

REPORT

Museums, museum professionals and COVID-19: follow-up survey

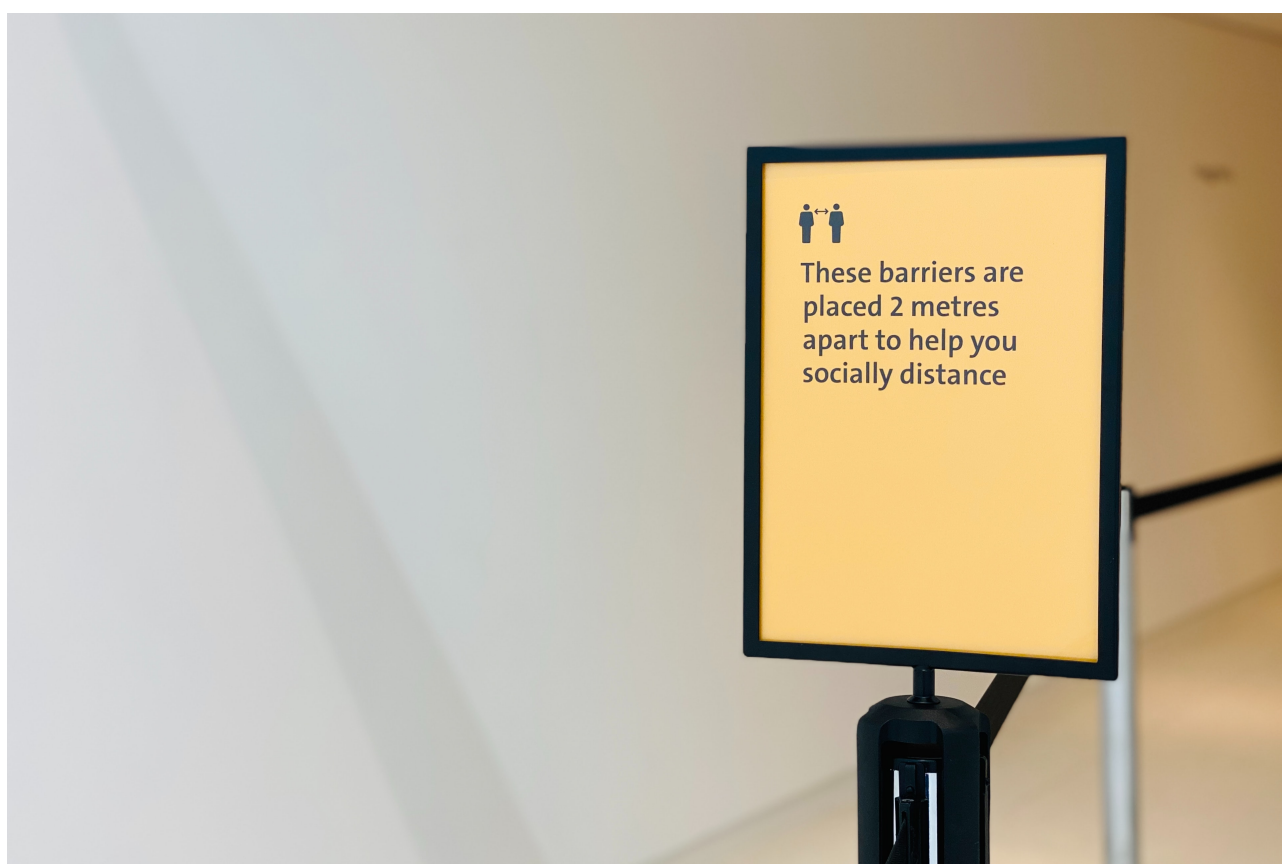


TABLE OF CONTENTS

Introduction	4
Summary of findings	5
1. The situation for museums and their staff	6
2. Expected economic impact	10
3. Digital activities and Communication	17
4. Museum security and Conservation	24
5. Reopening	27
6. Freelance professionals or consultants	30
7. Participants profile	33
Final notes	34

Introduction

The COVID-19 pandemic is still seriously affecting cultural institutions around the world. While some museums have reopened with major limitations, others institutions are still facing the consequences of the health crisis behind closed doors.

Our first report, published in May 2020, presented a dire situation for museums and museum professionals around the world, with around 95% of institutions forced to close in order to safeguard the wellbeing of staff and visitors, resulting in serious economic, social and cultural repercussions.

To gather further information and additional data on how the ongoing COVID-19 outbreak is impacting and will affect the museum sector in the short and long term, we launched a second global survey on 7 September, 2020. Most of the sections and questions referred to the previous survey, allowing us to assess the evolution of the museum crisis brought about by the pandemic and its perception by museum professionals. Other questions took into account how the situation has evolved in recent months, especially in view of the progressive reopening of museums in some regions of the world.

This report analyses almost 900 responses from museums and museum professionals across five continents, which were collected between 7 September and 18 October, 2020. It is important to underline that, shortly after the closure of the survey, Europe began to experience a second wave of generalised lockdowns.

Similarly to the first survey, we received a disproportionate number of responses from different regions of the world, in accordance with the regional subdivisions as defined by ICOM). The percentage of responses from each region varied slightly from the first report, and will be detailed in the "Participants Profile" section. Given the profound differences that emerged at regional level, the global data is accompanied by data broken down by region, whenever possible.

We do not claim that this data represents all museums but the responses received do highlight a widespread climate of uncertainty about their future, and the need for governments to respond 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

Compared to April 2020, the situation for museums in September-October 2020 was much more variable depending on their location in the world: most museums in Europe and Asia were open, the majority were closed in Latin America and the Caribbean, and the situation in the other regions was mixed.

Museums continued to enhance their digital activities. All the categories analysed by the survey increased in at least 15% of the world's museums, a figure that rises to almost 50% if we consider channels such as social media, livestreaming events or online educational programmes. Notably, the percentage of museums that started a new media channel increased for every activity considered compared to April.

Museum professionals have resumed work on site again, but working from home is still widely encouraged or enforced, especially in Latin America and the Caribbean, North America and the Pacific.

Some 14% of participants stated that part of the staff was furloughed or laid off. Moreover 16.2% of respondents stated that at least a quarter of the museum staff had been laid off or furloughed between February and September 2020 following the COVID-19 crisis, a figure that rises to more than half of the personnel for 10.6% of participants.

The situation for freelance museum professionals seems to have slightly improved since April, but remains alarming: 10.7% of the respondents said they had been temporarily laid off, and 16% have not had their contracts renewed. The freelance and consultancy sector is very fragile: 40.9% of the respondents stated that they will have to suspend the payment of their own salary as a result of the crisis, and 28.9% said their employers will have to reduce the number of staff. Some 27.5% of freelance museum professionals are considering changing their career entirely.

Similarly, almost all museums around the world will likely have to reduce their resources and activities as a consequence of the COVID-19 pandemic. 30.9% will downsize their permanent staff; this percentage will rise to 46.1% for freelance and temporary contracts. Although participants seem less worried about the reduction in exhibitions (62.4%) and public programmes (67.4%) than they did in April (82.6%), the figure is still unsettling. The percentage of respondents who think that their museum will close permanently falls from 12.8 to 6.1%, but more than 50% of participants think that their institution will have to operate with reduced opening hours.

The data still show significant differences across regions, and more pronounced effects where museums are recent and few, and where structures are still fragile: Asia, the Arab countries and Latin America and the Caribbean seem to be the hardest hit regions during this second survey.

