to questions from other perspectives. The question behind the second perspective, internal business processes, is as follows: ‘What are the processes that the organisation must excel at?’ From this perspective, organisations need to identify which are those critical processes that will make them achieve their customer and financial objectives and will position them as market leaders. In order to establish these internal measures, Kaplan and Norton recommend the definition of the internal-process value chain, in which the different production steps are represented and measures for each step are defined. These steps follow the sequential chain to place a product or service on the market, from innovation process,

\[\text{Ibid.},\ 47–62.\]

\[\text{Ibid.},\ 92–125.\]

Figure 48: The Balanced Scorecard, Robert S. Kaplan and David P. Norton (1996).
operation process and post-sale activities. The Balanced Scorecard affords special importance to the innovation process by enforcing the idea that investing in research and development will determine the organisation’s competitive advantage, empowering it to create products or services that will satisfy future customers’ needs before its competitors. Some measures for the results of the innovation process are, for instance, percentage of sales from new products, new product introduction versus competitors’ or time to develop next-generation products. Operation process measurement also remains very important as the company needs to assess if the production and delivery of products or services are achieving their goals, mainly in terms of quality, productivity, cost and time.\textsuperscript{307} From the internal perspective, organisations also need to identify those measures that will help them to continue to improve and create value for their customers and they are captured under the learning and growth perspective. The Balanced Scorecard proposes different measures that will solve the short-term problem of previous models, particularly of the aforementioned financial frameworks. Including measures from this perspective will allow the company to develop the ability to look into future scenarios. The starting point proposed by Kaplan and Norton is to establish measures from three main categories: employee capabilities, information systems and motivation, empowerment and alignment with the organisation’s strategy. Based on their experience implementing the Balanced Scorecard, Kaplan and Norton observed that although these measures were ignored by many organisations, they were very important and had a big impact on the future of any organisation.\textsuperscript{308}

For an organisation to be successful, its products or services need to create value for their customers. The financial performance of an organisation is directly related to this perspective because without satisfied customers, the organisation will not be sustainable in the market. The more valued the products are, the higher the financial performance will be. The question behind the measures which arise from this fourth perspective, customers, is how the organisation should appear to them.\textsuperscript{309} From the customer perspective, the organisation needs to translate the mission and strategy statements into specific market and customer-based objectives. The segmentation of customers in the

\textsuperscript{307} Ibid.
\textsuperscript{308} Ibid., 126–146.
\textsuperscript{309} Ibid., 63–91.
market and the identification of the targeted customer groups are essential in order to define the performance measures.\textsuperscript{310} In summary, the Balanced Scorecard should identify the customer objectives in each targeted segment to set up the corresponding measures that will allow performance to be evaluated for each segment. Segmentation and market differentiation can be carried out based on different criteria, such as price, reputation or quality.\textsuperscript{311}

The Balanced Scorecard proposes two types of measures from the customer perspective. The first type, the core outcome measures, is applicable to most organisations, regardless of the nature of their business activity. These are, for example, customer share, retention, acquisition, satisfaction and profitability.\textsuperscript{312} The second set of measures are those performance drivers of customer outcomes which capture the value propositions that the organisation tries to offer to customers. These objectives and measures that create value for the customer derive from three types of attributes: the functionality, quality and price of its products or services, the relationship with the customer and the intangible factors that attract a customer to an organisation, such as image and reputation.\textsuperscript{313}

In conclusion, the Balanced Scorecard measures how the organisation has performed through financial metrics and will help to predict future performance through operational and customer measures. It includes both quantitative and qualitative metrics and analyses the company from an internal and external perspective. One of the reasons for the success of the Balanced Scorecard is that it has been used, not only as a measurement system, but also as a management system, implemented for the purposes of strategy definition to performance measurement.\textsuperscript{314}

Although the Balanced Scorecard was originally developed for the business sector, different authors have attempted to apply it to the non-profit sector. To this end,

\textsuperscript{310} Ibid., 64.
\textsuperscript{311} Ibid.
\textsuperscript{312} Ibid., 67–73.
\textsuperscript{313} Ibid., 73–77.
Zimmerman adjusted the Balanced Scorecard for the non-profit sector defining the following categories: revenue and funding, resource allocation, product and service recipients, donors and board members, internal operations and staff development.  

The authors of the Balanced Scorecard dedicated a section of their book to explaining how the framework can be applied to government and non-profit organisations. They highlighted that the success of this type of organisations is not to obtain profits or stay on budget, but to ‘effectively and efficiently meet the needs of their constituencies’, which is their primary mission. As a result, measures should be defined to evaluate whether their mission objectives have been achieved. A few years later, in 2001, Kaplan, one of the authors of the Balanced Scorecard, reiterated the idea that the mission of the organisation is the core of the evaluation process, and the importance of a clear definition of strategic objectives, stating that ‘the start of any performance measurement system has to be a clear strategy statement. Otherwise, performance measures focus on local operational improvements rather than on whether the strategy is being achieved’. Kaplan conducted a survey led by the social enterprise programme at the Harvard Business School to investigate the performance measurement practices in non-profit organisations. He concluded in his review that this was one of the biggest concerns for managers and that a model to help the sector was needed. As a result, he conducted an action research programme to apply the Balanced Scorecard in non-profit organisations and published several case studies featuring a hospital, a social service organisation and an international relief organisation among others. Based on this research, he introduced two modifications to the Balanced Scorecard so it could meet the requirements of non-profit organisations. The first change was to put the mission at the top of the Balanced Scorecard, representing the accountability between the organisation and society. The second change was to determine who the customer is in this specific case. In the business sector it is the same person who pays and receives the product or service. On the contrary, in the non-profit

317 Kaplan, ‘Strategic Performance Measurement and Management in Nonprofit Organizations,’ 360.
318 Ibid., 357.
319 Ibid., 362–368.
sector, there are funders or donors who pay and benefactors that receive the service. To reflect this situation, he proposes two different perspectives which are positioned in the Balanced Scorecard at the same level. The internal process and learning and growth perspectives stay the same, except that they now aim to respond to the mission and donors/benefactors perspectives as shown in Figure 49.320

![Figure 49: Balanced Scorecard Framework for non-profit organisations, Robert S. Kaplan (2001).](image)

The fact that a performance measurement framework can be adapted and tailored based on a non-profit organisation’s needs is key for this research. It proves how this field is of relevance to museums and that it can fit one of the requirements stated at the beginning of the chapter, the need for flexibility depending on the objectives of the organisation. This modification also shifts the importance to the consumers or recipients, who in the museum sector are placed at the core of organisations’ mission statements. Furthermore, as discussed in previous chapters, the value of the public or user experience needs to be at the centre when assessing the impact.

Although the Balanced Scorecard is the most cited and applied framework, it is not free from criticism. One of the main criticisms is that the framework only includes customers and shareholders, missing other important stakeholders such as suppliers, regulators, alliance partners or pressure groups among others. Some authors consider

---

that measuring the relationship with them is vital in order to create a competitive advantage in the market. Neely’s proposal, analysed later in this chapter, deals with performance measurement, placing the different stakeholders at the core of his framework. Neely also claims that the competitiveness dimension is not present in the model and in reality, organisations need to take this factor into consideration so they can benchmark their results, compare their position against competitors and assess whether their actions have made this change in position. Some authors suggest that a cause-effect relationship follows a sequential chain, but a more systematic approach to marking the causal relationships between all the perspectives should be included. Other authors consider that the word ‘balanced’ in the name of the model stems from the inclusion of measures coming from different perspectives. Nonetheless, they argue that in practice, not all of the measures have the same weight, particularly when it comes to making decisions, since some may be more critical than others. Despite these critics, the Balanced Scorecard is, so far, the most cited and applied framework in theory and the most implemented in practice.

The field has also evolved with development of performance measurement frameworks based on modifying the original Balanced Scorecard to respond to some of its limitations or adapting it to specific cases. The evolution of the Balanced Scorecard was reviewed by Perkins, Grey and Remmers who identified three generations and eight different subsets of the framework. For instance, within those frameworks that seek to add more weight towards stakeholders’ satisfaction measures, there is Kanji’s Business Scorecard, which proposes to create an index based on process excellence,

---

322 Ibid.
organisational learning and stakeholders’ satisfaction.\textsuperscript{326} In another stream of adaptations of the Balanced Scorecard, there are examples of how it has been adjusted to respond to the specific evaluation needs of a particular field such as the hotel industry,\textsuperscript{327} health care and hospitals,\textsuperscript{328} libraries\textsuperscript{329} and universities\textsuperscript{330} among many others.

More frameworks were developed during the next decade. The ‘Performance Prism’ developed by Neely, Adams and Kennerley consists of five interrelated facets, in which stakeholder satisfaction represents the starting point of the model.\textsuperscript{331} According to this framework, organisations identify their key stakeholders’ needs (customers, employees, suppliers, shareholders, government, regulators and pressure groups) to establish a strategy aimed at satisfying them.\textsuperscript{332} Taking the stakeholders’ viewpoint instead of the strategy as the starting point to define performance measures represented quite a radical approach in the field. The five perspectives of this framework are: stakeholder satisfaction (identification of the key stakeholders and what they want and need), strategies (definition and implementation of the strategies that will satisfy what stakeholders want and need), processes (identification of what critical processes the organisation needs to operate and enhance to deliver the strategy and develop new

\begin{thebibliography}{99}
\bibitem{332} \textit{Ibid.}, 8.
\end{thebibliography}
products, generate demand, fulfil demand, plan and manage the organisation), capabilities (which are the combination of people, practices, technology and infrastructure that execute the organisation’s business processes) and stakeholder contribution (contributions that the organisation requires from its stakeholders to maintain and develop these capabilities). These five perspectives for measurement will determine the stakeholder value. The cause-effect relationship in this framework is that the results in stakeholder satisfaction (external measures) depend on the other three determinants: capabilities, strategies and processes (internal measures). Its representation in the form of a prism, as shown in the image below (Figure 50), is where this framework gets its name. According to its authors, the performance prism can also be applied to the non-profit sector. Although there is not a profit objective, there are funders who expect to see the results and benefits of their contribution and there are a series of stakeholders, the benefactors whose needs are expected to be satisfied. However, in practice, there are only a few cases found in the literature where the performance prism has been applied.

![Figure 50: The Performance Prism, Andy D. Neely, Chris Adams and Mike Kennerley (2002).](image-url)

---

5.2.3. Choosing a framework

Each of the performance measurement frameworks examined in this chapter determines a series of perspectives or dimensions and proposes to include a set of measures to capture the organisation’s performance. Based on the performance measurement requirements for museums’ assessment of the value and impact of their social media activities which has been outlined in previous chapters, this section selects a framework that may best fit these criteria for the sector. In short, the discussion here looks back to the outcomes of the literature review and the findings from the field research undertaken during the ‘Let’s Get Real’ project to enumerate the evaluation requirements and match them with the frameworks analysed in this chapter, in order to assess how to apply them to this specific evaluation context.

In determining a framework, the first thing that needs to be taken into account is the rapid speed of the changes that take place on social media, as evidenced in Chapter 2. This online environment has evolved exponentially in the past decade with shifts in the platforms available, their functionalities and users’ behaviour. The framework needs to be flexible and proactive to monitor and predict these changes, allowing the organisation to react quickly. From the internal point of view, it is crucial to measure the level of ability and efficiency required to act in this rapidly changing environment. This implies having the necessary organisational structure, processes to create content and monitor responses and having specialised staff dealing with social media who are capable of innovating as well as having the ability to remain up-to-date with news, platforms and online behaviours.

As discussed in Chapter 2, social media is formed of those activities initiated by the museum and those initiated by users. The analysis of the website traffic of some of the organisations that participated in the ‘Let’s Get Real’ project illustrated how people share content on their own platforms. Therefore, the evaluation framework needs to capture this whole online ecosystem. This would also allow an understanding of the cause-effect of each initiative and show the overall impact of social media. All these factors imply that the model needs to be multidimensional and it is clear that both internal and external evaluation perspectives are important. Most of the frameworks that have been reviewed include ways to capture the internal capabilities, innovation
practices and production processes among other factors. Going back to the practice of museum evaluation, this resonates with Weil’s ‘Success/Failure matrix’ for museums, as this model also includes an internal dimension to capture the museum’s resources and processes that, if used in an efficient way, will have an impact on the external dimension, which in this particular case constitutes the audiences. However, although these frameworks include both internal and external measures, some of them such as the ‘Results-Determinants framework’ or the ‘SMART Pyramid’ mainly focus on financial measures for the external perspectives and they have never been adapted to a non-profit scenario. Moreover, some other frameworks such as the ‘Macro Process Model’ are lacking the innovation aspect which is a fundamental element in working and excelling in this environment.

Chapter 3 showed the evidence-based model existing in the UK and how museums need to report specific measures every year. Museums need to justify their public or private funding and demonstrate the impact and value of their activities. Stakeholders are a key component and this fact is only clearly outlined by the ‘Performance Prism’ where they sit at the centre of the framework and by the ‘Balanced Scorecard’ for non-profit organisations. The other key players in this evaluation framework are the users, the museum’s public, because the main opportunity for organisations is to engage with them on these platforms and they are the focus of the museum’s activity. As discussed in Chapter 3, the current trend in the sector is moving towards an evaluation of outcomes and the intrinsic value of the museum experience. For this particular case, the most important measures are those that will capture this impact produced by the users’ relationship with the museum as a consequence of social media. The majority of the frameworks examined still place a higher emphasis on measuring the processes and as a consequence, a lot of the measures they include are focused on improving the operational performance, and less on measuring outcomes. When measuring from the external perspectives, some of the frameworks only look at customers’ satisfaction and how products and services fulfil customers’ needs. This approach is very limited when compared to what museums want to achieve using these platforms.

336 Weil, ‘A Success/failure Matrix for Museums.’
There are other critical factors in the framework selection. In terms of the empirical evidence, the majority of frameworks analysed in this chapter lack examples and practical implementations published in the literature that can support their success. This may be partly related to the lack of guidance in their implementation. The proposition in this research is that the Balanced Scorecard can provide a way for museums to select the measures and tools that can be used to evaluate their activity on the social web. For this purpose, the self-assessment models based on the awards do not contain a methodology for building a performance measuring system in an organisation. In this particular case, the Balanced Scorecard and the Performance Prism are the ones that provide a step-by-step implementation methodology in the authors’ publications.

All these factors taken together suggest that the two frameworks that best fit the criteria are the Balanced Scorecard and the Performance Prism, as they are the most comprehensive and, in practice, they have been used to implement performance measurement systems in different organisations. Nevertheless, in terms of the number of case studies found in the literature, the Balanced Scorecard presents a clear advantage, a fact that supports the flexibility of the framework. Taking into account the requirements, it has to be noted that although the stakeholder approach is very important for museums as they need to demonstrate their accountability, the overall objective of their online activity stems from the museum’s mission. Therefore, despite the very important role played by stakeholders, they do not necessarily determine the objectives of the museum and its social media activity. The non-profit version of the Balanced Scorecard developed by Kaplan bridges the gap and provides a comprehensive approach to include both the stakeholders and the customers.

In conclusion, the flexibility and adaptability of the Balanced Scorecard and its previous success in the non-profit sector (including its usage in museums) makes it the most suitable framework to fulfil the requirements of museum evaluation practices and the complexity and rapid changing speed of social media. The Balanced Scorecard includes both internal measures that can help to evaluate social media strategies and internal culture, and external measures that can serve to evaluate the impact on users and funders. In other words, the non-profit version of the Balanced Scorecard will provide the basis for the definition of the final framework in this thesis that will develop
the set of performance measures required to evaluate the success of the museum’s social media actions.

5.3. The Balanced Scorecard in practice

The Balanced Scorecard has been applied by both profit and non-profit organisations in a very diverse number of sectors. The model has been widely implemented around the globe, from large to small organisations and from corporate companies to government agencies. The Balanced Scorecard has been modified and adapted to different sectors and the next section of this chapter will examine how the framework has been modified to fit the characteristics of the non-profit sector and museums in particular. In practice, the four perspectives of the Balance Scorecard have not always been applied as a whole and authors have adjusted it by adding, removing or renaming the four perspectives originally proposed. To exemplify this fact and understand how this tool has been implemented, our discussion here analyses different case studies, some applied to the museum sector and others used to evaluate websites which are the closest examples to online evaluation found in the literature.

5.3.1. A Balanced Scorecard for museums

To date there have been several attempts to apply the Balanced Scorecard to the museum sector, although in most instances, those cases have only been defined from a theoretical point of view and not put into practice. Falk and Sheppard, in their book on business models for museums, urge museums to start measuring their performance and outcomes derived from their activity and they refer to the Balanced Scorecard as a tool that could be used for that purpose. They renamed the framework as the ‘THRIVE assessment’, or ‘Tools for Helping maximise Resources, Internal learning and growth, public Value and External relationships’, 337 which is also the source for the title of the book, Thriving in the Knowledge Age. The first perspective, public value, relates to how the museum achieves its mission and goals. According to the authors, outcome and

output measures will evaluate how the museum serves its audience and creates public value. The second perspective, internal learning and growth, refers to the measurement of how the knowledge of the museum workers increases at every level of the organisational chart, which is essential for a museum to succeed in the knowledge age. The third, external relations, is considered by the authors as fundamental for the museum’s sustainability, especially in creating long-term relationships with its community, strategic partner organisations and key individuals. Finally, the fourth perspective, resources and finances, retains the same meaning and scope as that of the original Balanced Scorecard. Museums need to measure their financial results and report the outcomes obtained from the funding expenditure.\textsuperscript{338}

Another theoretical attempt to define a Balanced Scorecard for art museums was made by Fox. The proposed framework in this case had three perspectives: public, intellectual and operations and financial.\textsuperscript{339} Boorma and Chiaravalloti proposed another theoretical application of the Balanced Scorecard. In this case, the aim was not to evaluate the impact of the whole museum, but more specifically, to measure the contribution of the marketing activities to the mission of an arts organisation. They included three stakeholders: customers, community and professional field, and argued that an individual Balanced Scorecard should be built for each stakeholder, as the organisation creates different types of value for each of them.\textsuperscript{340}

A systematic study that contributed a definition of a Balanced Scorecard for the museum sector was carried out by Zorloni. She interviewed forty-one directors and senior management staff in sixteen museums in New York, London and Washington. As a result, she proposed four perspectives, these being intellectual perspective (which includes the stewardship of collections and the scholarship and development of new knowledge), public perspective (which aims to measure the relationship with the museum’s communities and visitors’ perceptions of and experience in the museum),

\textsuperscript{338} Ibid., 235–239.
learning and growth (that will measure the alignment of the employees with the strategy and motivation towards learning) and governance and financial (as museums need to demonstrate their accountability and the efficient use of their resources). The same author applied the Balanced Scorecard to the Benaki Museum in Greece replacing the intellectual perspective with artistic contribution to measure how the assets of the museum are developed and shared.

A recent work by Tanner focused on the development of the ‘Balanced Value Impact Model’ also based on the Balanced Scorecard, with the aim of helping to demonstrate the impact of digital resources. The target users of this model include a diverse range of institutions such as museums, libraries and educational organisations, but also other types of organisations, as well as academics or funders that need to assess the value of digital resources. Tanner identifies several impacts and includes a perspective for each of these categories: social, innovation and audience, economic, innovation and internal processes impact.

This is yet another case that demonstrates that the Balanced Scorecard is a flexible framework that has already been adopted a number of times by the museum studies field. Table 4 summarises the perspectives suggested by each author. The Balanced Scorecard has been slightly modified, retaining most of the proposals and the four original perspectives from Kaplan and Norton’s model, although using different names to adapt it to the sector, including for example, the almost unanimous shift from customer to public or social. The most important change is, as Kaplan proposed for non-profit organisations, the introduction of the distinction between the different stakeholders, the public and the funders. These examples validate the fact that the Balanced Scorecard is a flexible framework that can be adjusted and modified so it can

---


adapt to the specific performance measurement requirements of an organisation, in this case, museums.

<table>
<thead>
<tr>
<th>Author</th>
<th>Balanced Scorecard perspectives</th>
</tr>
</thead>
<tbody>
<tr>
<td>John Falk and Beverly Sheppard (2006)</td>
<td>Public value, Internal learning and growth, External relations, Resources and finances</td>
</tr>
<tr>
<td>Alessia Zorloni (2012)</td>
<td>Intellectual, Public, Learning and growth, Governance and financial</td>
</tr>
</tbody>
</table>

Table 4: Applications of the Balanced Scorecard to the museum sector.

5.3.2. A Balanced Scorecard for online evaluation

There are some examples of how the Balanced Scorecard can be used to evaluate the online activity of an organisation. A modified Balanced Scorecard was developed by Morrison, Taylor and Douglas to evaluate websites. It has been applied in different organisations, especially in the tourism and hospitality sector. They argued that a multidimensional model was needed because of the complexity of a website and also to capture the technical aspects and the impact on the online visitor. The perspectives that were defined are: customer (measures related to attractiveness, currency of information, user friendliness, security, interactive functions), technical (link checks, html check, browser compatibility, accessibility), internal (ease of site maintenance, skills to
maintain the site) and marketing (branding, segmentation, product, positioning, partnerships). Although some external perspectives, such as customer and marketing, are useful in evaluating the impact of the activity on the user, this framework does not include specific measures related to the social features of the web. Most likely due to the novelty of the subject, practically no research has been conducted on how to apply the Balanced Scorecard to evaluate the success of social media activities. Forrester Research, an international technology and market research advisory company, has proposed a social media Balanced Scorecard from a marketing point of view. The four proposed perspectives are: financial (increase revenue or decrease costs), brand improvement (attitude changes on the part of the customer), risk management (related to reputation) and digital (measures to understand whether the organisation has enhanced its owned and earned digital assets). Although this again demonstrates the flexibility of the framework, it would need to be further adapted, as this approach is primarily focused on marketing and commercial objectives.

5.4. The Museum Social Media Measurement Framework

In order to respond to the primary research question of this thesis, how to measure the impact and value of museums’ activities on social media, different performance measurement frameworks from the field of business studies have been examined in this chapter. The result of this analysis and comparison of the frameworks concluded that the Balanced Scorecard developed by Kaplan for non-profit organisations is the one that better suits the situation criteria and evaluation requirements. As previously reviewed in the chapter, one of the advantages of this framework is the flexibility in its application which means that further modifications can be made for a specific evaluation scenario. The performance measurement frameworks studied in this chapter have been presented from the macro point of view of an organisation. However, these frameworks can also be applied to Strategic Business Units (SBU), which, from the perspective of

organisational structure, can be defined as an organisational unit for strategy-making purposes.\textsuperscript{347} For instance, it could refer to a specific product or service or to the activity of a given department in an organisation and as a consequence, specific measures need to be defined for each SBU. For this purpose, we will treat the social media activities carried out by the museum as an SBU, with its own strategy and objectives, but they will also be linked to the overall mission of the museum. This section will present an adaptation of the Balanced Scorecard with the aim of measuring the impact and value of museums on social media.

Continuing with the process of adapting the Balanced Scorecard, the next step is to refine the perspectives proposed by Kaplan in order to match the evaluation requirements. According to Kaplan and Norton, the definition of performance measures needs to come from the critical success factors in each perspective and the linkage between them. To facilitate the identification of these critical success factors they proposed the usage of a strategy map that ‘provides a framework to illustrate how strategy links intangible assets to value-creating processes’.\textsuperscript{348} The diagram below (Figure 51) shows an example of what a strategy map for a museum on social media looks like, representing the critical success factors in each perspective. This strategy map is based on the literature review of museum strategies on social media (in Chapter 2) and on the fieldwork carried out during the ‘Let’s Get Real’ project (in Chapter 4), which leads to the final definition of the framework.


