REPORT

Museums, museum professionals and Covid-19: third survey

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Introduction

One year and a half into the Covid-19 pandemic, the museum sector is still trying to grasp its long-term consequences, while facing the challenges of reopening with social distancing restrictions in place.

Our first report, published just over a year ago, presented a dire situation for museums and museum professionals around the world. With almost 95% of institutions forced to close in order to safeguard the wellbeing of staff and visitors, the sector was facing severe economic, social and cultural repercussions.

Our second global survey, conducted in early autumn 2020, presented a much more varied situation for museums, with stark regional differences in terms of opening rates and economic impact. One of the most interesting figures, which has often been the focus of discussions about the sector and Covid-19, has been the massive shift to digital activities. This trend, which increased sharply between the first two surveys, raised questions about the maturity and sustainability of these practices in the future.

With the aim of analysing the evolution of this and other key developments in the museum sector, we have therefore launched a third survey, one year after the publication of the first one. This third ICOM global survey, which was open from 15 April to 29 May 2021, investigated a scenario which is certainly still a crisis, but which is also increasingly being described as 'the new normal'.

As with the second survey, we have kept most of the sections unchanged, allowing us to assess the major trends of the crisis brought about by the pandemic and its perception by museum professionals. Other questions considered possible future scenarios and how museums are preparing for a new start.

This report analyses around 840 responses from museums and museum professionals across five continents. It is to be noted that, like many other organisations involved in research in this area, we have witnessed an important decline in participation over the last year.

This being the third ICOM report, we decided to present the trends of responses over time, rather than focusing on regional comparisons, to show how the situation has evolved over these past 18 months. For this reason, the figures represent aggregated results, and should be interpreted with caution, bearing in mind the profound differences among museums around the world.

Whenever possible, we also present comparisons of responses from museums of different sizes (considered on the number of employees) and with different funding structures (public or private funds, earned income or endowment funds/assets).

We do not claim that this data represents all museums, but the responses received do highlight an ongoing climate of uncertainty about their future, and the need for governments to act swiftly to ensure the future of these institutions and the invaluable cultural heritage they hold. Museums are an essential part of the identity of peoples and nations, a vital element for the communities they serve and pivotal drivers of local development.

Summary of findings

Overall, the situation of museums in the Spring of 2021 worsened slightly compared to the period between September and October 2020, but it was inconsistent across regions: while the overwhelming majority of museums in Africa and the Pacific were open, in Europe and North America they had only started to reopen their doors. The situation for Asia, Latin America and the Caribbean and the Arab Countries was also irregular at the local level.

The shift towards digital content continued on a massive scale. As already pointed out in the second report, museums relying mainly on private funds or earned income showed a greater impetus in this field. It comes as no surprise that big museums are better equipped than small and medium ones to reach their publics remotely, as they need adequate support in their their digital transition by developing human and financial resources, as well as specific skills.

The second waves of the Covid-19 pandemic and the resulting lockdowns have led to a reduced presence of staff on site compared to the second survey, but above all to an increase in economic measures that will negatively impact the economic stability of museum professionals. In particular, the percentage of participants stating that employees have been laid off has risen steadily from 5,8% in May 2020 to 9,6% a year later. This means that almost one in ten of the participating museums had to lay off staff members as a result of the crisis.

The situation for freelance professionals remains critical: 15% of participants stated that they had been laid off due to the Covid-19 pandemic, 5% less since Spring 2020 but still an alarming number. Following the evolution of the three reports, we can see a sharp decrease in the percentage of museum-related work in the total income of freelancers. The percentage of workers for whom consultancy for museums equals at least 50% of their income fell from 56,9% to 32,5%. Without adequate support to the sector, there is a real risk of losing highly-skilled and specialised professionals to other fields.

Comparing the data from the three surveys, we can see a positive trend for all the categories considered. In particular, the percentage of museums facing a permanent closure has fallen from 12.9% to 4.1%. However, without adequate financial relief measures, the pandemic will still have major repercussions in terms of reduced operational capacity, affecting opening hours, exhibitions and public programmes. This will have further negative consequences on the access to culture, depletion of cultural opportunities and, ultimately, the well-being of the communities these institutions serve.

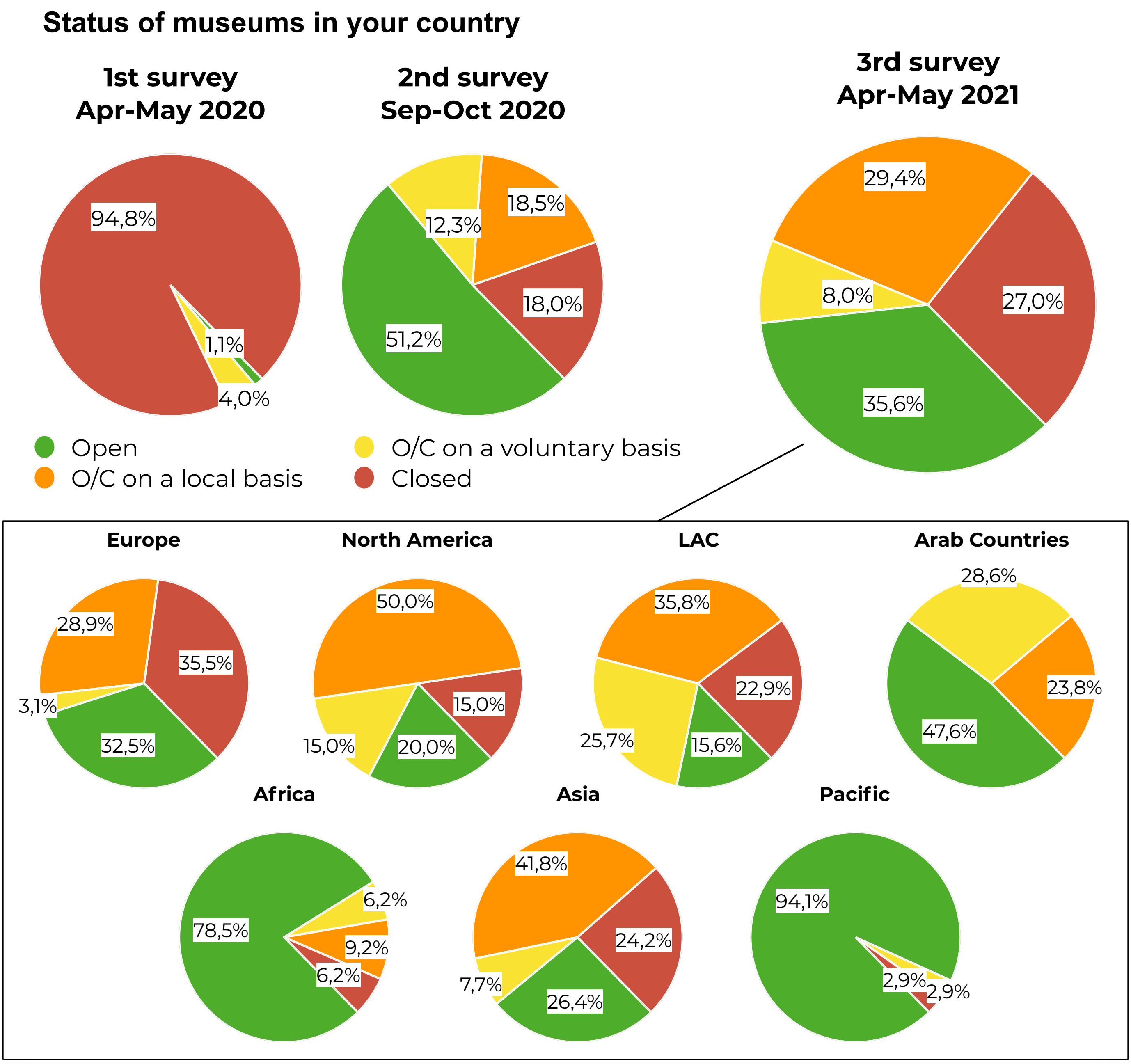
Museums are struggling to adapt their business models to this emergency situation and they need aid to develop the necessary skills to do so. A majority of participants, 59,1%, answered that they have not experimented with new sources of revenue, specially small to medium-sized museums.

In general, security procedures and the conservation of heritage in museums continued throughout lockdown: the percentage of positive responses remained similar throughout the three surveys, with around 80% of participants or more feeling confident about these two key aspects of museum management. The two figures that seem to cause most concern, with results slightly below 80%, are the maintenance of crime prevention systems and the control of the environmental conditions.

1. The situation of museums and their staff

The first ICOM survey was carried out between April and May 2020, when the overall percentage of museums in lockdown neared 95%, and at least 85% in each region. The second survey, which closed just before the second wave hit Europe, showed a fluctuating situation. By the time of the third questionnaire, the state of affairs had regressed slightly, as lockdowns due to the second wave were still being enforced in many regions of the world.

This is the only category of data for which we will show results broken down at a regional level. The African and Pacific regions had by far the highest rate of open museum in the time window (April 15 - May 29) of the survey. Europe and North America had just started to reopen the doors of their museums at that time, but the situation highly varied locally. The same applies to Latin America and the Caribbean and Asia, where only around a quarter or less of museums were open at the time.



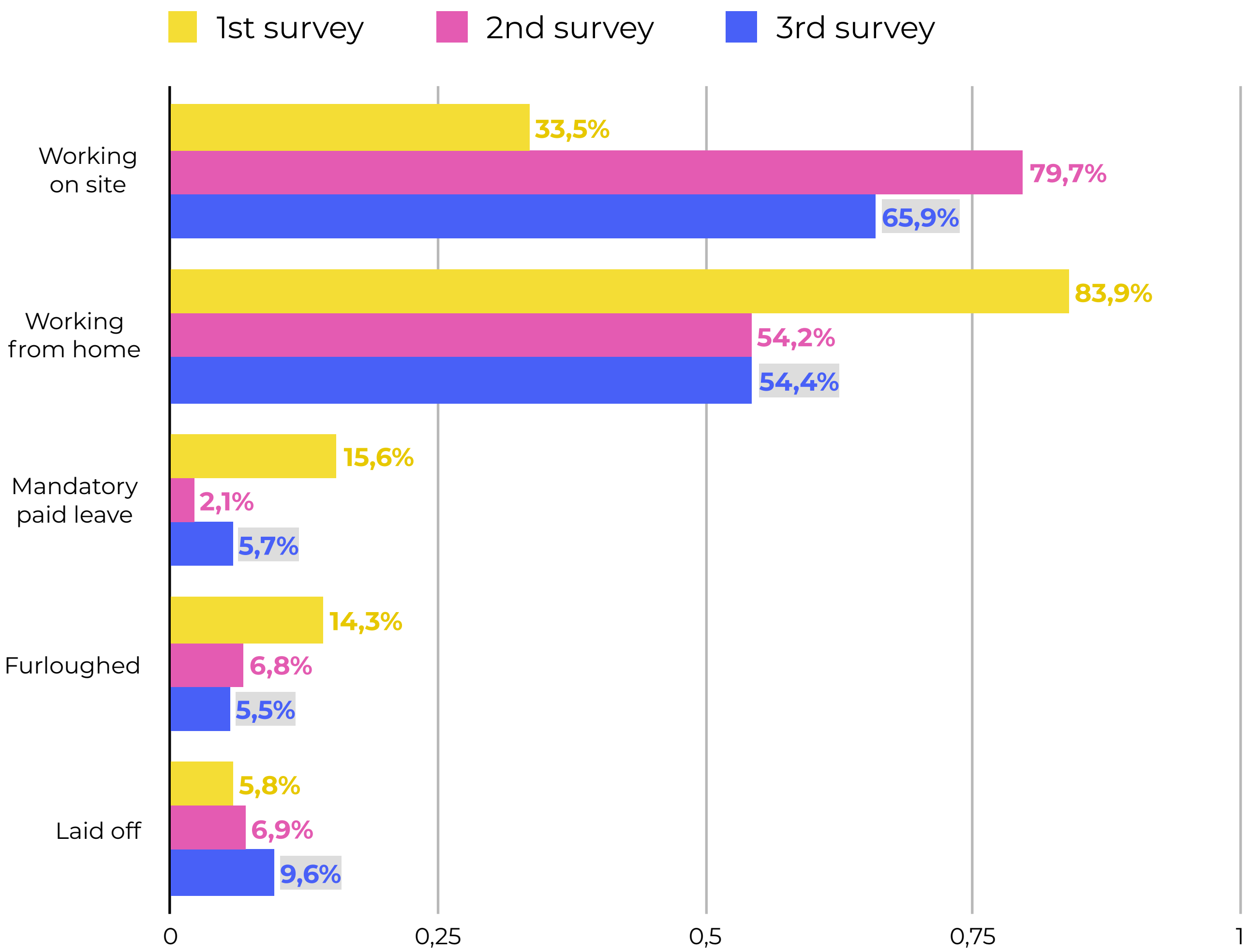
The situation of museum staff

Although we are far from the crisis levels of the first ICOM report of April-May 2020, the conditions of museum staff appears slightly more concerning in Spring 2021 than in Autumn 2020: the effects of the second wave and the resulting lockdowns have led to a reduced presence of staff on site compared to the second survey, but above all to an increase in measures with a severe negative impact on the economic stability and the lives of professionals in the museum sector.