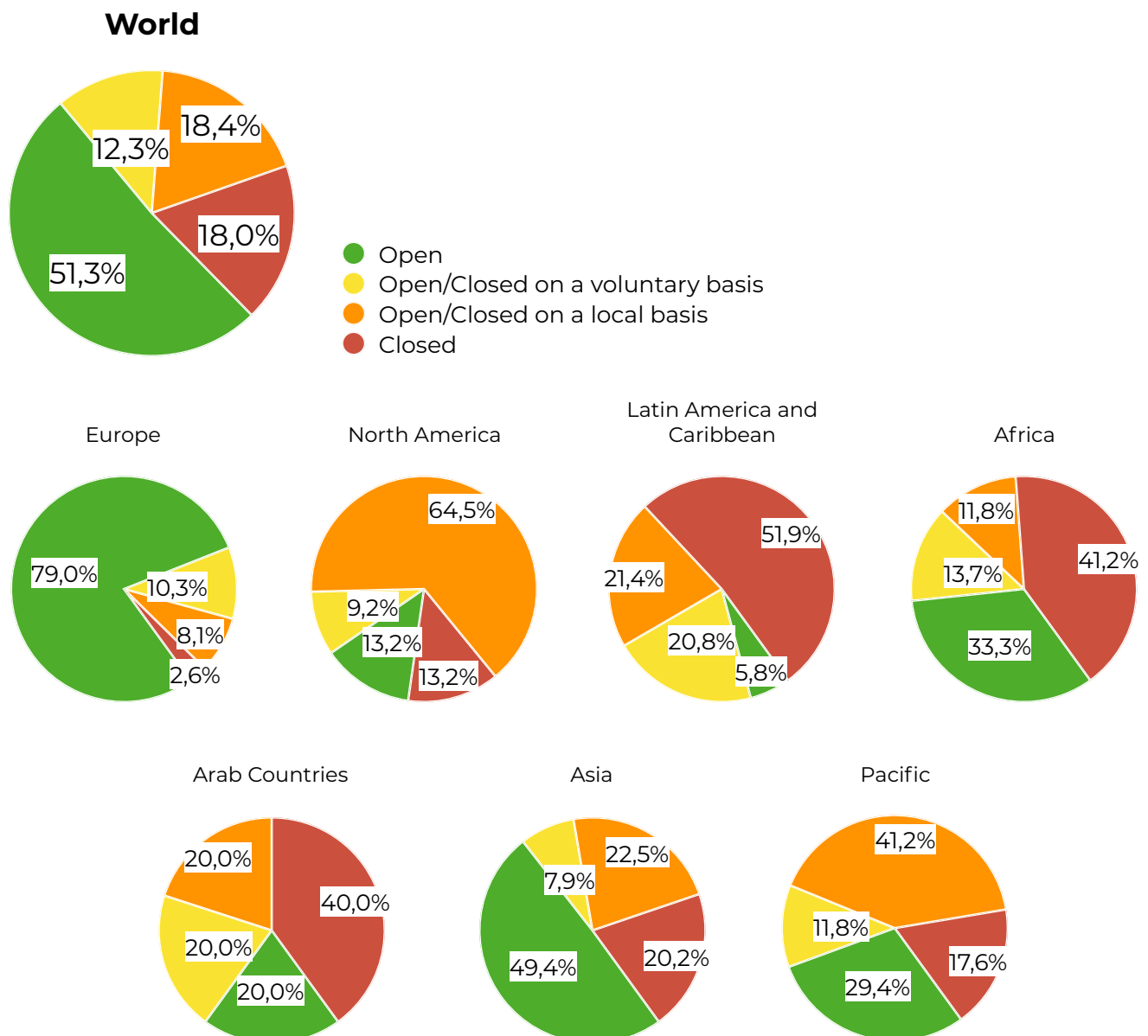
In general, security procedures and the conservation of heritage in museums continued throughout the lockdown: about 80% of the respondents said that these measures were maintained, with at least 10% of respondents stating that their museums had increased these measures since April to help them cope with the pandemic. However, in Africa, Latin America and the Caribbean and the Arab Countries these measures were considered to be insufficient by 15-20% of participants.

1. The situation for museums and their staff

Compared to the first ICOM survey carried out in April-May, the situation for museums varies depending on the region of the world considered. In April the overall closure percentage was 95%, and at least 85% for each individual region. The situation now instead varies considerably.

Some 79% of European participants replied that museums were open in their country (although the figure at the time of writing has probably changed dramatically following the second wave of lockdowns), while other regions such as Latin America and the Caribbean, Africa and the Arab countries showed a much higher percentage of closed museums. North America and the Pacific indicated that the decision to keep museums open or closed was largely a matter for the local authorities. In Asia about half of the museums were open, one fifth closed, and the rest open or closed on a local or voluntary basis.

Status of museums in your Country

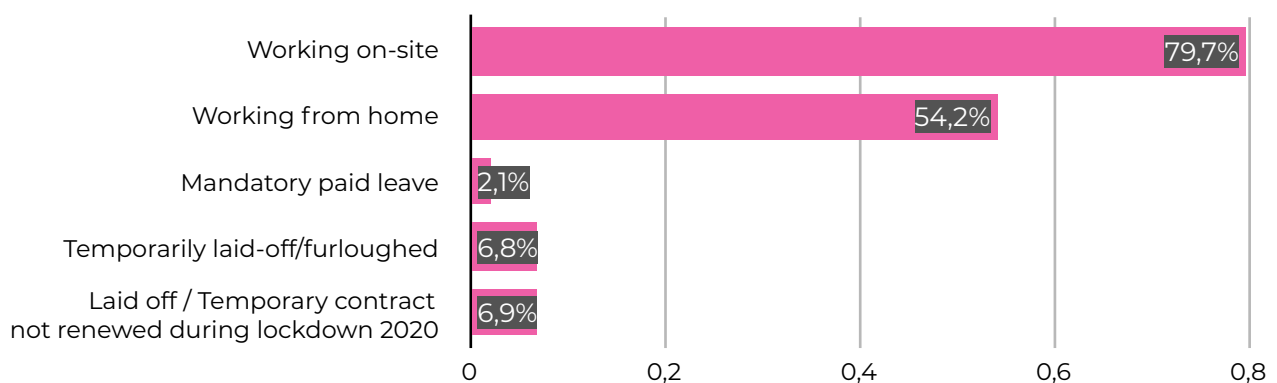


The situation for museum staff

As far as museum staff are concerned, here too we encounter a wide range of situations, which reflect roughly what has already been said for museums and the different regions of the world. In general, although working from home remains strongly encouraged and many museum professionals are doing this, almost 80% of the participants indicated that at least part of their museum's staff has resumed working in the museum (compared to 33% in the first survey). Still, in 42.1% of cases, less than 50% of the staff was currently working at the museum at the time of this survey.

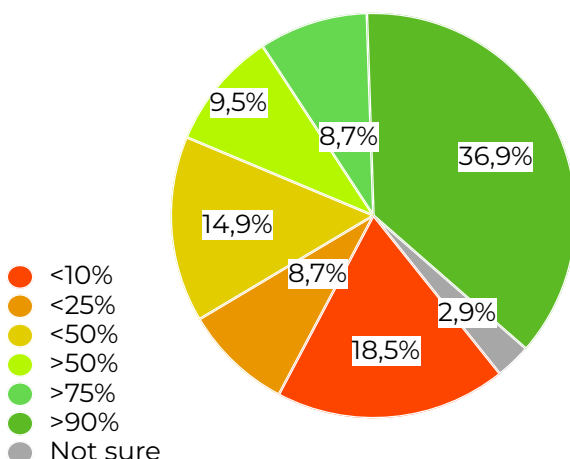
To get a sense of the economic impact for museum professionals, around 14% of participants stated that part of the staff had been currently furloughed or laid off. Moreover, 16.2% of respondents stated that at least a quarter of the museum staff had been laid off or furloughed between February and September 2020 following the Covid-19 crisis, a figure that rises to more than half of the personnel for 10.6% of participants.