The Balanced Scorecard adapted for this specific evaluation context is named ‘The Museum Social Media Measurement Framework’ and it is visually represented in Figure 52. The starting point of the measurement process is provided by the objectives of the social media strategy that aim to contribute to the museum’s mission which is, therefore, placed at the top of the framework as in Kaplan’s version. The same number of perspectives is maintained. The framework includes external measures related to the public (renamed from customers/ recipients) and funders (renamed from financial donors) and internal measures related to processes, learning and growth. Given the existence of different perspectives there is a balance between short-term measures related to the results of current activities and long-term measures that will also allow for the identification of the critical performance success factors of the social media initiatives.
Figure 52: The ‘Museum Social Media Measurement Framework’. Figure created by author.
Looking now more in detail as to what to measure from each perspective, the **external perspectives** included in the framework are:

- **Public**: *To achieve the social media strategy, how does the museum create value for its public and impact their experience with these activities?*

This perspective includes measures to capture how the museum is regarded by online users, visitors and communities as a result of the social media initiatives. This perspective will evaluate all the public-facing objectives that a museum wants to achieve with its social media presence. The field research for the ‘Let’s Get Real’ project (as discussed in Chapter 4) showed the main strategic themes related to the public and examples of metrics and tools to track their success were included in the Social Media Evaluation Framework. These perspectives may include measures, for instance, to capture the impact of the interaction activities, to assess how these activities change brand perceptions, to understand what type of communication flows are created from the museum to the users and between users or to evaluate to what extent these posts may influence the public, converting online activity to footfall at exhibitions or events.

The measures included in this perspective will vary depending on the strategic objectives of the museum. Based on the strategic goal, the measures may derive from methods and tools from that specific area. For example, in the case of marketing goals such as exhibition ticket sales or changing brand perceptions, this perspective should include measures from a marketing point of view. Following Kotler’s categories of measures\(^{349}\), these may include counting-based metrics (e.g. Facebook likes, number of positive comments about an exhibition), accounting-based metrics (e.g. ROI of a Facebook advertising campaign, total revenue from social media traffic) or outcome metrics (e.g. how social media contributes to brand loyalty or customer lifetime value).

In the case of evaluating the impact of these interactions for learning purposes or to capture the impact of the usage of social media during the on-site museum experience, measures may come from the visitor studies field as examined in Chapter 3 or from new online research methods explored in Chapter 2. This will allow the combination of

---

quantitative and qualitative measures to capture the intangible value and the impact that the museum’s social and interactive online activity has on the public. From this perspective, as proposed by Kaplan and Norton, segmentation can be used to apply the Balanced Scorecard in this sector, as museums may have different target audiences. This can be achieved through segmentation by age, gender, location or motivation. This segmentation practice has also been applied in visitor studies (as discussed in Chapter 3) as museums need to understand who their audiences are as well as their online behaviour on social media in order to conduct evaluations. Segmentation is a key factor in understanding the real impact and in obtaining better insights.

As previously discussed in this chapter, one of the criticisms of the Balanced Scorecard is that the specific weight of each of the different perspectives is not clear, as all of them are placed at the same level. In this particular case, the primary perspective of the framework is public, as this is the ultimate goal that links to the mission of a museum. Moreover, the review of museum evaluation practice (in Chapter 3) has shown that measuring the impact on the visitors is the key component in demonstrating the value of museums. Another reason to add more weight to this perspective is the social aspect of this medium, which aims to connect and interact with people.

- **Funders:** If the museum succeeds, how will it look to its public and/or private funders?

As seen in Chapter 3, at the moment there is a lack of clear guidelines from public funders such as the DCMS or ACE as to what museums need to measure in regards to social media, so the requirements are not specific. Although the evidence-based model would favour including measures to assess the levels of efficiency and efficacy that meet the accountability requirements, the response from the sector is clear in terms of the limitations presented by this approach. This perspective will take those measures from the public perspective that can demonstrate the impact of the activities and how they contribute to the overall mission of the museum. In the case of private funders, this

---


perspective will also include those measures museums have been specifically requested to report on.

The **internal perspectives** included in the framework are:

- **Internal processes**: ‘To offer value to the public and demonstrate it to the funders, at which internal processes must the museum excel?’

From this perspective, the framework adds measures to evaluate museums’ organisational culture and structure in relation to social media, as well as the process of running social media initiatives, from content creation and posting on these platforms to engaging with the users, monitoring and responding to their comments. Another important aspect to measure from this perspective is the innovation capability, as this is important to the social media environment. This perspective may include measures such as the number of messages posted on social media, percentage of users’ comments responded to or percentage of staff adopting a social media policy or a milestone to include a social media policy in the wider museum procedures. To measure innovation it can include a number of new social media platforms or an award in innovation in this area such as a ‘Webby’ or a ‘Best of Web’ award in the social media category of the *Museums and the Web* conference.

- **Learning and growth**: ‘To achieve the social media strategy, how must museum staff learn, communicate and work together?’

This perspective aims to measure how museums increase their knowledge, skills and capabilities to operate in this rapidly changing online environment. It is important for workers to continuously learn and stay up-to-date on the latest trends and there is an increasing number of staff who have to know how to participate on social media. The analysis of the resources invested in social media during the ‘Let’s Get Real’ project showed that the number of staff dedicated to these tasks is increasing and on many occasions it included people in different departments not necessarily under the umbrella of the social media manager. As a result, some of the potential measures to be included in this perspective are: number of staff members trained on how to write a blog and distribution of the number of messages on social media by department.
5.4. Conclusion

This chapter has reviewed different performance measurement frameworks in the search for one that could be implemented to evaluate the success of the activities carried out by museums on social media. Taking into account museum evaluation practice specifications and the variables of the social media context, we have come to the conclusion that the multidimensional framework that best fits these criteria is the Balanced Scorecard developed by Kaplan for non-profit organisations. However, this framework has been adapted to fully satisfy the particular evaluation requirements of the situation analysed, resulting in The Museum Social Media Measurement Framework.

Further work needs to be done to tune and situate the proposed framework and to define the measures that will be included. After all, as concluded in Chapter 4, each museum has its own strategic objectives, funding structure and audiences, which is why it is necessary to frame the model within each specific case. Subsequent research is also needed to gain a better understanding of its practical implications. In regards to the measures, the methods and tools that can be used to collect and analyse the data may derive from traditional methods, such as those from the visitor studies field or the marketing field, but also from the new online research methods that this environment necessitates. Therefore, further steps to move from theory to practice will be undertaken in the next two chapters with the definition and application of the Balanced Scorecard for one specific museum’s social media activities – those of Tate. The field research undertaken at Tate will evaluate which are the best metrics to use in the framework, which are the tools and methods to collect and analyse these metrics and how the data can be presented and turned into visualisations and actionable pieces of information that inform the decision-making process. The following chapters will also reflect on the implications that establishing a performance measurement system in terms of processes, organisation structure and resources could have for museums. The most important question is the applicability of the Balanced Scorecard, namely, whether this framework works to evaluate the success of museums’ social media activities and what are the benefits and challenges when it is put into action.
Chapter 6: Defining an Evaluation Framework for Tate’s Social Media Activities

Social media seems the place where we get to increase the public’s understanding, knowledge and enjoyment of art; this is going to be one of the places where it happens. And one of the reasons why we need to get better at measuring it, it’s because we need to assess the process and how we are doing against our mission.\(^\text{352}\)

6.1. Introduction

This chapter aims to define a Balanced Scorecard, and, more specifically, adapt the Museum Social Media Measurement Framework to Tate. After a summary of the evolution of social media at Tate, this chapter is organised following the sequential logic of the components of strategic planning and Balanced Scorecard methodology. The work progresses from the understanding of key strategic elements to then, based on this analysis, develop the strategy map and finally build the framework for Tate.

Firstly, this chapter provides a brief review of Tate’s mission and vision to then proceed to examine the strategy behind its social media activity. This context is intended to help identify the strategic objectives and to understand how Tate operates in the social media arena. This aspect of the research was driven by an analysis of strategic documents such as strategies and policies (published and unpublished), a mapping of the current activities and a series of semi-structured interviews with staff across Tate who work on social media platforms.\(^\text{353}\) These interviews identified the details of the different social media platforms and accounts and their individual objectives. The interviews included a number of questions aimed to address the four perspectives of the Museum Social Media Measurement Framework defined in Chapter 5 (public, funders, internal business processes and learning and growth).\(^\text{354}\) An analysis of internal documents and interviews with members of staff to gather the strategic thinking behind a given activity

\(^{353}\) See list of staff members interviewed in Appendix 8.
\(^{354}\) See interview questions in Appendix 9.
and to assess the organisation’s vision alignment is a common method recommended in the Balanced Scorecard literature and also found in numerous case studies.355

6.2. Evolution of social media at Tate

Tate has an extensive presence on social media and its plan is to continue to grow in this area.356 Based on the theoretical analysis of social media presented in Chapter 2, it could be broadly defined as any platform that allows user interaction and the possibility to create and share user-generated content. Tate’s website would be included among these platforms, as social functionalities to interact with the users are increasingly being added and developed alongside community sites such as Tate Collectives357 or Tate Kids358 and profiles on social networking sites such as Facebook or Twitter. The interaction with the users is not limited to a purely online experience outside the gallery, but on the contrary, there are an increasing number of initiatives integrating this interactive aspect with the physical visit. This section of the chapter examines the evolution of social media at Tate, maps its current usage and shows how the organisation plans to continue working in this arena. The mapping was conducted based on the analysis of the current website, archived versions of the old website available on the National Archives site,359 the social media directory360 available on the Tate’s website and the information provided by an interview with John Stack, Head of Digital Transformation:

360 ‘Social Media Directory.’
Over the years we’ve done a lot of activities where Tate is moving away from being a brochure – just advertising what’s on, things about the organisation like press releases – and a channel website – where content is made for the web like papers, videos, learning resources, where all is one way – to a more of a platform model in which the museum is a place where ideas are exchanged. There is a huge interest now in social media from some areas of the organisation such as learning, marketing, development, members, and patrons. The way they are looking at the future and how we will operate digitally in the future is about social.\textsuperscript{361}

\textsuperscript{361} Stack, John. Interview by author. October 24, 2013.
Figure 53: Evolution of social media at Tate.
The results obtained from the activity mapping exercise carried out during the fieldwork are presented in Figure 53, which shows the different profiles on social media and main digital projects with a social and participatory element that were created and developed since 2005. In 2007, the first element of social interaction was added to the website in the form of a forum (Figure 54), but participation and usage numbers were low compared to what was expected. Stack reflects on this first interactive element and states that the fact that it was not linked to a particular activity or exhibition and that no specific resources were dedicated to creating and managing a community may be the main reasons to explain its lack of success.362

![Tate Forums](http://webarchive.nationalarchives.gov.uk/20061021040310/http://www.tate.org.uk/cgi-bin/visitorbook.pl)


Tate’s website has evolved greatly in the past decade from a very static site that featured visiting information and a calendar of events, to a social website where users can participate in online conversations and debates and where there are also social interactive areas such as Tate Kids and Tate Collectives which allow users to upload their own content. Social features have also been added to the new site, which was relaunched in April 2012, such as social media sharing buttons (Figure 55) and Twitter.

feed widgets which allow users to see real-time tweets from the different accounts or based on a specific hashtag. Users can also log into the website with their Facebook, Twitter or Google+ log in details and comment on some content types such as blogs, articles or videos. Social media and interactive elements continue to be added to the site. In 2014, Tate launched an ‘Albums’ feature (Figure 56) that allows users to collect artworks and archive items from the Tate’s collection and upload their own created content. This new functionality also gives users the opportunity to tag, annotate and share these albums created by users.363

Figure 55: Screengrab of an artwork page with the social media sharing buttons displayed. ‘The Blue Rigi, Sunrise,’ Tate, accessed October 9, 2015, http://www.tate.org.uk/art/artworks/turner-the-blue-rigi-sunrise-t12336.

Outside the website, as a complementary component for several ongoing exhibitions, Flickr was used to create the first participatory projects back in 2007, trying to connect with specific audiences on this platform. A photography competition was held using a Flickr group for the *How we are* exhibition at Tate Britain, which took place from May to September 2007.\(^{364}\) The exhibition comprised a survey of works relating to the

---

history of British photography. The marketing campaign aimed to position Tate Britain as a place where photography happens and Flickr was the perfect platform for reaching out to the public interested in this art form. The curator and a participating artist selected forty photos and these were displayed in the galleries and on the website. The discussion forum on the group was very active and frequently moderated, and a total of approximately eight thousand photographs were uploaded to the group. Two other projects were developed on this platform alongside exhibitions. For the exhibition Street or Studio at Tate Modern, the curator selected one hundred photographs from the Flickr group that were compiled in a book and subsequently sent to the winning participants. For the exhibition Colour Chart at Tate Liverpool, the participatory activity had similar rules, although this time the output was a poster of the selected photos.

There are other examples of participatory projects where users were invited to submit their content in response to a particular call on different platforms. On the now almost forgotten social media site My Space, there was an initiative called Tate Tracks where musicians were invited to come to Tate Modern, select an artwork and write a new piece of music inspired by it. For another exhibition, this time Unilever Series: Dominique Gonzalez-Foerster: TH.2058 (October 2008 – April 2009), there was a project which consisted of inviting people to submit stories inspired by the artwork and focusing on their vision of the future. Almost a hundred stories were sent in and the artist and the curator selected six of them which were recorded and podcasted as an audio tour and narrated by a well-known actor.

Initiatives that linked the digital participatory experience with the gallery visit or exhibition content continued being developed during the following years. The Unilever Series Ai Weiwei Sunflower Seeds exhibition at Tate Modern (October 2010 – April

2011) offered the opportunity for visitors to record a video in one of the eight kiosks situated close to the work, either responding to a question from the artist or asking him directly about the sunflowers seeds installation. The artist responded to a selection of these questions and a total of approximately twenty thousand videos were recorded by visitors during the exhibition.  

Along the same lines, with the objective to generate debate and dialogue about art in the gallery space, the Interpretation team partnered with the Digital team to create another participatory experience for The Tanks, a new space at Tate Modern which opened in 2012 with a live arts programme. The very nature of this type of art often has an element of participation in itself and this is a key feature of many of the works exhibited in this space. The teams wanted the interpretation to reflect this participatory character. A comments wall with prompt questions about the arts programme and ongoing events was installed and users were able to participate by logging in via a widget with their social media accounts or adding the hashtag #thetanks to their message. The comments appeared automatically projected onto the wall.

These types of initiatives, in which users upload content, have generated a new task of ‘moderation’ for those who work in social media. New roles have been created for user-generated content projects such as BP Art Exchange and the Great British Art Debate which required someone to manage these communities. Minnie Scott, Curator in the Interpretation department, talks about how this type of project and especially the last one she has been working on, Bloomberg Connects at Tate Modern, have impacted on their daily work:

---

It’s been an interesting learning curve with moderation. We were aware of what this would take in advance, this is not the type of project you launch and you step [back] from. We have to do regular monitoring which implies out of hours and weekend moderation. I feel that we had good support with other departments, but a lot of work to do in terms of internal cross-departmental communication with the Visitor Experience team, which has been very supportive but this is a new thing for everyone[^373].

Another emerging role that joins staff efforts to manage these communities is the creation of specific content to generate discussion and debate. The blog activity that started in 2010 is a clear example of content creation work. It includes a range of posts, for example, ‘work of the week’, an exhibitions blog, debates, project documentation and quizzes[^374]. The creation of this content is produced by the blog editors but it also requires people across the organisation to provide the stories.

Apart from its online presence through the website, Tate has opened profiles on different social media platforms and updates them on a regular basis. Twitter is the platform that has the most accounts at twenty-two, including four from curators, followed by Facebook that has eight as of the end of December 2013 (Table 5). The main accounts for each gallery are managed by the marketing team and the rest of the accounts follow different criteria of origin. We can find accounts from Tate departmental activities or products (for example, the shop, TateShots, Tate Etc.), or organised by the age of the audience (such as Tate Collectives), specific art form (Tate Film, Tate Live) or close relationship with Tate (for instance, young patrons and members). There are some curators who have joined Twitter and use this platform to communicate their work and tell behind-the-scenes stories: ‘I take pictures during the installation of exhibitions, revealing snippets of information to people who are interested in the process of putting together a show, making comments about a particular work that may have arrived or that is being installed or surprises or discoveries’, explains Helen Little, Assistant Curator at Tate Britain, on how she uses Twitter. She goes on to comment that ‘An example would be a work that we unpacked

during the installation of the Lowry exhibition. We discovered a lost work on the back of one of the canvases. So we used social media to highlight and bring attention to the new discovery and this generated a lot of interest.  

<table>
<thead>
<tr>
<th>Twitter account</th>
<th>Followers</th>
<th>Facebook account</th>
<th>Likes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tate</td>
<td>1,009,696</td>
<td>Tate</td>
<td>633,576</td>
</tr>
<tr>
<td>Tate Liverpool</td>
<td>42,710</td>
<td>Tate Liverpool</td>
<td>24,349</td>
</tr>
<tr>
<td>TateShots</td>
<td>35,102</td>
<td>Tate Film</td>
<td>17,416</td>
</tr>
<tr>
<td>Tate Etc.</td>
<td>16,185</td>
<td>Tate Members</td>
<td>7,510</td>
</tr>
<tr>
<td>Tate St Ives</td>
<td>11,880</td>
<td>Tate St Ives</td>
<td>6,769</td>
</tr>
<tr>
<td>Tate Shop</td>
<td>5,023</td>
<td>Tate Shop</td>
<td>4,445</td>
</tr>
<tr>
<td>Tate Publishing</td>
<td>4,141</td>
<td>Tate Etc.</td>
<td>2,762</td>
</tr>
<tr>
<td>Tate Collectives</td>
<td>3,415</td>
<td>Tate Collectives</td>
<td>1,331</td>
</tr>
<tr>
<td>Tate Kids</td>
<td>3,374</td>
<td>TOTAL</td>
<td>698,158</td>
</tr>
<tr>
<td>Tate Modern Shop</td>
<td>2,318</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tate Live</td>
<td>2,297</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tate Research</td>
<td>1,500</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tate Film</td>
<td>1,364</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tate Young Patrons</td>
<td>1,360</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tate Teachers</td>
<td>1,331</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tate Food</td>
<td>358</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tate Images</td>
<td>261</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tate Public programmes</td>
<td>230</td>
<td></td>
<td></td>
</tr>
<tr>
<td>TOTAL</td>
<td>1,142,545</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Table 5: Tate’s Facebook and Twitter accounts (number of followers as of December 2013).

The spectrum of initiatives produced on social media is very wide, ranging from updates announcing the opening of an exhibition to an interpretation tool used in the galleries. Our discussion here attempts to enumerate some examples of this to illustrate how the most active platforms, Facebook and Twitter, have been used in the recent years. New postings are regularly written for these platforms, including the promotion of exhibitions and events, links to content on the website such as blogs or videos, news announcements or visiting information. There are activities taking place on a regular basis, such as ‘Tate Weather’, a weekly post released every Friday where an artwork from the collection is selected to illustrate the weather forecast for the weekend.\footnote{Hashtag Search for \#TateWeather, Twitter, accessed February 2, 2014, https://twitter.com/search?q=%23tateweather&src=typd.}

Other examples linked to the promotion of the collection are \#tatecaption that

\footnote{167}
encourages users to add a caption in a comment, artists’ birthdays or #artxmassongs where users were asked to come up with Christmas songs using art-related words. Marc Sands, Director of Media and Audiences, explains how Twitter is used for this purpose:

Our strategy in Twitter is really to surface the collection because so much of what we have cannot be seen by the public because is in the stores, but it exits digitally so we need to find ways of using social media to surface the collection, that is one aspect. It can be done in a funny way, I do a dog a week from the collection, I do pets, I do subject matters that we know people like, but there is a serious use behind it. I think that activities such as ‘ask a curator’ or the Twitter tours. Again if you go back to Tate’s mission, that is about increasing understanding and knowledge of art, and I think it is done in a medium that is very gentle, that is very engaging and in that sense, is giving us new tools to do what we have always done, but to do it in a slightly different way.377

Specific projects have been carried out solely on social media, such as tours on Twitter. The curator of an exhibition takes the online users through the visit by posting images of the artworks, recounting facts about the artist and responding to questions sent by the users that are following the series of tweets. Hashtags are frequently used on both platforms to encourage people to post their comments on social media. For instance, Twitter is used as a backchannel during the Turner Prize winner announcement on TV, a hashtag is also selected for each exhibition and then promoted on the website, on each related post and also in printed media such as posters, leaflets or room guides. Tate also includes this type of message on digital displays and even on the coffee cups in the gallery (see images of examples in Figure 58 and Figure 59). This is yet another example of how social media is not only used for online conversation, as it can also be integrated into the gallery visit. Furthermore, the examples provided here show that depending on the type of initiative, the in-gallery social media interaction with Tate can be part of a marketing goal or an interpretation activity. Moreover, it can also be another channel for the visitor experience team to respond to enquiries and comment on feedback while the visitor is in the gallery, especially due to the recent increase in mobile usage.

Overall, by looking at Tate’s current presence on social media and the examples that have been outlined here, we can evidence both a rapid increase in the number of accounts and number of people from different departments involved in these activities,
as well as a substantial diversification in the use of social platforms. Sands predicts that social media will continue expanding:

Social media is one of the single biggest areas of activity at Tate. I can only imagine that it will grow. It will be more segmented, [by] particular art forms or horizontal, building communities of interest, some big, some small. So the future will increase these multiple voices in numbers but also in the diversity of the accounts, in the different platforms based on department objectives, audiences, art forms or probably a mix of them. \(^{378}\)

### 6.3. Strategic thinking behind social media at Tate

Tate’s mission and vision set the strategic intent of the galleries’ activity and define the core values and priorities that the strategies need to subscribe to. The mission statement expresses the overarching purpose of an organisation and states that all its activities should align in order to accomplish it. In the case of Tate, the mission, drawn from the 1992 Museums and Galleries Act, is ‘to increase the public’s knowledge, understanding and enjoyment of British art from the sixteenth century to the present day and of international modern and contemporary art’. \(^{379}\) Social media, according to Sands, allows Tate to work in these areas:

You can take that as a brief and develop a strategy based on that simple statement. Tate’s mission is about knowledge, understanding and enjoyment of art, then I think that social media can meet all three elements and I don’t think it should be viewed as in competition with or as exclusive to, it’s just another means by which we can engage with audiences in the work that we do. \(^{380}\)

\(^{378}\) Sands, Marc. Interview by author. October 24, 2013.

\(^{379}\) ‘About Tate.’

\(^{380}\) Sands, Marc. Interview by author. October 24, 2013.
Tate’s vision for 2015 focuses upon becoming more open, diverse, international, entrepreneurial and sustainable. This vision incorporates four areas of activity which are the collection, programmes, audiences and improving Tate. Regarding audiences, the vision states that

[…] diversity of viewpoints is integral to the concept of the public realm. Today more than ever, the museum is a place where ideas, experiences and opinions are exchanged. There will always be a role for the expert, but the evolution of communication technologies offers unrivalled opportunities for people to contribute from their own personal perspective.

More specifically, it highlights that Tate will continue

[…] to serve current audiences while reaching out to a broader range of audiences with a particular aim to: [...] build on the website’s worldwide reach consolidating it as a platform for discussion and the extension of Tate’s presence on other web and social media platforms.

A series of strategic documents have been written highlighting the aims and objectives of Tate’s digital activity. The first strategic document concerning social media dates from 2008 and was written by the Tate Online department. It predicted something that five years later became a reality: ‘given the continuing growth of these sorts of sites it is anticipated that they will become more central to communicating Tate’s key messages and opening up the institution’. The document focuses on Facebook and enumerates a series of opportunities on how to use this platform: to increase engagement with online activities, increase awareness of Tate’s offering in the galleries, act as a reminder to visit Tate’s website and Tate’s Facebook page and to attract more fans through referrals from friends. This document suggests the working structure for this new medium which consists of a steering group that would agree on key messages and cross-channel messaging, a process for submitting content across departments and a

---


382 Ibid.

social media calendar. It analyses the audiences in terms of demographics and interests and lists the type of content to be promoted on these platforms (contemporary and cutting edge programmes, innovative online content, opportunities to get involved and meet people online and offline and evening and weekend events that have a fun, social element).\textsuperscript{384}

The \textit{Tate Online Strategy 2010-2012},\textsuperscript{385} states the new role that the website will play in order to reach and interact with the audiences:

Online audiences are now active contributors to online communities through comment threads, forums, blogs and social media. Tate should embrace this and welcome online audiences as contributors and collaborators. Dialogue and debate will be embedded throughout the new website, through forums, blogs and community websites and through Tate activity on third-party social media websites.\textsuperscript{386}

A specific section is dedicated to social media which emphasises its potential in offering different functions, but ultimately it aims to contribute to the delivery of the Tate’s mission. Three aims are listed at the end of this section which are to: engage audiences, promote Tate’s programme and distribute content to a wider audience:

Social media has much to offer Tate across our learning, marketing, communications and audience engagement activities, and in delivering our mission. Tate is already using social media extensively, and there is now a clear need to implement an organisation-wide strategy and set of policies that will facilitate growing use in the future. Key to our approach must be a recognition that social media websites are not just a new platform to advertise our activities or promote our brand. We must transparently interact with audiences and, though this is labour intensive, the result will be an engaged audience with whom we have a deep relationship. This engagement will have Tate content and

\textsuperscript{384} \textit{Ibid.}


\textsuperscript{386} \textit{Ibid.}
ideas as its starting point, and all of our social media activity should be linked closely to Tate’s programme.\textsuperscript{387}

The strategy published three years later titled ‘Digital as a Dimension of Everything’ continues to emphasise the idea that social media needs to be part of the different functions of the gallery and explains how this will happen. \textit{Tate Digital Strategy 2013-2015}\textsuperscript{388} has four defined areas of activity: content, commerce, community and organisation. The section on community highlights the plans for activity on social media and third-party platforms:

Social media has already transformed Tate’s approach to communication and marketing. Social media and use of third-party content platforms, however, are destined to change many more activities at Tate, offering new ways to engage with audiences and to distribute content where it will reach new audiences. We believe that there are significant opportunities for social media and new digital platforms to revolutionise the visitor experience as well as transform the practices of learning, research, curating and fundraising within the museum. As with blogging, Tate will seek to embed the use of social media across the organisation.