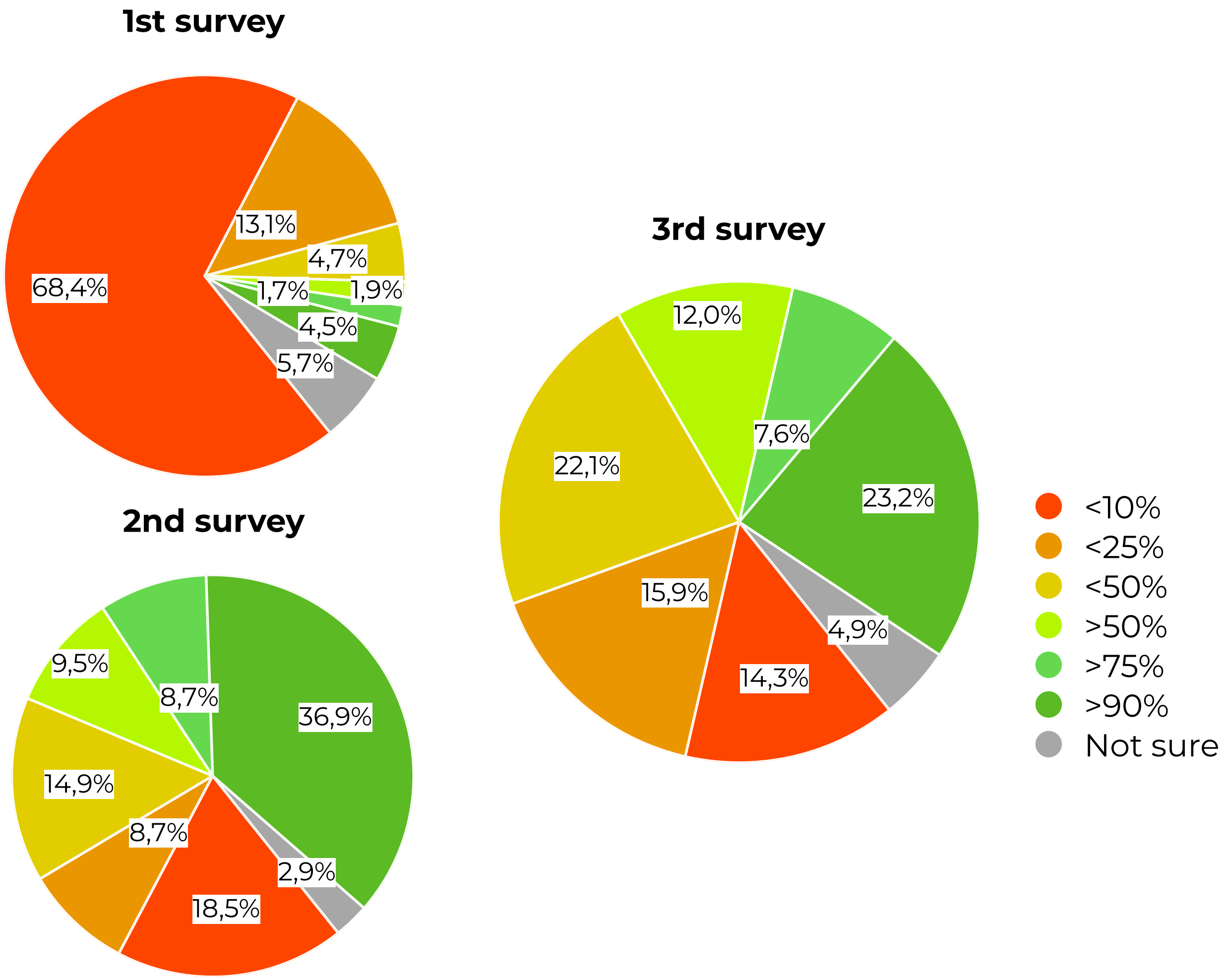
In particular, the percentage of participants stating that employees have been laid off has risen steadily, from 5,8% in May 2020 to 9,6% a year later. This means that almost one in ten of the participating museums laid off staff members as a result of the crisis.

What is the current situation of the staff? (*multiple choice question*)

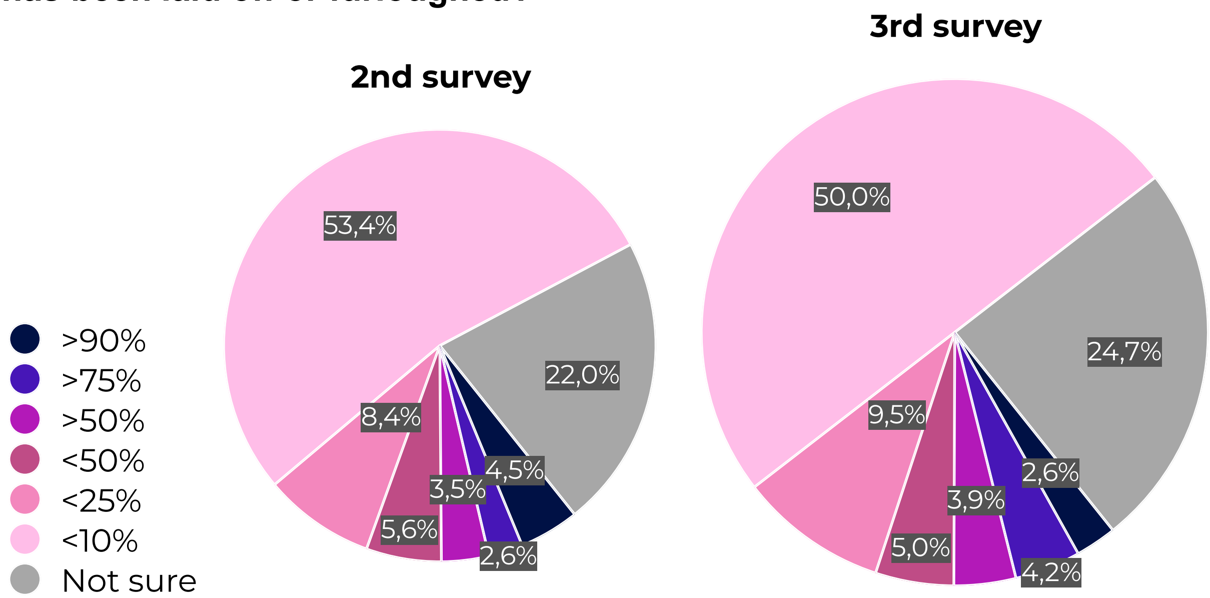
NB. this was a multiple answer question, percentages are higher than 100% and illustrate how many of the total number of respondents selected at least that answer



What percentage of the staff is currently working on-site?



What percentage of the staff has been laid off or furloughed?



The two graphs on the previous page examine in more detail the situation of museum professionals and how it evolved in the past 18 months. As far as the percentage of employees working in museums is concerned, we see a steep increase in on-site work from the first to the second survey. At the time of the first survey, the majority of respondents reported that less than 10% of the staff was working at the museum, a figure that went up to 18,5% in Autumn 2020 and fell back to 14,3% in May 2021. However, there has been a general decline in on-site work: the percentage of museums reporting that less than 50% of their staff are working at the museum rose from 42,1% to 52,3%.

For those museums which reported that employees had been laid off or furloughed, the percentages remain mostly unchanged. The figure is still concerning: of these museums, 15.7% (16.2% in Autumn 2020) stated that at least a quarter of their staff were laid off or furloughed, a figure that rises to more than half of the personnel for 10.7% of them (10.6% in Autumn 2020).

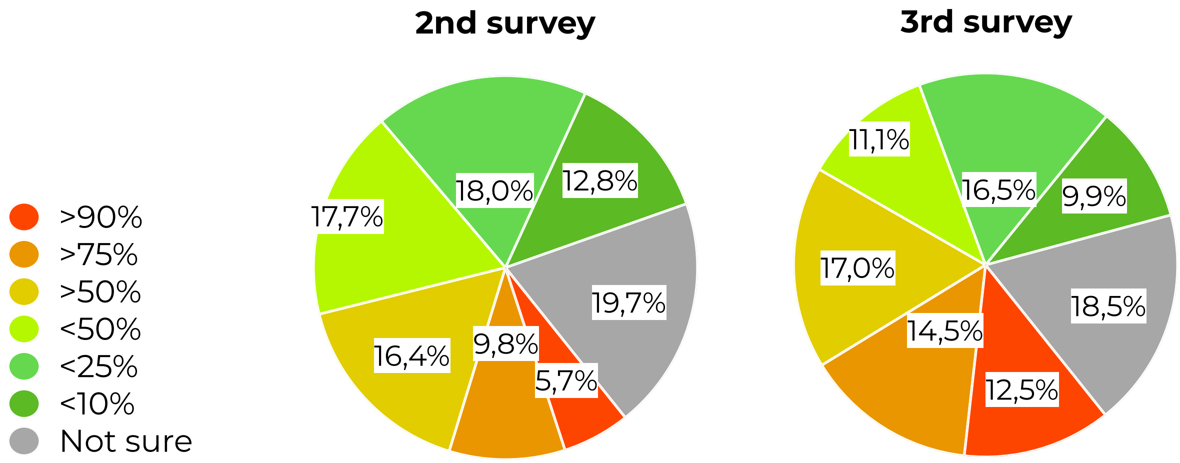
2. Expected economic impact

This section presents the expected economic impact on museums across the three surveys, whenever possible. In some cases, questions have been added after the first report due to the evolution of the pandemic and after taking into account other studies developed or published in the meantime.

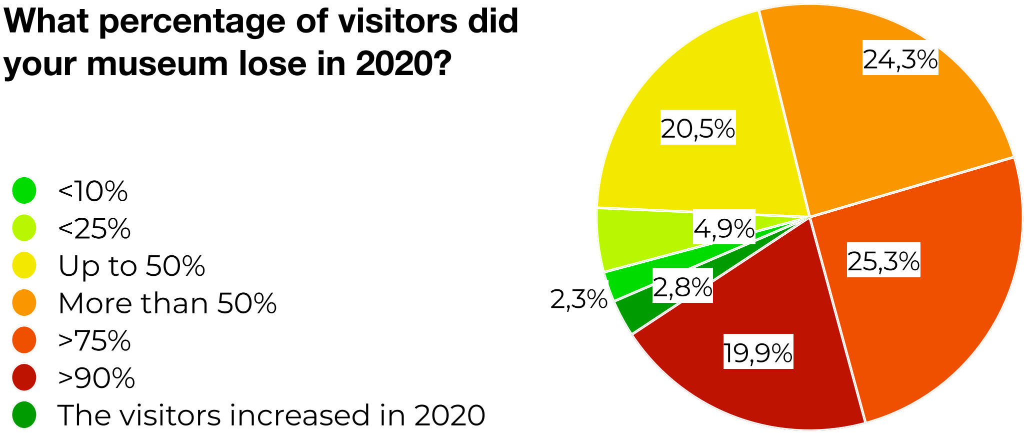
The charts below highlight the impact of the lockdown on museum revenues. In the Spring of 2021, when museum professionals had a clearer view of the effects of the lockdown, the losses recorded are much more substantial than those reported in the Autumn of 2020. The impact on the financial stability of museums, especially those relying on their own revenues, is substantial.

The percentage of museums that reported a loss of income superior to half of their annual revenues is now up to 44%, compared to 31,9% of Autumn 2020.

What percentage of its annual revenues does your institution expect to lose (left) / did your museum lose (right) in 2020?



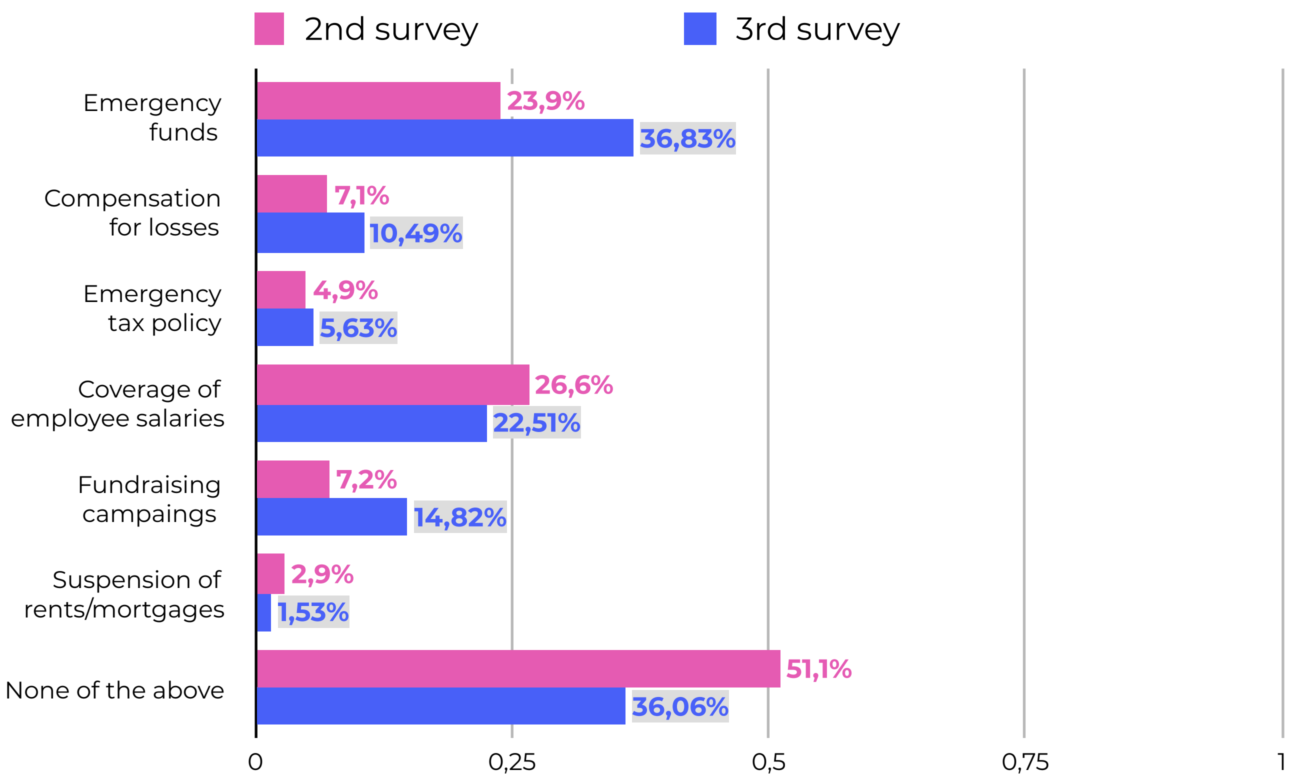
What percentage of visitors did your museum lose in 2020?