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

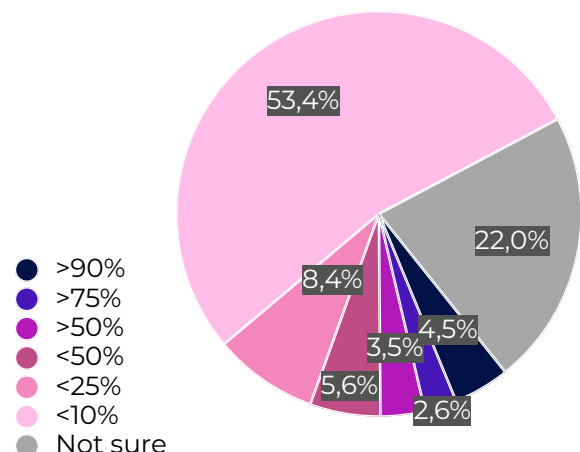


NB. this was a multiple answer question, percentages are higher than 100% and illustrate how many of the total number of respondents selected at least that answer

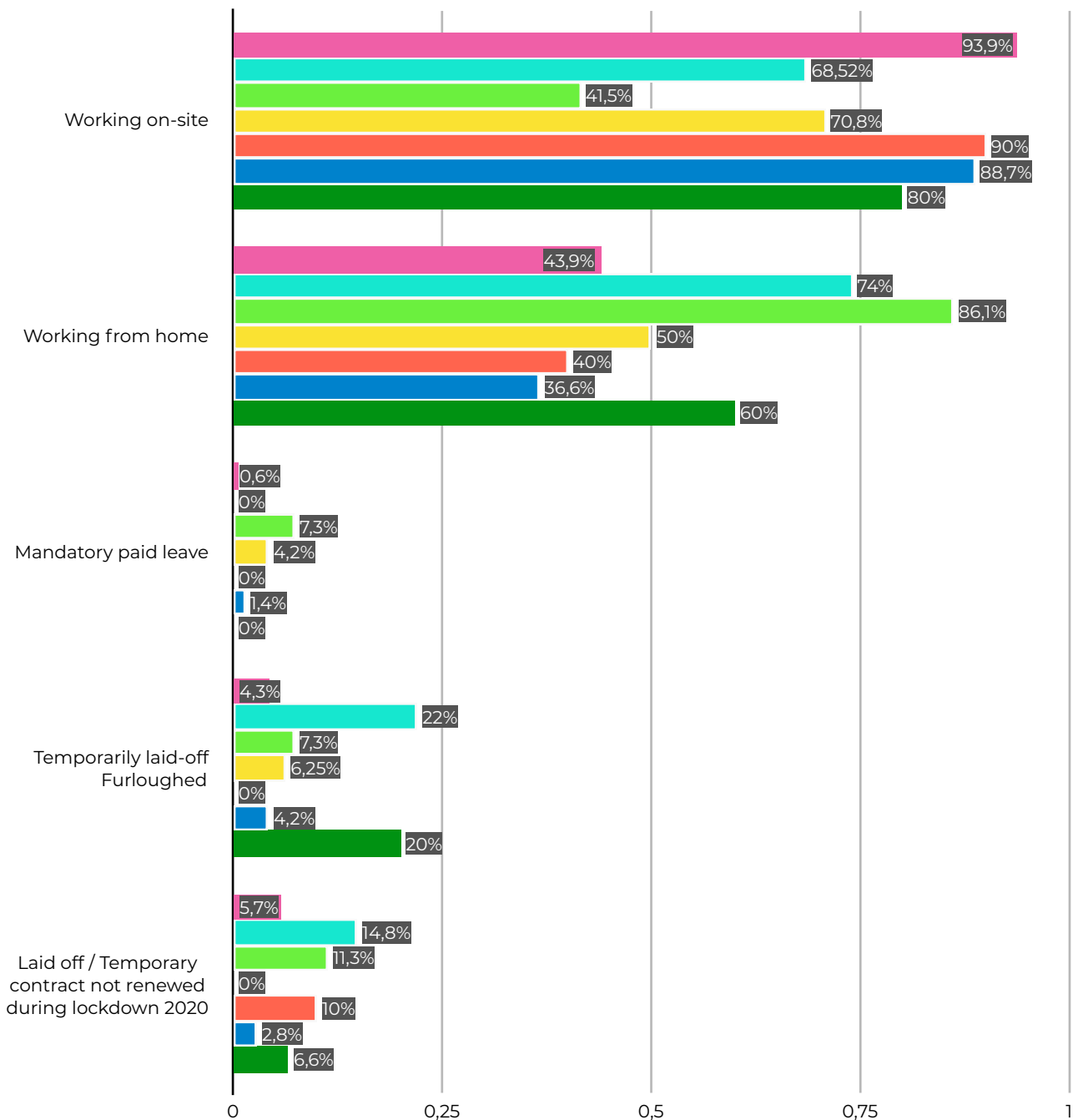
What percentage of the staff is currently working on-site?



What percentage of the staff was laid off or furloughed between Feb-Sep 2020?

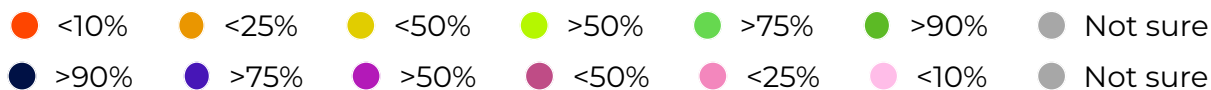


Europe North America LAC Africa Arab Countries Asia Pacific

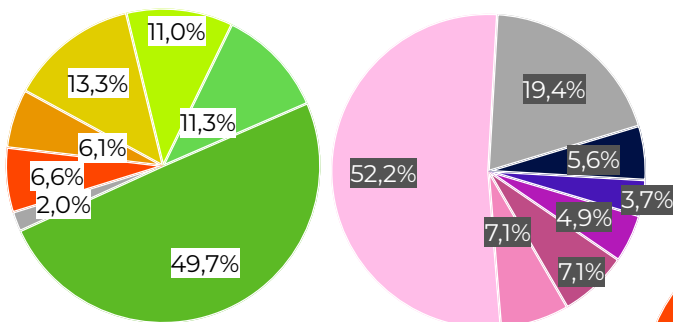


When analysing the regional data separately, as mentioned before, some substantial differences emerge. In Europe and Asia, during the survey, the majority of staff had returned to work in their museums, while in other regions these percentages were much lower. The figure for Latin America and the Caribbean is particularly striking, and highlights a much smaller percentage of staff currently working on site between September and October.

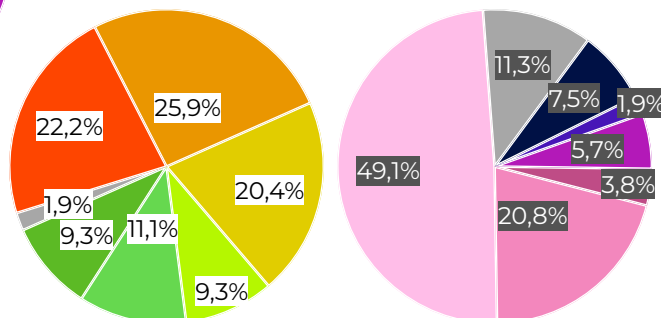
The responses of participants from North America, Europe and the Arab countries also show worrying trends regarding the percentage of staff who were furloughed or laid off between February and September 2020 (*page below, graphics on the right*), and the resulting economic impact for professionals in the sector.