Accompanying these two strategies, Tate has published a \textit{Social Media Communications Strategy 2011-2012}.\textsuperscript{389} This strategy lists the twelve goals for social media from the communications and digital marketing perspective which focuses on content distribution, reach of the messages and return in terms of footfall to the gallery and revenue. The strategy lists the platforms upon which this will happen, including Facebook, Twitter, YouTube, Flickr and My Space.

\textsuperscript{387} Ibid.


The strategic documents recognise the potential that social media has to impact on the visitor experience and on the different functions of Tate. There are broad aims about engagement and reach but no specific objectives for this area. The strategy features a plan about how to digitally transform Tate to work on social media, including an improvement of digital skills and implementation processes. As the objectives are not precisely defined in the strategic documents, semi-structured interviews were carried out with senior management staff in the digital area, as well as with people who manage different social media accounts to capture the specific objectives, target audiences, activities and evaluation practises. This is a very common method used as part of the process of implementing a Balanced Scorecard in an organisation. As Kaplan and Norton have mentioned, this performance measurement framework sometimes ends up being a performance measurement system that helps managers to define the objectives and to agree on common goals.\textsuperscript{390} It helps to understand what the strategy means and assess the vision alignment within the organisation.

Stack notes that objectives are not clearly defined at this stage and that there are different views on how to use social media, which are more aligned with departmental objectives than with an overall use of this media.\textsuperscript{391} This is clearly demonstrated in the interviews with people who manage the accounts. Although some common themes appear during these interviews, there is a huge diversity in the actual use of social media from promoting exhibition tickets to debating on an art topic. In conclusion, there is a maturity in the support from the top level of the organisation that believes in the potential of social media to contribute to the mission, as highlighted in the vision and digital strategic documents. However, there are no overarching and integral strategic objectives which align the whole organisation.

As shown in the mapping of the previous section, the social media activity at Tate now occurs on a very large scale. The study demonstrates that Tate is very proactive in terms of the number of profiles on the different platforms. Some of these have a large number of followers and the posting of content and updates is very frequent. Sands explains that this is the first generation at Tate to use social media, and talks about an experimental

\textsuperscript{390} Kaplan and Norton, \textit{The Balanced Scorecard: Translating Strategy into Action}, 2.

\textsuperscript{391} Stack, John. Interview by author. October 24, 2013.
phase and a process of trial and error to understand how to use these platforms and what type of content works best.\footnote{Sands, Marc. Interview by author. October 24, 2013.} The creation of these accounts is more the consequence of proactive people who have seen an opportunity for their departments to use these platforms than an overall strategic plan based on audiences. The specific target audiences are not explicitly mentioned in the strategy and for most of the social media accounts, the definitions are very vague and recognised in the interviews as something to be improved upon with the need to refine existing strategies. Some accounts have clear target audiences, for example Tate Collectives is aimed at young people between 16-25 years old; Tate Members focused on this particular group and the Tate Research Twitter account messages reaches academics, students and art historians. However, there is still a lack of definition of the audiences in general, of which audiences this social media activity aims to reach and a lack of understanding of the characteristics of the audiences that follow Tate on each platform.

This non-shared strategic vision is also translated into the evaluation, as there are no KPIs or targets for social media. Current reporting of social media metrics focuses on the number of people that follow Tate on the different social media sites. These numbers for the main Tate account on Facebook, Twitter and Google+ are collated in a monthly report and also appear in the annual report. The reports also include top content in terms of number of interactions or views. In conclusion, in regard to evaluation, there is no shared vision about what to measure and how to do it.

Social media is an area that will continue growing during the next few years at Tate and there are plans to develop the digital maturity in this area through a series of initiatives as part of the digital transformation project. This project will ‘embed digital skills, processes and a digital culture across the organisation to make digital a dimension of everything that Tate does’.\footnote{‘Digital Transformation Project.’} Based on this analysis and following the Balogun and Hope Hailey strategic change path typology,\footnote{Julia Balogun and Veronica Hope Hailey, Exploring Strategic Change (Harlow, England: Financial Times Prentice Hall, 2008), 24.} this change would be classified as ‘evolution’, as the scope is a transformational change and the nature of the change is
incremental with a series of connected and complementary initiatives to achieve the strategy.

6.4. Translating the strategy into objectives

The previous sections of this chapter have provided the organisational context and have helped to identify what the strategic direction of using social media is for Tate. This part of the chapter now goes on to examine this in more detail, identifying the specific objectives and categorising and analysing them from each of the Museum Social Media Measurement Framework perspectives (public, funders, internal business perspectives and learning and growth). Based on the analysis of the strategic documents and interviews carried out during the field research, Figure 60 summarises the state of the maturity of different organisational aspects in relation to social media now and how they will develop in the future according to the digital transformation plans. Tate will need to measure how this evolutionary change is happening and the external impact that these changes will have on the public.

Figure 60: State of the different organisational elements in 2013 and the plans for how these will develop in 2015. Created by author.

The Tate’s evaluation framework has two types of measures. These are, firstly, those internal measures that will evaluate the progress towards the implementation of the strategy regarding learning and growth and internal business processes. Secondly, the
scorecard will include external measures that will capture the impact and value that
these social media activities are having on the public and also the reporting
requirements from the funders. The Balanced Scorecard provides the framework to
define the objectives, select the measures and structure the overview of the evaluation
of the activity. Following its definition, specific methods then need to be used to
capture and analyse the measures. In practice, for each measure the following aspects
need to be considered: methodology and tools for data collection and analysis, the
evaluation period and finally reportage, that is, how to present the data to communicate
the results in such a way that helps in the decision-making process.

In order to translate the strategy into specific objectives a strategy map was used in this
study to identify the key factors for success in implementing the strategy. Tate’s
strategy map (Figure 61) shows the activities and results that need to be measured, as
well as the links between them and how they create value for the public. The strategy
map includes both the internal and external perspectives that will, finally, build the
Balanced Scorecard for Tate. Each perspective includes the key success factor for
which specific measures are selected. The following section explains the specific
objectives to emerge from the review of the strategy and internal documents and the
analysis of the interviews conducted with members of staff working on social media.
Mission: to increase the public’s knowledge, understanding and enjoyment of British art from the sixteenth century to the present day and of international modern and contemporary art.

Vision: Tate to be more open, diverse, international, entrepreneurial, sustainable. Over the coming years, Tate plans to achieve these aims by pursuing the following:
- A commitment to presenting excellent public programmes by presenting a range of different perspectives and voices on art, within Tate’s physical galleries as well as online and through social media platforms.
- Continuing to serve current audiences while reaching out to a broader range of audiences with a particular aim to [...] build on the website’s worldwide reach consolidating it as a platform for discussion and the extension of Tate’s presence on other web and social media platforms.

Digital strategy 13-15 (social media): Social media has already transformed Tate’s approach to communication and marketing. Social media and use of third-party content platforms, however, are destined to change many more activities at Tate, offering new ways to engage with audiences and to distribute content where it will reach new audiences. We believe that there are significant opportunities for social media and new digital platforms to revolutionise the visitor experience as well as transform the practices of learning, research, curating and fundraising within the museum. As with blogging, Tate will seek to embed the use of social media across the organisation.
6.4.1. Internal perspectives: Measuring the digital transformation

In the case of Tate, internal initiatives are crucial for success, in order to achieve the strategic goals of the digital transformation project outlined in the following strategy:

Through embracing digital activity and skills across the organisation Tate aims to use digital platforms and channels to provide rich content for existing and new audiences for art, to create and nurture an engaged arts community and to maximise the associated revenue opportunities.\(^{395}\)

The learning and growth and internal business perspectives are key to identifying and measuring the elements that drive value for the public now and also in the future.

**Perspective 1: Learning & growth**

As explained earlier in this chapter, social media activities at Tate will continue to grow. Therefore, enabling staff to produce these activities, and increasing their social media knowledge and available working tools are key success factors in making this growth possible and evolving towards a multiple voice organisation. Three main objectives surfaced from this research in relation to this perspective:

- **Objective 1: Create an organisation of many voices on social media**

The digital strategy plans for Tate will bring about organisational change with the implementation of a digital culture where staff members from different departments will, for example, tweet as part of their practice or contribute to the conversations situated on the blog. This objective is not free from some challenges. One issue mentioned repeatedly by staff when interviewed concerning this question, is resources. Specifically, time is required to create content, publish it on these platforms and subsequently monitor the conversations and respond to users. For instance, for a curator, writing a series of blog posts for an exhibition is another task that must be undertaken during the hectic period of an exhibition opening. This is partially linked to

\(^{395}\) Stack, ‘Tate Digital Strategy 2013–2015: Digital as a Dimension of Everything.’
another challenge. Both Stack and Sands acknowledge the main obstacles that are faced, including challenges surrounding the level of support received by staff when allocating time to this kind of work. According to Sands, a catalyst for change is when people start to notice these platforms and then begin to get directly involved with them. An interesting development is that internal directors are increasingly following Tate on social media, a fact that facilitates an internal conversation. A fluent and efficient communication of the impact of these activities can generate a greater attraction internally.396

Awakening an internal interest and the realisation of the importance of this type of activity across departments entails a change in the working culture of an organisation and in the personal approach that the individuals involved with social media have to their own work and responsibilities. It requires a change in the working culture in which people think about how their work can be integrated within the social media output, translating the knowledge generated from their work into a format that people can read or watch on these platforms; for example, writing a blog about what they do or taking photographs during an activity that can be posted. Alex Cary, Digital Editor, talks about his role within the Research department:

Social media is bringing a new culture to people’s jobs that they never had to consider before. Telling people about it, that this is not self-promotion or just posting, but an integral part of your job. Increasingly people are thinking like that. It is a change in people’s thinking. I know some colleagues find it difficult, so part of my job is staying in touch and to make people aware of the benefits of Twitter and the services that it provides.397

From a formal operational perspective, the increase in the number of people involved in these activities from all the areas of the gallery will be the consequence of the following two objectives: increasing staff skills and providing the necessary technology to operate on social media.

396 Sands, Marc. Interview by author. October 24, 2013.
397 Cary, Alex. Interview by author. October 30, 2013.
• **Objective 2: Increase staff skills and abilities**

In order for social media to transform the practices of people across the organisation, the level of digital literacy and confidence in using the different platforms needs to increase. Digital knowledge, including of social media, will be acquired through the implementation of a training programme in which staff members will learn about the technicalities but also about the culture of each platform. Little, who has her own Twitter account,\(^{398}\) reflects on her experience in learning how this platform works, especially how to transform editorial and curatorial content to fit the tone and length of the messages:

A learning curve for me is about how you write in a social media context. As curators we have been trained to write formally about history, about art, about artists, but I’ve learned that the world of social media has a very distinctive language in its own right, that is very different to the way we talk about art and artists within a museum context. And I’ve really enjoyed that because it allows you to write in a more relaxed and personal style and it enables you, as a curator, to form an identity for yourself as an individual who is going through this extraordinary process working with an artist and working on these amazing exhibitions. We are also talking about how you condense and communicate an extraordinarily rich body of information and how you drip that out and how you communicate stories, narratives, messages in 140 characters or in a blog post.\(^{399}\)

Other initiatives to encourage staff to increase their digital knowledge range from formal performance reviews to digital bursaries made available for those members of staff who wish to attend a conference or a training session. These skills and responsibilities will be formalised in people’s job descriptions.\(^{400}\)

---


\(^{399}\) Little, Helen. Interview by author. December 16, 2013.

\(^{400}\) Stack, John. Interview by author. October 24, 2013.
- **Objective 3: Provide tools and technology to work on social media**

Finally, working on social media requires the use of some tools that can help with the daily management of this activity. At the time of this study, Tate was using a tool called Hootsuite which incorporates functionalities to schedule posts, monitor mentions of the galleries or exhibitions and assign posts requiring a response to specific members of staff. This type of tool should be available to all staff members working on social media in order to facilitate the management of posting and monitoring on these platforms.

**Perspective 2: Internal Business Processes**

In Chapter 5, we encountered the internal business processes perspective which formed part of the overall flow and model of the Museum Social Media Measurement Framework. The purpose of this measure was to evaluate museums’ organisational culture and structure in relation to social media, as well as the process of running social media initiatives, from content creation and posting on these platforms to engaging with the users, monitoring and responding to their comments. For this case study, we apply the concept in the same way. From the internal business process perspective, there is a series of operational work to manage the activity on social media that needs to be supported by a set of processes, policies and an internal network structure at Tate. We can identify three objectives from this perspective.

- **Objective 4: Implement policies**

Some staff members interviewed indicated that one of the challenges of working on social media is to know what can be said on these channels and how to respond to people’s comments, especially regarding sensitive issues. The strategy recognises the efforts that moderation tasks entail, encourages people throughout the organisation to undertake this work and establishes guidelines and policies that are needed to help staff members across Tate to learn how to operate them. The Tate Social Media Communications Strategy also included a code of engagement which featured some guidelines on how to update the social media accounts and respond to people’s

---

questions on these sites. During this digital transformation project these guidelines and policies were intended to be reviewed. As a result of this process, one of the key outputs was the creation of a digital handbook. It outlined the importance of including safeguarding, moderation and layered editorial control guidelines.

- **Objective 5: Increase efficiency in operations management**

In the description of the daily activities of the staff working on social media we can identify a series of challenges in the behind-the-scenes processes related to message coordination, planning, content creation, monitoring, evaluation and archiving. The creation of content is a key part of social media as a lot of the initiatives link back to content, such as blogs, photos, videos or articles, interpretation prompt questions or artist quotes. However, since each department has its own set of objectives, prioritising the themes of the content and the key messages represents an internal challenge for the organisation. Regular meetings take place to decide on the content to be posted on the main Facebook and Twitter accounts, as well as on the blog and channel. There are planning documents with a schedule for the content to be posted for these main accounts and also for the more segmented accounts. Within the context of a large organisation, getting to know what every person from each different department involved in the process is doing represents a challenge, so achieving a great level of internal coordination is a key element for success. Once the content is posted, then the staff need to monitor users’ reactions and respond to comments. To understand what works and what does not means that evaluation is also a very necessary element of this process. Furthermore, there is a growing conversation at Tate concerning what to do with all the comments, responses and other user-generated content produced during these initiatives and which processes should be implemented to record, archive and preserve this activity.

---

403 ‘Digital Transformation Project.’
• **Objective 6: Establish a governance and organisation structure**

Finally, as a result of the previous two objectives and of the learning and growth perspective, there is a need for a new way of working with fluent communication and collaboration between departments. For this purpose, the best solution seems to be the implementation of a horizontal approach to working rather than relying on a hierarchy of responsibilities. The digital transformation project proposes a ‘hub and spoke’ structure and also the creation of networks across departments for specific areas of digital activity such as social media or community.  

6.4.2. **External perspectives: Measuring the impact and value on the public and funders**

Continuing with the Balanced Scorecard logic, the next two perspectives of the Museum Social Media Measurement Framework defined examine the impact and value that these activities have on the public and the requirements to satisfy funders. The list of objectives of the external perspectives is a consequence of the internal initiatives outlined in the previous section. From the external perspectives, the measures selected need to capture the impact and value generated for the public and to use this evaluation as a form of evidence for funders.

**Perspective 3: Public**

The previous analysis of the strategic vision of social media at Tate presented in this chapter concluded that the objectives vary for each of the accounts and depend on the department that generates the activities. This variation of objectives continued to be evident during the interviews. The staff members who participated in the interviews were asked by the author to explain in their own words what success looks like and also to provide an example of a successful activity that had occurred in the past. There were clear differences in the definition of success. From the extreme ends of the spectrum, we can find the shop, where revenue represents the highest level of success and social interactives, where an in-depth comment in response to a debate would be the best

---

possible achievement. However, besides these differences in the specific objectives of each account there are a series of interlinked strategic themes that appeared during the interviews, especially when people commented on the overall impact of social media and on what these platforms allowed them to do compared to the limitations they experienced in the past regarding the relationship and interaction with the audiences. Three of these are the main objectives identified from the ‘Public’ perspective: to provide access to art, generate interaction and conversation and communicate and promote Tate and its activities via social media.

- **Objective 7: Provide access to art**

The first key theme that appears in both the strategic documents and interviews is how social media can provide access to the Tate collection and also to the expertise generated from this practice. It can take the form of videos, blogs, articles and images of artworks which are linked or embedded in other platforms. The nature of social media and the potential reach that the content can have beyond the gallery walls provide an opportunity for Tate to reach out to a wider audience. One of the objectives is to distribute content to where users are and due to the possible viral effect of social media, the reach of this content can substantially increase. Providing access to art not only applies to where the user can consume the art content, but also to how it can be presented in a more informal and friendly way through the use of language, tone and format. This can influence user perception of what art and museums are about, as Sands highlights:

> Social media allows institutions like Tate, that are quite uptight and quite academic, to have a different level and type of discussion with different audiences, that I think that it is truly about democratising access to art which is what Tate is about, and social media is a fantastic way to do that.  

Initiatives such as ‘Tate Weather’, in which an artwork is selected to present the weather forecast for the weekend, presents works from the collection in a different way. Another example is provided by the #TateTours examined in the next chapter in which

---

405 Sands, Marc. Interview by author. October 24, 2013.
a curator on Twitter or the blog introduces the exhibitions they are working on in a less formal way than through a regular symposium or talk in the gallery’s programme.

- Objective 8: Generate conversation and interaction

The second objective within this perspective is to engage with users. Words such as participation, interaction, engagement, co-creation, conversation, dialogue and user-generated content were repeatedly mentioned in the interviews with the staff and also appear in the strategy documents. The fact that users can play an active role and interact with Tate in different ways is a key characteristic of social media platforms. The *Tate Online Strategy* describes the audience as ‘contributors’ and ‘collaborators’ and a clearly defined strategic goal contained in both strategies states that these are platforms for multiple voices, discussion and debate. According to Sands, ‘social media for an organisation like Tate is the prime method of having an interactive relationship with a wider audience.’ Nevertheless, interestingly, there were notable variances in the definitions of success provided so that the meaning of engagement at Tate varies for each department and, as a consequence, this creates an internal conflict as Stack commented upon:

> One of the challenges is that these activities on social media start to collide with each other. From the user perspective it is hard to see when one ends and the other begins and as a result of that, there are tensions between people in the organisation where everyone has very strong opinions on both sides.

The concept of engagement and the definition of social media success diverge, and this was clearly evidenced during the interviews. For instance, Scott talked about the importance of the quality of the content submitted by users and how digital initiatives contribute to their interpretation practices:

---

We work so there are different interpretations and resources available and that is not a single Tate voice so we want to include multiple perspectives of an artwork including visitors’ voices and interpretation so they can share their ideas with other visitors. Some of the projects I have worked on are The Tanks response wall or the Bloomberg Connects project in which we try to motivate conversation and debate and invite visitors to share their views.  

In the case of the accounts that target Tate Members, the type of engagement is more directly linked to inform them what’s on at the galleries and to follow up on their visit, as Cooper explains:  

We do generally sort of engagement stuff, so people know about upcoming exhibitions, openings [...] These tend to do well and get lots of likes. We send out trigger review emails about exhibitions to our members so we ask them what they thought about the exhibitions. We got comments of people who went back and back again to the exhibition using their membership.

From a marketing point of view, as Ringham affirms, this engagement aims to convert these users by bringing them to the website so they become advocates of Tate’s message and help in spreading it further online:

In terms of evaluation we look at the effect that social media has on our website using Google Analytics and also using other tools which look at the overall effect of social media across digital generally, not just the traffic to the website but our overall influence on conversation, reach, all that viral effect.

Another interviewee, Aarvold, who creates digital content for young audiences, values the interaction created when generating conversation around a topic, not only on Tate’s platforms but on the user’s own channels:

---
For the on-going activity is about how many people have engaged, not just likes, I don’t think this is how you should measure success, but comments, responses, conversation, shares and what they write before the retweet on Twitter or the reblog on Tumblr.\(^{412}\)

The whole range of social actions can be considered engagement, but the depth of this interaction and the ‘effort’ from the user can range from a simple click on a post to liking it or to writing a long comment responding to a debate question on the blog.

- **Objective 9: Marketing and communication**

One of the main uses of some of the social media channels such as Facebook, Twitter and Google+ is to promote the exhibitions and events programme. A high number of profiles are managed and regularly updated by members of the marketing team. The *Tate Social Media Communications Strategy* lists these specific communication objectives which include: direct traffic to the website, distribute content, increase awareness of key messages, integrate social media channels into the marketing campaigns, generate advocates and partnerships to increase online following and generate revenue and footfall to the gallery.\(^{413}\) An indirect objective and consequence of all these activities is to ‘warm up the brand’ and create excitement about it. An example of how to use Twitter in the marketing plan of an exhibition is provided by the curator tours on Twitter. According to Ringham,

[…] they open up to a diverse, international and UK audience in real time and the use of Twitter makes the campaign more accessible. This activity ticks the box in terms of marketing because it generates awareness of the exhibition and possible returning visits.\(^{414}\)

\(^{412}\) Aarvold, Jen. Interview by author. October 29, 2013.

\(^{413}\) Ringham, ‘Tate Social Media Communication Strategy 2011–12.’

\(^{414}\) Ringham, Jesse. Interview by author. October 31, 2013.
The marketing and communication campaigns profit from the potential viral distribution of content on these platforms. There is an increase in the amount of content produced for marketing purposes and this is reflected in the Tate Digital Strategy:

Editorial content in the form of short videos and blog posts are now the keystone of Tate’s digital communications. Using our own media channels – website, social media, email etc. – we are increasingly able to tell our stories effectively, as well as to communicate the programme through high quality content of lasting value.\textsuperscript{415}

**Perspective 4: Funders**

This perspective aims to demonstrate the accountability of these activities to the funders and financial stakeholders and includes those specific evaluation metrics which Tate needs to submit to its funders. Due to the size and diversity of the social media activity we can find different external stakeholders. The current reporting requirements regarding digital activity mainly features the number of unique website visitors requested by the DCMS on annual basis, so there is no annual KPI to report regarding social media. For the privately-funded social media projects, the reporting requirements are typically the top-level numbers such as number of users, views or number of uploaded photos. However, reporting these top numbers does not always necessarily represent the success of the project and the rich engagement that these projects generate.

In both cases, this perspective brings us back to the origins of this research and constitutes one of the reasons why the sector requires new ways of measuring. While this perspective aims to capture those specific reporting requirements, a solution is to merge it with the public perspective, which captures the impact and value that these activities have on audiences, and to propose these measures as those to be reported to the funders.