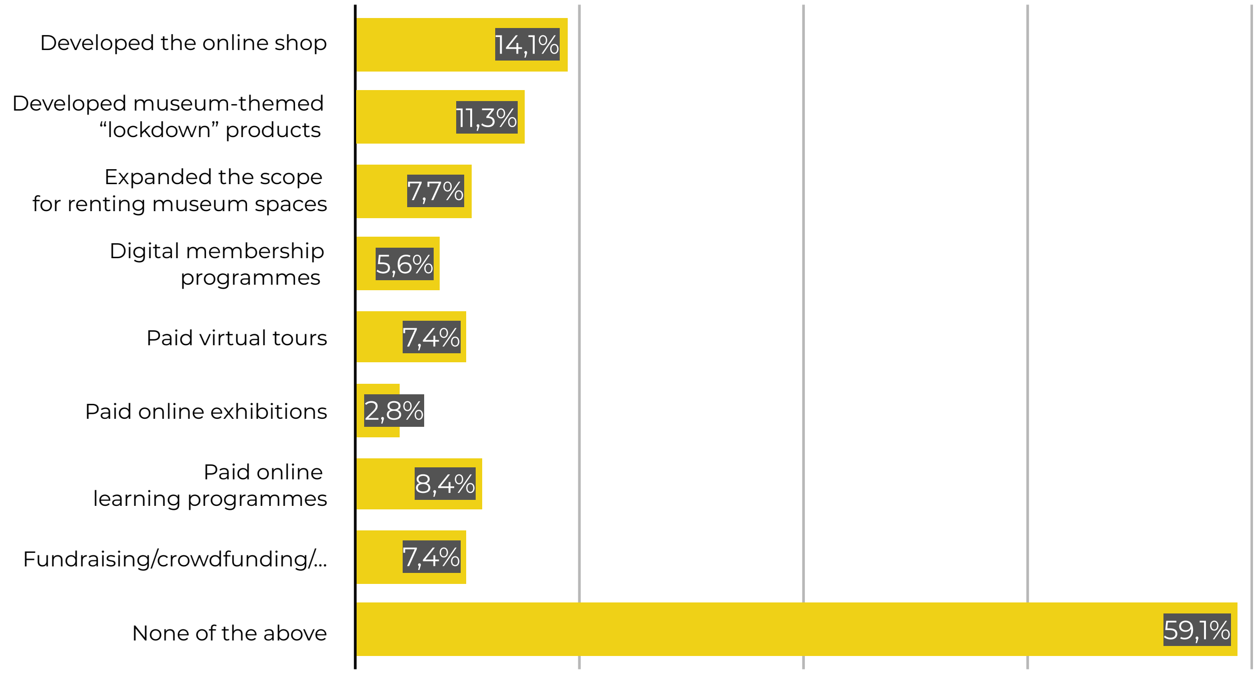
With museums being closed for most of 2020, the revenue loss is reflected in the dramatic drop in attendance numbers suffered by the vast majority of institutions worldwide. Almost 70% of participants reported a loss of more than 50% of their annual visitors, a number that rises to more than 90% for 1 in 5 museums.

To mitigate the effects of the crisis, different measures have been implemented by individual institutions as well as by local and national governments. Funding was allocated to compensate for losses and to support the sector. Comparing the data from the second and third surveys, a significantly higher number of institutions had access to at least a form of financial aid. However, more than a third of respondents (36,06%) still stated that they had not received any financial support.

Did you have access to any of the following forms of financial support?
(*multiple choice question*)

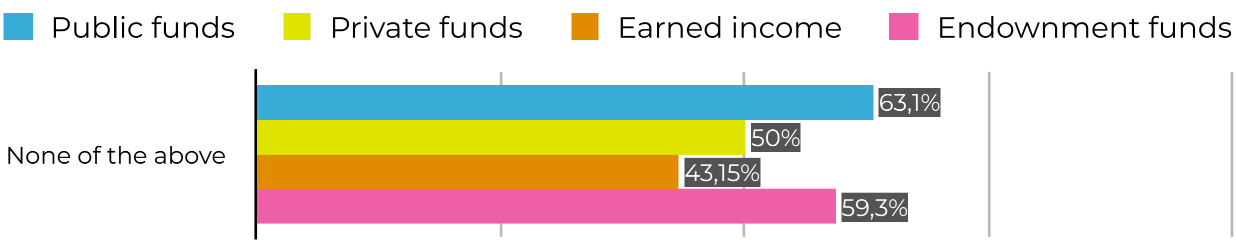


Has your institution experimented with new ways of generating income?



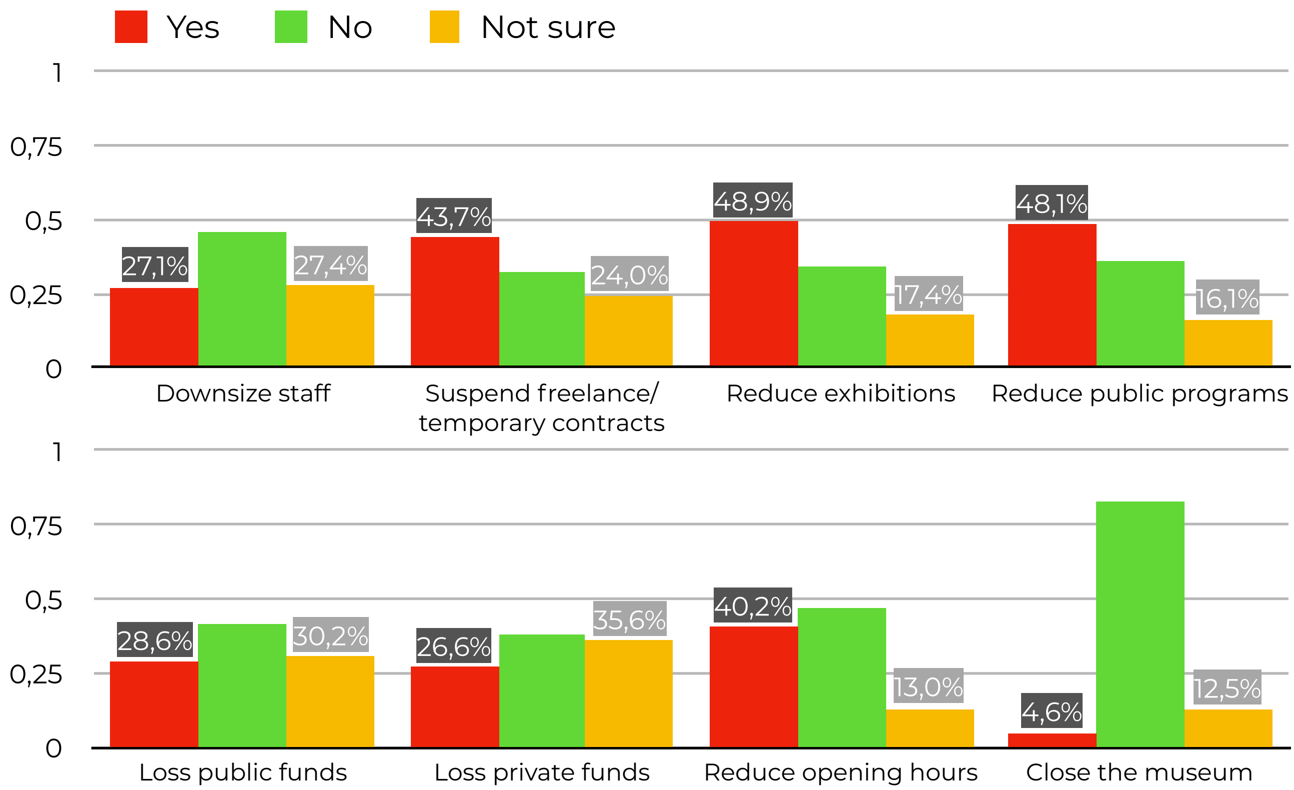
Attempts to tackle the loss of revenue through new ways of generating income are still marginal. Almost 6 out of 10 museums (59,1%) stated that they have not experimented with any new sources of revenue. The most common attempts are those related to investing in merchandising, either by expanding online sales (14,1%) or by creating new products (11,3%).

Generating alternative revenues. Percentage of negative answers in spring 2021 according to museum size (above) and sources of funding (below)

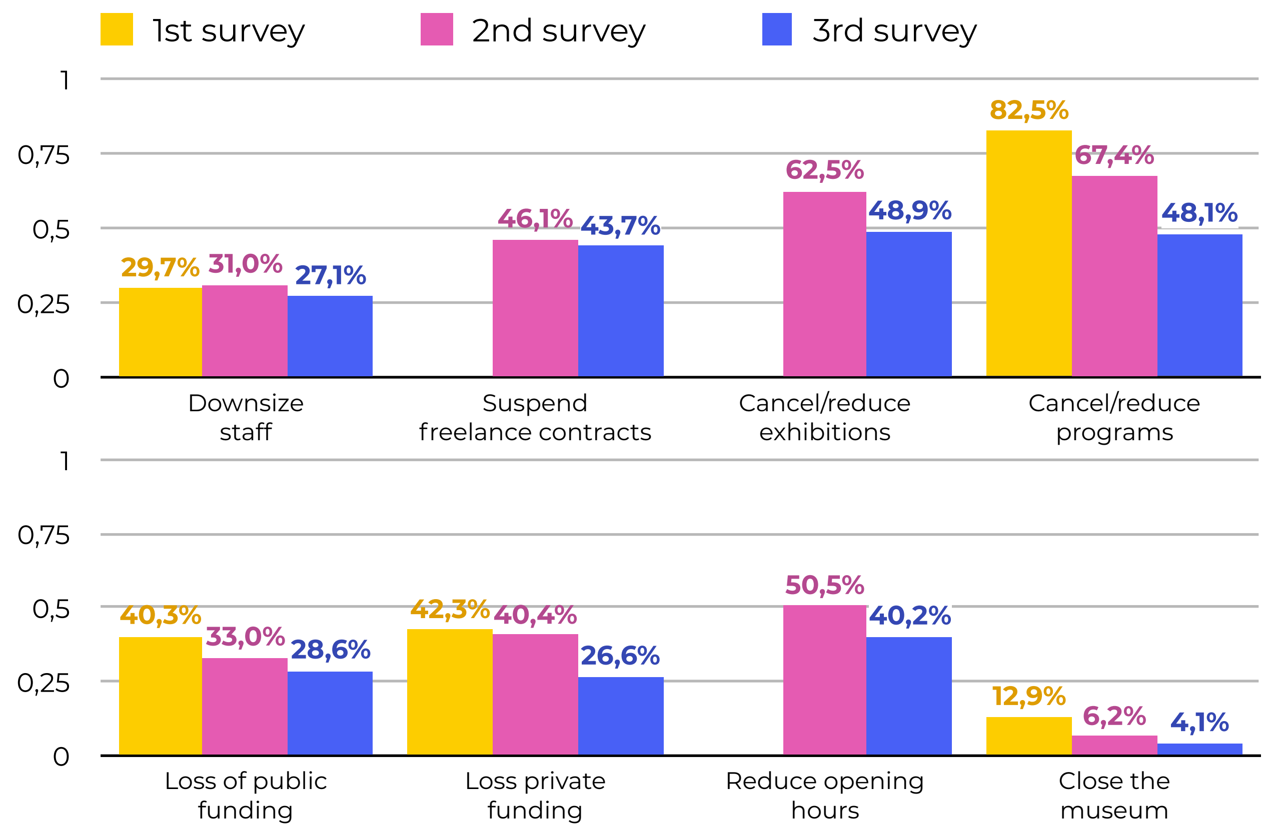


Unsurprisingly, larger museums seem to be better equipped than small to medium-sized museums to experiment with new ways of generating income. Similarly, museums relying mainly on earned income and private funds tried to a greater extent to generate additional revenues than museums relying on public or endowment funds.

What do you think will be the economic impact of Covid-19 on your museum in the long term? Third survey responses (Spring 2021)



Evolution of expected economic impact over time. Showing only "Yes" answers = negative impact

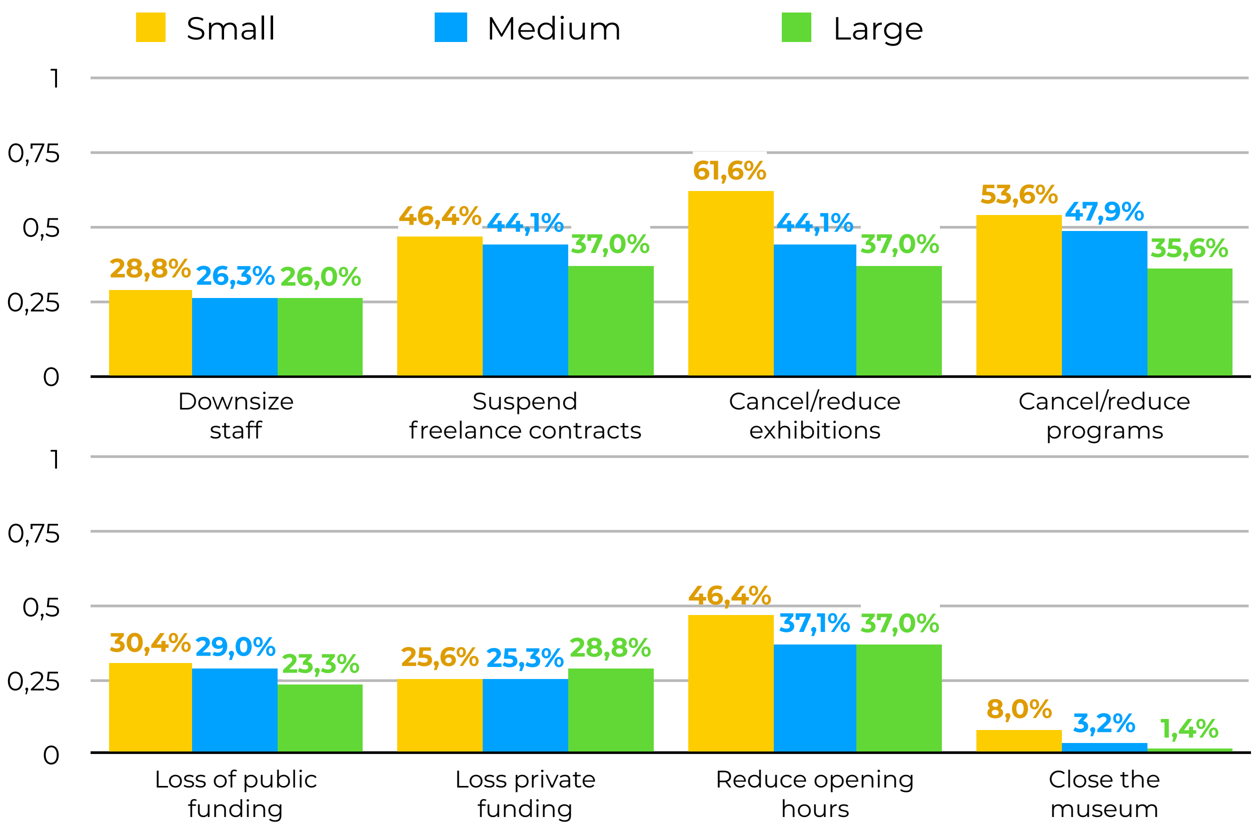


The economic impact of the Covid-19 crisis on the sector, as already indicated in our first two reports, is severe but its long-term effects are still difficult to grasp. Besides reduced income and downsizing, the effects of the pandemic on museums will also have major consequences in terms of operational capacity and their role in society, negatively impacting opening hours, exhibitions and public programmes. This will have further consequences in terms of access to culture, depletion of cultural opportunities and, ultimately, the wellbeing of the communities these institutions serve.