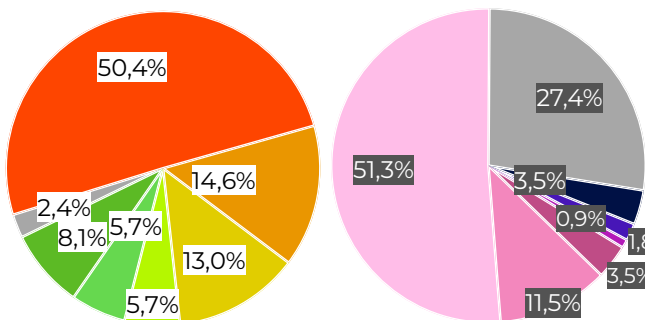
Europe



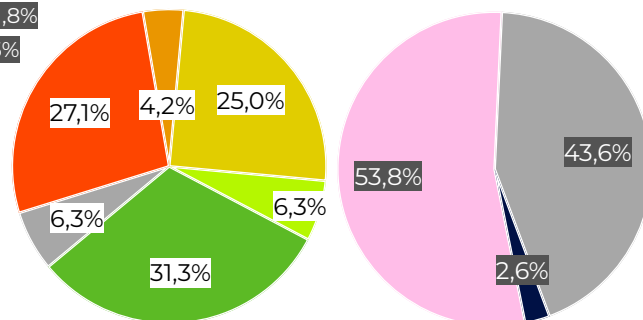
North America



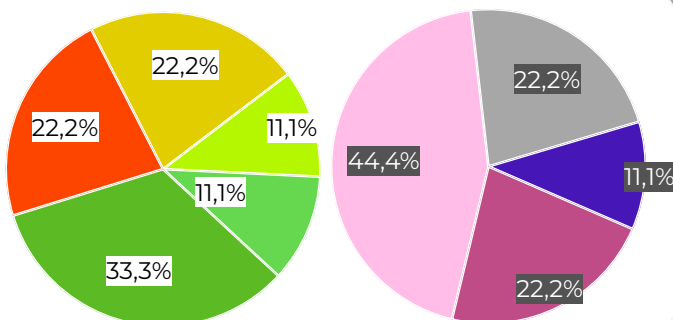
Latin America and the Caribbean



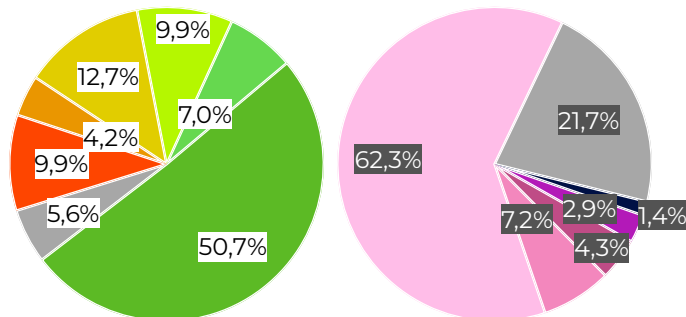
Africa



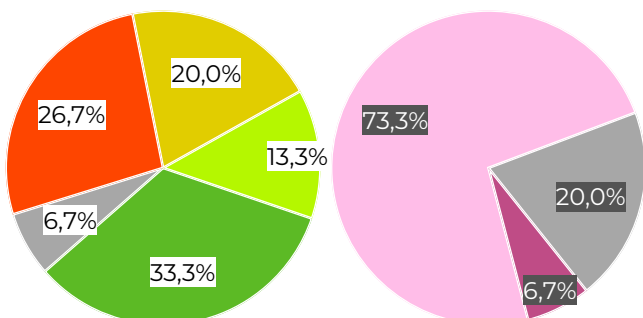
Arab Countries



Asia



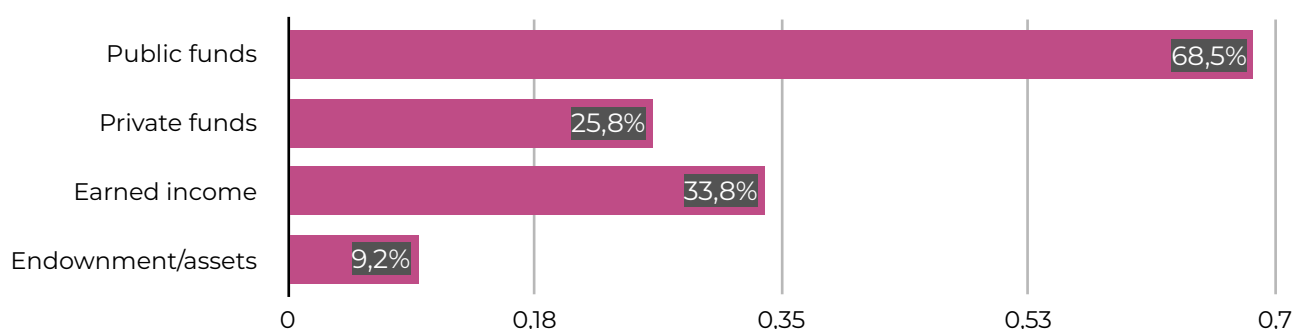
Pacific



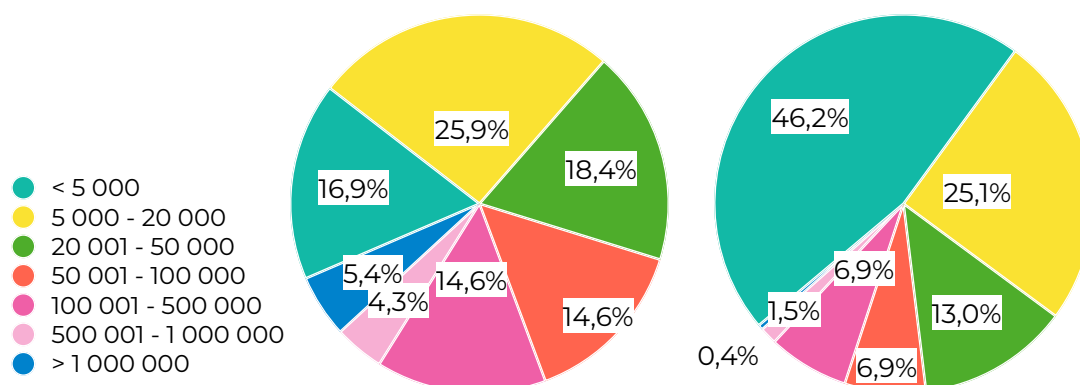
2. Expected economic impact

In order to measure and compare the economic impact of the crisis on museums, we have considered the geographical region, the different funding structures and whether or not the participants' institutions had access to financial support. The majority of participants work in museums where public funds represent at least one of the two main sources of income, but for one third of them sales revenues are equally crucial. For these institutions, lockdowns therefore can have a much more serious impact in the immediate future.

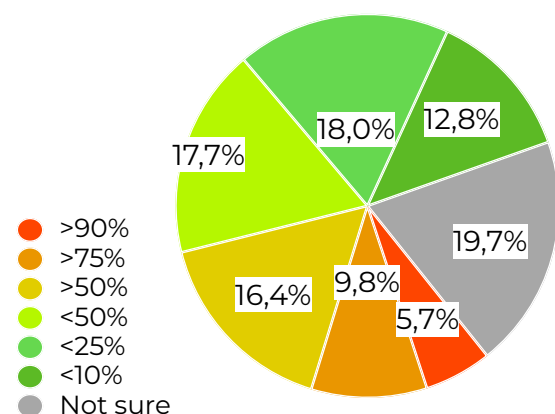
Which of the following has the greater weight on the total budget of your museum (max. 2 options)



Average number of visitors before 2020 (left) and between Jan-Oct 2020 (right)



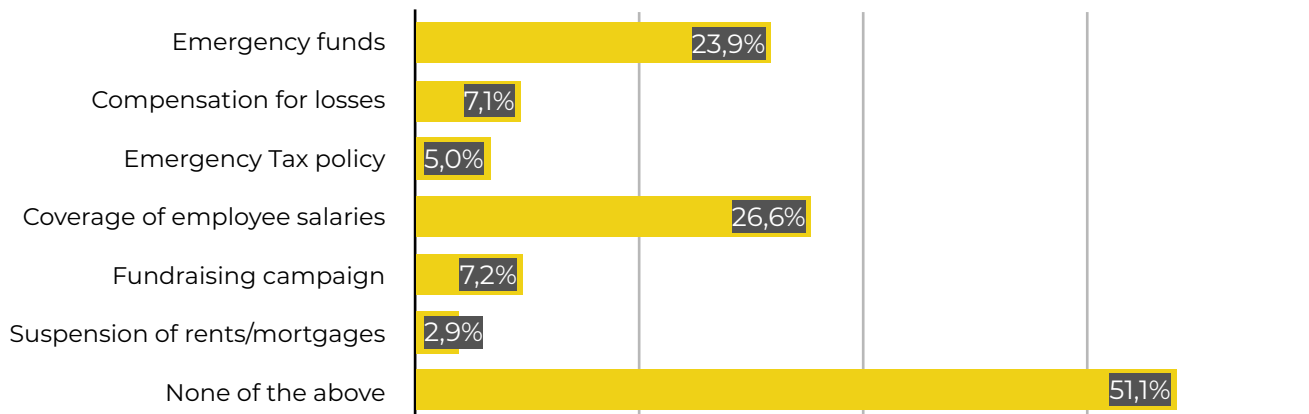
What percentage of its annual revenues does your institution expect to lose in 2020?