\textsuperscript{415} Stack, ‘Tate Digital Strategy 2013–2015: Digital as a Dimension of Everything.’
6.5. A Balanced Scorecard for Tate

The perspectives listed above and their corresponding objectives analysed in the previous section are assembled visually in Figure 62, creating the Balanced Scorecard, and, more specifically, the Museum Social Media Measurement Framework for Tate. It includes potential measures for each of the objectives identified and the possible methods for data collection and analysis. For the internal perspectives, the measures selected aim to evaluate the process of organisational change and the status of implementing a social media culture. These are driver or leading measures. The methods of collecting this data may include a survey to all staff to discover the percentage of people who are aware of the strategy and who are involved in the social media activities or interviews and focus groups to gain more qualitative information about the strategy alignment, challenges and impact on and changes to working practices. The evaluation from these perspectives should be conducted on a medium or long-term frequency basis. The measures used in the external perspective include some which require a mixed-method approach combining quantitative and qualitative methods. Quantitative data includes metrics such as number of likes, followers, comments, impressions and traffic to the website. Qualitative data focuses on analysis of the content, sentiment and quality of the user-generated content on these social media sites. These are outcome or lagging measures and can be undertaken on a more short-term, project or campaign basis. According to Kaplan and Norton, these measures need to be defined based on targeted segments which at this time are not defined at Tate. This presents a challenge as there is little knowledge of the type of users that follow Tate on these social media platforms or participate in some of these types of projects, their motivations to follow or the context in which they participate.

---

416 Kaplan and Norton, ‘Using the Balanced Scorecard as a Strategic Management System,’ 64.
<table>
<thead>
<tr>
<th><strong>OBJECTIVES</strong></th>
<th><strong>MEASURES</strong></th>
<th><strong>METHOD</strong></th>
<th><strong>INITIATIVE</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Learning &amp; growth</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Create a social media culture of multiple voices</td>
<td>Number of accounts (number of individuals, by activity, by audience, by department) People in the social media group, authoring blog content (informal) or with social media tasks in their job descriptions (formal) Number of social media projects Culture change progress</td>
<td>Social media platforms list Social media group members list / Job descriptions Social media plan Staff surveys, focus groups or interviews</td>
<td>Training programme, performance reviews, formalise tasks in job descriptions, internal communication</td>
</tr>
<tr>
<td>Increase staff skills and abilities</td>
<td>% Staff attended social media training course Number of hours of training in this period</td>
<td>Training records Training plan</td>
<td></td>
</tr>
<tr>
<td>Provide tools and technology to work on social media</td>
<td>% computers with social media tools/number users with accounts on these tools</td>
<td>IT records Social media tools users list</td>
<td></td>
</tr>
<tr>
<td><strong>Internal business processes</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Implement guidelines and policies</td>
<td>% published guidelines, adoption and milestones</td>
<td>Internal comms channels Staff surveys, focus groups or interviews</td>
<td>Digital Handbook (social media policies and guidelines: editorial, layered control, moderation, safeguarding, digital asset management) Improve evaluation work Creation of internal networks Standard processes and internal comms channels</td>
</tr>
<tr>
<td>Increase efficiency in the operations management (message coordination, community management, evaluation, archive)</td>
<td>Cross-department work Amount of published content (per platform) Number of staff responding to their own content (eg. blog comments by the author) Number of research and evaluation reports in this area Amount of archived content</td>
<td>CMS, social media sites Social media group members list Job descriptions Internal comms Archive records</td>
<td></td>
</tr>
<tr>
<td>Establish a governance and organisation structure</td>
<td>Number of people in the social media/community network Amount of best-practice sharing</td>
<td>Milestones Internal comms channels</td>
<td></td>
</tr>
<tr>
<td><strong>Public &amp; funders</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Access to art</td>
<td>Reached users, size of the community, impressions New users Diversity of audiences Content views on social media Traffic from social media to the collection, blogs, videos or other type of content</td>
<td>Social media platform and website analytics tools (e.g. Facebook Insights, Twitter Analytics, Google Analytics) Surveys</td>
<td>Ongoing activities on the website and social media platforms Interactive participatory projects</td>
</tr>
<tr>
<td>- Reach a wider audience</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Distribute content</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Conversation and interaction</td>
<td>Interaction rate, frequency of interaction, volume user-generated content Number of comments and replies, message direction, on-topic responses, length of comments, sentiment, tone, quality of the interaction</td>
<td>Social media platform analytics tools</td>
<td></td>
</tr>
<tr>
<td>- Increase interaction</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Generate dialogue, debate and interaction about art</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Communications and marketing</td>
<td>Total revenue / Conversion rate</td>
<td>Social media platform analytics tools</td>
<td></td>
</tr>
<tr>
<td>- Generate revenue</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Warm up the brand</td>
<td>Changes in brand perception Share of voice and attention</td>
<td>Web analytics and surveys in the gallery Survey or focus groups Monitoring tool</td>
<td></td>
</tr>
<tr>
<td>- Get advocacy from followers</td>
<td>Number of shares, recommendations, mentions</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Create awareness of the programme</td>
<td>Percentage of people aware of the programme via social media channels</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Visitor services</td>
<td>Number of enquiries responded on social media</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Figure 62: Balanced Scorecard for Tate’s social media activities. Figure created by author.
Due to the very large number of existing social media profiles and projects mapped in this chapter, including all the figures in one report represents a substantial task even with the aid of automated tools. Although from the internal perspective there is a common centralised direction with a clear action plan, from the external perspective the diversity in objectives, audiences and format of these activities make it very difficult to aggregate all the results in one report. Some years ago, when there were only a few profiles and this activity was clearly isolated from other types of work this could be more easily achieved. Now that there are multiple accounts in a higher number of platforms and these are integrated within the diverse activities of the departments at Tate, the reporting can be very difficult depending on the scope and degree of detail. However, the structure of the Balanced Scorecard can help to deploy this shared approach in the evaluation and use standard measures and methods across the activities.

In conclusion, we have seen how the methodology to implement a Balanced Scorecard helps, not only as an evaluation framework, but also as a performance management system where objectives are clarified and common strategic themes identified. The Balanced Scorecard captures both internal and external measures providing a balanced overview of the outcomes, as well as the internal initiatives needed to achieve them. However, in this particular case, different points of views coexist within the main themes, and need to be approached through a more tactical and operational method of reporting and analysis. This will be examined in the following chapter where the framework is put into practice for several social media initiatives.
Chapter 7: Putting the Evaluation Framework into Action: Practical Application and Analysis of the Results

7.1. Introduction

This chapter is a continuation of the previous one, which defined the evaluation framework for Tate’s social media activities. The Balanced Scorecard proved to be a useful method to gather strategic information and to build a framework with the aim of evaluating the success of social media. The next step is to put the framework into action, to assess its usefulness and analyse the insights and the challenges that stem from applying it. This part of the fieldwork has been a practice of trial and error to test various methods and tools aiming to analyse and visualise the data from different digital activities. Using several case studies of social media activity at Tate, this work intends to respond to the following questions on the applicability of the Balanced Scorecard, and specifically the Museum Social Media Measurement Framework defined in Chapter 5.

- Does the Balanced Scorecard work in this context? What are the benefits and also the challenges when putting this framework into action?
- Are the number and definition of the four perspectives of the Museum Social Media Measurement Framework the right ones? What are the best performance measures to be included in each perspective to evaluate the impact and value of social media?
- Which are the right tools and methods to collect and analyse these metrics?
- How can the data be presented and turned into visualisations and actionable pieces of information that inform the decision making process?
- What are the implications for museums in establishing a performance measurement system in terms of processes, organisational structure and resources?

The starting point is the evaluation framework defined in the previous chapter (Figure 62). However, as implementing the entire model during the fieldwork was not achievable, the focus was on gaining an in-depth understanding of a specific section.
Kaplan and Norton affirm that the typical definition time of the Balanced Scorecard is approximately 16 weeks. The timescale required to implement the Balanced Scorecard for the case studies discussed in the literature varies from six months to two years from its definition to obtaining a completed scorecard with data and its integration with the processes and systems of the organisation, communicating the results and creating an evidence and data culture that fosters decision-making based on the results obtained. Due to the timeframe of this study, therefore, the full implementation of the Balanced Scorecard in the organisation’s structure and processes was beyond the scope of this thesis. In addition, due to the early stages of the digital transformation project at Tate at the time of this research, putting the internal perspectives evaluation into practice was not feasible and therefore, the application focused on the external perspective, ‘Public’. Within this perspective, applying the framework to all of the activities carried out by Tate during the fieldwork was not achievable due to the size of the task, which already highlights some of the challenges and needs in the evaluation of social media. As of July 2014, Tate had over thirty social media accounts with ongoing activity and there were also other digital projects based on social features which imply a substantial volume of data to collect and analyse. Moreover, as the previous chapter highlighted, objectives and audiences are very different depending on the social media account or activity. In order to collect the data for the different metrics listed in the framework, a range of methods and tools are needed, making this task too large for the period of the study.

In consequence, this test focused mainly on developing the metrics and working with different methods to collect, analyse and visualise the data to measure the interaction and conversation created while using these platforms. Table 6 below shows the part of the evaluation framework developed for Tate in the previous chapter that includes the potential metrics to measure the objectives in relation to increasing interaction and generating dialogue, debate and discussion about art. This table also includes potential tools and methods that may be used to collect and interpret the data.

---

Objective:
Conversation & interaction

<table>
<thead>
<tr>
<th>Measures</th>
<th>Tools &amp; methods</th>
</tr>
</thead>
<tbody>
<tr>
<td>Interaction rate, frequency of interaction, volume of user-generated content</td>
<td>Social media platform analytics tools</td>
</tr>
<tr>
<td>Generate dialogue, debate and discussion about art</td>
<td>Social media platform analytics tools</td>
</tr>
<tr>
<td>Number of comments and replies, message direction, on-topic responses, length of comments, sentiment, tone, quality of the interaction</td>
<td>Social media platform analytics tools, Content, linguistic, sentiment analysis, Social network analysis</td>
</tr>
</tbody>
</table>

Table 6: Section of the evaluation framework for measuring conversation and interaction.

The case studies selected for the fieldwork comprise the following:

- Ongoing social media activities of the most active Tate accounts on Facebook, Twitter, Pinterest, Google+, Instagram and Tumblr.
- Twitter activity of Tate Kids and Tate Collectives.
- The Tanks comments wall at Tate Modern.
- Bloomberg Connects Interactive touchscreens at Tate Modern.
- The 1840s GIF Party at Tate Britain by Tate Collectives.
- #TateTour on Twitter of two exhibitions: Henri Matisse: The Cut-Outs and The EY Exhibition: Late Turner – Painting.

The case studies include a mix of ongoing activity from the main and most-followed Tate account on different social media sites and accounts targeted at more specific audiences, as well as some social media activities based on projects with a limited duration. The following table (Table 7) shows a summary of the social media activities with the methods, tools and visualisation techniques applied.
<table>
<thead>
<tr>
<th>Activity</th>
<th>Methods and tools</th>
<th>Visualisation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ongoing social media activity on main profiles (Facebook, Twitter, Pinterest, Tumblr, Instagram, Google+)</td>
<td>Facebook Insights, Twitter Analytics, Pinterest Analytics, Tumblr Analytics, Iconosquare (Instagram Analytics), Google+ Analytics, Google Analytics, Gallery survey</td>
<td>Social media dashboard (including funnel, line charts, comment-shaped box, narrative with highlights)</td>
</tr>
<tr>
<td>Twitter Tate Kids and Tate Collectives</td>
<td>Twitter Analytics</td>
<td>Twitter metrics dashboard (including bar chart, line chart, pie chart, interactions diagram, narrative with highlights)</td>
</tr>
<tr>
<td>The comments wall at The Tanks at Tate Modern</td>
<td>Content Analysis, Sentiment Analysis, Comments wall database, Twitter search</td>
<td>Wordcloud, Bar chart, Quotes from tweets</td>
</tr>
<tr>
<td>Bloomberg Connects Interactive Screens</td>
<td>Content Management System database of the social interactives, Content Analysis, Gallery survey</td>
<td>Funnel report, Stacked bar charts, Summary table, Bubble charts, Examples of responses</td>
</tr>
<tr>
<td>The 1840s GIF Party by Tate Collectives at Tate Britain</td>
<td>Google Analytics, Tumblr Analytics, Gephi</td>
<td>Line chart, Social network graph</td>
</tr>
<tr>
<td>Twitter #TateTour</td>
<td>Twitter Analytics, Content Analysis</td>
<td>Social network graph, Quotes from tweets</td>
</tr>
</tbody>
</table>

Table 7: List of the case studies including the methods, tools and visualisation techniques applied.

Putting the framework into practice in this research is a key step in demonstrating its validity and feasibility. This research has been able to test the application of the Balanced Scorecard and different methods to work with the data. While this chapter
includes some analysis of the data, the actual objective is not to evaluate these activities in detail but to assess the usefulness of the different metrics and how these are presented. For this purpose, feedback was gathered from staff members interviewed in the first part of the fieldwork when the evaluation framework was being built.

### 7.2. Ongoing social media activity

Tate runs its social media activity from several accounts, mainly Twitter, Facebook, Pinterest, Tumblr, Instagram and Google+. The interviews with staff members carried out for this research included questions to capture their reporting needs and their answers demonstrated differences in the degree of detail and the kind of information needed in their decision-making process. While senior management staff emphasised big picture aspects such as the impact that social media has in creating a warmer experience or how to generate dialogue about art, those who manage the accounts on a daily basis focused more on the detail and the individual performance of each tweet, pin or post. Consequently, there should be various levels of reporting and different types of reports and dashboards to present the information. Based on these requirements, this research developed dashboards for different levels of reporting, from strategic dashboards that monitor trends and offer an overview of the activity, to more tactical and operational reports linked to specific departments or account objectives and aiming to optimise the activity by performing an in-depth evaluation as to which are the approaches that work.

The following section shows two dashboard templates that were created during the fieldwork. These were based on the previously mentioned reporting requirements and used as examples of the type of visualisations museums may use. They feature a strategic dashboard that captures the main key performance indicators (KPIs) of the social media activities and a more tactical and operational dashboard that includes the metrics of a specific Twitter account. The dashboards were presented to staff members who were interviewed at the beginning of the research and who would be the readers and users of this data. The feedback obtained helped to evaluate their usability and visual efficiency and it was gathered by asking them the following questions:
- How does this dashboard help to evaluate your social media activity? What is useful about this dashboard?
- Do you find that the dashboard includes too much data, fair amount of data or too little data? Is there any information missing?
- What are your key takeaways based on this dashboard?
- If you were to make a decision about your social media activities based on this data, what would that be?
- How do you find the visual elements of the dashboard? Is the format and information easy to digest?
- Do you have any other comments about the dashboard?

7.2.1. Social media metrics dashboard

A social media dashboard was created as part of the fieldwork, following a strategic reporting perspective and also covering the main Tate social media accounts (see example of the dashboard with August 2014 data in Figure 63) The dashboard features a series of metrics regarding community size, reach and interactions, as well as some more transactional and conversational metrics such as traffic to the website, revenue and percentage of visitors who have heard about the gallery from Tate’s social media activities. It was decided to build a monthly dashboard to fit with a series of monthly reports sent to Tate senior management staff. The dashboard presented here is an example of the type of visualisation museums could use for their reporting activity and how to transform the measures included in the Balanced Scorecard to visualisations of the data.

---

After the drop in the number of impressions and referrals during June and July, this month there has been an increase due to the Matisse exhibition which included paid campaigns on both Facebook and Twitter. The Google+ page reached 1 million followers. However, the interaction is very low compared to other platforms getting this month an average 34 interactions per post.

Pinterest whitelisted the Tate account and included the ‘Summer of Colour’ board in their newsletter which caused an increase of over 25k followers. Approximately 20 users posted images of sunset photos on Twitter and 150 on Facebook to respond to the call for photos originated from the J.M.W. Turner’s work The Scarlet Sunset. Competitions worked very well. The competition got free tickets to the Matisse exhibition with the art selfie to get 15 photos submitted on Twitter and 85 on Facebook.

![Figure 63: Tate’s social media metric dashboard (August 2014).](image-url)
The dashboard includes a box featuring the metrics of each of the sites (see example for Facebook in Figure 64). Although it displays some absolute numbers for followers, the reach and interaction metrics have been normalised with the aim of rendering these comparable every month across time. As discussed in Chapter 4, the data from the analytics tools does not normally emerge as proportions or percentages, so it becomes necessary to make calculations in order to compare it with previous periods and analyse trends. Again, in this particular case, the interaction rate is calculated by dividing the number of interactions by the number of reached users. However, as was the case for the ‘Let’s Get Real’ project, it is not always possible to apply the formula because the metrics that are available on social media sites have some limitations. The formula had to be adjusted for some platforms by using impressions instead of users reached or using the number of interactions available in the analytics tool. However, it has to be noted that it may not include all the possible ways to interact with the posted content.

This data is represented via a funnel to show the potential reach and the percentage of conversion. The funnel helps to visualise the different steps of interaction as well as to assess whether the main goal has been accomplished; that is, the users’ participation and interaction with Tate on the particular social media platform. The percentage of reached users and interaction is also represented in a line chart when historical data was accessible through the tools, as trends can be better interpreted if they are visually rendered. As conversation and dialogue are the main objectives, a comments-shaped box has been added with the average number of comments per post. At the top of the
dashboard there is a summary with the main highlights of the activity that took place during that particular month. This is a key part of the dashboard for the reader as it includes explanations of the changes, peaks and other useful information extracted to interpret the data.

The proposed dashboard features a high volume of data which brings about a practical challenge: how to collect and transfer the data to the reports. The case study investigations conducted by Assiri, Zairi and Eid in the literature on the implementation of the Balanced Scorecard, included interviews with the one hundred and three organisations using it, and pointed to key determinants that influenced a successful performance measurement system.\footnote{Ali Assiri, Mohammed Zairi and Riyad Eid, ‘How to Profit from the Balanced Scorecard,’ \textit{Industrial Management & Data Systems} 106, no. 7 (2006): 937–52.} Automation was identified as a main factor for implementation success, to allow quick access to the data that facilitates the culture change.\footnote{Ibid., 945.} The dashboard presented in this chapter was built using a spreadsheet and downloading the data from the analytics tools of each of the platforms. This raised some challenges as information is not always easy to export and the available data is sometimes limited to a specific timeframe (for example, when this fieldwork was undertaken the data on Twitter Analytics could be downloaded only for the past 90 days and Google+ Analytics showed only the metrics for the past 30 days). Although there are other ways to gather data in an automated way, this requires programming skills to access the Application Programme Interface (API) of the platform. Furthermore, there are also some limitations in the number of API calls and not all the platforms have this option available.

One of the first reactions when staff members were shown the dashboard was to start comparing the results across the different platforms. However, this comparison can only be partially conducted as the metrics available in the different reporting tools are not always the same and the type of interaction also varies. For instance, the number of reached people was available on Facebook, while Twitter Analytics tools report total impressions so it accounts for the multiple occasions on which a user had potentially seen the content. Besides these limitations, the advantage of using a custom-built
dashboard relies on its consistency for internal reporting communication, its ability to aggregate data from several sources and to add extra information, highlights, results and examples from further qualitative analysis to tell the story behind the data. In addition, and most importantly, it also has the ability to add the metrics selected for the key objectives by using the Balanced Scorecard.

The metrics included on the dashboard were positively regarded by the team, as the number of followers was usually the only metric reported at that time. Stack highlights this fact when reflecting on how the proposed dashboard could help to evaluate their social media activities:

So far our reporting of social media activity has focused on audience growth. We have reported overall followers, likes, etc. and internally celebrated milestones on this road (e.g. 1 million Twitter followers). There has been little interrogation of this approach as senior managers do not have the knowledge or background to ask the right questions.421

As this dashboard includes other metrics which examine the interaction with users, Stack claims that its implementation may instigate some internal interrogations regarding the current activity:

What is useful about the dashboard is that it starts to lead this discussion by presenting additional information which goes further into the behaviours of our followers and how many of them are completing tasks that are aligned to business needs. The tricky thing is that these business needs are not clearly defined so we have to make some assumptions about them.422

However, the dashboard could also trigger some changes in the activities through an immediate look at the results. Stack commented on how this type of reporting could help to evaluate more risky approaches on social media, by trialling some radically

421 Stack, John. Interview by author. October 24, 2013
422 Ibid.
different approaches and experimenting further to finally understand the impact on these metrics.\textsuperscript{423}

Regarding the amount of data presented in this case study, it was recognised that quite a lot of data was featured and given the wide range of participating social media platforms, it was necessary to include the individual metrics for each of them. Ideally, if the nature and criteria of the metrics available were the same, it would be possible to simply include a total figure for the reach and interaction of the entire social media activity. However, as discussed before, metrics and the type of available interactions are not the same across all of these sites. When staff were asked about any other information required for the dashboard, the data that was felt to be missing were metrics such as learning outcomes and whether the quality of comments and interactions was changing across time. Some of this more qualitative analysis is included in the highlights at the top of the dashboard. Although further and deeper analysis of a sample of responses could also be a good option, as we saw in the ‘Let’s Get Real’ project fieldwork, it is not always a feasible task in terms of resources if this analysis has to be done on an ongoing basis.

As far as the visual presentation of the data is concerned, the funnel gives an overview of the actual impact in terms of reaching and interacting with the users. Moreover, staff found the dashboard useful to monitor trends and observe changes happening over time. As an example, one of the clear results when this dashboard was assembled is that the percentage of users reached on Facebook was decreasing and that this drop was linked to the latest algorithm changes to how the content was displayed on users’ walls. This insight raised questions about what to do in regard to the activity strategy on Facebook, whether to invest in promoted posts or to make changes to how the platform was being used.

This step, in which the data was presented to the future users of the dashboard, was decisive in this study in assessing how useful the dashboard could be. There is normally an expectation gap when comparing the metrics requirements to the actual data on the scorecard for the first time, and this fosters further questioning and reviewing of the

\textsuperscript{423} Ibid.
selected metrics by the organisation. In the example from Self on the presentation of the results of the first year’s Balanced Scorecard for the University of Virginia Library, the reactions from members of staff were a very important element in shaping the final version. Some of the metrics were not considered as relevant as previously envisioned and a gap still existed between priorities and the metrics in the scorecard. He concludes by stating that the scorecard helped the staff to become aware of the importance of assessment, but it would require refinements over time in order to accurately reflect and assess the library’s performance.

The missing information in the dashboard includes the targets, as these have not yet been established at Tate, nor how performance relates to these, making the figures inconclusive in terms of evaluating whether Tate achieves its goals. The other piece of information that is not included is data from competitors. This is one of the well-known weaknesses of the Balanced Scorecard, as by default this data is not reflected in the framework template. Data could be added to benchmark against other organisations; however, access to data from other organisations is often limited. In addition, with the exception of some publicly accessible data such as the number of followers and interaction, other types of data such as the actual volume of impressions or reached users are not visually available on the profile pages. Moreover, as discussed in Chapter 4, it is important to investigate particular elements such as social media size, funding structure, strategic objectives or type of activity in order to select the appropriate organisations with which to compare results.

The main issue stemming from representing all of the social media accounts together is that each of them has different objectives, which require measurement in different ways. Nevertheless, many of the accounts aim to interact with their users, even if this goal comes from marketing or learning. What this type of reporting does not provide is an in-depth analysis of data or the quality of the interactions and a more detailed breakdown of what works and what does not is also a missing point. This takes us to the next level of reporting presented in the following section of the chapter.

---

424 Self, ‘From Values to Metrics: Implementation of the Balanced Scorecard at a University Library.’
425 Ibid., 62.
Case study summary:

- The dashboard offers an insightful visualization which provides an overview of the social media activity. It allows the museum to monitor trends and to understand the data patterns generated by the different platforms. Having an ongoing scorecard with standard metrics is an effective way to track changes and to see the results of the experiments.
- The lack of qualitative measures does not offer a full view of the impact of these activities. Moreover, each of the social media platforms has its own objectives which sometimes require a different set of measures.

7.2.2. Twitter metrics dashboard

To test the usability and efficacy of a more tactical and operational dashboard, a Twitter metrics dashboard was created for this field research. This dashboard is an example of the type of reporting that could be used by museums to evaluate the success of the monthly activities of a specific social media account, in this case Twitter (see Twitter dashboard example for Tate Kids in Figure 65). As we saw in Chapter 4, museums and cultural organisations have more than one profile for each social media platform; for instance, they have accounts for their shop, members, specific audiences or art forms, etc. The same applies to Tate, where, as stated in the social media presence mapping of the previous chapter, it has over twenty profiles on Twitter alone.