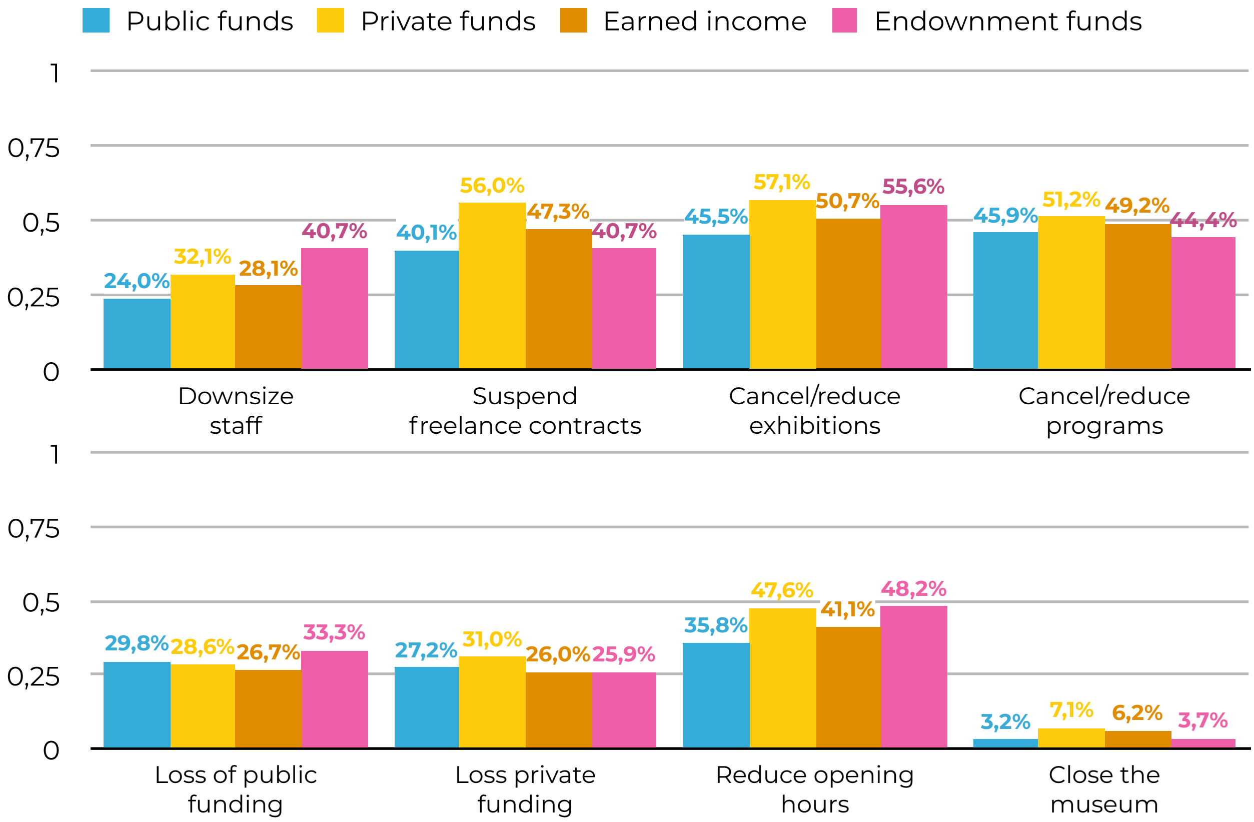
Comparing the data from the three surveys over time, we can see a positive trend for all the categories considered. In particular, we can see that the percentage of museums facing permanent closure has fallen from 12.9% to 4.1% – a figure that had caused international, widespread concern following the first report.

However, uncertainty about the long-term effects of the crisis remains constant. Museums need emergency resources to adapt their business models and continue to fulfil their fundamental role in society. In terms of employment stimulation and economic stability, in order to assist museum professionals but especially precarious and freelance workers, it is imperative to activate adequate forms of support for the sector.

Expected economic impact according to museum size (Spring 2021).
Showing only "Yes" answers = negative impact



Expected economic impact according to funding structures (Spring 2021). Showing only “Yes” answers = negative impact

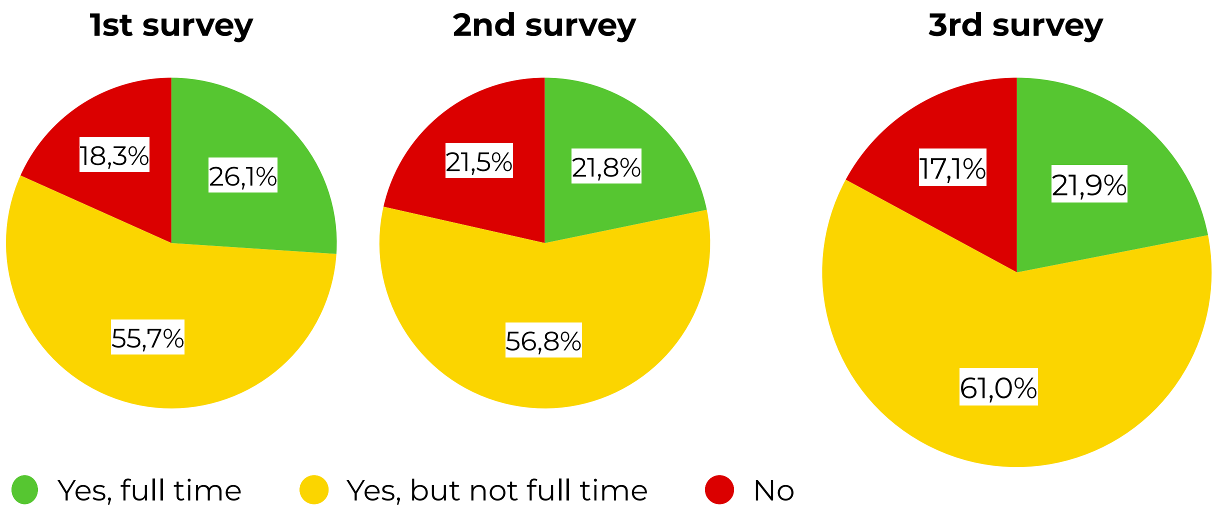


Comparing the data of the Spring 2021 survey according to the size of the participating museums, it again emerges that smaller museums are more affected by the negative effects of the Covid-19 crisis. For these museums, the possibility of permanent closure is much more significant than for medium to large museums, as is the need to reduce exhibitions, programmes or opening hours. As already pointed out, this may have further serious effects on their local communities.

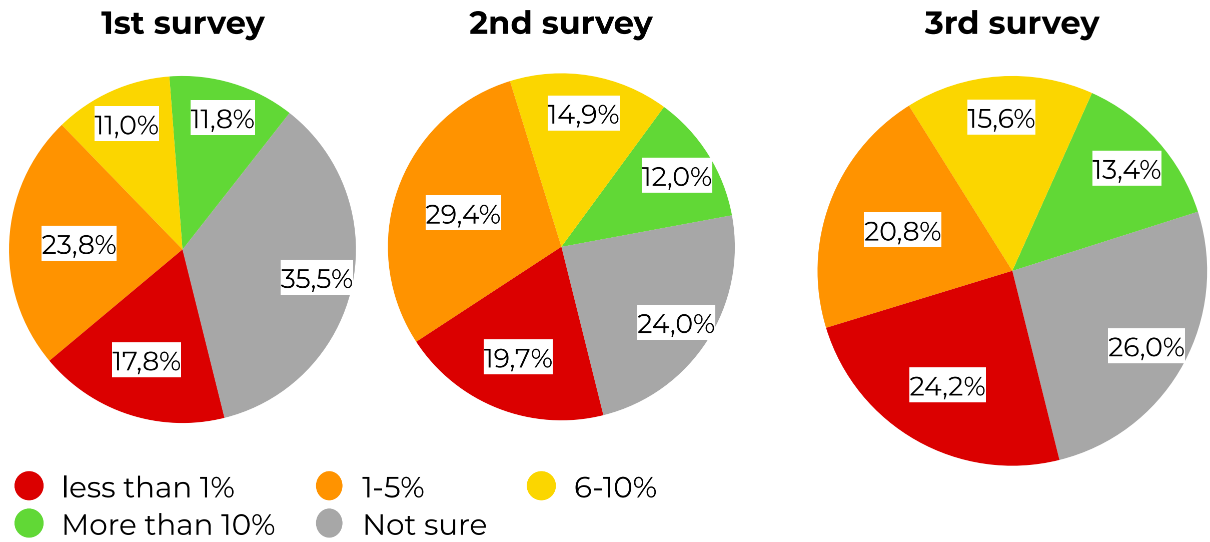
A comparison according to funding structures shows less marked but nevertheless significant differences. As might be expected, museums that can count on public support seem to be more stable in terms of the economic impact on their operations, especially compared to those institutions that rely mostly on earned income.

3. Digital activities and Communication

Do you have dedicated staff for digital activities?

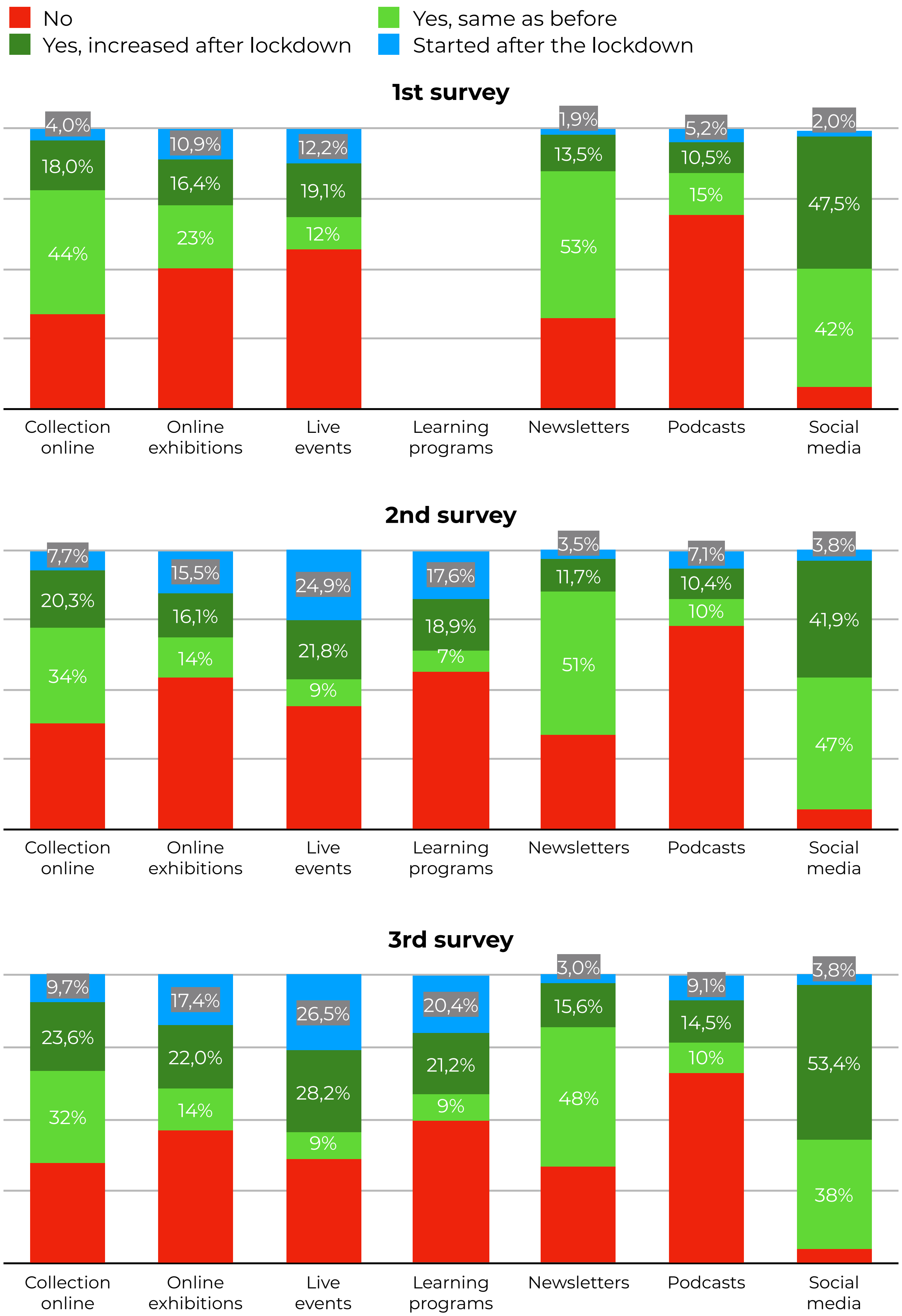


What percentage of your overall budget is dedicated to communication and digital activities?