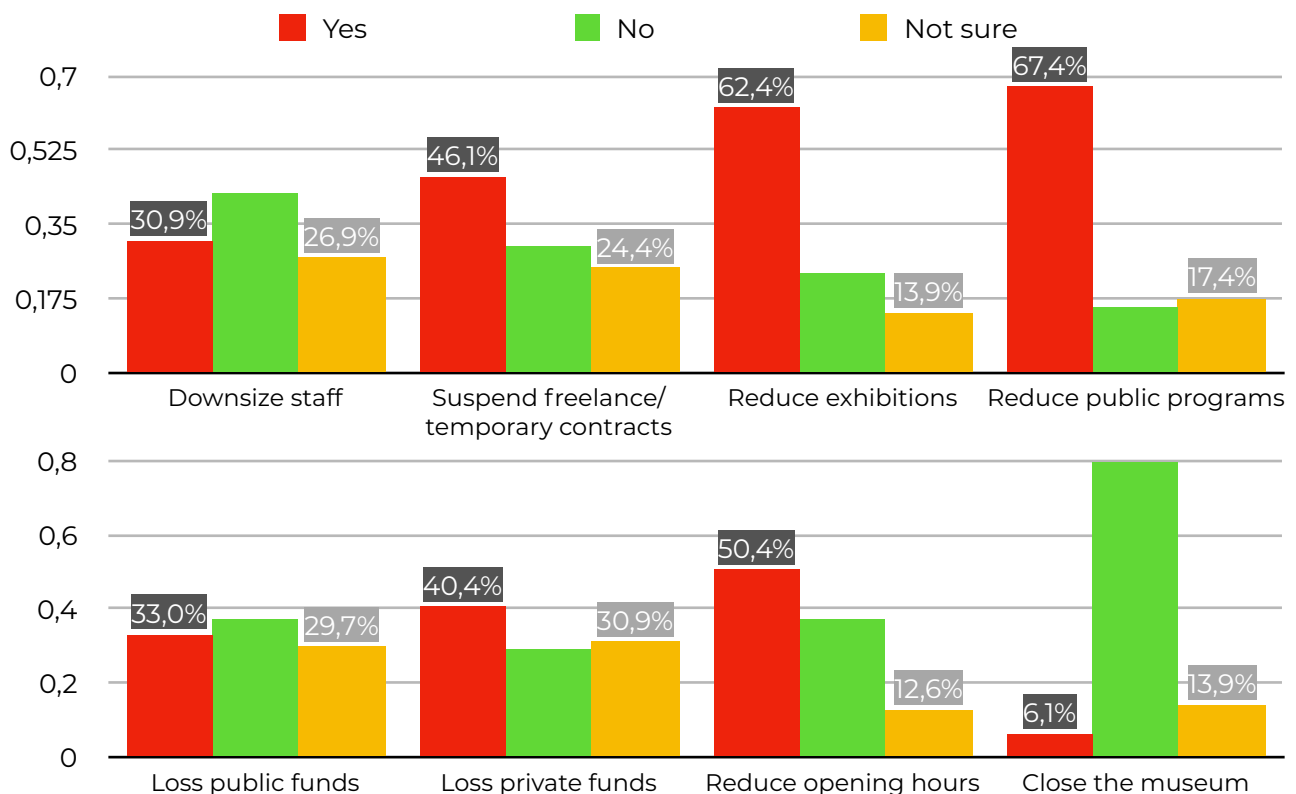
With museums closed and countries in lockdown, the number of visitors has obviously dropped dramatically, causing in a severe economic impact especially for those museums who rely primarily on earned income. 49.6% of the participants think that their museum will lose at least a quarter of its revenue in 2020, spiking up to half of the annual revenues for 31.9% of respondents.

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

(multiple choice question)



What do you think will be the economic impact of Covid-19 on your museum in the long term?

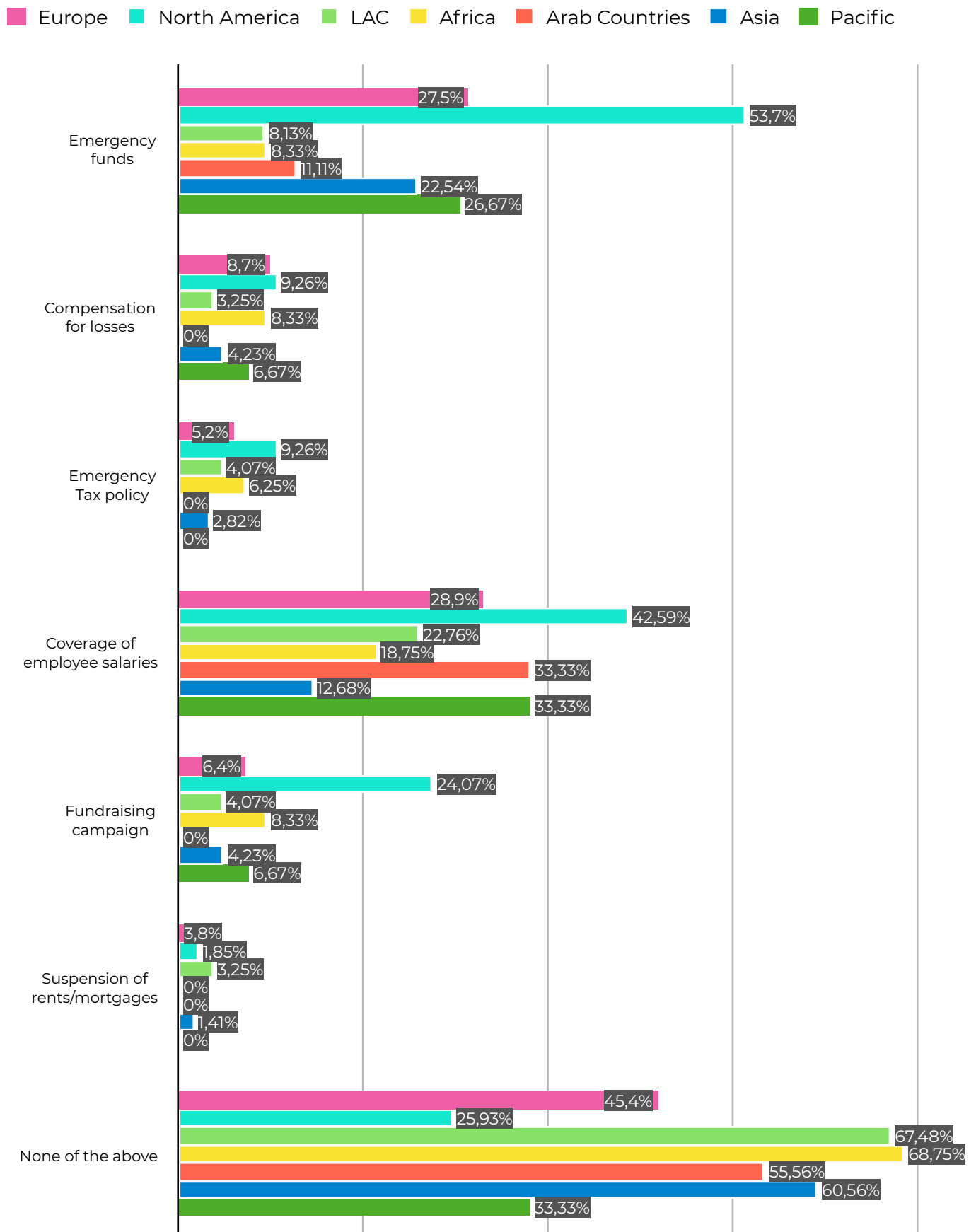


The economic impact of the Covid-19 crisis on the sector, as already highlighted in our first report, is severe and will have long-lasting consequences on the finances of museums, their ability to reach their audiences and fulfil their fundamental cultural, social and economic role through exhibitions and public programmes.

Although the percentage of participants who declared that their museum might close permanently has decreased significantly, at 6,1% it is still an alarming figure. In terms of employment stimulation and stability, in order to assist museum professionals but especially precarious and freelance workers, it is imperative to activate various forms of support for the sector.