This dashboard was filled with the data extracted from Twitter Analytics for the month of August for Tate Collectives and Tate Kids, including the following metrics:

- Tweets
- Replies to users
- Followers
- Impressions: total volume, per tweet and in percentage of the total followers
- Interactions: total volume, per tweet and in percentage of the total impressions
- Distribution of the interactions
- Replies
- Retweets
- Favourites
- Top 10 tweets based on the interaction rate

At the top of the dashboard, a summary with the highlights of the activity was included.

The dashboard was presented to the staff who manage these accounts: Jen Aarvold, Tate Collectives Producer, and Kathryn Box, Tate Kids Producer, with the aim of gathering feedback on the usefulness of the metrics and information included. The main objective of the dashboard was accomplished, as they valued the fact that they could see the top performing tweets and also a breakdown of the interactions. Box commented: ‘It’s great to see the exact tweets which bring about certain interactions such as the content which is retweeted most or favourited most and to then, be able to think about what you want your tweets to achieve’. For example, live tweeting for Tate Kids events during the weekend worked very well in August, so pushing live tweeting and even training curators across different sites were actions that were taken based on the analysis of the results. Another finding was the impact caused by the retweets of the posts from the main account, which generated an increase in the volume of interactions. However, the interaction rate was lower than the average for the Tate Kids account. These findings are noted at the top of the report. For Aarvold, this was a key element of the dashboard:

A particularly useful and bespoke element is the ‘Highlights and recommendations’ section which encourages each account to analyse the data and make specific suggestions based on their user-needs. It is also beneficial for evaluating whether or not the previous month’s recommendations have been achieved. I think as well as having account-specific recommendations, this would be a good place to highlight wider organisation priorities and key messages, so we can make sure the accounts are responding to these, and using the right hashtags (where relevant).  

---

426 Box, Kathryn. Interview by author. October 14, 2014.
Given the many different accounts in use, they suggested that including the Twitter bio and a sentence clarifying the main purpose of the account would help the reader of the dashboard to interpret the metrics based on the objectives. The visual was clear for both, although some questions were asked about the exact meaning of the metrics and how Twitter tracks this information. These questions regarding the calculations and the definitions of the metrics on each platform raise an important challenge to implementing a culture of evaluation. The training of staff was also one of the main factors identified by Assiri, Zairi and Eid for a successful implementation of the Balanced Scorecard and that includes programmes to link the training to long-term strategic plans and training employees in performance measurement and other required technical skills.  

---

428 Assiri, Zairi and Eid, ‘How to Profit from the Balanced Scorecard,’ 942–945.
Figure 65: Twitter metrics dashboard of Tate Kids (August 2014).

These two dashboards, one for all social media activities and one for a specific Twitter account, are examples of how a museum or gallery could gather and present the social media results on a regular basis, in this case monthly. Several studies have revealed that one of the benefits of the Balanced Scorecard is having a visible, transparent and
regular reporting system. Manville concluded in a case study undertaken for a not-for-profit small and medium-sized organisation, that one of the main benefits of the framework is a more consistent reportage which does not rely on *ad hoc* measures as these are very time consuming to obtain.\(^\text{429}\)

Case study summary:
- This tactical dashboard focused on one social media platform allows the museum to identify trends as well as what works and what does not work in order to generate reach and interactions on Twitter.
- The automation of data collection and visualization for ongoing reporting represents an advantage of this type of dashboard.
- As with the previous dashboard, the summary can include some other key insights of the impact of the social media site. However, it is limited in its capacity to represent qualitative measures on an ongoing basis.

### 7.3. The Tanks Comments Wall at Tate Modern

In July 2012, Tate Modern opened a new space called The Tanks, the world’s first set of galleries permanently dedicated to exhibiting live art, performance, installation and film work. The Tanks used to contain the oil that fuelled the former Bankside Power Station and have now been turned into Tate Modern’s brand new gallery space by architects Herzog & de Meuron.\(^\text{430}\) They are enormous concrete circular spaces of 30-metres in diameter and 7 metres high, and they opened their doors to the public with a fifteen-week festival, *The Tanks: Art in Action*, which took place from July 18 to October 28, 2012. The programme presented in these industrial spaces featured an array of installations, live performances and films, including a commission by Korean artist Sung Hwan Kim, the displays of Lis Rhodes, Suzanne Lacy’s work, the *Undercurrent* festival for young people and live performances from over forty artists from around the

---


Nicholas Serota, Director of Tate, emphasised the participatory element of these spaces at their opening:

Tate is rooted in showing the collection and working with artists. The Tanks will give us the opportunity to respond to the changing practice of artists, many more of whom are now engaged in installation and performative forms of art than ten or fifteen years ago. It has also become apparent that our audiences seek different forms of participation and engagement. They want dialogue and discussion and The Tanks will provide a forum for such exchange.

During the festival events programme at The Tanks, social media was used as a platform to create a conversation with the visitors. A comments wall was installed for visitors to reflect on their visit and their experience (Figure 68). The objective was to provide a communal and participatory interpretation resource where discussion, debate,

---

431 ‘The Tanks - Art in Action Event Series.’

or reflection about live art could take place. Visitors were invited to comment via Twitter, Facebook and Google+ and answer the question: ‘What do you think?’ They needed to include the hashtag #thetanks, and their comment was projected on the wall almost immediately. Visitors could also respond to some prompt questions, using the question’s own hashtag (Table 8) or signing in to a specific widget using the gallery’s Wi-Fi. A mixed-method approach was taken in this study, the number of responses was counted and their quality was also taken into analysis.

Figure 67: Comments wall in The Tanks at Tate Modern. © Tate Photography.
Figure 68: Visitor sending a comment with her phone to the comments wall. © Tate Photography.

<table>
<thead>
<tr>
<th>Question</th>
<th>Hashtag</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do you prefer to collaborate or work alone?</td>
<td>#collab</td>
</tr>
<tr>
<td>What subculture are you part of?</td>
<td>#subculture</td>
</tr>
<tr>
<td>What did you create or change today?</td>
<td>#today</td>
</tr>
<tr>
<td>How do you imagine tomorrow’s museum?</td>
<td>#tomorrow</td>
</tr>
<tr>
<td>Does participating enhance your experience?</td>
<td>#participate</td>
</tr>
<tr>
<td>Who tells you what you’re seeing in the museum?</td>
<td>#who</td>
</tr>
<tr>
<td>How can destruction be creative?</td>
<td>#creative</td>
</tr>
<tr>
<td>Is performance ‘art of the present tense’?</td>
<td>#perform</td>
</tr>
<tr>
<td>Is film in the gallery different from film in the cinema?</td>
<td>#film</td>
</tr>
<tr>
<td>How can art change society?</td>
<td>#society</td>
</tr>
<tr>
<td>What is the role of the audience?</td>
<td>#audience</td>
</tr>
<tr>
<td>Does live art need to be experienced live?</td>
<td>#live</td>
</tr>
</tbody>
</table>

Table 8: List of prompt questions and hashtags.
Examples of the responses sent by visitors to the prompt questions included:

**Question: How can art change society?** (Hashtag: #society)
‘We shape our art, and then our art shapes us #thetanks #society’

‘In different ways – sometimes with a call to arms, sometimes by making us uncomfortable, sometimes by uplifting us… #thetanks #society’

‘Art allows and opens the debate for change to happen. Change is inevitable, art can show the way #tanks #society #unbrokenline @tate’

**Question: Does live art need to be experienced live?** (Hashtag: #live)
‘A certain kind of art is experienced live, but even as its live, its historicizing itself & creating a historical lineage #theTanks #live’

‘When #live art involves and plays with the ‘audience’, recordings are something else entirely. #thetanks’

‘#thetanks #live xperience of art must help audience to spiritually develop him/herself”

‘#thetanks #live nothing compares to experiencing the real thing. Like architecture, it’s not the same in a book’

‘To influence, and in the end, define. Finally, be the art perhaps. #thetanks #live’

**Question: What is the role of the audience?** (Hashtag: #audience)
‘The #audience shapes the art by how they interact with, define and digest the work. They cannot be mutually exclusive #thetanks’

‘#thetanks the role of the #audience is to give the art a sense of life and realism. Occasionally it feels so simple but it looks incredible’

‘Our role is not to be audience but part of the performance #thetanks #audience’
The evaluation work carried out during this field research aimed to measure the impact of social media as a means to engage with the visitors to The Tanks and understand how these platforms were used by the visitors to express their reactions, insights and thoughts about this new exhibition space. What visitors tweeted offered a great opportunity to apply content and sentiment analysis and to learn about the main topics they talked about and their overall feelings towards the space and live art programme. As we saw in Chapter 2, content analysis is a classic technique that is experiencing an increasingly important role in online research. Content analysis helps to categorise pieces of text or images and translate this categorisation into numbers for analysis. Sentiment analysis, also known as opinion mining, has attracted sufficient attention to be applied to social media as well. Furthermore, several automatic tools have been developed to detect subjectivity in a text, as well as the sentiment behind it, while attributing a positive or negative score. Examples of these tools include SentiStrength, Linguistic Inquiry and Word Count. Automatic sentiment analysis has been applied to study how people react on Twitter toward brands and their products, as well as toward popular topics such as the Oscars, sporting events, natural disasters and political elections. However, some researchers have been critical of this analytical approach, questioning its validity and arguing that no lexical algorithm has been developed that can replace human analysis yet. This has proven true for this case, as, for instance, we can see the challenge presented by automatic sentiment attribution in the following tweets: ‘Also, the first time I’ve been pushed to real life emotional tears in years #thetanks #theartistispresent’ and ‘The Tanks were weird to say

439 Branthwaite and Patterson, ‘The Power of Qualitative Research in the Era of Social Media.’
the least but hell I liked it’. These tweets received a negative score from the automatic tools, when in reality they have a positive connotation. Moreover, automatic coding does not disclose the reason why the experience was positive or negative for the visitor; therefore, getting to know the context of such experience is key to understanding the precise elements that impacted upon the emotions of the visitors and what attracted their attention.

The total number of messages that appeared on the comments wall was 2,602 and 150 were in response to the prompt questions. The number of responses to the prompt questions did not reach the expected target and the main barrier was the login process through the widget. However, the total number of comments with users sharing their feelings and opinions from the whole experience was high. The majority of messages came from Twitter using the hashtag #thetanks. This quantitative analysis exposed the usability issues of the widget but demonstrated the effectiveness of having a hashtag that everyone could use to talk about their experience and bring the conversation to both the digital and physical spaces. In order to gain some insights into their reactions, a random sample of 367 tweets was manually coded into positive, negative or neutral and then analysed based on the content of the tweet as well. The qualitative part of the analysis allowed the researcher to identify the themes and situations that emerged from the tweets, and the cross-tabulation with the sentiment pinpointed what visitors liked or disliked (Figure 69).

![Figure 69: Number of positive or negative mentions by theme.](image-url)
The majority of the tweets analysed (89 percent), regarded the experience as positive. While the space and different installations and performances were the most mentioned themes, we can observe how the industrial space deeply impacted the experience, as many tweets labelled the architecture as ‘amazing’ and ‘incredible’ and also mentioned the light and the smell (Figure 70). Interestingly, visitors also shared photos of the singularities of the space and of the remaining physical elements of the former oil tanks. The installations, displays and events featured in the festival programme also had a very positive response; so did the comments wall, which was regarded by visitors as a great participatory experience. Meanwhile, negative tweets about The Tanks mainly came from visitors who did not feel comfortable in the space because it was, in their own words, too ‘dark’ and ‘creepy’, or from visitors who did not understand the contemporary art on display (Figure 71).

Figure 70: Wordcloud: Adjectives used to describe The Tanks by the users who tweeted positively.

Figure 71: Wordcloud: Adjectives used to describe The Tanks by the users who tweeted negatively.
Visitors narrated their activities in the gallery using Twitter, building a rich bank of data of their impressions and thoughts on this new space. Content and sentiment analysis allowed the researcher to obtain information on what visitors were commenting on and of their overall feelings. Twitter’s 140-character cap poses certain limitations to this analysis, which may not respond to in-depth questions aimed to shed light on whether The Tanks’ impact on visitors radically changed their understanding of live art, or to link visitor reactions to demographics and art knowledge. Other variables need to be taken into account, such as what motivates people to tweet, the language of the tweets analysed or how the average Twitter user profile matches the demographics of the general visitors.

Case study summary:
- The usage of content and sentiment analysis was key to developing an understanding of the main topics people talked about at The Tanks, their feelings during their visit experience and the quality of the responses to the prompt questions on the comments wall.
- These methods are hard to automate and therefore they are very time consuming, which may represent a challenge during the evaluation process.

7.4. Bloomberg Connects Interactive Screens

Tate Modern has been hosting a series of social interactives that were installed with the aim of encouraging visitors to deeply and personally reflect on their experience at the gallery as well as to foster discussion with other visitors. The technology used consists of interactive touchscreens that allow visitors to engage in different activities, such as responding to a debate question or to a provocative statement, writing a caption for a key artwork or sharing their experience at Tate Modern.440 Tate’s Curator of Interpretation, Minnie Scott, explains how projects like this one open up the conversation by giving the visitors a voice within the gallery:

We work creating resources that enhance visitor engagement with the works on display, exhibitions or displays. Those resources can include texts on the wall, leaflets, multimedia and audio guides and also digital resources. These facilitate that there are different interpretation resources available and that is not a single Tate voice. We want to include multiple perspectives of an artwork including visitors’ voices and interpretation so they can share their ideas with other visitors. The Bloomberg Connects project which invites visitors to share their views is an example of this, I guess you can call it Visitor Generated Interpretation.441

Bloomberg Connects, as a participatory experience, aims to encourage visitors to reflect on their experience at Tate Modern, foster the articulation of ideas and thoughts on specific artworks and events and on the gallery building itself via digital comments or drawings and to motivate discussion and debate with other visitors. This contributes to achieving Tate’s vision of creating multiple voices and also reinforces the notion that sharing an opinion on the issues surrounding modern and contemporary art, and Tate Modern in particular, should not just be confined to the voices of art specialists.

The logistics of the project were put into practice by installing interactive screens on Levels 2 and 4 at Tate Modern. These screens allow visitors to engage in different activities such as responding to specific questions about their experience at Tate Modern, engaging in a debate generated by artists’ statements or writing captions for the artworks on display (Figure 72 and Figure 73).

In order to understand the impact and reach of this experience, the focus of the evaluation in this study had to go beyond the number of participants or its popularity among visitors. The evaluation work carried out during the fieldwork mainly assessed whether conversations were prompted and the depth of the responses. The responses submitted by the visitors were also analysed in this case study, using a mixed-method
approach, and from both a quantitative and a qualitative perspective. The quantitative analysis examined the volume of responses, number of responses per question and the number of questions approved and featured, while the qualitative analysis complemented some metrics such as the length of comments, analysing the content of the responses and whether they responded to the prompt. The data was collected from the social interactives content management system and the table below summarises the main descriptive statistics regarding the volume of responses since the launch of the project in October 2013 until the end of July 2014.

<table>
<thead>
<tr>
<th>Metrics</th>
<th>Level 2</th>
<th>Level 4</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total number of comments</td>
<td>10,280</td>
<td>10,685</td>
<td>20,965</td>
</tr>
<tr>
<td>Average no. of comments per day</td>
<td>34</td>
<td>35</td>
<td>69</td>
</tr>
<tr>
<td>Approved comments</td>
<td>91%</td>
<td>49%</td>
<td>70%</td>
</tr>
<tr>
<td>Featured comments</td>
<td>8%</td>
<td>9%</td>
<td></td>
</tr>
</tbody>
</table>

Table 9: Comments metrics for Bloomberg Connects interactives.

These figures tell us the total number of conversions in terms of people adding a comment but there are other forms of participation that range from just noticing the screens in the gallery to reading the comments written by other users without actively getting involved. For the interpretation team it was also important to determine how many people were actually aware of the presence of the screens in the gallery and also if they knew about the possibility of expressing their opinion and experiences through them. The following funnel diagram shows, to scale, the total number of visitors to the gallery and the percentage of different degrees of participation. Thirty-five percent of visitors saw the screens and four percent left a comment on the interactive screens.442 Seventy percent of the comments submitted were approved by the interpretation team.

442 The data for the percentage of visitors that viewed and commented on the interactives was collected by Tate as part of the ongoing gallery surveys in 2013-2014 and provided to the author.
This takes us to the next part of the analysis which aims to understand whether the prompts work and which ones generate deeper conversation and engagement. For the interpretation team, the findings on which prompt questions and topics were most popular and elicited the most engaged responses allowed them to review and refine how visitors are invited to participate. The method used to respond to the question of which prompts are working includes some quantitative measures regarding the volume of responses and the definition of a coding scheme to apply some standardised measures to the varied pieces of writing submitted by Tate’s visitors. The methodology was tested and feedback was gathered from the Interpretation team about the insights and challenges that resulted from putting the evaluation method into practice. It has to be noted that the analysis was applied to the responses gathered from the month of April onwards, as some questions were added or reworded during the first months of the project. The questions visitors could answer to in each of the levels were:

**Level 2**

What does ‘art’ mean to you?

My visit in 5 words:

Joseph Beuys said, ‘Everyone is an artist’. What do you think?

How can art change society?
Are we born an artist or is it a skill that can be taught?

**Level 4**
Joseph Beuys said, ‘Everyone is an artist’. What do you think?
Do we lose creativity as we grow up?
Do artists and scientists see the world differently?
Is selling art, selling out?
Does the environment in which you view art change your experience of it?
Has art changed your world view?
Write your own caption for Giuseppe Penone’s ‘Tree of Twelve Metres’
Write your own caption for Wassily Kandinsky’s ‘Swinging’

The starting point of the analysis was to gain an overview of the volume of the activity. The following bubble charts (Figure 75 and Figure 76) show the volume of responses to each of the questions submitted in Level 2 and in Level 4 respectively. The larger and darker blue bubbles represent the questions that attracted more responses and vice versa.
Figure 75: Number of responses by question – Interactives in Level 2 (April – July 2014).
There are some characteristics of a text response that can be calculated automatically and the length of the responses might be a first indicator of the engagement generated by the responses. The following graphs (Figure 77 and Figure 78) show the length of both the number of characters and the number of words contained in the responses to each of the questions. The analysis of this information already discloses an interesting finding, as the length of the responses in Level 4 was longer than in Level 2. Although the questions differ on both levels, there is a particular one that appears in both: *Joseph Beuys said: ‘Everyone is an artist’. What do you think?* The average number of words of the responses in Level 2 was 4.7, while in Level 4 this was 9.4. The settings of the kiosks, the environment on each floor and the placement within the visitor journey along the building may have had an impact on this result. The space in Level 4 is quieter and visitors are given the opportunity to sit down to write the responses, as compared to Level 2 where they have to be standing. The interface of the screen and the options given also vary, as in Level 4 visitors can browse other users’ responses. These
results match the original objective of the interpretation team, to create a lighter engagement in Level 2, which marked the beginning of the visit to the galleries, while providing a deeper experience in Level 4, where the ambience encourages more time for reflection and it also happens to be one of the last locations along the visitor journey through most of the exhibitions and displays.

![Figure 77: Average length of the approved responses to the questions on Level 2.](image)

![Figure 78: Average length of the approved responses to the questions on Level 4.](image)

However, focusing only on the number of words may not offer a true picture of how visitors are actually using the social interactives, so further manual coding and interpretation of the content of the responses was necessary. The code scheme (Figure 79) developed based on the objectives of the project is as follows:
Figure 79: Coding scheme for interactive comments.

The first measure indicates whether the response was related to the prompt question or not. If on topic, then a score was given to the response based on the length, the deepness and other perceived sentiment and feelings in the responses during the coding. The scores were: 1 for light engagement, 2 for medium and 3 for high. The following is an example of the process by which the responses were coded:

Question: Are we born an artist or is it a skill that can be taught?
1 (light): ‘Both’
2 (medium): ‘It’s a skill to be taught but sometimes you can be born with’
3 (high): ‘We are born as creators but lose the ability to perceive reality as it is through cultural boundaries. Being an artist is being able to look through the eyes of a kid’

The following graphs show the results of the coding (Figure 80, Figure 81, Figure 82 and Figure 83):
### Figure 80: Percentage of responses related to prompt question (Level 2).

<table>
<thead>
<tr>
<th>Question</th>
<th>Yes</th>
<th>No</th>
<th>100%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Are we born an artist or is it a skill that can be taught?</td>
<td>73%</td>
<td>27%</td>
<td></td>
</tr>
<tr>
<td>Joseph Beuys said, ‘Everyone is an artist’. What do you think?</td>
<td>75%</td>
<td>25%</td>
<td></td>
</tr>
<tr>
<td>How can art change society?</td>
<td>56%</td>
<td>44%</td>
<td></td>
</tr>
<tr>
<td>What does ‘art’ mean to you?</td>
<td>76%</td>
<td>24%</td>
<td></td>
</tr>
<tr>
<td>My visit in 5 words:</td>
<td>69%</td>
<td>31%</td>
<td></td>
</tr>
</tbody>
</table>

### Figure 81: Percentage of high, medium and light engagement responses by question (Level 2).

<table>
<thead>
<tr>
<th>Question</th>
<th>High</th>
<th>Medium</th>
<th>Light</th>
</tr>
</thead>
<tbody>
<tr>
<td>Are we born an artist or is it a skill that can be taught?</td>
<td>40%</td>
<td>44%</td>
<td>15%</td>
</tr>
<tr>
<td>Joseph Beuys said, ‘Everyone is an artist’. What do you think?</td>
<td>44%</td>
<td>34%</td>
<td>22%</td>
</tr>
<tr>
<td>How can art change society?</td>
<td>19%</td>
<td>60%</td>
<td>21%</td>
</tr>
<tr>
<td>What does ‘art’ mean to you?</td>
<td>43%</td>
<td>42%</td>
<td>16%</td>
</tr>
<tr>
<td>My visit in 5 words:</td>
<td>25%</td>
<td>35%</td>
<td>39%</td>
</tr>
</tbody>
</table>

### Figure 82: Percentage of responses related to prompt question (Level 4).

<table>
<thead>
<tr>
<th>Question</th>
<th>Yes</th>
<th>No</th>
<th>100%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Does the environment in which you view art change your experience of it?</td>
<td>63%</td>
<td>7%</td>
<td></td>
</tr>
<tr>
<td>Do artists and scientists see the world differently?</td>
<td>98%</td>
<td>2%</td>
<td></td>
</tr>
<tr>
<td>Do we lose creativity as we grow up?</td>
<td>95%</td>
<td>5%</td>
<td></td>
</tr>
<tr>
<td>Is selling art, selling out?</td>
<td>84%</td>
<td>16%</td>
<td></td>
</tr>
<tr>
<td>Has art changed your world view?</td>
<td>62%</td>
<td>38%</td>
<td></td>
</tr>
<tr>
<td>Joseph Beuys said, ‘Everyone is an artist’. What do you think?</td>
<td>83%</td>
<td>17%</td>
<td></td>
</tr>
<tr>
<td>Write your own caption for Giuseppe Penone’s ‘Tree of Twelve Metres’</td>
<td>92%</td>
<td>8%</td>
<td></td>
</tr>
<tr>
<td>Write your own caption for Wassily Kandinsky’s ‘Swinging’</td>
<td>91%</td>
<td>9%</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Question</th>
<th>Yes</th>
<th>No</th>
<th>100%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Are we born an artist or is it a skill that can be taught?</td>
<td>73%</td>
<td>27%</td>
<td></td>
</tr>
<tr>
<td>Joseph Beuys said, ‘Everyone is an artist’. What do you think?</td>
<td>75%</td>
<td>25%</td>
<td></td>
</tr>
<tr>
<td>How can art change society?</td>
<td>56%</td>
<td>44%</td>
<td></td>
</tr>
<tr>
<td>What does ‘art’ mean to you?</td>
<td>76%</td>
<td>24%</td>
<td></td>
</tr>
<tr>
<td>My visit in 5 words:</td>
<td>69%</td>
<td>31%</td>
<td></td>
</tr>
</tbody>
</table>
Figure 83: Percentage of high, medium and light engagement responses by question (Level 4).