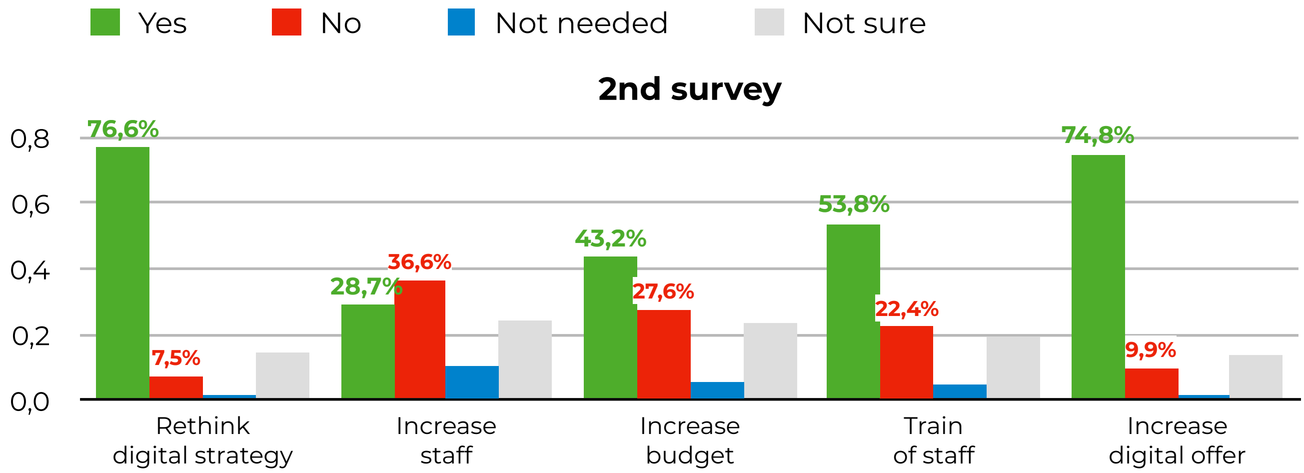


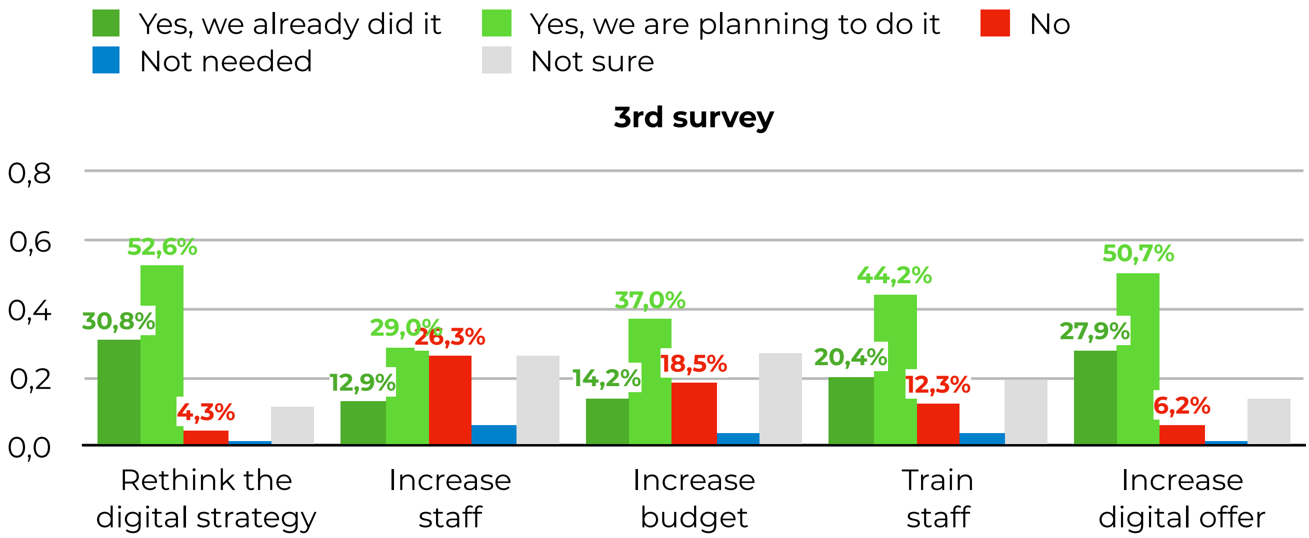
Online activities continue to increase, in particular through the creation of new digital communication channels in the wake of lockdown (see charts below). However, resources do not always seem to increase accordingly, which can be explained due to the economic consequences aforementioned.

With regard to staff, the proportion of non-full-time employees has increased, perhaps indicating a reallocation of personnel to communication and digital activities, as the percentage of museums with no dedicated staff decreased moderately. The percentage of participants who stated that their museum spends at least 6% of its budget on digital and communication activities increased by 6,2% (from 22,8% in Spring 2020 to 29% in Spring 2021), but so did that of of museums claiming to spend less than 1%.


No
Yes, increased after lockdown
Yes, same as before
Started after the lockdown
1st survey
4,0%
18,0%
44%
10,9%
16,4%
23%
12,2%
19,1%
12%
1,9%
13,5%
53%
5,2%
10,5%
15%
2,0%
47,5%
42%
Collection online
Online exhibitions
Live events
Learning programs
Newsletters
Podcasts
Social media
2nd survey
7,7%
20,3%
34%
15,5%
16,1%
14%
24,9%
21,8%
9%
17,6%
18,9%
7%
3,5%
11,7%
51%
7,1%
10,4%
10%
3,8%
41,9%
47%
Collection online
Online exhibitions
Live events
Learning programs
Newsletters
Podcasts
Social media
3rd survey
9,7%
23,6%
32%
17,4%
22,0%
14%
26,5%
28,2%
9%
20,4%
21,2%
9%
3,0%
15,6%
48%
9,1%
14,5%
10%
3,8%
53,4%
38%
Collection online
Online exhibitions
Live events
Learning programs
Newsletters
Podcasts
Social media

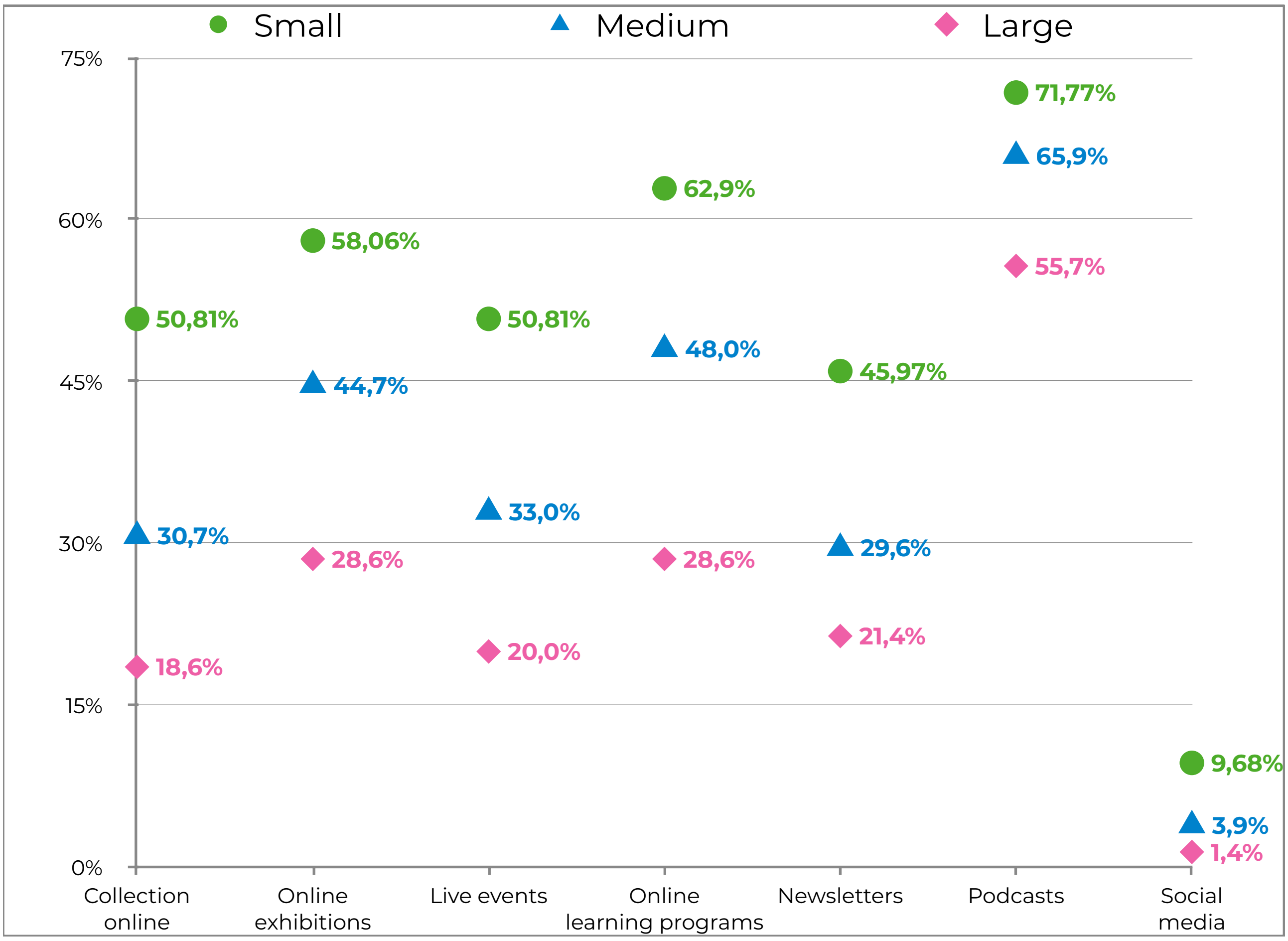
Which of the following digital changes is your museum considering after the lockdown?





What is certain, is that the Covid-19 crisis has changed museums' perception of the digital world forever, highlighting existing issues and accelerating changes that were already underway. Although the resulting economic crisis will obviously be a major obstacle in terms of the economic and human resources that museums will be able to invest in, more and more institutions are now aware of the fundamental importance of digitisation. The percentage of museums that started or planned to upgrade their digital infrastructure and resources increased significantly between Autumn 2020 and Spring 2021. To facilitate this transition, it is imperative that governments and international organisations support museums in their processes of digital transformation.

What digital services does your museum provide? % "No" answer

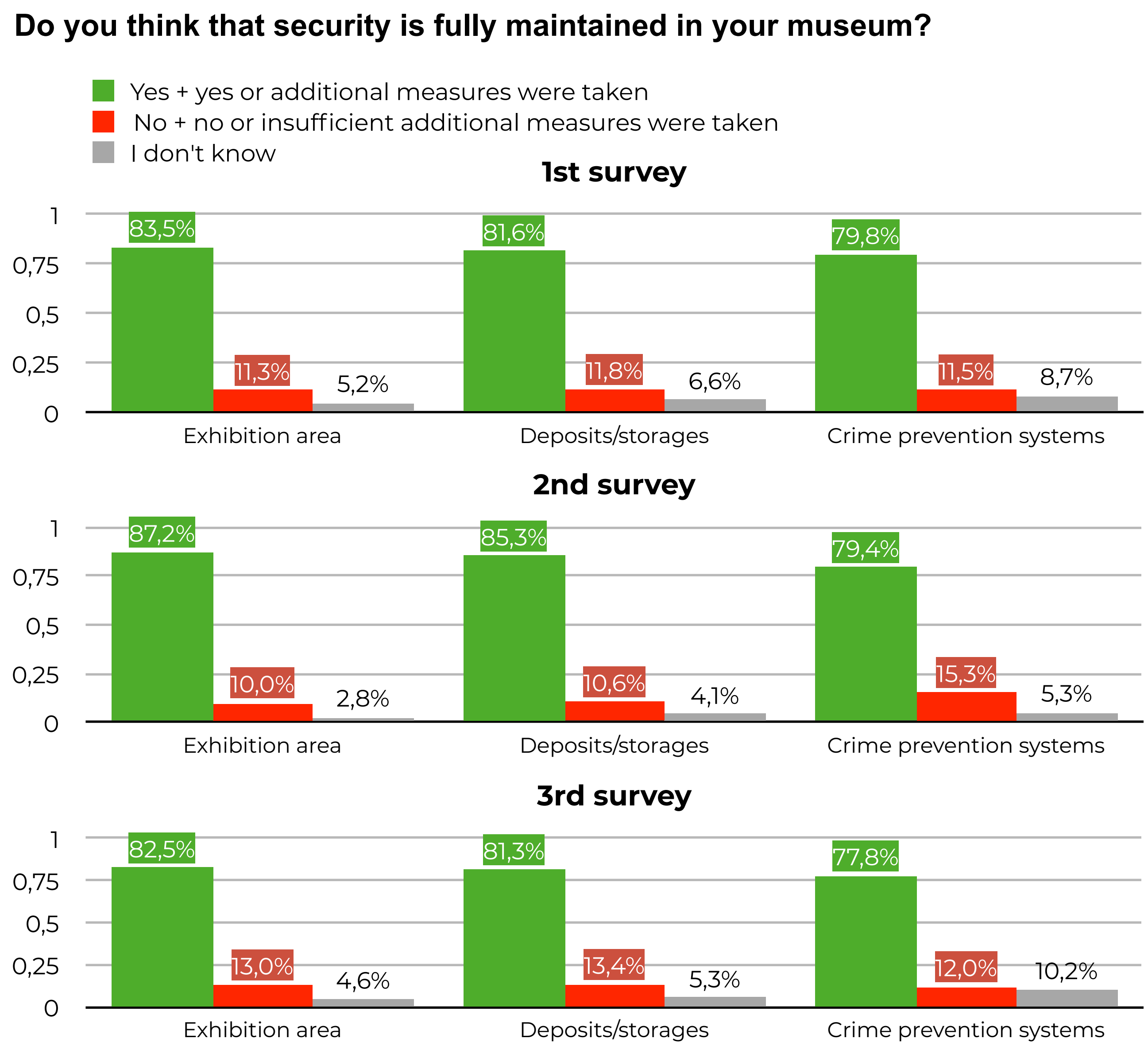


This graph shows a comparison of the digital services provided by museums of different sizes and illustrates the percentages of negative responses. The higher a category is located, the fewer museums offer a certain digital service. The comparison highlights the aforementioned differences between large, medium and small museums in terms of digital presence and activities due to a certain lack of human and financial resources.

Significant differences also emerge when comparing different funding structures, as the second report of October 2020 already indicated. The museums that have shown the greatest reactivity in digital communication are those that primarily rely on earned income and endowment funds, which are also the two types of museums that invest the most resources in this field.