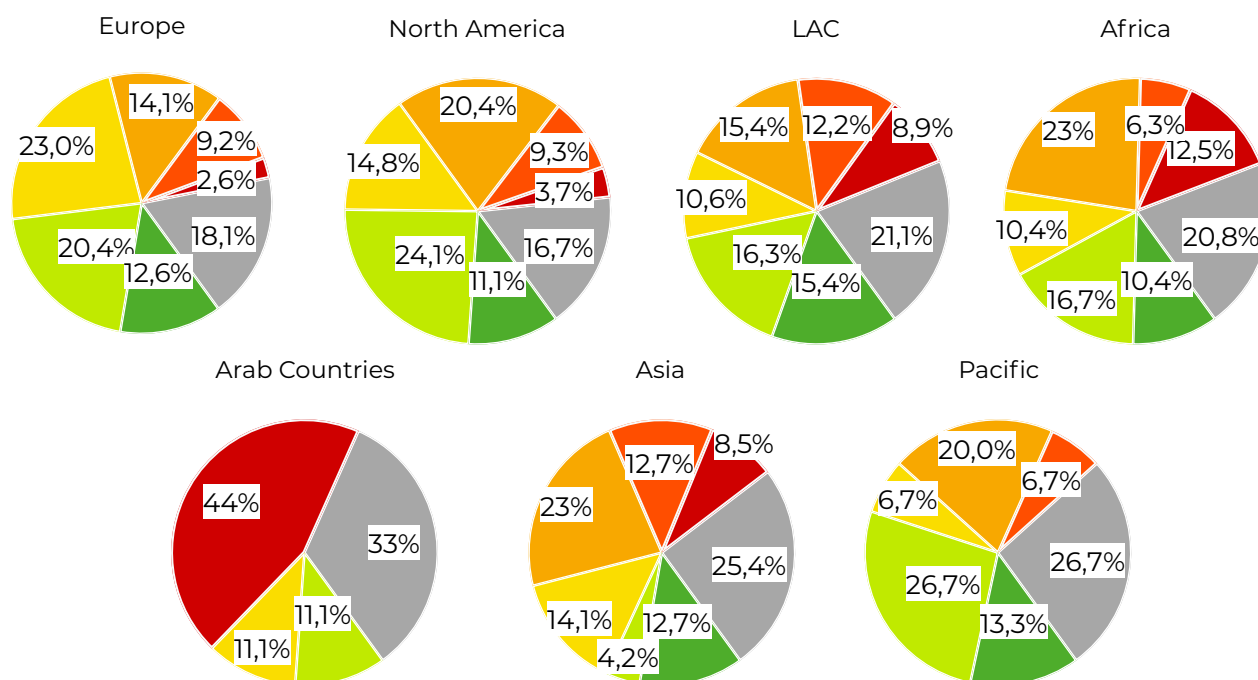
Regional comparison

Access to financial support



Expected loss of revenue for 2020

● <10% ● <25% ● Up to 50% ● More than 50% ● >75% ● >90% ● Not sure



Expected economic impact

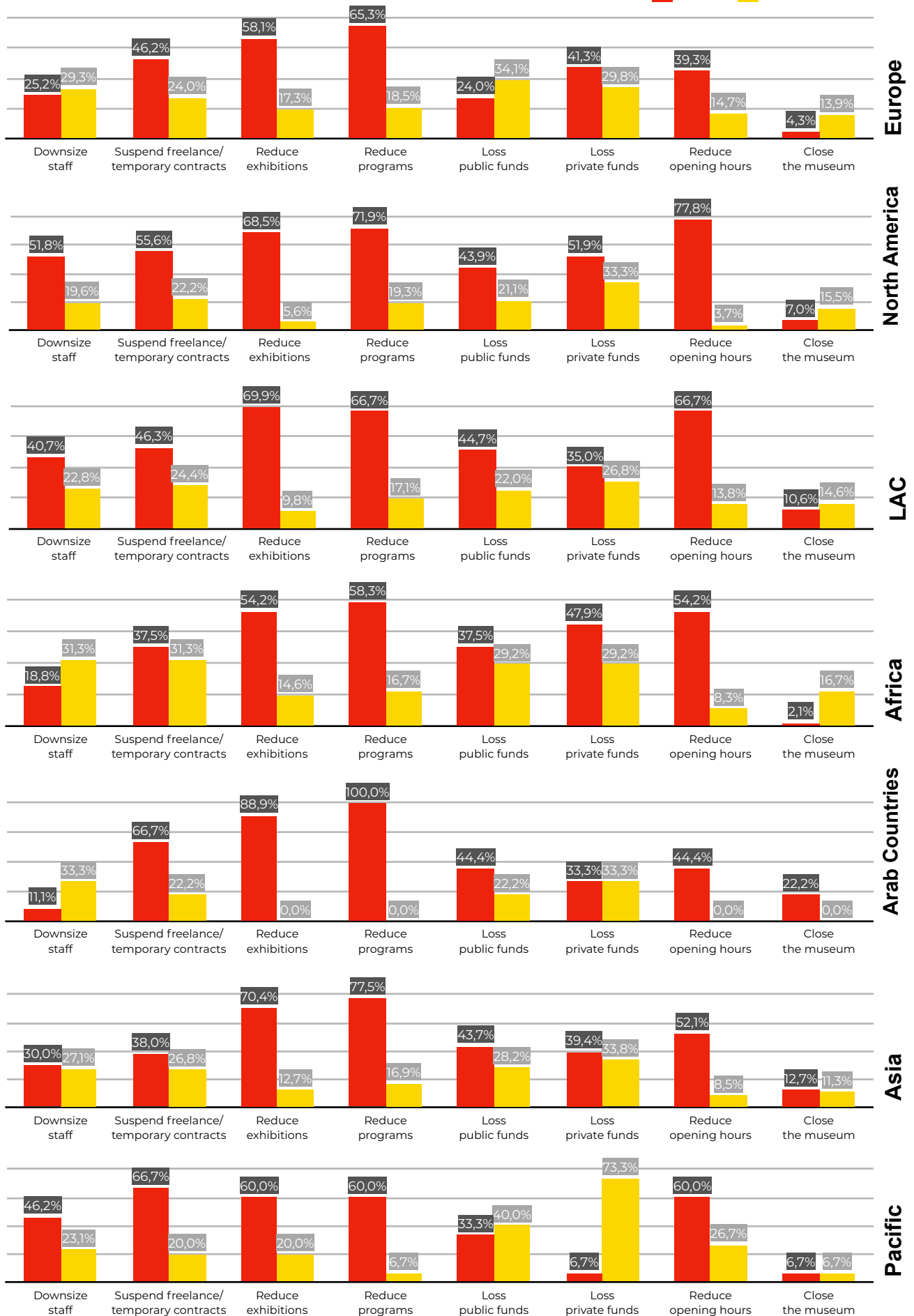
Data show additional profound regional differences in the expected economic impact of the pandemic. The loss of revenue for 2020 is perceived to be highest in the Arab Countries, Asia, Africa and Latin America and the Caribbean, but the figures are worrying everywhere around the world.

Looking more closely at the impact on museum activities (see below), responses vary from region to region and for each element considered. The impact on employment seems to be of greater concern in North America, Latin America and the Caribbean and the Pacific, while the reduction in programmes and exhibitions is a more widespread problem, although less acute than in the first survey (where “Yes” responses were around 80% in each Region). The reduction in opening hours seems to be of less concern to the Arab countries and Europe, although it is nevertheless perceived as a real possibility by 44.4 and 39.3% of the participants from these regions respectively.

The perceived risk of having to close the museum permanently has dropped dramatically in Africa, and remains low in Europe, the Pacific and North America (where it is still around 7%), while it is higher in Latin America and the Caribbean, Asia and especially in the Arab countries regions.

Note: to make the results more readable, the graphs on the following three pages show only the columns with the answers “Yes” and “Not sure”, i.e. those that represent a negative or potential impact on museum activities.