The analysis was presented to the interpretation team and it helped them to answer the evaluation questions of the project, identify which questions worked best and compare the results of the interactives in each level of the building. This evaluation work also helped to assess the impact of designing different interactive interfaces and settings for people to participate with and use to write their comments. However, the process of coding the responses revealed a series of challenges and limitations in the approach. When coding the responses we look at the final output: the words, emoticons and symbols in the replies but we do not know what has happened before this text was entered into the system. Behind a short and simple response in terms of the score, there may be a long discussion between friends or someone who has read many responses from other visitors or an overseas tourist whose mother tongue is not English. People who come to a museum have different degrees of knowledge of the subject and for example, an artwork caption written by someone with little or general knowledge of art may be coded lower than a caption written by a specialist in art. This visitor comment on the social interactives: ‘it has lots of circles and shapes’ for the Kandinsky caption may be from a young person with a general knowledge of art, not a specialist who has spent some time looking at the image and the shapes painted.

If a high percentage of the responses had been unrelated to the question, or a ‘yes’ or ‘no’ type of answer, this would have meant a failure for the project, so the coding was useful to gain an understanding of the usage of the interactives. However, there are some limitations when it comes to evaluating how this participatory interactive activity
impacts on the visitor experience in the gallery and how engaged they are with this type of analysis. Anecdotally, one can read people’s comments about the interactives, and this may include very emotional and in-depth responses, but for the majority of cases, it is not easy to correlate the responses to the experience without more direct feedback from the visitor. More importantly, it is challenging to evaluate how the visitor values this social interactive experience, whether it has enhanced the visit or not and how it impacts on the relationship with the museum.

Case study summary:

- A mixed-method approach combining quantitative and qualitative data enabled the development of an understanding of the impact on the volume of participation and evaluation of the efficiency of the prompt questions and the design of the user experience.
- The content analysis of the comments is limited to the coder research criteria and therefore there are some challenges inherent in the evaluation of the responses and the impact on the experience without more direct feedback from the visitor.

7.5. Visualising the interactions on the social network

Counting the number of interactions between the user and the museum account is a useful measure to observe the volume of activity. Behind these numbers there are the stories of how the conversation or the shares take place within the social network. Mapping those interactions and analysing the flow of content or conversation between the users is called social network analysis. In a social network graph the nodes are the objects (e.g. people, organisation or a website) and the edges are the links between pairs of nodes.  

Hogan proposes the use of visualisation and statistics to map the network, measure the density and cluster and identify the centrality of the nodes among other metrics.  

---

443 Hogan, ‘Analyzing Social Networks via the Internet,’ 143.
444 Ibid., 149–150.
This method was applied during this fieldwork and social network graphs were created for two case studies. The first graph represents the shares on Tumblr of the GIFs that were created and submitted by users inspired by five artworks from the Tate collection as part of the 1840s GIF Party. The graph in the second case study represents the conversation generated during the Twitter #TateTours, an initiative where a curator takes the users through an exhibition, tweeting and sharing content about it on a specific day and time. The tour concludes with a Q&A in which users have the opportunity to ask questions to the curator. In both cases, the tool that was used to create the graphs was Gephi, an open source tool for social network visualisation and analysis.

7.5.1. The 1840s GIF Party

The 1840s GIF Party was an initiative carried out by Tate Collectives, the digital programme for young people (15-25 years old). The activity consisted of inviting artists and members of the public, notably the Tumblr community, to transform artworks from the 1840s gallery at Tate Britain into animated GIFs. The first stage of the project involved commissioning five digital artists to take part by creating an animated GIF from five selected collection artworks. The commissioned artists were: Matthias Brown (MuseumGIFs), Greta Larkins (FashGIF), Hilary Sloane, James Kerr (Scorpion Dagger) and Zack Dougherty (Hateplow). The animated GIFs were posted on the Tate Collectives Tumblr site and on their own channels. Using these GIFs as a source of inspiration and a tool to create awareness about the initiative, the second stage of the project took place: a call for mass public participation was posted on the Tate website and Tate Collectives social media channel. The third and last stage transported the users to the physical collection, a celebratory showcase ‘The 1840s GIF Party’ was held at ‘Late at Tate’ on Friday 7 February 2014, in which all submissions were shown on a loop on 30 Sony Cube TVs, in the 1840s gallery room at Tate Britain, alongside the original artworks (see photos of the installation on Figure 84). Approximately 2,500 people visited the 1840s GIF Party. The aim of this project was primarily to target a

younger, digitally engaged audience, who may not have been familiar with Tate and its collection. The specific objectives of the 1840s GIF Party project were to engage new (digital) audiences (primarily young people aged 15-25), to encourage mass digital participation and response, to increase engagement with artworks in the Tate collection (online and offline) in innovative ways, to commission and collaborate with exciting new young digital artists, to raise awareness of the Tate Collectives community and its initiatives and finally to encourage participants to attend the event ‘Late at Tate’ to see their work showcased in the galleries.

![Figure 84: Late at Tate event. Photos taken by author.](image)

As part of this field research, the evaluation of this project focused on measuring, on the one hand, the reach of the activity to increase awareness of the Tate collection, and on the other hand, measuring the impact, the participation element and the interaction that was created among the Tumblr community. The data was obtained from Tumblr’s 1840s GIF Party page, the Tate Collectives Tumblr analytics tool and Google Analytics which was set up on Tate’s website.

The participatory call received a total of 587 submissions (examples of some of the GIFs can be seen in Figure 85). The project achieved an enormous level of virality online and the number of reblogs demonstrated this fact. The commissioned GIFs were reblogged and liked 15,000 times on the Tate Collectives Tumblr. The selected public
submissions, shown on the Tate Collectives Tumblr, were re-blogged and liked over 100,000 times.

Figure 85: Examples of three GIFs submitted to the 1840s GIF Party project.

As mentioned above, one of the objectives of the project was to increase the awareness of Tate’s collection. Based on the data from Google Analytics, we can conclude that the project significantly increased the number of visits to the selected artworks on Tate’s website and to the 1840s Gallery page. The line charts (Figure 86) show a significant increase in traffic during the open call and even after the ‘Late at Tate’ event, compared to previous months.
<table>
<thead>
<tr>
<th>Page</th>
<th>Page views</th>
<th>Graph</th>
</tr>
</thead>
<tbody>
<tr>
<td>1840s Gallery</td>
<td>5,525</td>
<td><img src="image1.png" alt="Graph" /></td>
</tr>
<tr>
<td>1,878</td>
<td></td>
<td><img src="image2.png" alt="Graph" /></td>
</tr>
<tr>
<td>1,405</td>
<td></td>
<td><img src="image3.png" alt="Graph" /></td>
</tr>
<tr>
<td>9,766</td>
<td></td>
<td><img src="image4.png" alt="Graph" /></td>
</tr>
<tr>
<td>1,262</td>
<td></td>
<td><img src="image5.png" alt="Graph" /></td>
</tr>
<tr>
<td>1,875</td>
<td></td>
<td><img src="image6.png" alt="Graph" /></td>
</tr>
</tbody>
</table>

**Figure 86: Volume of traffic to the 1840s Gallery page and artworks.**

The number of reblogs on Tumblr was considerably high, a fact that helps to measure the potential reach and distribution of the artworks, but it was also important to understand how these artworks had travelled across the network and identify the impact
of specific users who amplified this effect. The following two graphs (Figure 87 and Figure 88) represent the virality of two of the GIFs submitted and posted on the Tate Collectives Tumblr account, the nodes representing the Tumblr users and the edges the reblogs. The node size is based on the number of reblogs from each user. To improve the visualisation, colours based on the modularity measures have been added to visualise the structure of the network and cluster the different communities in which the reblogs occurred. The author ‘Scorpion Dagger’ is one of the artists who was commissioned to create a GIF and as the graph (Figure 88) shows, this user’s reblog from Tate Collectives generated an even bigger viral effect on the distribution of this GIF image.

Case study summary:

- Social network analysis is an effective method for visualising how users share content on social media and for identifying influences that increase the reach of the museum’s content.
• The evaluation of the whole impact requires a combination of methods including social network analysis, web analytics and observations as the experience moves from an online activity to a final outcome in the galleries.

7.5.2. #TateTour

Tate runs tours on Twitter in which the curator of a particular exhibition guides the user through the rooms of the gallery posting photos and videos of the artworks on display and explaining in 140 characters some interesting facts about the artist or a specific artwork. They are scheduled just like the physical tours that take place in the gallery as there is a specific day and time to join the Twitter tour. Users need to follow the hashtag #TateTour to read the tweets and they can include this in their tweets to send their comments or ask questions during the Q&A at the end of the tour. These tours were carried out for several exhibitions: Lichtenstein: A Retrospective, Lowry and the Painting of Modern Life, Henri Matisse: The Cuts-Outs, Mondrian and his Studios, ARTISTS ROOMS: Louise Bourgeois: A Woman Without Secrets and Malevich and The Ey exhibition: Late Turner - Painting Set Free. Jesse Ringham, Digital Communications Manager, sees this initiative as a great success due to the reach of the message and the interaction of the curator with the users:

Things that I would say are very successful are the Twitter tours at the moment because it ticks so many boxes with what Tate mission is all about. First of all, it gets people that would have never come across social media before, such as the curators and it gives them a voice directly to the public for instance with a Q&A, which I think is brilliant. It also opens up to a diverse, international, UK audience in real time and naturally using Twitter for the tours makes the campaign more accessible. It ticks the box in terms of marketing because it generates awareness of the campaign and possibly returned visits.448

The case study presented in this chapter will analyse two of the tours that took place for these two exhibitions: Henri Matisse: The Cuts-Outs that took place on 16 April 2014 from 18:00-19:00 BST, led by Flavia Frigeri, Assistant Curator of the exhibition and


236
The EY exhibition: Late Turner - Painting Set Free on Tuesday 9 September 2014 also from 18:00-19:00 BST and led by Amy Concannon, Curator of the exhibition.449

Figure 89: Screengrabs of some of the tweets posted during the Twitter tours. Tate, Twitter Post, April 16, 2014, https://twitter.com/tate/status/456477465976643585. Tate, Twitter Post, September 9, 2014, https://twitter.com/tate/status/509387156222386176.

The key statistics of the activities gathered from Twitter Analytics for each of the tours are as follows:

- **Henri Matisse: The Cuts-Outs:**
  - Number of tweets sent by Tate: 32
  - Impressions: 251,906 (average of 7,6K impressions per tweet)
  - Retweets: 1,416 (average of 42 retweets per tweet)
  - Favourites: 1,850 (average of 56 favourites per tweet)
  - Replies: 172 (average of 5 replies per tweet)
  - Other interactions (clicks on images, videos, hashtag, user profile, links): 2,482

- The EY exhibition: Late Turner - Painting Set Free.
  - Number of tweets sent by Tate: 28
  - Impressions: 836,339 (average of 29,869 impressions per tweet)
  - Retweets: 790 (average of 28 retweets per tweet)
  - Favourites: 1,123 (average of 40 favourites per tweet)
  - Replies: 79 (average of 3 replies per tweet)
  - Other interactions (clicks on images, videos, hashtag, user profile, links): 9,659

It is worth noting that there is no information available on Twitter Analytics that shows the distribution of impressions by number of unique reached users. Also, impressions do not necessarily mean that people read the tweets, as the tool only counts how many times the tweets are displayed to users. Nevertheless, it is a useful indicator that shows potential reach and a relevant figure with which to draw a comparison with other activities. This again raises the discussion on the challenges of the social media data that is available on the analytics tools of these platforms.

One of the objectives of the tour is to connect with audiences and generate a conversation, especially at the end of the tour with a Q&A. In order to visualise the conversation between Tate and the people who were following the tour, two social network graphs were created (Figure 90, Figure 91 and Figure 92). The analysis focused on the conversations generated during the tour and therefore, these graphs only include the tweets sent from the Tate Twitter account, the direct replies to those tweets or those using the hashtag. It excludes other interactions such as retweets, favourites or clicks. Each of the nodes represents a user and the edges correspond to the tweets sent between users. The colour of the edges represents the direction of the tweet. The edges in pink represent replies to Tate and the ones in turquoise are those sent by Tate to reply to users. The width of the edges represents the volume of replies from a single user to Tate during the tour. While most of the users only replied once, a few of them sent more than one tweet. Normally, those users who received a response from Tate replied to thank them for the message. Due to the large number of edges, in order to improve the visual aspect, the nodes of those users who sent a question and received a reply from Tate have been coloured dark blue.
A comparison of both social network graphs reveals that in both cases the conversation graph has a clear 'star' shape, which is common for popular tweets where there is a central user who generates the activity and users who respond to this. The majority of the tweets were replies to Tate and only a small exchange of tweets occurred between users. The first social network graph (Figure 90) represents a total of 182 tweets. This included 10 replies from Tate to users and 172 replies from the users who followed the tour. There were a total of 140 users including Tate that tweeted or replied during the tour.

Figure 90: Visualisation of the tweets from the #TateTour of the exhibition *Henri Matisse: The Cuts-Outs*.

Figure 91: Detail of the visualisation showing the tweets sent between Tate and some users who were following the #TateTour.

A total of 86 tweets are represented in this second graph (Figure 92) which includes 7 replies from Tate to users and 79 replies from the users who followed the *EY exhibition: Late Turner - Painting Set Free* tour. There were a total of 63 users including Tate that tweeted or replied during the tour.
If we turn now to a deeper analysis of the tweets we can see that not all of the users’ replies included a question, so a response was not always required. Moreover, the content analysis of the conversation provided insights regarding the variety of replies that occurred, mainly including four types of responses listed below and illustrated with some tweets from users during both tours.

- Users showed their excitement about the exhibition and their planned visit to Tate.

‘I’m taking my 9yr old GD next week, she’s lived with Blue Nude all her life & is excited. Just hope we can see thru crowds!’
‘Excellent idea- following this on my commute and have ticket ready to visit #Matisse on Friday
‘I am really really looking forward to seeing this one’

‘Got a ticket for Saturday!!!’
‘gorgeous, will have to get into town at some point to have a good look at these :)’

• Users showed their enthusiasm for the artist and appreciation for the aesthetic elements of the artworks.

‘Just beautiful #matisse’
‘Love them, very colourful’.
‘So gorgeous, love the colour combination’.
‘So inspiring. simple and intriguing. #art #inspiration #Matisse’

‘The use of colour is just spectacular’.
‘Have never seen this one before...magical!’
‘I never knew a friend’s burial was the theme of this work. Thank you for the #TateTour of this #Turner show - what a wonderful idea!’

• Users thanked the curator for the tour. The tours provided access to the exhibition especially for those who do not live near the gallery and may not visit it.

‘Thank you so much for tweeting the tour of Matisse. A wonderful idea’.
‘Cannot wait to see this exhibition. The tour is a great idea’.
‘Many thanks for the wonderful #TateTour of #Matisse - we can't wait to see it!’
‘Thank you! I really enjoyed the Tate Tour here in Holland’.
‘#TateTour #Matisse was very good, great introduction to the artist’s work and exhibition, definitely looking forward to see it!’

‘This #tatetour is fascinating’.
‘Many thanks for #TateTour! We really enjoy following you!’
‘My commute home was made so much more enjoyable by joining the fascinating #TateTour on Turner tonight! Thank you @Tate’
• Users shared personal memories or emotions evoked by the tour or a previous experience seeing the artworks presented.

| ‘Blue Nudes remind me of my beloved grandmother, and the birthday mug I painted for her as a child’ |
| ‘I would love some Matisse inspired stained glass in my home. Saw his work at Vence chapel. Absolutely stunning!’ |
| ‘The Snail started my love affair with art. I was only 6 when my dad first took me to see it. 30 years on, it's still my favourite’ |
| ‘I remember seeing this for the first time many years ago with mum @JanisColey and loving the little hidden snail’ |
| ‘I love teaching kids about this part of his life and the artwork they make as a result!’ |
| ‘I love Turner’s work is fantastic. I’ve seen originals in Scotland & England’ |
| ‘@Tate for many years I have enjoyed viewing his sketchbooks at the Tate the give a real insight into his finished work’ |

While most of the comments were positive, there were a very small number of complaints in the tweets regarding the ticket price, others claiming that the initiative was a spoiler that revealed what people would see in the exhibition in advance or labelled it as spam because of the number of tweets. There were a few comments in other languages evidencing the international reach of the platform.

Case study summary:
• While Analytics provided information about the reach (impressions) and interactions with users, the social network graphs were powerful visuals for understanding the direction of the conversation and the structure of the network between the museum and Twitter users. The analysis of the content of the tweets provided anecdotal evidence of how this activity impacts on the visitor journey.
• This type of analysis requires knowledge of the usage of more advanced visualization tools.
7.6. Lessons learnt from the case studies

The fieldwork carried out at Tate has been decisive in responding to one of the main research questions of this thesis; that is, to assess the advantages and disadvantages of using a set of methods and tools and to understand the challenges of collecting and analysing the data from different social media platforms (see summary of the social media activities with the methods, tools and visualisation techniques applied in each case study in Table 7). The feedback provided by Tate staff helped to determine whether the metrics and the methodology selected worked effectively, to find out which evaluation aspects people were most interested in, and to establish the minimum standard metrics required for each project, thus shaping an evaluation framework for these social and participatory digital projects.

One of the key learning outcomes is related to the social media metrics, methods and tools used to measure the success of generating interaction, conversation and debate with users or visitors. The metrics utilised in the fieldwork at Tate can be categorised in three different groups: quantitative metrics that count the volume of interactions, qualitative metrics that measure the quality of the interactions and impact metrics that assess the effect on the museum user experience and the value created for users.

The first set of metrics applied to all the activities analysed in the fieldwork examined the volume of overall activity, how many people participated and the number of interactions that were generated. This category derives from a quantitative perspective and provides the context for a more in-depth analysis. Among this set of metrics we can include, for instance, the unique number of participating users, the number of responses and interactions (this data needs to be normalised based on the potential reach of the activity such as visitors, unique impressions or reached users), distribution of interactions by type of post or by prompt question and frequency of interactions. The dashboard created for the ongoing activity of various social media sites mainly included this type of metrics, which provided top-level management staff with an overview of the trends in terms of the size and reach of the activities. These quantitative metrics were part of the first step in the analysis of other activities such as the comments wall at
The Tanks (examining the volume of tweets that were sent), the Bloomberg Connects interactive screens (calculating the percentage of visitors that participated) and the 1840s GIF Party (counting the number of GIF images sent by users). For this last activity and for the exhibition tours on Twitter, social network analysis was used to analyse the direction of the conversation and the structure of the network, quantifying the volume of comments from museum to user, from user to user and user to museum.

The second type of metrics that resulted from the case studies focused on a more in-depth evaluation of the interaction, looking at the quality of the submitted comments, replies or content and other intrinsic variables such as subjects, themes and sentiment of this user-generated content. Among these metrics we find moderation figures (such as percentage of approved and unpublished comments or pieces of content) and activity effectiveness, measured by percentage of responses or submissions on the topic and which were related to the prompt activity. These proved to be useful to assess the effectiveness and usability of the design of the Bloomberg Connects interactive screens and the wording of the questions.

During the field research other methods have been applied to analyse the user-generated content from a qualitative point of view in order to evaluate the impact of the activity. These methods included content analysis, which provided insights that helped the researcher to understand the themes or subjects, and sentiment analysis that quantified the percentage of positive and negative comments. Both methods were applied, for instance, to code and analyse the messages sent through social media to the comments wall placed at The Tanks at Tate Modern.

The third and final set of metrics helped to put the whole experience into context by looking at who participated, at what point in the museum visit the interaction took place, the motivations that drove users to participate and the impact generated on the individuals as a result of this activity. The in-depth analysis of the comments and replies to the activities raised the question of how important it is to measure the impact of the social media experience by itself and how social media contributes to the wider museum experience. When looking in detail at the comments posted on the wall at The Tanks or the reactions to activities such as the Twitter exhibition tours, we find users who expressed their excitement about coming to the exhibition, their memories of their
visit or their feelings towards the art. In a similar case, we find these types of comments and reactions in the responses given to one of the questions on the interactive screens where visitors were prompted to write about their visit in five words. Users would not have been able to share some of these memories or express their emotions if this medium had not been available and the conversation had not been facilitated by Tate. Another example of the extended experience is the participation in the 1840s GIF Party that encouraged the participants to physically visit the venue to view their GIFs displayed in the galleries.

To sum up, we can evaluate the numbers and interactions generated from social media to monitor trends and identify the most successful channels in terms of creating dialogues, but there is also another element to measuring the impact of social media on the whole museum experience. The content analysis carried out for the different case studies showed that various types of experiences were generated as a consequence of social media and that the context of those experiences played an important role in creating the impact and value in the relationship between the artwork and the user.

The metrics and methods explained above and used to collect data are potential candidates to be included in this part of the balanced scorecard which is utilised to measure the success of generating interaction and conversation with the users or visitors. However, these should be added to, adjusted or deleted from the framework depending on the particular specifications and objectives of the project and the data collection possibilities of the medium.

The analytics tools used for this study represent another point of discussion. Some of the challenges encountered during the fieldwork arose from the nature of the social media platforms themselves and their analytics tools. The collection of data depends greatly on the information available through these tools. For instance, Facebook has developed an advanced insights tool that provides a large amount of data for each of the pieces of content and easy ways to export the data to a spreadsheet or via the API. However, as this study draws to a close, other platforms such as Instagram do not have their own analytics tool, and Google+, for instance, only offers data for the past 30 or 90 days of running the report. This lack of analytics tools makes the data collection process quite complicated and time consuming. Moreover, the metrics available on each
of the analytics tools vary. For example, Facebook reports the number of unique reached users while Twitter focuses on the total number of impressions, which means the number of times tweets were displayed to users. This makes drawing comparisons between platforms very complex and raises challenges in terms of interpreting the data and the exact meaning of the numbers presented in the dashboards and reports.

Another essential aspect that has been considered during this study with immediate practical implications is the visualisation of the social media data. The data in the case studies presented in this chapter was visualised in different ways including tables, charts, social network graphs, wordclouds and funnel reports among other visual or graphic elements. A one-page dashboard was built for the general ongoing activity, but the details of the analysis and results of the other case studies can be collated in a report with a long narrative explaining the impact of the activity. This degree of detail depends on the reporting purposes and on the user the dashboard or report is conceived for. For senior management staff, the most useful information was an overview of the KPIs and trends. However, for people managing the activity on a regular basis, specific details such as the best time to tweet or the type of content that performs best were very useful pieces of information to measure and inform future activity.

The research covers the definition of the framework at Tate and presents a selection of metrics. It tests the waters with several case studies, visualising the results and obtaining feedback from the key people managing social media at Tate. The research benefits from the volume and diversity of activities that are carried out at Tate, contributing different methods of evaluation depending on the objectives. However, due to the timeframe of the fieldwork and the early stages of the digital transformation project at Tate, putting the whole framework into practice was not feasible. The application of the framework focused on the external perspective, or ‘Public’. Specifically, the test focused mainly on developing the metrics and working with different methods to collect, analyse and visualise the data to measure the interaction and conversation created while using these platforms. Therefore, some limitations arise from this research as it does not provide a full integration of the evaluation framework within the organisation. This poses some limitations in assessing the complete benefits and pitfalls of the framework when it comes to appraising its impact on organisational processes, where data is used to change and plan future activities.
7.7. Conclusion: Does the Balanced Scorecard work?

The field research undertaken at Tate proves how the Balanced Scorecard can be applied to a specific context: museums on social media. This research contributes to the field with a case study highlighting the strengths and weakness of this performance measurement and management tool. The conclusion summarises the main findings and explains how the framework performed during the evaluation process as well as discussing the challenges and barriers encountered. This fieldwork has also been very useful in shedding light on the advantages and disadvantages of using a particular set of methods and tools and to experience the challenges of collecting and analysing the data from different social media platforms. The six activities analysed have been key to testing the Museum Social Media Measurement Framework, especially working closely with staff members at Tate to see what works for them in order to make decisions and implement changes at different levels, from a strategic point of view to a more tactical and operational perspective. The research covers the definition of the framework and the selection of metrics and tests the waters with these examples as well as visualising the results and obtaining feedback from the key people managing social media at Tate. Nevertheless, there are some limitations due to the partial integration of the evaluation framework in the organisation. This poses some limitations in assessing all of the benefits and pitfalls of the framework, particularly when it comes to understanding its long term impact on the organisation’s processes, in which the digital transformation is linked to the outcomes.