4. Museum security and conservation

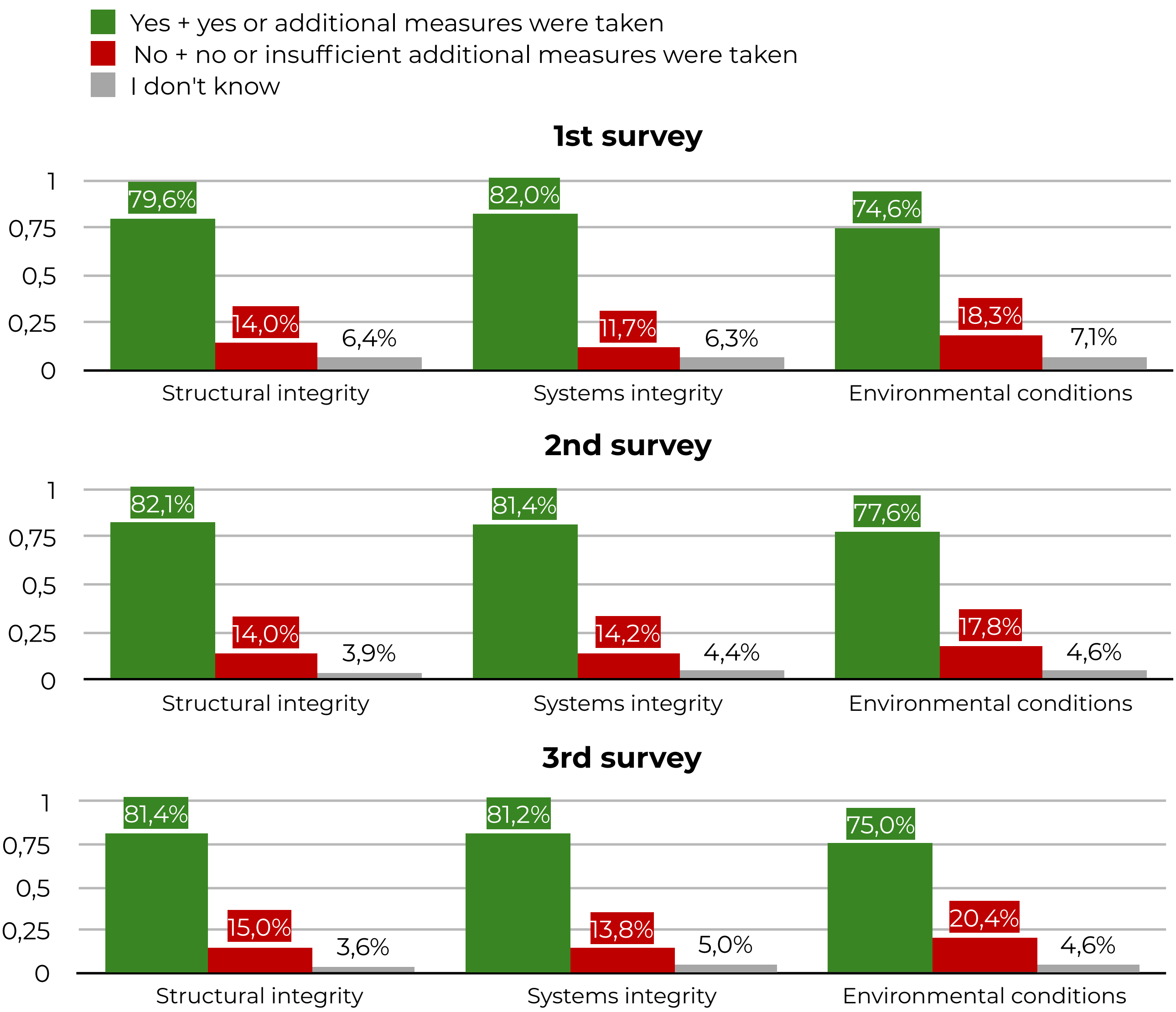
With regard to museum security and conservation of collections, the percentage of positive responses remained mostly constant throughout the three surveys, with around 80% of participants or more feeling confident about these key aspects of museum management. In some cases, however, the data show differences that should be taken into consideration. The two figures that seem to cause most concern, with results slightly below 80%, are the maintenance of crime prevention systems and the control of environmental conditions.



Regarding the security of collections, surveys show a marginal deterioration in the perception of the measures implemented by museums, possibly due to the prolonged absence of staff in the institutions. Compared to one year earlier, an additional 1,7% and 1,6% of participants think that their museum has put in place insufficient measures to ensure the safety of the works in the exhibition and storage areas respectively. Conversely, the positive perception of the three aspects fell by 1 to 2%.

Considering the conservation of artworks, buildings and systems, the percentages of professionals with a positive perception remained almost unchanged or moderately increased. The percentage of participants who fear that the measures already in place were insufficient or that insufficient additional measures were taken also increased by 1 to 2,1%.

Do you think that conservation is fully maintained in your museum?

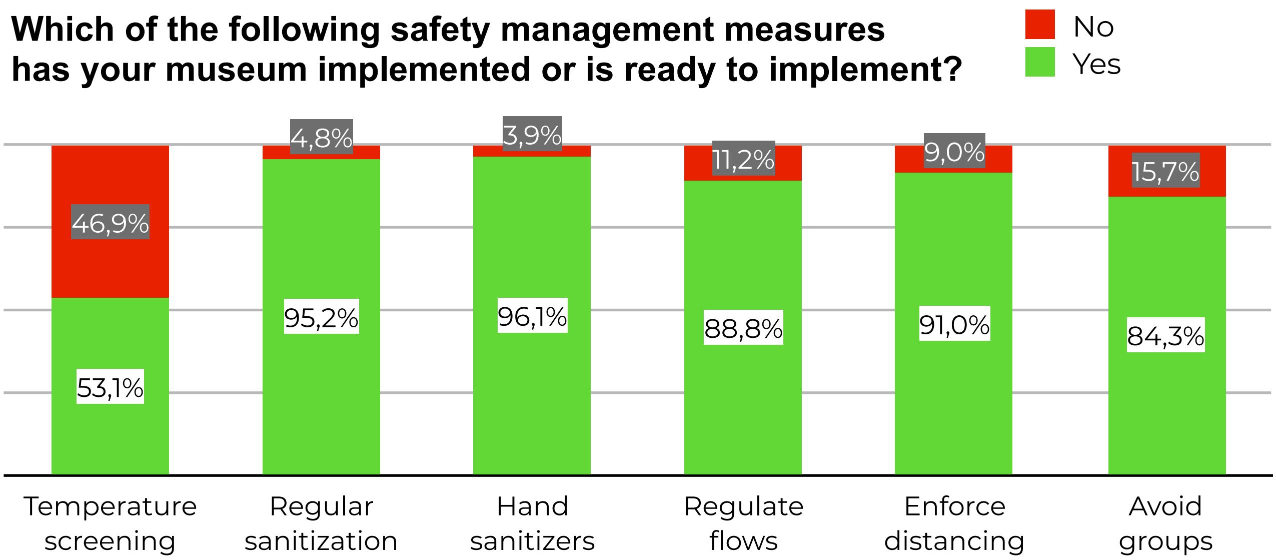


5. Reopening and preparing for the future

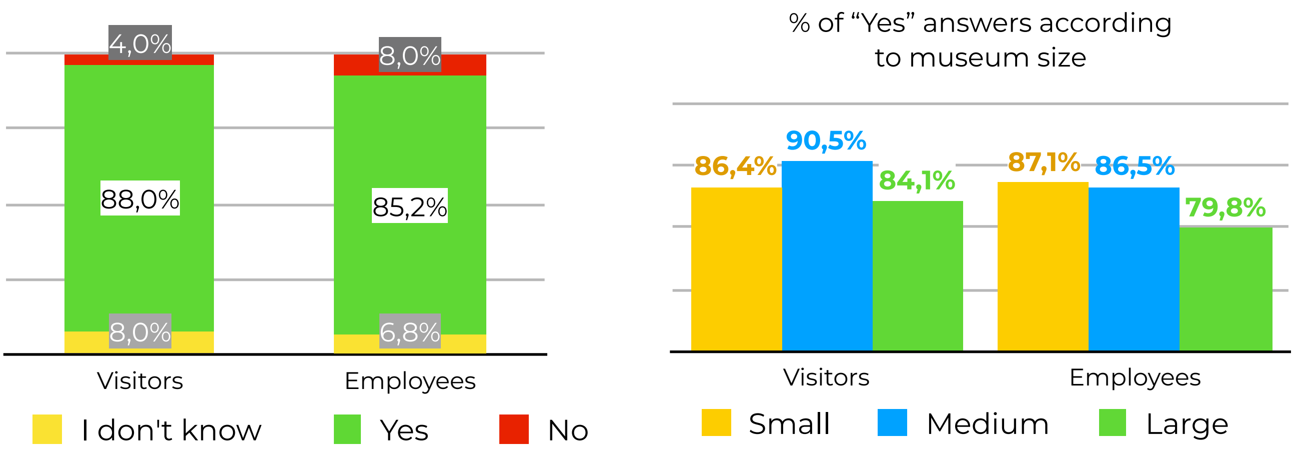
While many institutions are struggling to reopen to the public with major limitations, others are still closed or have recently been forced to close for a second or third time. To ensure the safety of staff and visitors, cultural institutions must comply with government directives and meet specific safety measures.

Similarly to the results of the second survey in October 2020, providing a temperature screening at the entrance seems to be a potential challenge for museums, as well as regulating flows and avoiding the agglomeration of groups, albeit to a lesser extent.

Which of the following safety management measures has your museum implemented or is ready to implement?



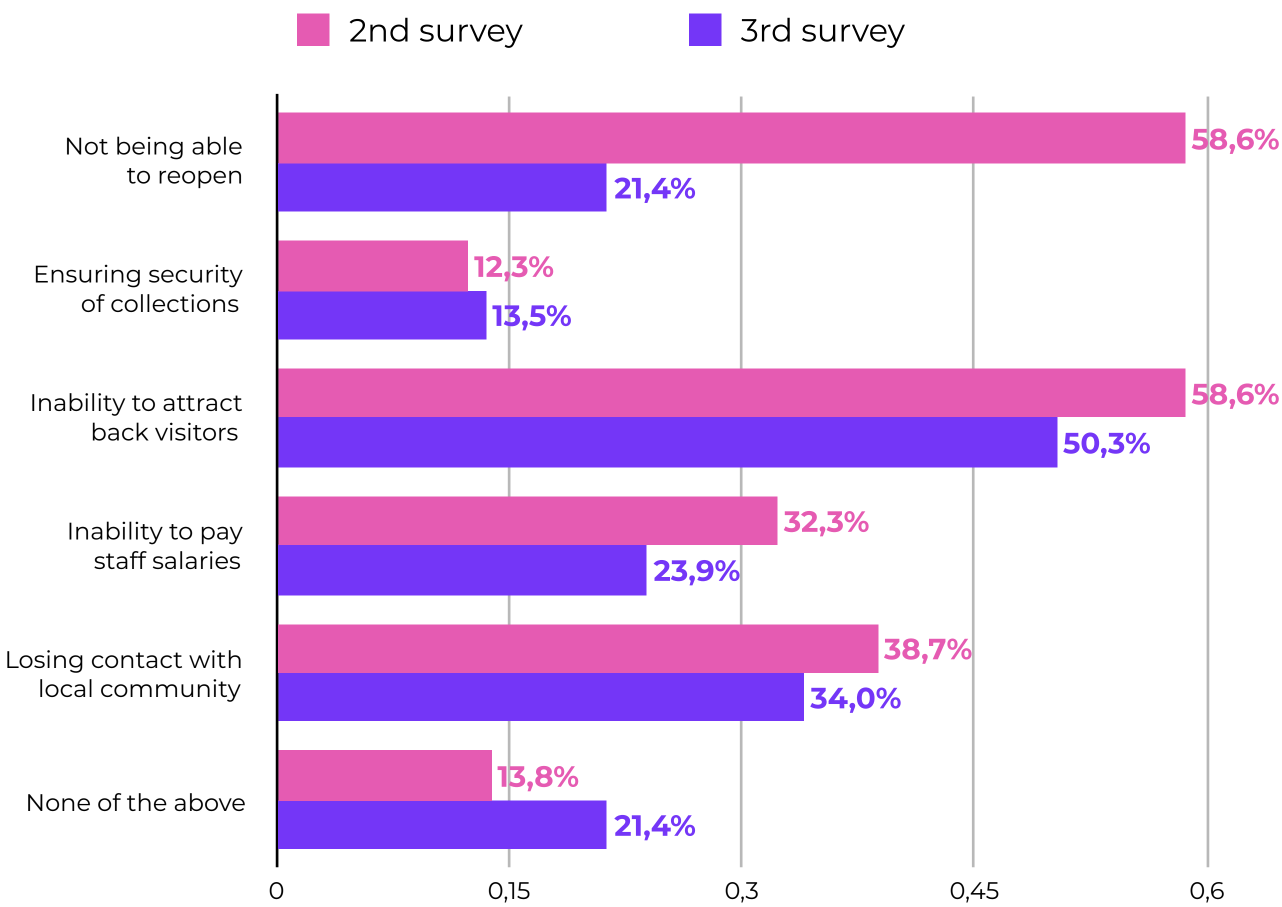
Considering the sanitary measures in place, do you think visitors and employees are safe in your museum?



Regardless of the size of their institution, the vast majority of respondents confirmed that both staff and visitors are safe in their museum (only large museums with more than 100 employees show a greater concern for staff members). This has been highlighted by several reports and should be taken into account by national and local governments when implementing pandemic control measures: museums are equipped to comply with health regulations, and are a safe and essential place to ensure the wellbeing of their communities, especially in conditions that may seriously affect them.

When examining the threats perceived by the participants, we can observe a positive trend for almost all the categories analysed. The only perceived risk that increased, in accordance with what already stated above, is the ability of museums to ensure the security of their collections.

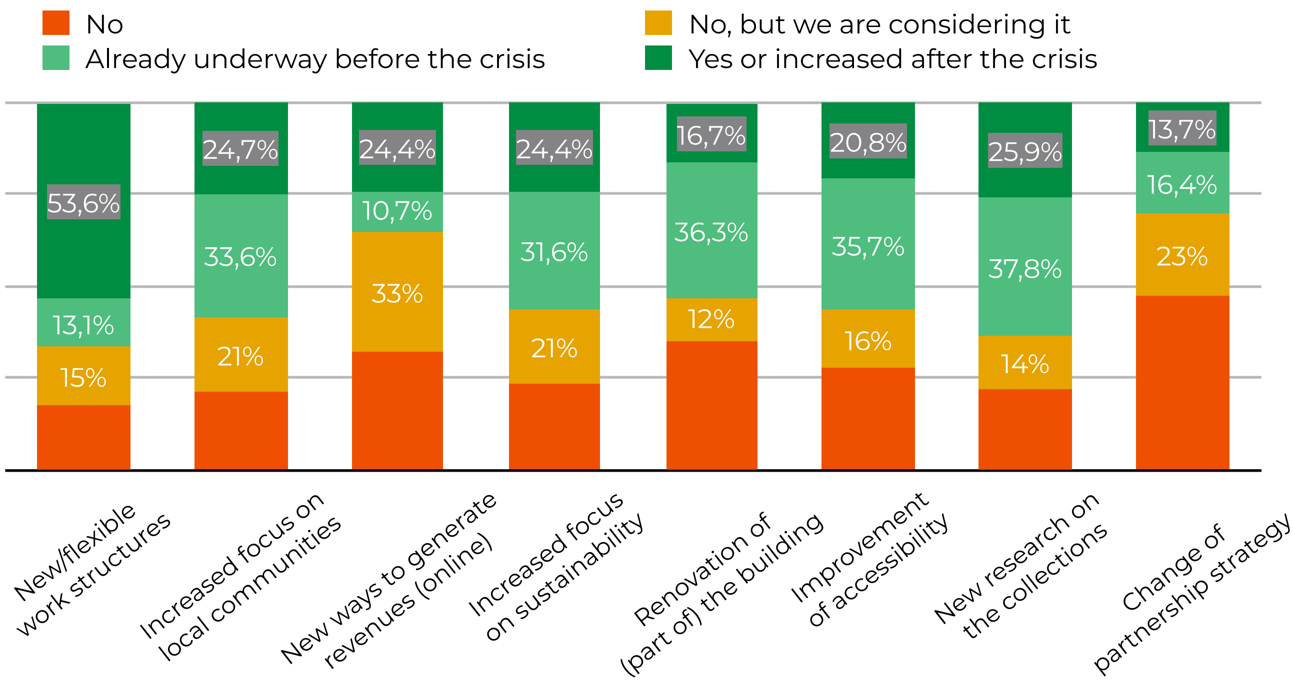
Which of the following do you perceive as a threat for your museum?