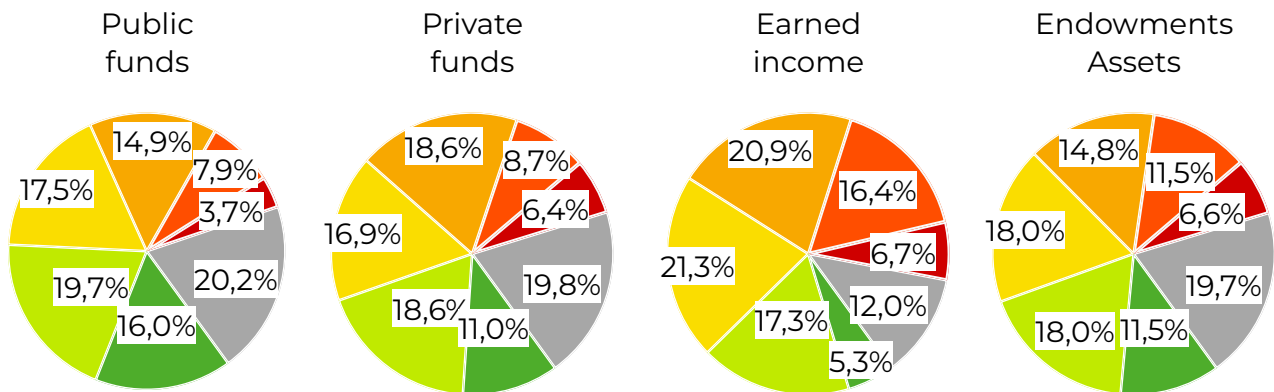
Yes Not sure



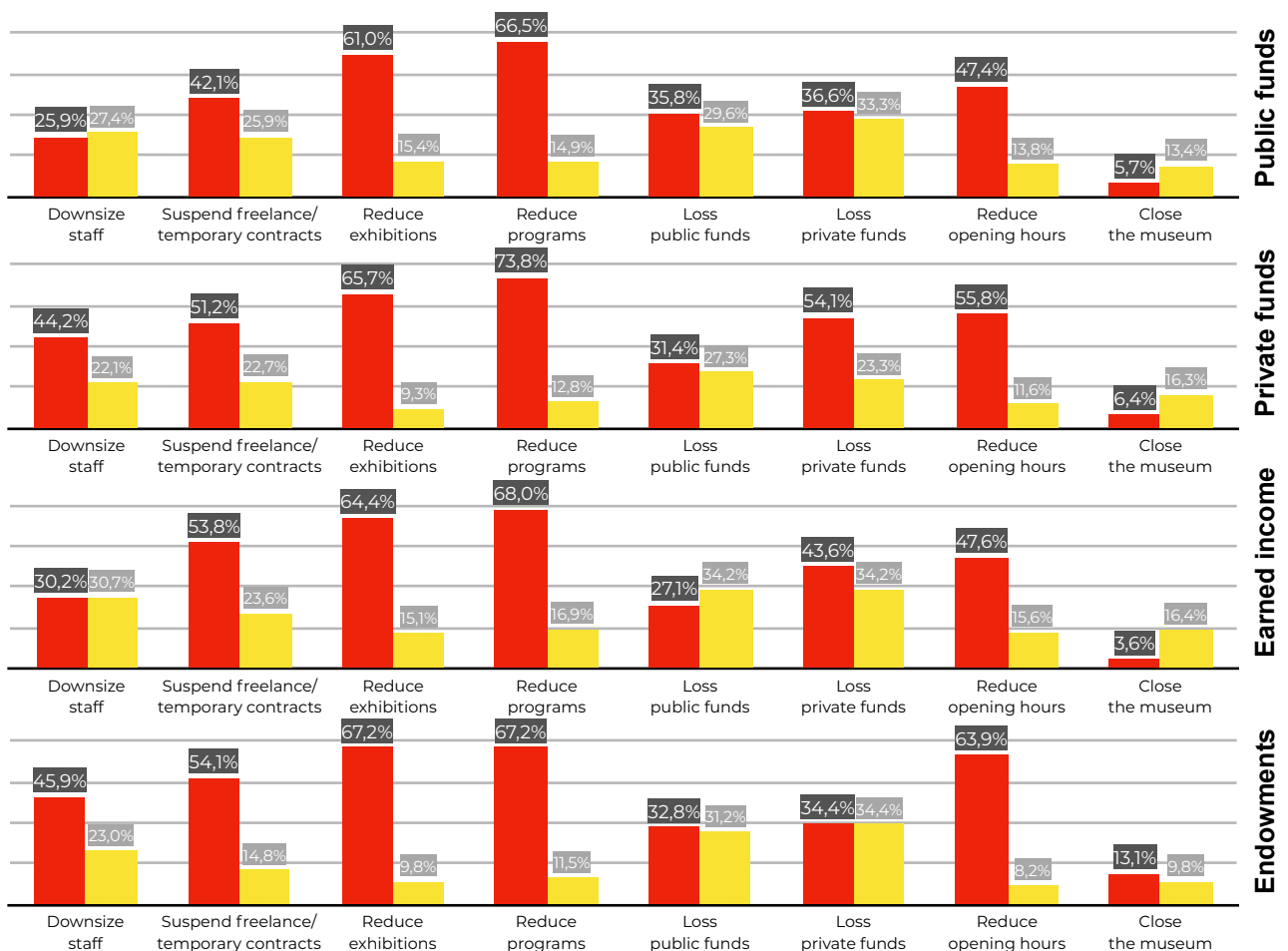
Funding structure comparison

Expected loss of revenue and economic impact

● <10% ● <25% ● Up to 50% ● More than 50% ● >75% ● >90% ● Not sure

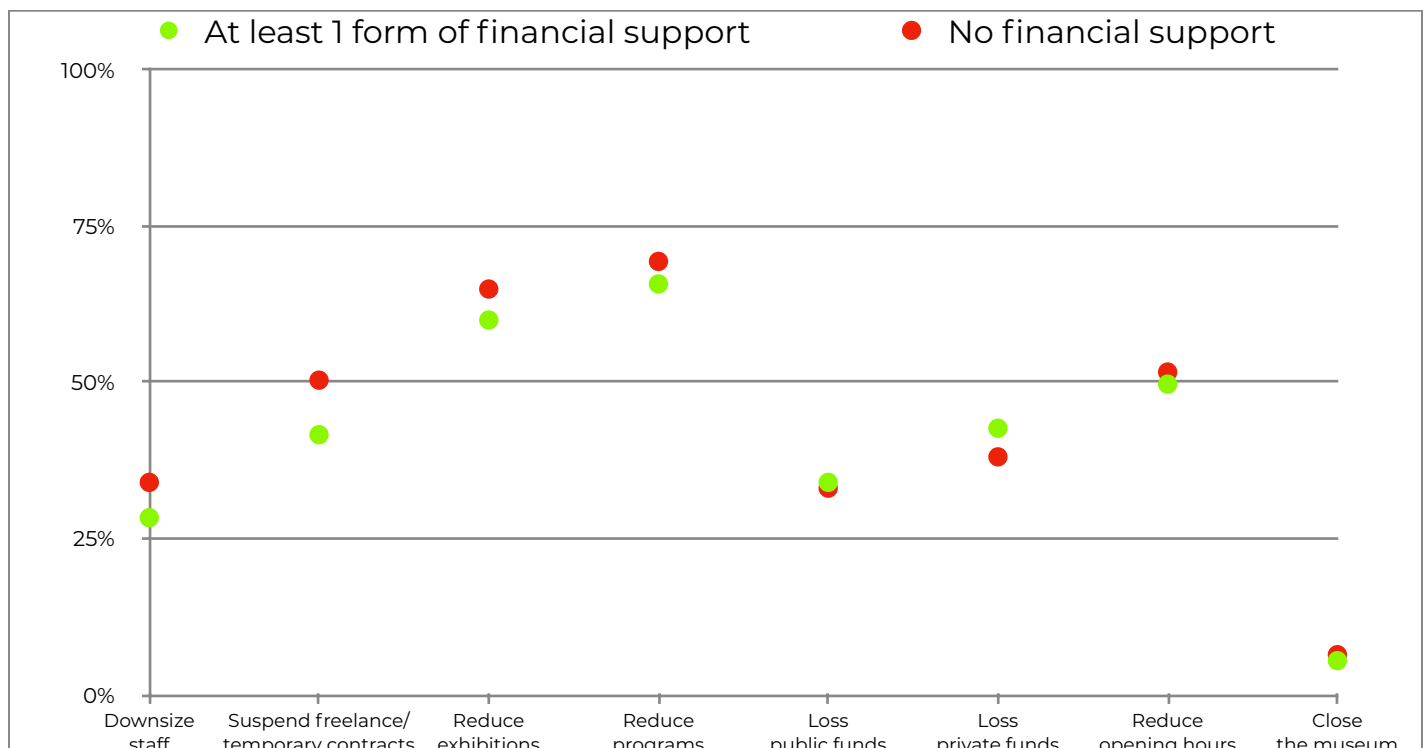
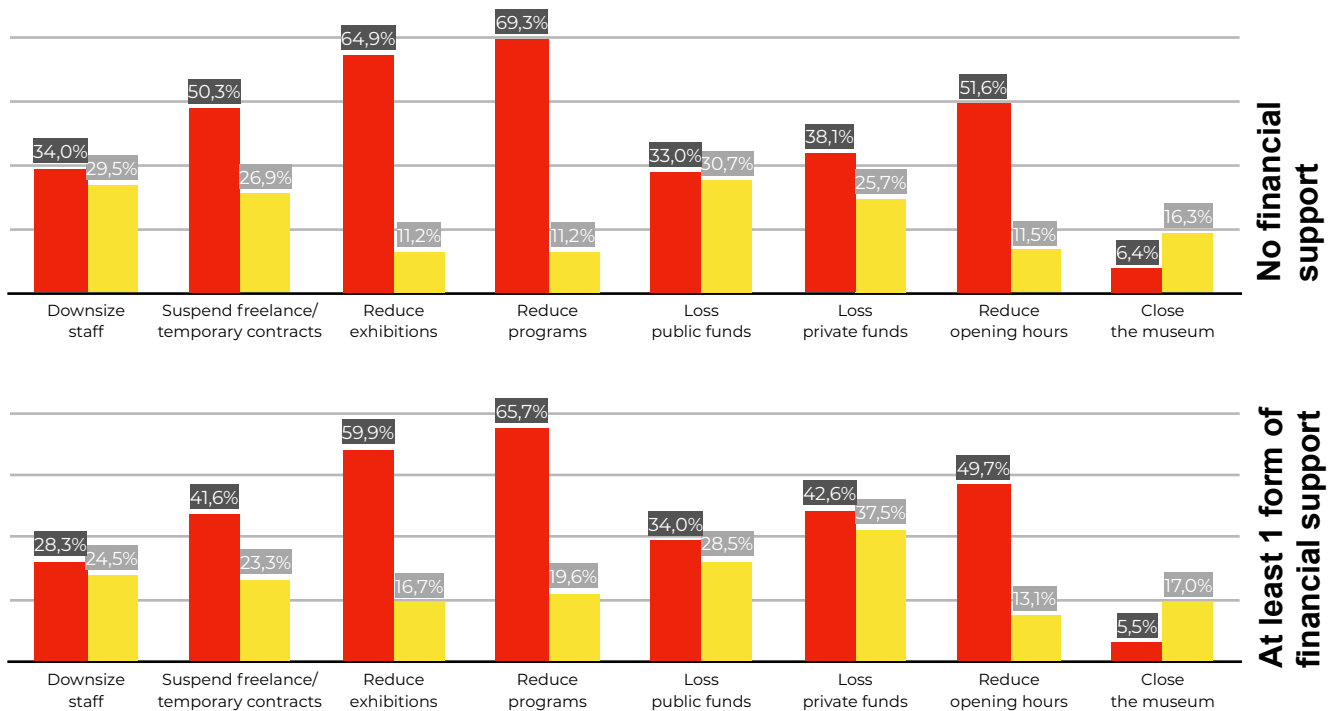