Kaplan and Norton state that the Balanced Scorecard ‘translates an organisation’s mission and strategy into a comprehensive set of performance measures that provides the framework for a strategic measurement and management system’.451 They affirm that the Balanced Scorecard can be used as a management system ‘to clarify and gain consensus about strategy, communicate strategy throughout the organisation, align departmental and personal goals to the strategy, identify and align strategic initiatives, perform periodic and systematic reviews and obtain feedback to learn about and improve strategy’.452 Several studies conducted in different sectors during the last two

452 Ibid., 19.
decades have highlighted the gaining of a better understanding and alignment towards the organisational strategy as the principal benefit of using this framework. Chavan describes how the process of creating the scorecard requires involvement from staff members, which triggers changes in the culture and in the way of thinking. Taylor and Baines in their review of the usage of the scorecard in several universities in the UK conclude that a clear advantage of its usage is the clarification and alignment of communication and strategy in the universities examined. The methodology proposed by the Balanced Scorecard worked for Tate and the framework helped to translate the strategy into measures. The strategic review of documents and activities together with the interviews with staff members were definitely beneficial in understanding the maturity of the strategic usage of social media at Tate and articulating their objectives in a more specific manner. The strategy maps constituted an effective management tool to visualise the whole value chain, how the organisation creates this value and which factors influence the output – the social media posts. Therefore, the Balanced Scorecard can be a useful tool to better define strategy and align the organisation towards it, even before selecting the performance measures. It could be used in future activities at the beginning of the process as a strategy management tool and subsequently, when the activity is live, as an evaluation tool.

The discussion of the Balanced Scorecard in Chapter 5 highlighted that one of the advantages of this framework lies in its flexibility to adapt to the different perspectives. In the particular case of Tate, the balance of internal and external measures provided a complete framework to evaluate the success of the social media strategy. From an internal point of view, it lays the groundwork in establishing the evaluation of the digital transformation that has taken place and of how the social activity is managed. For this purpose, the framework included measures under the internal businesses process and learning and growth perspectives. From the external point of view, the impact on the user is captured under the public perspective. This flexibility that allows for the adjusting of the framework to different fields is one of the reasons for the


454 Taylor and Baines, ‘Performance Management in UK Universities: Implementing the Balanced Scorecard,’ 122.
success of the Balanced Scorecard.\textsuperscript{455} However, the framework does not provide an accurate and guided definition of the metrics and methods that will finally be included. These can be influenced by the practice of museum evaluation and by the methods used in visitor studies. The new methods emerging from the online environment can also be quite useful for this particular scenario.

Based on this case study and the practical implementation of the framework in six different social media activities, we can conclude this chapter by stating that the Balanced Scorecard constitutes the structure of the final evaluation tool that needs to be filled in with the different metrics selected depending on the activity objectives, and visualising them based on the final reader of the results. In other words, and reflecting on this last point concerning the visualisation aspect of the reporting, the methodology of the Balanced Scorecard is a great tool for the categorisation and selection of the metrics. However, the empirical studies examined in the literature review do not include much detail on how organisations have visualised the results using the Balanced Scorecard. The data in the case studies examined in this chapter was visualised in different ways. The Balanced Scorecard is the framework behind the visual presentation of the data and illustrating the objectives can be achieved in different ways such as using visual elements and text that highlight and explain the main outcomes of the activity as well as providing recommendations for improvement. In regards to the methods deployed in this chapter, the practical implementation of the Balanced Scorecard proved that there is no one-size-fits-all method that can be applied to evaluate social media. A different approach and a different method were adopted for each of the projects, a fact that was evidenced when measuring the conversation and interaction generated by these initiatives. Increasing interaction and provoking conversations was just part of the public perspective of the Museum Social Media Measurement Framework defined in Chapter 6. Looking back at the entire perspective, there are other objectives for social media: in the case of Tate, providing access to art and promoting the museum activities from a marketing angle. These objectives would require another set of methods and visual tools that differ from those applied for measuring conversation and interactions.

\textsuperscript{455} Ulf Johanson \textit{et al.}, ‘Balancing Dilemmas of the Balanced Scorecard,’ \textit{Accounting, Auditing & Accountability Journal} 19, no. 6 (2006): 842–57.
The implementation of the framework evidenced that focusing only on counting numbers does not always go far enough to evaluate the level of accomplishment in engaging with users, as the quality of the interaction is a very important factor in assessing the overall success of the activity. The degree of detail also has an impact on how we report and obtain the value of social media. In this case study, the interaction has been interpreted and visually represented in a range of ways. The interaction can be counted in relation to the number of people reached, as it appears on the dashboard for ongoing social media activities, or it can be looked at by depth, topic and sentiment through content analysis as conducted for the comments on the interactive wall installed in The Tanks at Tate Modern. In the case of the 1840s GIF Party project, the interaction on Tumblr was mapped using a network graph. This conclusion takes us back to the origins of this research, the reporting requirements of funders, and that when it comes to the UK, these only include the top quantitative data. The findings resulting from applying other methods demonstrate the limitations of this way of evaluating the success of social media.

The final point to be made concerning the applicability of the Balanced Scorecard is that having a performance measurement system implies an investment in resources and changes in the processes that align the organisation towards the use of the Balanced Scorecard with the aim of fostering a data-driven approach, and ultimately, influencing the decision-making process. Collecting and analysing the data requires expertise and an investment in tools. As Taylor and Baines concluded in their paper, the organisation needs a champion, either internal or outsourced, to lead the implementation process, as having someone appointed in this role is a key element of success.\textsuperscript{456} Chavan remarks that the Balanced Scorecard is quite costly to implement in terms of resources, and that the return on this investment will depend greatly on how this influences the decision-making process.\textsuperscript{457} In this particular case, although Tate is a large institution with a lot of resources, when it comes to the size of their social media activity, this may turn out to not be dissimilar from that of a small institution. In any case, processes need to be

\textsuperscript{456}Taylor and Baines, ‘Performance Management in UK Universities: Implementing the Balanced Scorecard,’ 122.
\textsuperscript{457}Chavan, ‘The Balanced Scorecard: A New Challenge,’ 398.
implemented to define how the evaluation system is put into practice. When it comes to Tate, the structure follows a hub and spoke model. The Digital department (the hub) is in charge of establishing the tools, running the overview dashboards and coordinating the digital audience research and there is a full-time Digital Analytics position in charge of these tasks. The other departments at Tate (the spokes) work with the digital department to create their own reports so they can monitor and analyse their own activities.\textsuperscript{458} This organisational structure and way of working involve training and increasing data analysis literacy. During the feedback-gathering session, some members of staff asked questions about the calculations or the meaning of some of the metrics gathered from the analytics tools.

In conclusion, the Balanced Scorecard is a useful and effective tool for strategy clarification and provides a good overview of how the organisation creates value from both an internal and external perspective. However, it lacks guidelines to visualise the data and there are some implementation challenges that require changes in the internal processes, organisational structure and resources of the museum. The Museum Social Media Measurement Framework included the necessary perspectives to evaluate the impact of these activities. Its details can be tailored more specifically to a particular organisation, but it has covered the internal measurement needs and included measures to observe the influence of social media on users and visitors. In regard to this particular evaluation context, the measures included in the framework need to come from a mixed-method approach, including both quantitative and qualitative measures in order to evaluate the success of social media.

\footnotesize{\textsuperscript{458} ‘Digital Transformation Project.’}
Chapter 8: Conclusion

8.1. Summary of the thesis

This thesis has developed an evaluation model, the Museum Social Media Measurement Framework, using the Balanced Scorecard as its foundation, with the aim of investigating how museums can evaluate the success of their social media activities. The literature review chapters helped to identify the requirements that this model needed to fulfil in order to define the evaluation framework. Chapter 2 examined the social media ecosystem, studying key concepts, theories and characteristics aiming to identify the external factors that affect how organisations establish their activity within this environment and the opportunities and challenges these platforms offer to museums. This chapter also considered how museums are currently using social media, exploring various examples and identifying the specific objectives for each of the different platforms. The framework requirements analysis continued in Chapter 3, examining the practice and culture of museum evaluation to understand the evidence-based model, focusing on how museums need to justify their funding and identifying the performance indicators that have to be reported to the funders, not only for their general activity as an organisation but also in relation to their digital activities.

The research on how museums use social media continued in Chapter 4. The study was based on original data collected during the work carried out in collaboration with twenty arts and cultural organisations as part of the UK’s ‘Let’s Get Real’ national action research project. This field research included a social media strategic review, benchmarking of the main metrics and qualitative analysis of the activities undertaken by a select number of museums that participated in the project. The strategic review sought to identify relevant factors in the organisational approaches to social media across the group. Then, an exploration of social media behaviours in connection to common social media metrics was undertaken, including metrics for community size, reach and interaction, as well as website visits arising from social referrals. Finally, in response to the learning outcomes from the overall analysis of social media behaviours, a Social Media Evaluation Framework was produced as a key result. This framework summarises the relevant social media measurement methodologies, metrics and tools.
that organisations should consider using and that relate to their organisational goals. The main outcomes of this fieldwork helped to provide an in-depth picture of how museums are using social media and to assess whether there is one evaluation framework that can be applied across the sector or whether, on the contrary, this model in fact needs tailoring based on each museum’s specifications. This analysis demonstrated that, although there are some common key themes, when looked at in detail, priorities, objectives, target audiences and type of activity varied across the group.

Taking into account museum evaluation practices, specifications and the variables of the social media context, Chapter 5 reviewed the field of performance measurement by analysing different frameworks from business studies to determine which best fitted these criteria. The literature review discussed the theory of these frameworks and also the practice; that is to say, how some of these frameworks have been implemented in both for-profit and non-profit organisations. The chapter concluded by proposing to use the Balanced Scorecard, a multidimensional evaluation framework created by Kaplan and Norton; specifically, the non-profit version developed by Kaplan as it is better suited to the museum sector. Based on this model and on the requirements enumerated for this evaluation context, the Balanced Scorecard was adapted and as a result, the Museum Social Media Measurement Framework was introduced. It was also noted that the framework must be adapted to each individual case in order to fully satisfy the evaluation requirements of the situation to be analysed and the local specifications of the organisation where it is applied.

The next chapters of this thesis (Chapter 6 and Chapter 7) comprised the refinement and practical assessment of the Museum Social Media Measurement Framework. It was applied to one particular organisation, Tate, in order to determine its feasibility and the practical implications of implementing a custom plan for evaluating social media. Chapter 6 illustrated the process of defining the Balanced Scorecard for Tate’s social media activity. After a summary of the evolution of social media at Tate, a further examination of the strategy behind the social media activity was conducted to identify the strategic objectives based on the analysis of documents such as strategies and policies, a mapping exercise of the current activities and semi-structured interviews with people across Tate who work on social media platforms. The chapter concluded
with the definition of an evaluation framework for Tate that featured the measures for each of the identified objectives and a proposal of the methods for data collection and analysis. The validation of the framework continued in the following chapter, where it was put into practice to assess its usefulness and analyse the insights and the challenges that stem from its application. This part of the fieldwork tested various methods and tools aiming to analyse and visualise the data from different digital activities, and in particular, to evaluate the interaction with users and the creation of conversation and debate. Using several case studies of social media activity at Tate, this work appraised the applicability of the Balanced Scorecard. The case studies included a mix of ongoing activity from the main account on different social media sites and on more specifically targeted accounts, as well as some social media activities based on projects with a limited duration. Chapter 7 presented the final results of the Balanced Scorecard application, explaining how it works in this context, what its benefits were seen to be, as well as the challenges of applying this framework and reflecting on the implications for museums to establish a performance measurement system in terms of processes, organisational structure and resources.

8.2. Key findings

The aim of the research is to define a performance measurement framework that may serve as a tool for museums to evaluate the success of their activities on social media. As a result, this thesis specifically addresses the following primary question: how can museums measure the impact and value of their social media activities? This thesis defines a performance measurement framework that could be adopted to select the set of measures and tools required to carry out this evaluation task. The framework developed in this study, and named the ‘Museum Social Media Measurement Framework’, uses the ‘Balanced Scorecard’ as its foundation. The journey through the definition and application of this framework has led to the following findings which respond to the research questions listed in the introduction of this thesis.

How are museums currently measuring their online and social media performance, and which metrics reported to funders can demonstrate the impact of museums’ work on social media?
At the time of this study, when it comes to evaluating digital activities in the UK, national museums report the number of their website visits to the Department for Culture, Media and Sport (DCMS) on an annual basis. Likewise, other UK cultural organisations that report to Arts Council England (ACE) are required to submit and publish the number of followers they have on social media. This approach is very limited in its capacity to capture the impact of social media.

The responses from the ‘Let’s Get Real’ project showed that as well as tracking the number of followers, some organisations are also counting the number of comments, mentions and other interactions. However, there was still a need to increase the maturity of the reporting with a more formal structure, definition of targets and with the application of qualitative evaluation methods.

What are the objectives of museums’ social media strategies?

- *Museums were not, on the whole, using social media strategically and were missing key participation opportunities.*

Although all the organisations that participated in the ‘Let’s Get Real’ project had a profile on social media, the degree and maturity of the definition of strategic objectives varied across the group. At the time of the study, most of the venues had a strategy, policy or working document but when their objectives were investigated in detail, it was found that they were not specific; some only included a diverse range of open objectives and in reality, they did not have clear target audiences. For instance, objectives such as reaching new audiences or generating engagement are too broad and in fact, as we saw in the Tate case study, concepts such as engagement mean different things for different people in the organisation. Therefore, the most crucial factor in implementing a performance measurement framework is to have clearly defined objectives and the majority of museums and cultural organisations were not quite at this stage when this research was produced. Another missing strategic element is that organisations did not have defined performance indicators and targets in order to measure and evaluate their activities. All of the organisations were counting the number of followers on social media, and some of them had started to look at interaction
numbers but for most, the benchmark work and the individual metrics analysis exercise conducted during the project constituted their first actual opportunity to examine and question their results in detail.

Moreover, despite organisations affirming that they use these platforms to engage and interact with users, the actual main usage of social media, and especially the ongoing activity on sites such as Facebook or Twitter, is mainly to promote exhibitions or events. While there are some very interesting usages of social media highlighted in Chapter 2, in most cases the management of social media sits in the marketing departments and as a consequence, the activity is limited to promotional content posted in a more traditional, broadcasting mode. The analysis of the interactions demonstrated a higher volume of responses when the activity was image-driven and fostered engagement in an active manner with a conversational and informal tone.

- **Museums are using social media in different ways; in consequence, there is no single evaluation framework that fits the needs of all the organisations.**

The literature review and the work carried out during the ‘Let’s Get Real’ project demonstrated that museums use social media in different ways and that a significant number of them have more than one account serving different objectives. The interviews and post content analysis identified six main strategic themes: community, brand, marketing and communication, visitor services and content and interaction. This demonstrated that the same evaluation framework cannot be applied to all museums, as the objectives and types of activities vary. Although in some cases the objectives were similar, in others, they varied deeply and ranged from using social media as a marketing tool with the goal of generating revenue and footfall to using social media as a conversational tool. This diversity of objectives was ultimately noticeable in the feedback gathered from the individual data analysis regarding which metrics had been more useful in evaluating the organisation’s social media activity. Moreover, it is possible to adopt a more granular perspective and identify different objectives in the social activities of the same museum and even diverse objectives targeted by posts or tweets coming from the same museum account. Therefore, each organisation needs to customise and tailor the framework to reflect their specific organisation’s mission, vision, strategy and how social media contributes to its cause.
As introduced in the research questions outlined in Chapter 1 and later during the literature review and field work, museums’ discussion of evaluation utilises four key terms: impact, value, success and engagement. Yet when analysed in detail these concepts are, in reality, too broad and on occasion, they need to be more precisely defined and specified in the organisation’s strategies. There were notable variances in the definitions of success provided so that the meaning of engagement varies for each museum. These differences led to the formulation of one of the conclusions in the definition of the framework; there is no single one that fits all museums’ social media objectives and requirements and therefore, each museum needs to adjust the Social Media Museum Measurement Framework in its application.

Would the Balanced Scorecard work for museums in measuring the impact and value of their social media initiatives? What are the benefits and also the challenges when putting this framework into action?

- The Balanced Scorecard is a useful and effective tool for strategy clarification and gives a good overview of how the organisation creates value from both an internal and an external perspective.

Kaplan and Norton note that the Balanced Scorecard ‘translates an organisation’s mission and strategy into a comprehensive set of performance measures that provides the framework for a strategic measurement and management system’. They affirm that the Balanced Scorecard can be used as a management system ‘to clarify and gain consensus about strategy, communicate strategy throughout the organisation, align departmental and personal goals to the strategy, identify and align strategic initiatives, perform periodic and systematic reviews and obtain feedback to learn about and improve strategy’. Affirming that the framework helps to translate the strategy into measures has a factual basis in the Tate case study, where the methodology of this tool proved to be useful during the process. The review of strategic documents, activity and interviews was clearly useful in, firstly, assessing the maturity of the strategy and secondly, moving from undefined specific goals to gaining a clear picture of Tate’s

---

strategic objectives in their use of social media. The strategy maps were an efficient management tool to visualise the whole value chain; that is, how the organisation creates this value and which factors influence the output: the social media activity. As observed in Chapter 4, the definition of clear objectives was also premature or too broad, not only at Tate, but also in other cultural organisations that participated in the ‘Let’s Get Real’ project.

Therefore, the Balanced Scorecard can be a useful tool to better define the strategy and align the organisation towards it, even before selecting the performance measures. Furthermore, one of the advantages of the framework is its flexibility to adapt to the different perspectives and the balance of internal and external measures provides, from an internal point of view, a good understanding of the evaluation of the digital transformation and of how the activity is managed. It also helps to capture both the value created internally as well as that stemming from the public perspective, by measuring the impact on users.

- The Balanced Scorecard lacks data visualisation guidelines and is not free of implementation challenges.

The literature review has shown that the Balanced Scorecard is a framework which is widely used in both the profit and non-profit sector. However, there are gaps in the existing body of literature; in particular, in locating detailed practical implementations and in how to visualise the data. On the one side, this is an advantage as it can offer the organisation the flexibility needed, and yet on the other, the lack of guidance can create some challenges in visualising the data or selecting the number of metrics. The data in the case studies presented in this paper was visualised in different ways: tables, charts, social network graphs, wordclouds and funnel reports, as well as using icons and drawings to illustrate the results of some of the key objectives such as comments. The Balanced Scorecard is the framework behind the visual presentation of the data and illustrating the data can be achieved in different ways, using visual elements such as icons or text that highlight the main outcomes of the activity. Another challenge arises from the fact that certain resources are needed in order to implement a performance measurement system and the return on this investment may need to be taken into consideration, as it has a direct impact on the required tools. This is also due to the
existence of some practical implications in terms of skills, resources, processes and organisational culture.

- **Museums need to create different levels of reporting depending on the degree of evaluation and the final reader.**

The way in which the data is presented is directly influenced by who the reports are addressed to and the findings they communicate. As a consequence, the level of detail of the information contained will differ if presented, for example, to sponsors, directors, managers or to people who work with social media on a daily basis. During the fieldwork at Tate, a one-page dashboard was built for the general activity, but the details of the analysis for the other case studies could be collated in a report explaining the impact of the activity. This will depend on the reporting purposes and on who the dashboard or report is addressed to, as well as on the way in which it will be used. For senior management staff, the most useful report was a one-page visual overview with trends that could inform decisions on where to invest resources. However, for people managing the activity on a daily basis, specific details such as the best time to tweet or the type of content that performs best are very useful pieces of information to measure and inform future activity.

**What are the most appropriate methods and tools that can be used to collect and analyse this social media data?**

- **Social media measurement needs a mixed-method approach. Different tools and methods provide diverse ways of analysing and visualising the data.**

The case studies from Tate proved that there is no one-size-fits-all method that can be applied to evaluate social media. Different objectives call for different approaches and methods. What was clear is that counting numbers is, in most cases, not enough and the quality of the interaction is crucial to evaluating the success of the activity. The degree of detail also has an impact on how we report and obtain the value of social media as observed in the previous point. For instance, if we are examining interaction, we can create a graph to map how the community of users interact with each other to observe the centrality of the nodes using social network analysis, as conducted for the 1840s
GIF Party project. It can also be counted in relation to the number of people reached, as it appeared on the dashboard for ongoing social media activities or by looking at the depth of that interaction through content analysis, as with the comments on the social interactive wall installed at The Tanks at Tate Modern. In conclusion, measuring social media can be a challenging task. Counting the number of visitors to a museum may not be complicated but these numbers are not meaningful enough by themselves to fully understand the experience and learning outcomes behind them, so further methods to capture the insights of the visit will be required. The same situation occurs in the online space where metrics such as websites or social media followers are easy to gather but do not show the actual impact of these digital platforms.

Implications

The findings of this research have clear implications for an organisation that attempts to implement the Balanced Scorecard in order to measure the impact of social media. Moreover, there are also relevant implications from a cultural policy perspective for this type of evidence-based model existing today in the UK.

- **Creating a learning organisation: resources, skills, organisational structure and processes required to move towards an insights-driven culture.**

While the Balanced Scorecard can help to clarify the objectives and choose the right measures, there are internal organisational changes that need to occur at the same time. In the future, there may be some changes in the analytics tools and metrics may become more standardised. However, without a culture of evaluation, those changes will not impact on producing performance improvements. The research for the ‘Let’s Get Real’ project identified a series of audience research and evaluation challenges. Of all the organisations that took part in the project, 88% said that the main challenge they were facing when evaluating social media was the lack of time and available staff resources. Moreover, the implementation of the Balanced Scorecard at Tate has also demonstrated that resources were needed to collect and analyse the data.

This fact seems to be in accordance with several other recent publications such as *The Horizon Report: 2013 Museum Edition:*
The need for data literacy is increasing in all museum-related fields. Ninety percent of the world’s data has been created in the last two years, and, through the exponential growth of hardware, software, and networking, every day we add 2.5 quintillion bytes. Important societal decisions in the near future will be informed by big data and for individuals, as informed citizens, to fully engage in these conversations the ability to read and interpret large data sets will become increasingly necessary.  

Along these lines, Nesta published a report in December 2014 on how arts and cultural organisations in England use technology, based on a survey to 947 organisations. The study identified a series of barriers to implementing digital initiatives and when it came to the most needed skills, it found that 40% of the organisations believe themselves to be underserved in the field of data analysis. Therefore, it is important to introduce changes to increase data literacy among those who manage digital activities. As a consequence of this trend, we see arts organisations today starting to demand these skills in job advertisements or as they recruit for digital analyst positions.

Having a digital analyst helps to consolidate this change and to implement a data usage strategy that can be crucial in facilitating this organisational shift. How these data skills are embedded across the institution needs to be defined in the organisational structure.

463 Examples of roles in the sector and the majority advertised in the period 2012 – 2015 are: Web Analytics & SEM Analyst, Smithsonian; Digital Analyst, Tate; Business Analyst (Digital Analytics), National Gallery; Data Analyst, LACMA; Digital Media Analyst, Natural History Museum; Digital Analyst, American Natural History Museum; Marketing Analytics Manager, MoMA; Program Analyst (Web Analytics), U.S. Holocaust Memorial Museum; Market Research Analyst, Canadian Museum of Nature; Digital Media Analyst, The Metropolitan Museum of Art; Data Scientist, British Museum; Digital Analyst, Science Museum (London).
The approach for the framework implementation can be centralised; for instance having the data skills in the web/digital department, or it can be decentralised, spreading the responsibility across different roles. There is a blended option, such as that presented in Tate’s hub and spoke model. In this organisation’s structure for digital analytics, the Digital department (the hub) is in charge of establishing the tools, running the overview dashboards and coordinating the digital audience research. The department has an in-house Digital Analyst that is in charge of these tasks. The other departments at Tate (the spokes) work with the digital department to create their own reports so they can monitor and analyse their own activities. In any case, we can conclude that there is a growing need for increasing data analysis literacy.

Apart from the staff resources needed in an organisation, other internal changes need to take place in order to create an insights-driven organisation, such as the development of processes where insights and findings inform the decision-making process (see steps of the digital production and evaluation tasks for each stage illustrated in Figure 93). When a social media activity is planned, it should also include an evaluation plan in which the Balanced Scorecard can help to gather the objectives, select the measures that will be collected during the evaluation and set up the targets for each of those measures. The evaluation plan can also include the roles and responsibilities of the evaluation team, the data collection and analysis timeframe, frequency of reporting, stakeholders that will receive the evaluation findings, communication channels and how the findings will be used. When a production phase is completed, for instance in the establishment of The Tanks comments wall or before starting to use a hashtag, it is important to set up the analytics tools in advance in order to collect the desired data. Finally, once the project goes live, the data is collected and analysed and findings are circulated within the organisation to implement changes based on this information. As we saw in the last chapter, this can be achieved in different ways and the detail and level of data will depend on who receives the data analysis information.