Attracting visitors in the aftermath the pandemic is still perceived as a challenge and potential threat by half of the participants. Furthermore, other major concerns are the effects of social distancing on the museums' relationships with their local communities, as well as the ability to pay staff due to a loss of revenue.

Apart from the development of digital services, the pandemic has transformed almost every aspect of the work of museums and their professionals. The following two graphs can give us an idea of the directions that institutions have taken in response to the crisis, and the skills that will need to be developed to seize the opportunities that have surfaced from this emergency.

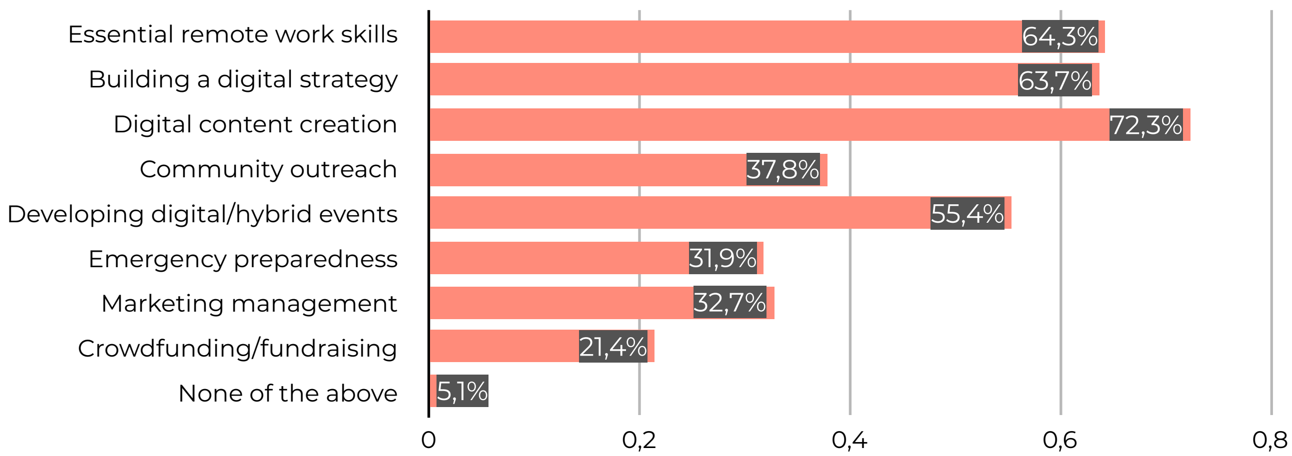
Has your institution changed its strategy as a result of the crisis?



The shift towards more flexible working structures is a change that is common to almost all sectors. In addition, with lockdowns and the drop in international tourism, museums are shifting their focus to a more local dimension: from a greater emphasis on permanent collections meant to compensate the cancellation of exhibitions with external loans, to a stronger focus on local communities.

For many museums, these are changes that were already underway before the pandemic. However, for many others this crisis has exacerbated existing problems, especially in terms of (economic) sustainability of museum institutions.

Which of the following skills have you felt the need for during the crisis?



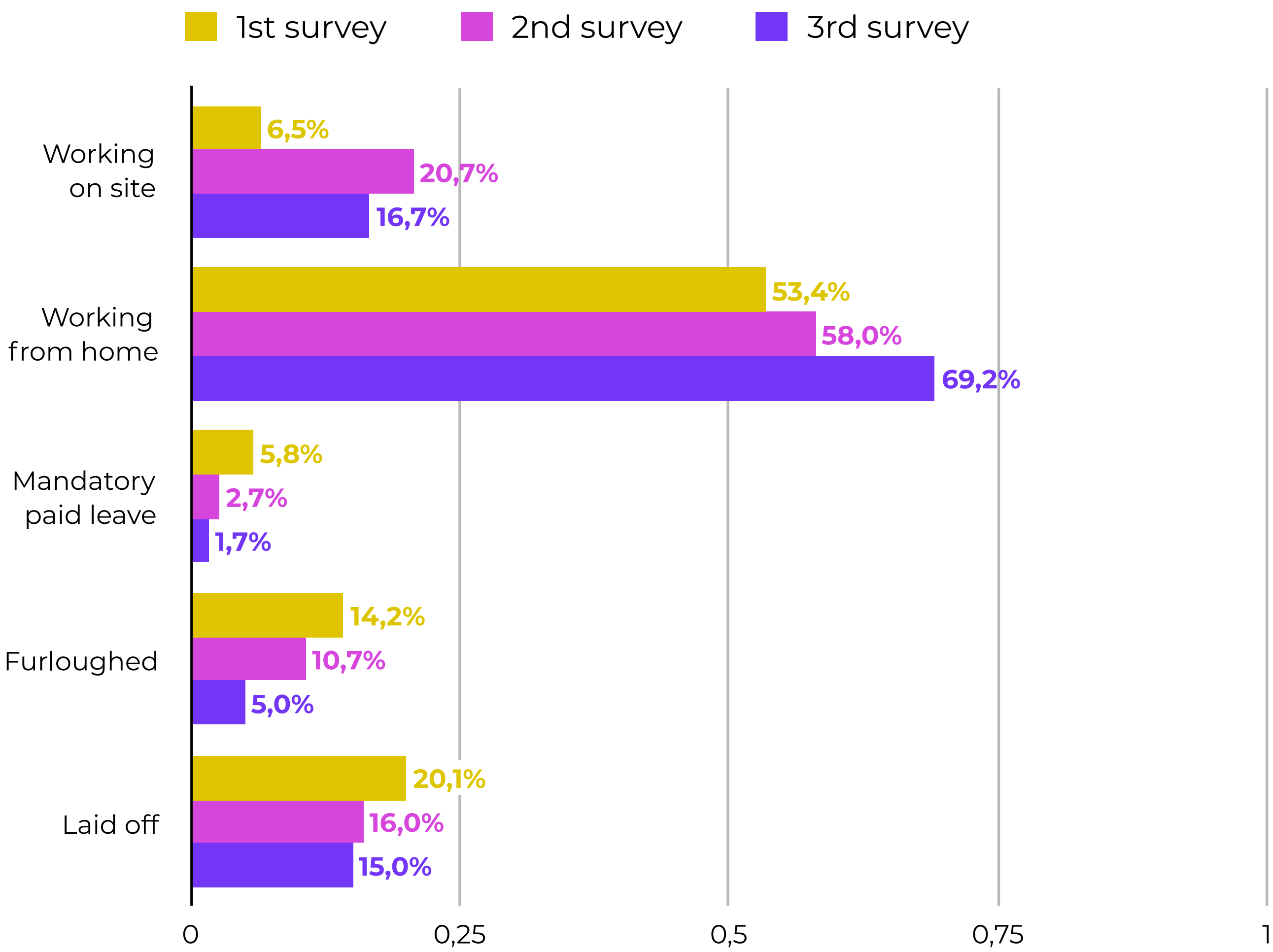
6. Freelance professionals and consultants

As in the two previous surveys, respondents have highlighted a critical situation for freelance workers, with serious repercussions for the self-employed in the museum sector both in the medium and long term. It is important to consider that, in many countries , freelancers and consultants make up a large portion of the total museum professionals and are key for the vitality of the sector.

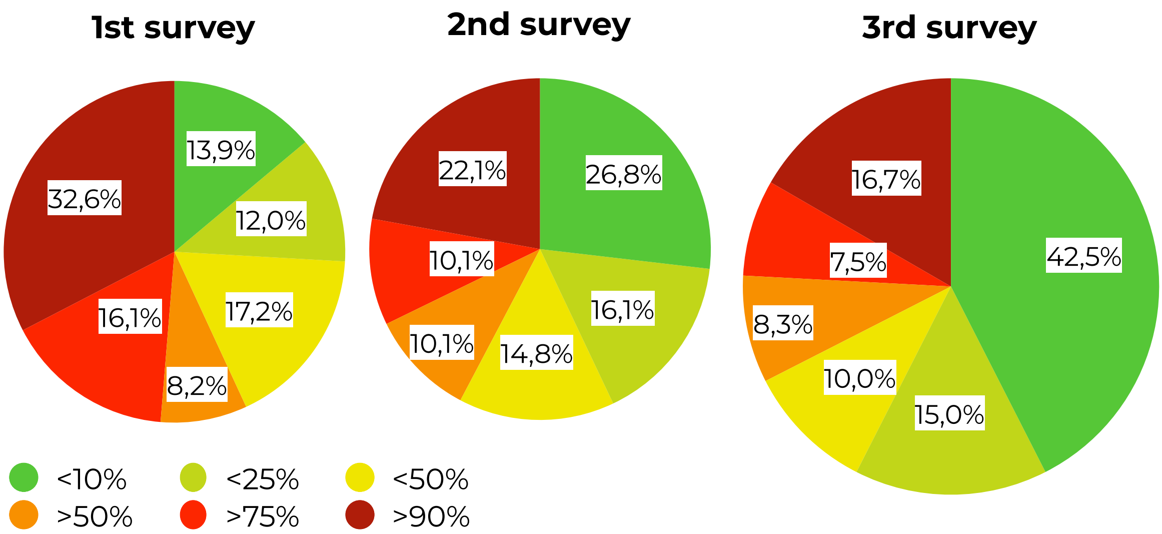
We have to bear in mind that these professionals are also the most exposed to systemic economic recessions in the cultural sector. Compared to the first two surveys, some of the negative impacts seem to have been mitigated, but independent museum professionals still need financial support to sustain their activity in the sector.

In this third survey, 15% of participants stated that they had been laid off as a result of the Covid-19 pandemic which, although 5 points down since Spring of 2020, is still a concerning figure.

What is yours and/or your agency current situation?

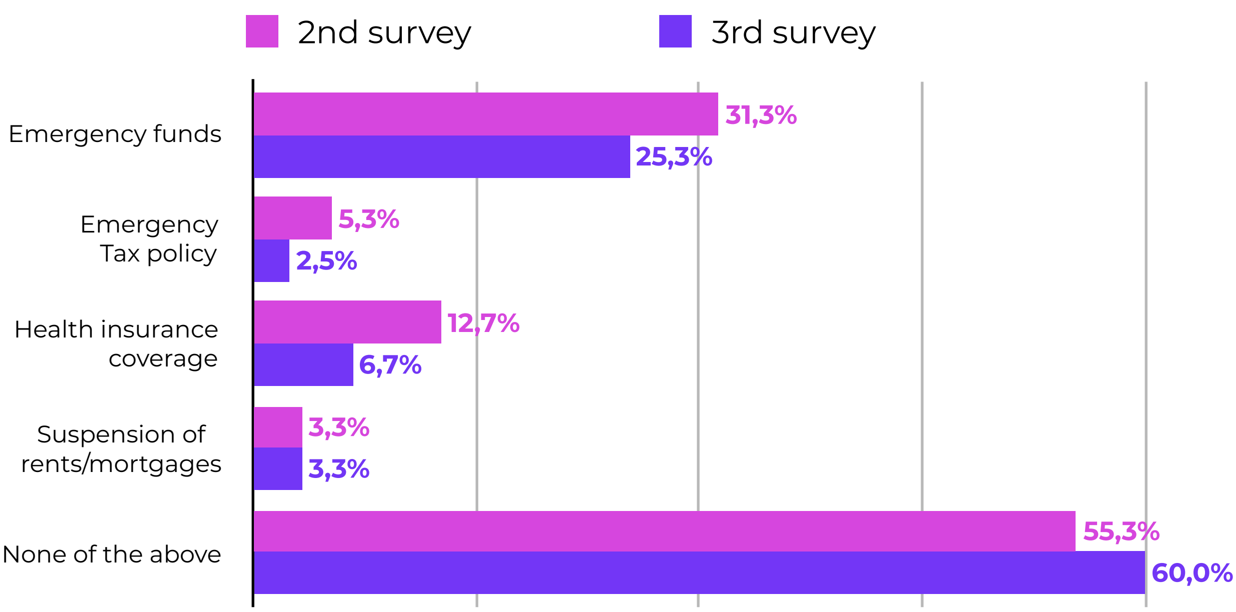


What percentage of your income is based on consultancy for museums?



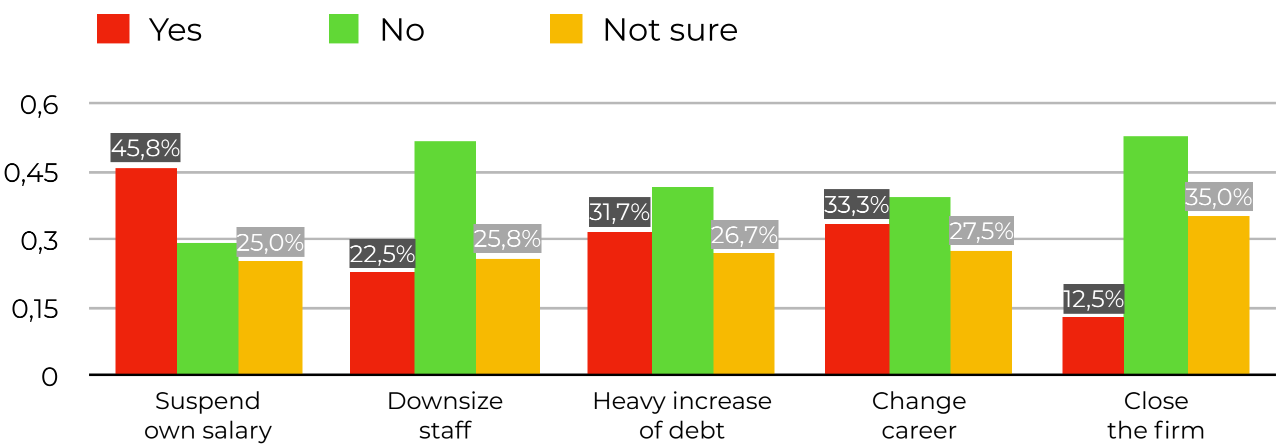
Following the evolution of the three reports, we can see a sharp decrease in percentage of museum-related work of the total income of freelancers. The percentage of workers for whom consultancy at museums equals at least 50% of their income fell from 56,9% to 32,5%. Without an adequate policy response for the sector, there is a real risk of losing skilled and specialised talents to other fields.

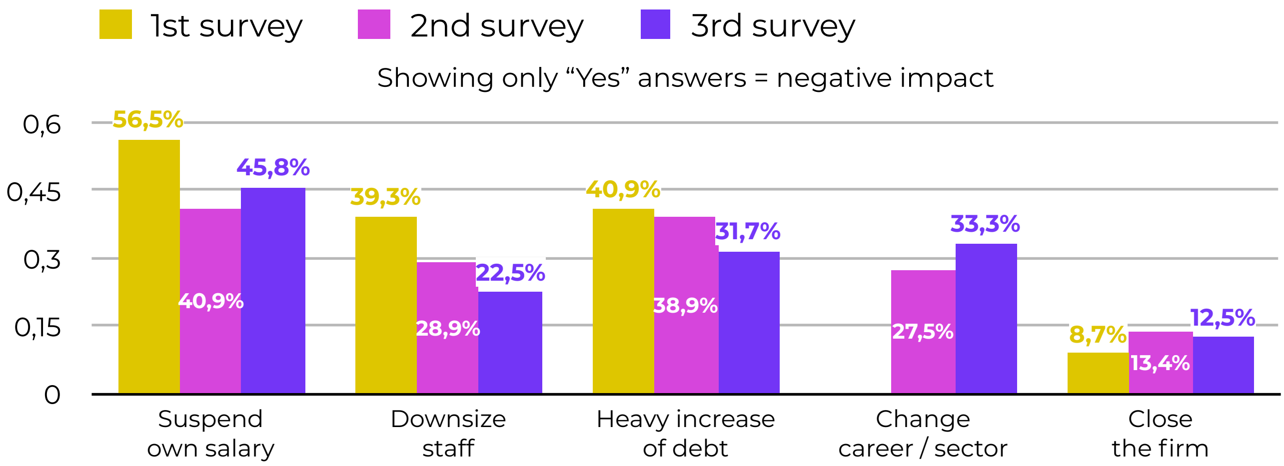
Did you have access to any of the following forms of financial support?



The percentage of access to financial aid seems to have even worsened between Autumn 2020 and Spring 2021, with fewer participants reporting that they had benefited from some form of support.

What do you think will be the economic impact of Covid-19 on your work?

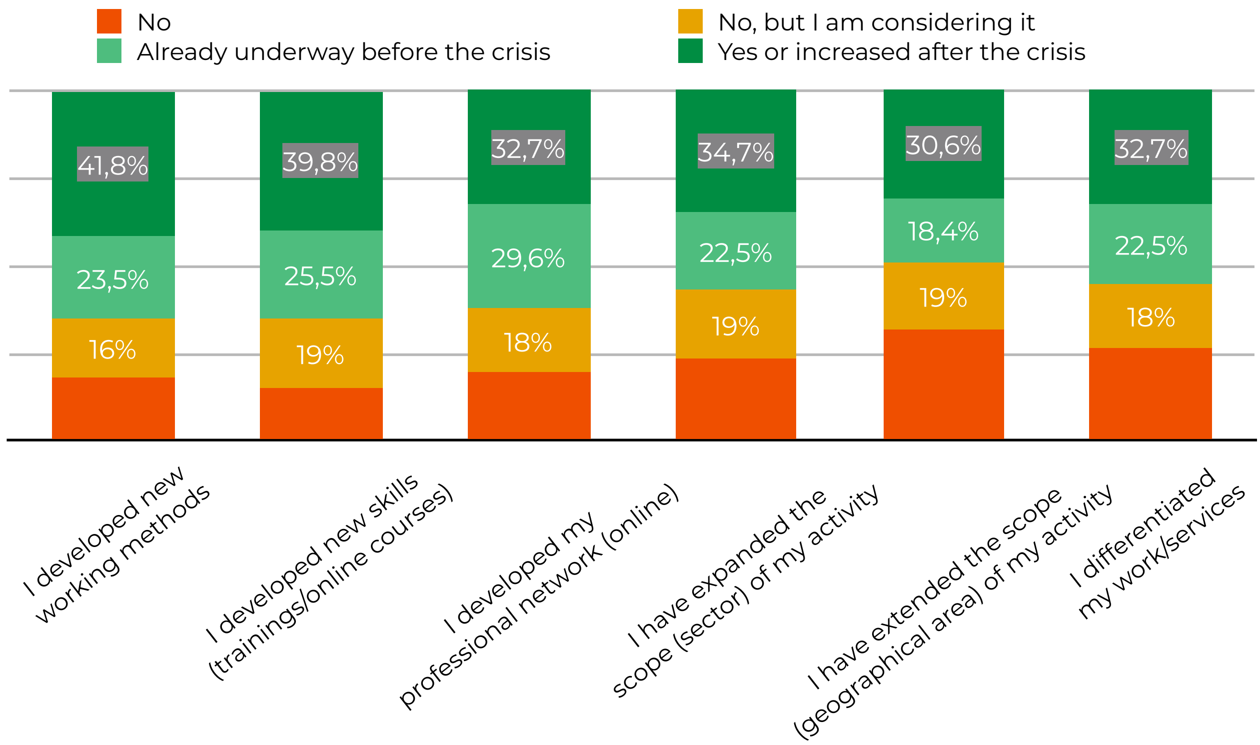




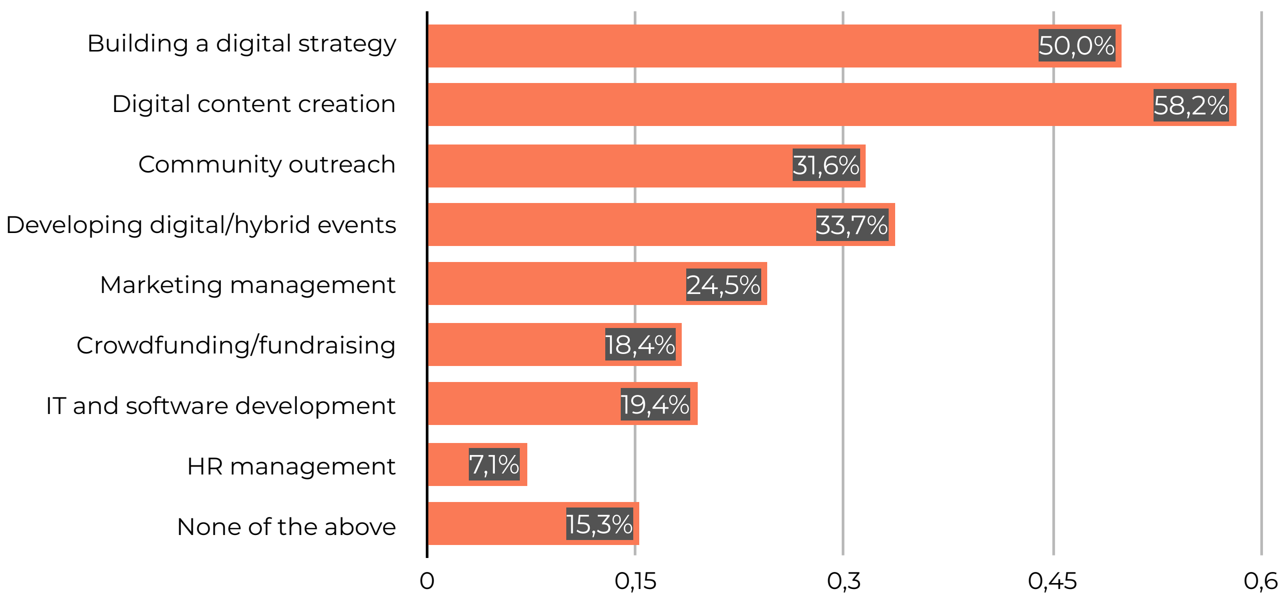
Although some of the negative effects of the crisis seem to have subsided, the situation for freelance workers is still critical. Following the trend of the expected economic impact during these past 18 months, a significant percentage of participants state that the pandemic will continue to heavily impact their work. As previously highlighted, 1 in 3 independent professionals stated that they will have to change careers or sectors as a consequence of the pandemic.

The two following graphs show how freelance professionals have adapted to the crisis and what skills they consider essential to overcome similar scenarios in the future. Trainings and capacity building are essential to enable these professionals to make the most of the possibilities offered by digital tools and reach a wider customer base.

Has your institution changed its strategy as a result of the crisis?

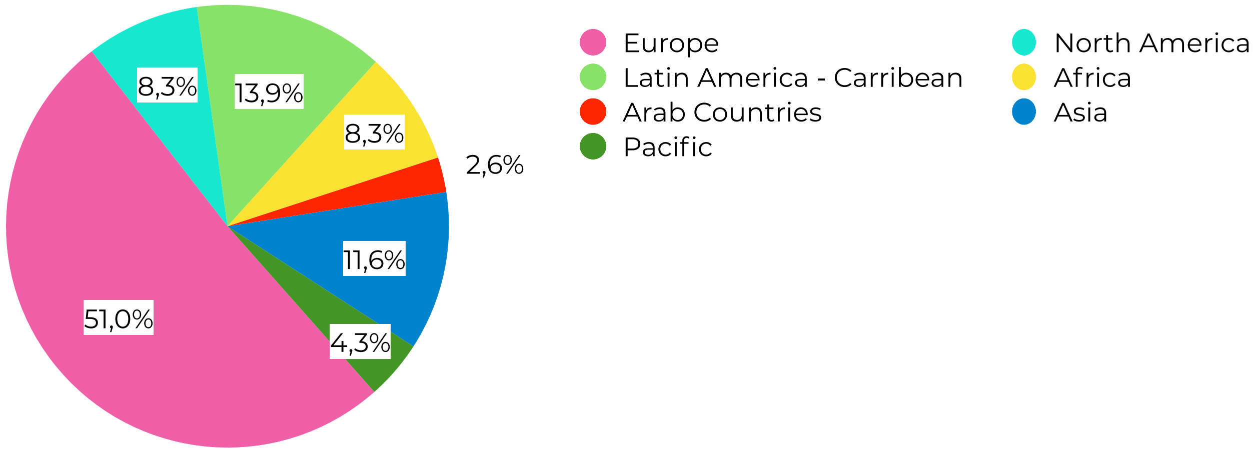


Which of the following skills have you felt the need for during the crisis?

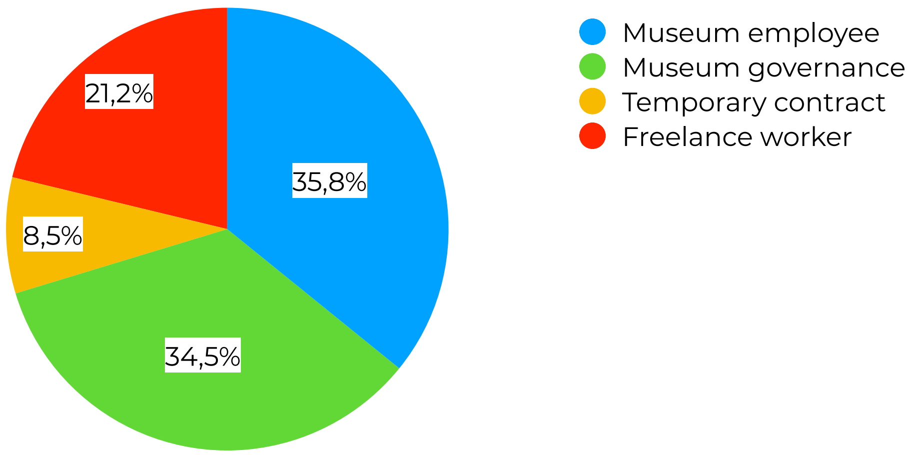


Participants profile

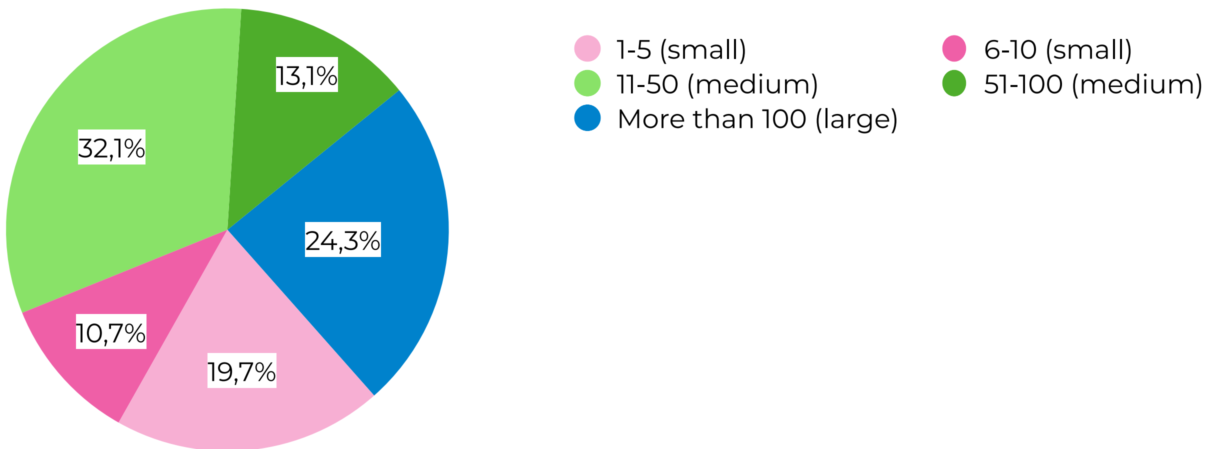
World region



Working position



Size of museum (by staff)



Final notes

This report and the underlying data from the survey was gathered, analysed and interpreted by Alessandro Gaballo, Communications Coordinator at the Communications and Public Relations Department of the International Council of Museums (ICOM) with the support of the Secretariat.

Data was collected through an anonymous, voluntary survey, without traceability or accountability for the accuracy of statements from participating individuals, nor verification of their profession. The collected data will remain private under the management of ICOM.

The original results of the online survey "Museums, museum professionals and Covid-19" were standardised as follows:
- Country names were standardised; (i.e. "ITALIE", "Italia", "ITALY" became "Italy" and "USA" became "United States");
- Where several responses were received from the same museum, only one answer has been kept, preference was given to the most complete response;
- Incomprehensible responses were deleted.

While the sample does not guarantee representativity of the current circumstances in their respective localities, this report nonetheless offers a snapshot of the perceived consequences and challenges faced by museums and museum professionals, as well as their efforts to overcome them and serve their communities during the pandemic.

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