---

464 ‘Digital Transformation Project.’
In conclusion, having a performance measurement system implies an investment in resources and changes in processes that align with the use of the Balanced Scorecard to foster a data-driven approach, and ultimately, to influence the decision-making process. These are the fundamental organisational changes needed to become a ‘learning organisation’ as described by Peter M. Senge,\(^{465}\) where there is a shared vision among the team and where the experimentation and open assessment of the results inform the transformation and allow the organisation to react swiftly in these rapidly changing environments.

- **Cultural policy implications: definition of standard metrics and evaluation guidelines in collaboration with the sector.**

As we saw at the beginning of the thesis, the current evaluation requirements are only website visits for those museums reporting to the DCMS and the number of social media followers in the case of certain organisations reporting to ACE. These are also the figures included in annual reports published by the organisations. The field research carried out during the ‘Let’s Get Real’ project with the organisations made it evident that these are not meaningful numbers and that metrics such as interaction or virality rate are more useful to assess performance. But as social media objectives can vary greatly and most museums have more than one account that tend to be embedded in the activities of the venue, funder requirements need to evolve and ask for metrics that are

based on the impact on users’ experience and contributions to the overall mission of the institution.

The Balanced Scorecard can help in providing the reporting framework, but as highlighted in the findings above, the usage of social media varies across venues and the efforts to capture the actual impact and value of social media using a qualitative perspective cannot be underestimated. However, it can be utilised in a modular approach with standard metrics creating a customised dashboard based on specific objectives and providing, therefore, some guidelines and tools to approach the evaluation of social media. Government organisations should create better guidelines, and based on the current available technologies, they could assist museums by providing them with a tool or templates to help automate some standard social media metrics that will facilitate the reporting process for museums. These guidelines should arise from a better collaboration between funders and museums when it comes to deciding what to measure and they should also agree on using a common vocabulary regarding social media metrics.

The thesis as a whole makes the case for a better evaluation approach in museums when it comes to measuring the impact and value of social media. The discussion calls for a change in the focus of the existing evaluation practice, moving from absolute numbers and benchmarking to a more robust and tailored measurement of the impact and value by looking at the uniqueness of each museum and their mission, strategies and audiences.

The resulting knowledge from this research can be used as an example of the type of insights that can be gathered when applying different methods to understand the impact of social media. The case studies from the ‘Let’s Get Real’ project and Tate furnish a starting point for the definition of evaluation projects with similar initiatives. This type of analysis can also be applied to other social media projects, but the particularities of each individual initiative should always be taken into account. Further work is needed to experiment and apply research methods to social media in order to continue to define the metrics and to prepare the ground for drawing comparisons among different cases within the museum sector. What this research highlights is the complexity of the topic and that besides the volume of data available, in order to achieve a level of maturity in
the digital evaluation methods, clear strategies, objectives and defined targets are required. Following this important step in the strategic definition, the detailed illustration of the definition and application of the framework during this research may potentially be replicated and adapted in another institution.

8.3. Original contributions

This thesis has investigated the potential usage of the Balanced Scorecard to measure the success of museums’ social media activities. The key contributions of this research comprise three distinct levels: the academic level, the sectoral level and the institutional level.

From an academic point of view, this research contributes to the business studies field with a detailed case study of the application of the Balanced Scorecard, demonstrating the strengths and weakness of the framework, assessing where it works and the challenges and barriers encountered in its application. Furthermore, this research illustrates the value of applying business theories to the field of museum studies with the proposal of a new framework and a tool for the sector. This demonstrates once again how the field of museum studies can be enriched through the application of other disciplines such as education, computer science or in this case, performance management and measurement theories.

This Ph.D. research was triggered by the existing need in the sector to better understand how to measure online success and that premise laid the groundwork for the collaboration with Culture24 to work as part of the ‘Let’s Get Real’ project. The arts and cultural organisations that participated in the project benefited from an in-depth analysis of trends across the sector and of their individual social media activity. Very positive feedback was received at the end of the project and a report entitled ‘A

466 These are comments from the feedback survey sent to the project participants. The open question was: What impact, if any, has this project had on your organisation? ‘Comparing social media stats alongside other organisations helped clarify larger trends in social media with numbers. The dashboard was a really useful tool and something that extends outside of the project’; ‘Feed into wider discussions about how we measure social media engagement on a long term basis and in
journey towards understanding and measuring digital engagement’ was published featuring the results of the benchmarking exercise and the social media metrics framework.\textsuperscript{467} As of January 2015, this report has been downloaded 2,142 times and the social media metrics framework 905 times.

The contributions to the sector have continued beyond the ‘Let’s Get Real’ project. Since October 2014, some of the thesis research has been published on a blog called \textit{Arts & Metrics} created by the author on digital audience research and evaluation in the culture sector.\textsuperscript{468} The Twitter metrics dashboard template was published in October under a Creative Commons license,\textsuperscript{469} becoming available to any museum that wishes to use it and since then, it has had 1,430 downloads as of August 2015. It has also been shared on the Facebook group ‘International Social Media Managers in Museums’. The feedback from the sector has been very positive and some organisations have implemented it in their reporting and analysis practices.\textsuperscript{470}

relation to all our web traffic’; ‘The shared stats have informed discussions around the use of social media and its impact with departments and stakeholders. It has also developed shared learnings across museums which is always very useful and it is great to meet the people working on this’; ‘I definitely found the last stage the most useful. That is to say, when we had to define and monitor our own metric on Google Analytics and also had to analyse the social media data provided by Elena. Initially I found it challenging to define and set up our metric as I had not done anything like this on Google Analytics before. The social media analysis I also found incredibly interesting as through the exercises set by Elena I was able to see that Polka was lagging behind similar organisations in terms of growth. The drilling down exercises helped me to gain a better understanding of our social media audience and what types of posts they were engaging with. I was also able to contextualise this information in the more general presentation given by Elena in the last meeting’.

\textsuperscript{467} Malde, Finnis, Kennedy, Ridge, Villaespesa and Chan, ‘Let’s Get Real 2: A Journey towards Understanding and Measuring Digital Engagement.’

\textsuperscript{468} ‘Arts & Metrics blog.’


\textsuperscript{470} Feedback gathered in response to the blog post: ‘It gives a much clearer picture of the engagement and the changes from month to month than what is provided by Twitter itself. I especially like the graph that shows the distribution of interactions’; ‘The dashboard is incredibly easy to use, and I wish that I had equivalent dashboards for our other key social media platforms’; ‘The most useful thing is probably that all the settings are pre-programmed in, so I don’t have to try to build the dashboard myself. I really like the month-to-month summary sheet, so I can look for trends’.
As mentioned in the previous section, this research has also contributed to the sector by raising a discussion about museum evaluation, interrogating the current practices when it comes to reporting digital performance and demonstrating the complexity of social media measurement. It has clearly evidenced the limitations of the current reporting requirements and the main conclusions call for more comprehensive evaluation standards and tools that can better measure the impact and value of social media.

The third level of contributions derives from the fieldwork at Tate. The research conducted helped to assess the maturity in the usage of social media in regards to strategy, processes, target audiences and measurement. The methodology served to clarify the objectives and as a result of the fieldwork, the social media and Twitter dashboards have been implemented in the gallery, improving reporting practices and raising some initial questions about the impact of using social media.

The process of defining and validating the framework was conducted in close collaboration with the sector. Both during the ‘Let’s Get Real’ project and the Tate case study there was a feedback loop with the potential future users of the framework. This scenario situates this research close to practice in the museum field, adding a significant and essential validation element.

8.4. Limitations and future research

This research has used Tate as the main case study to test and validate the Balanced Scorecard. Therefore, there are a series of limitations that come as a direct consequence of the characteristics of the gallery. Tate is a national art gallery in the UK with a large size in terms of staff and a bigger budget than other cultural organisations. One of the challenges identified has to do with the resources that are needed to implement the Balanced Scorecard, as the volume of social media activity at Tate was too large to even be able to implement the scorecard within the fieldwork timeframe. This may be different in a smaller institution where the social media activity is limited to a few platforms. Further research to apply the Balanced Scorecard methodology to other museums will help to validate the framework and observe the difference in its
application depending on variables such as the type of museum, size, maturity of
strategy implementation or evaluation culture.

The research covers the definition of the framework at Tate and presents a selection of
metrics. It tests the waters with several case studies, visualising the results and
obtaining feedback from the key people managing social media at Tate. The research
benefits from the volume and diversity of activities that are carried out at Tate,
contributing different methods of evaluation depending on the objectives. However, due
to the timeframe of the fieldwork and the early stages of the digital transformation
project at Tate, putting the whole framework into practice was not feasible. Therefore,
some limitations arise from this research as it does not provide a full integration of the
evaluation framework within the organisation. This poses some limitations in assessing
the complete benefits and pitfalls of the framework when it comes to appraising its
impact on the organisational processes, where data is used to change and plan future
activities.

This research has tested different methods to collect and analyse social media data
including digital analytics with descriptive statistics, content analysis, sentiment
analysis and social network analysis, but there are other methods that can be used to
evaluate depending on the social media objective. There are continual changes in the
methods available and the computational methods to conduct social network analysis,
sentiment analysis and linguistic analysis are becoming more sophisticated.
Furthermore, the volume of what is now called ‘Big Data’ may represent an opportunity
for museums to understand their audiences and measure their social media presence.
Therefore, further work using traditional methods and experimenting with new ones to
evaluate social media can continue the discussion on the most appropriate tools to use
and will lay the groundwork for drawing comparisons between different cases within
the museum sector.

While this research has focused on evaluation, actual audience research needs to be
undertaken to complement this work. The research has demonstrated that target
audiences are not clearly defined for museums’ social media activities. However, it is
important to understand who the audiences are and identify people’s expectations and
motivations when they follow a museum on social media or interact in their
participatory digital activities. Profiling these audiences, understanding the usage context and creating a segmentation will help in the evaluation to determine the impact and value created in each case.

### 8.5. Performance measurement in an evolving context

As this research has demonstrated, social media is now used in different ways by various departments and is being increasingly integrated within other museum activities. The post-digital museum is, as described by Parry, a museum where digital is normative, being present in all departments’ strategies and not separate from the non-digital activities when it comes to the engagement with audiences. As a consequence, the evaluation of the social media results needs to be contextualised within the whole museum’s work. Although the data analysed in this case study has focused on social media activities, they are just one part of the whole picture and they need to be situated within this context. For example, the research focused particularly on the Twitter comments wall at The Tanks at Tate Modern, but there was an analogue version as well in which visitors were able to leave comments using post-its and pens, so the final report in the gallery would need to examine the impact generated by both activities together, the digital and the analogue versions. Another example is found in the data aggregated in the dashboard of the ongoing social media activity as it derives from posts that have very different objectives; some are part of exhibition marketing campaigns, some aim to distribute content and others to promote the art collection.

If social media is a ‘dimension of everything’ as stated in the Tate’s digital strategy, then evaluation work should be included as part of other museum activities to assess how these participatory activities are functioning, rather than having a separate report within social media metrics. The analysis per platform allows trends to be monitored and helps decide, as a whole, whether the museum should remain on that particular platform, what content works best and which are the best resources to invest in. However, social media should be measured and presented to demonstrate how it

---


contributes to the different departments and functions of the museum. For instance, for marketing purposes, if we isolated the reporting of social media activities it would not be possible to compare the effort with those of other digital activities or even offline activities. We can create a detailed report on the volume of tweets, tickets sold directly from social media or other marketing aspects but we also need to compare these results with other channels such as advertisements on the underground, promotions in digital newspapers, paid search, or ads in magazines if we want to make informed decisions about the best communication and marketing channels to invest in.

At the beginning of this research in 2010, museums had two or three profiles on social media, this activity was confined to the online environment and in most of the cases this activity was managed by the web or digital departments. Now, five years later, the number of platforms has considerably increased, the number of departments that use social media has multiplied and it is now rare that any new digital initiative comes without a social element where users or visitors can interact with the museum, share the content with friends or leave their comments about their visiting experiences. It is hard to predict what the whole social media ecosystem would look like next year, in five or ten years or further forward in time. The changes in this rapidly shifting environment may require modifications as to what to measure, just as social or interactive actions may. However, besides these potential metrics and analytics tools variations, the performance measurement principles will remain the same and the key starting point of any evaluation framework remains to scope based on well-defined strategic objectives. Besides these methodological changes, the shift of organisational culture towards evaluation and how the results impact on the decision-making process will always remain a key factor for museums in becoming a ‘learning organisation’.
Appendices

Appendix 1: List of the cultural organisations that participated in the first and second ‘Let’s Get Real’ projects.

‘Let’s Get Real 1’
Amgueddfa Cymru – National Museum Wales
Birmingham Museum and Art Gallery
British Library
British Museum
Design Museum
English Heritage
Imperial War Museum
National Gallery
National Maritime Museum
National Museums Scotland
National Portrait Gallery
Roundhouse
Royal Botanic Gardens – Kew
Royal Shakespeare Company
Science Museum
Tate
Watershed

‘Let’s Get Real 2’
Amgueddfa Cymru – National Museum Wales
Birmingham Museum and Art Gallery
Brighton Museum and Art Gallery
Bristol Museums, Galleries and Archives
British Library
British Museum
Historic Royal Palaces
Museum of London
National Galleries of Scotland
National Museums Scotland
Own Art
Polka Theatre
REcreative
Science Museum
Shakespeare’s Globe
Tate
The Photographers’ Gallery
Victoria and Albert Museum
Wales Millennium Centre
Warwick Arts Centre
Watershed
Wellcome Collection
Appendix 2: Social media data of the Let’s Get Real project participants

The appendix includes the Facebook and Twitter metrics and an example of the Google Analytics dashboard produced for each organisation. This data was distributed along with the charts in Chapter 4 and a file with the top 10 posts with the highest interaction and virality rates to each of the participating organisations. The interactive charts shown below allowed the organisations to benchmark their data selecting similar organisations. The project participants also received a list of questions (see Appendix 3) to help their analysis of these charts.

Figure 94: Interactive chart of the Facebook likes.
Figure 95: Total website traffic from Facebook and percentage of the total website visits.

Figure 96: Interactive chart of daily website traffic from Facebook.
Figure 97: Interactive chart of Twitter followers.

Figure 98: Total website traffic from Twitter and percentage of the total website visits.
Figure 99: Interactive chart of daily website traffic from Twitter.
Figure 100: Google Analytics social media dashboard.
Appendix 3: Social media metrics questionnaire

This appendix includes the list of questions that were distributed to the organisations that took part in the ‘Let’s Get Real’ project along with a spreadsheet with the social media metrics, data charts and a Google Analytics dashboard presented in Chapter 4 and Appendix 2. Each organisation filled in this form prior to the group discussion in the project meeting on 1 May 2013.

1. Intro: Social Media strategies
   - What are the objectives of your social media strategy/plan/activities?

2. Analysis of traffic to the website from social media sites in 2012
   - What percentage of your traffic comes from social media sites?
   - What are the top social referring sites of your website?
   - Which were the most shared pages?
   - Is there any difference in the metrics (pages/visit, time on site, % new visits, bounce rate) between social media sources and Google or other traffic sources?

3. Twitter
   - How is your trend and the percentage of followers increasing compared to similar organisations?
   - What is your virality rate? Which tweets got a higher number of retweets? What characterises these tweets (topic, tone, type of content, call to action, trending topic, hashtag...)?
   - How is the trend of the traffic from Twitter? Does it follow the same trend as total visits to your website? Were there any exhibitions, events, news or seasonality of visits that affected this trend? Where there any particular tweets that brought a lot of traffic to your website?
   - How much traffic came from Twitter in 2012? How much of this represents the total number of visits to your website? How does this data compare to similar organisations?
4. Facebook

- How is your trend and the percentage of likes increasing compared to similar organisations?
- How is the trend of the Facebook traffic? Does it follow the same trend as total visits to your website? Were there any exhibitions, events, news or seasonality of visits that affected this trend? Where there any particular posts that brought a lot of traffic to your website?
- How much traffic came from Facebook in 2012? How much of this represents the total number of visits to your website? How does this data compare to similar organisations?
- How is the interaction rate of your organisation compared to similar organisations?
- How is the distribution of the type of interactions (likes, comments, shares)?
- Analyse the posts that generated higher reach, virality or interaction with your content on Facebook. List the most successful posts based on this criteria. What characterises these posts (topic, tone, type of content, call to action, image...)?

5. Conclusion

- What have been the most useful metrics/reports to evaluate your social media activity?
- Are there any results that may impact on your strategy or future social media activity?
- What other information/metrics would be useful to evaluate the success of your social media activity?
Appendix 4: Social media resources and measurement survey

This appendix includes the online survey that was distributed to the organisations that participated in the ‘Let’s Get Real’ project in order to understand the platforms used, the investment in social media and the current reporting practices.

Social media channels
Which are the social media channels you use in your organisation?

- Facebook
- Twitter
- Google+
- YouTube
- Pinterest
- Instagram
- Flickr
- Blogs
- Other: ………………………….

Investment in social media
Please indicate the number of staff working on social media within your organisation (updating, creating content, monitoring social media platforms):

- 1-3
- 4-6
- 7-9
- > 10

Please indicate the number of hours per week spent working on social media (updating, creating content, monitoring social media platforms):

- 1-4
- 5-8
- 9-12
- >13
How much do you spend monthly on social media (paid campaigns, training, consultancy fees, tools… please do not include staff costs):
£…………………………

**Social media measurement**

What are the social media tools you use in your organisation?
- Free tools
- Paid tools
- Mix of free and paid tools

Please name the tools you use: …………………

How frequently do you evaluate and report your social media results?
- Daily
- Weekly
- Monthly
- Annual
- I do not report social media metrics

Please provide information of who in your organisation gets these reports………………

What are the metrics you report? (Select all that apply)
- Number of followers/fans/subscribers
- Traffic to website
- Number of mentions
- Influencers talking about your organisation
- Impressions, views, reach
- Number of interactions (likes, shares, comments, favourites…)
- Number of conversations
- Revenue from social media
- Sentiment
- Other metrics you report: ………………………………………
What are the main challenges of measuring social media? (Select max of 3 responses)

- Lack of time and staff resources
- Lack of budget to invest in tools
- Unsure how to choose the right metrics
- Too many tools
- Not found useful tool
- Too much data
- Lack of interest or understanding from senior management
- Other: ………………

Add any other further comments or questions regarding social media measurement:
Appendix 5: List of interviewees that participated in the ‘Let’s Get Real’ project

Andrew Lewis, Digital Content Delivery Manager, Victoria and Albert Museum
Charlotte Wood, Marketing Manager, Victoria and Albert Museum
Hala Osman, Performance & Evaluation Officer, Bristol Museums, Galleries and Archives
Hugh Wallace, Head of Digital Media at National Museums of Scotland
Jo Healy, Head of Marketing, The Photographers’ Gallery
John Stack, Head of Digital Transformation, Tate
Melissa Darby, Marketing Assistant, British Museum
Appendix 6: Interview questions for ‘Let’s Get Real’ museum participants

Strategies
- Do you have a social media strategy? What are the strategic objectives of the use of social media?
- What is your target audience?
- Activities on the Social Web
- What are the key activities that will lead your museum to achieve the strategy?
- Which social media sites are you using (Facebook, Twitter, Pinterest, Blogs...)? How do you integrate social media features on your website (e.g. sharing buttons, option to log in with social media accounts, comments, user generated content..)?
- What would be the main internal challenges to succeed in this rapidly changing environment?

Measures and reporting
- Do you regularly measure the impact of social media? Yes/No. If no, are there any barriers that prevent you from having a performance measurement system in place? (lack of budget, resources, lack of knowledge, too much data, lack of coordination...)
- What are the measures you use internally to evaluate their online success? Do you have KPIs and targets? What are the measures your museum needs to report to funders and policy makers?
- Which tools do you use? (Web analytics, social media automatic reports, online surveys…)

Success and engagement
- How would you define success in social media? Please provide an activity that you think was successful and explain why.
- In your opinion, what is the impact and value of museums using social media? How would you define digital engagement?
Appendix 7: List of Facebook and Twitter accounts of the ‘Let’s Get Real’ project participants

<table>
<thead>
<tr>
<th>Organisation</th>
<th>Facebook</th>
<th>Twitter</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tate</td>
<td><a href="http://www.facebook.com/tategallery">http://www.facebook.com/tategallery</a></td>
<td><a href="http://twitter.com/Tate">http://twitter.com/Tate</a></td>
</tr>
<tr>
<td>Wales Millennium Centre</td>
<td><a href="http://www.facebook.com/WalesMilleniumCentre/2118559346">http://www.facebook.com/WalesMilleniumCentre/2118559346</a></td>
<td><a href="http://twitter.com/WalesMilleniumCentre">http://twitter.com/WalesMilleniumCentre</a></td>
</tr>
<tr>
<td>Wellcome Collection</td>
<td><a href="http://www.facebook.com/WellcomeCollection">http://www.facebook.com/WellcomeCollection</a></td>
<td><a href="http://twitter.com/WellcomeCollection">http://twitter.com/WellcomeCollection</a></td>
</tr>
</tbody>
</table>
### Appendix 8: List of people interviewed at Tate

<table>
<thead>
<tr>
<th>Staff member</th>
<th>Job Title</th>
<th>Department</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marc Sands</td>
<td>Director, Audiences and Media</td>
<td>Media and Audiences</td>
</tr>
<tr>
<td>John Stack</td>
<td>Head of Digital Transformation</td>
<td>Tate Digital</td>
</tr>
<tr>
<td>Jesse Ringham</td>
<td>Digital Communications Manager</td>
<td>Marketing/Digital</td>
</tr>
<tr>
<td>Susan Holtham</td>
<td>Blog Editor</td>
<td>Tate Media Productions</td>
</tr>
<tr>
<td>Minnie Scott</td>
<td>Curator, Interpretation</td>
<td>Learning</td>
</tr>
<tr>
<td>Carly Townsend</td>
<td>Marketing Manager</td>
<td>Marketing Tate Liverpool</td>
</tr>
<tr>
<td>Emma Evans</td>
<td>Marketing Manager</td>
<td>Marketing St Ives</td>
</tr>
<tr>
<td>Jen Aarvold</td>
<td>Tate Collectives Producer</td>
<td>Tate Digital</td>
</tr>
<tr>
<td>Elizabeth Cooper</td>
<td>Marketing and Communications Manager</td>
<td>Membership &amp; Support Engagement</td>
</tr>
<tr>
<td>Alex Carey</td>
<td>Digital Editor, Research</td>
<td>Research</td>
</tr>
<tr>
<td>Belinda Johnson</td>
<td>Publishing Manager</td>
<td>Tate Etc.</td>
</tr>
<tr>
<td>Nick Aldridge</td>
<td>Assistant Producer</td>
<td>Tate Media Productions</td>
</tr>
<tr>
<td>Helen Little</td>
<td>Assistant Curator</td>
<td>Curatorial, Tate Britain</td>
</tr>
<tr>
<td>Lucy Noakes</td>
<td>Online Shop Administrator</td>
<td>Tate Enterprises</td>
</tr>
<tr>
<td>Kathryn Box</td>
<td>Tate Kids Producer</td>
<td>Tate Digital</td>
</tr>
</tbody>
</table>
Appendix 9: Questions of the interviews with members of staff at Tate

Your role and social media:
- What is your role at Tate and how do you use social media for your work?
- Which social media accounts do you manage?

Strategies
- What are your strategic objectives using social media?
- Do you have a specific target audience?

Activities
- What do you use social media for? Please provide examples of the type of activities you do on social media.
- How do you plan and manage social media?
- For you, what have been the main challenges (internal or external) in working on social media?

Evaluation:
- Do you regularly evaluate your social media activities?
  - If yes, which metrics do you report? Do you have KPIs and targets?
    - Which data helps you to make decisions?
  - If not, which are the barriers to evaluating your social media activities?
- How would you define success in social media? Please provide an activity that you think was successful and explain why.

Future plans:
- Overall, what do you think the impact of your social media activity has been?
- How do you see social media? What are your future plans with social media?
Bibliography