Comparing the different funding structures, museums that rely mainly on public funds seem slightly more stable, with lower percentages of expected negative economic impacts for all the different categories, apart from the loss of public funds themselves. With regards to museums that indicated earned income as (one of) the main source(s) of funding, although they predicted higher expected losses, show on the contrary slightly lower percentages of negative impacts than museums that rely on private or endowment funds.



Financial support (or lack thereof) comparison

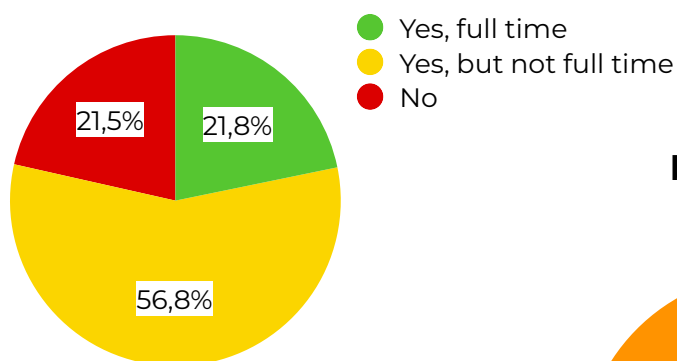
As a final analysis, we compared the expected economic impact for museums that stated that they had not received any financial support and for those that stated that they had received at least one. In this case data shows that, for all categories with the exception of future access to public or private funds, the expected negative impact percentages are generally lower. This further highlights how necessary it is for museums to be able to access financial support to ensure their stability.



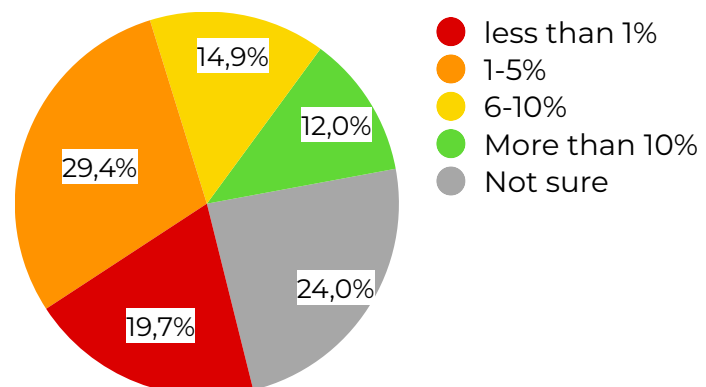
3. Digital activities and Communication

The forced temporary closure of museums during lockdown suddenly brought digital communication with the public to the fore. Compared to our first survey, online activities have increased further, and in particular the percentage of institutions that have created new digital communication channels after the lockdown started. However, the majority of museums remain poorly equipped to deal with this and other similar situations in the future and the different ways of engaging with the public remotely.

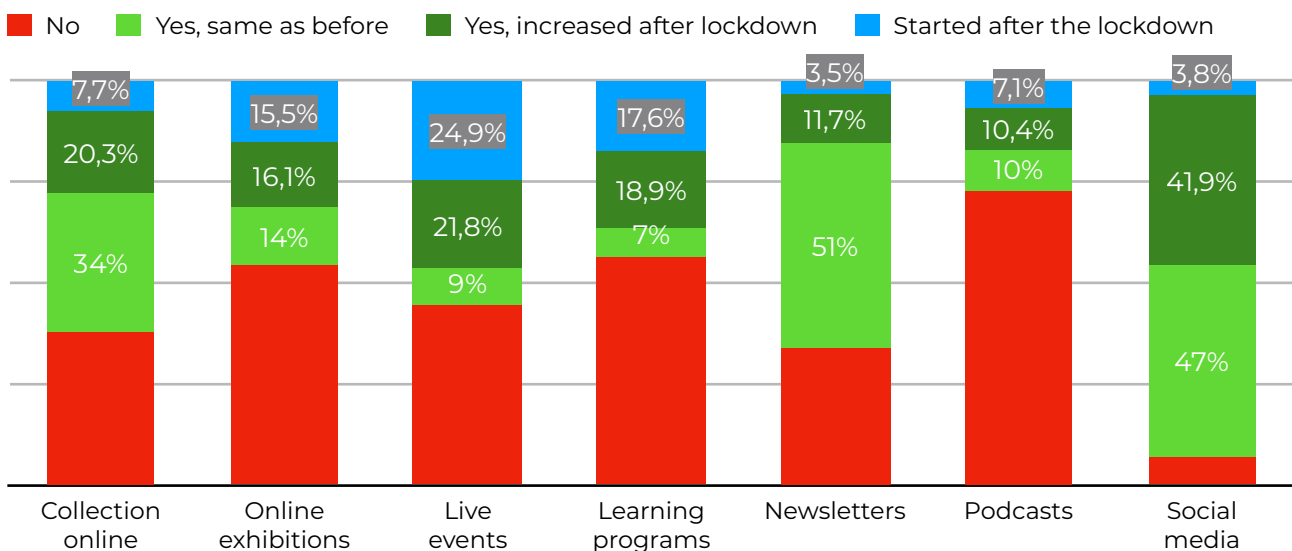
Do you have dedicated staff for digital activities?



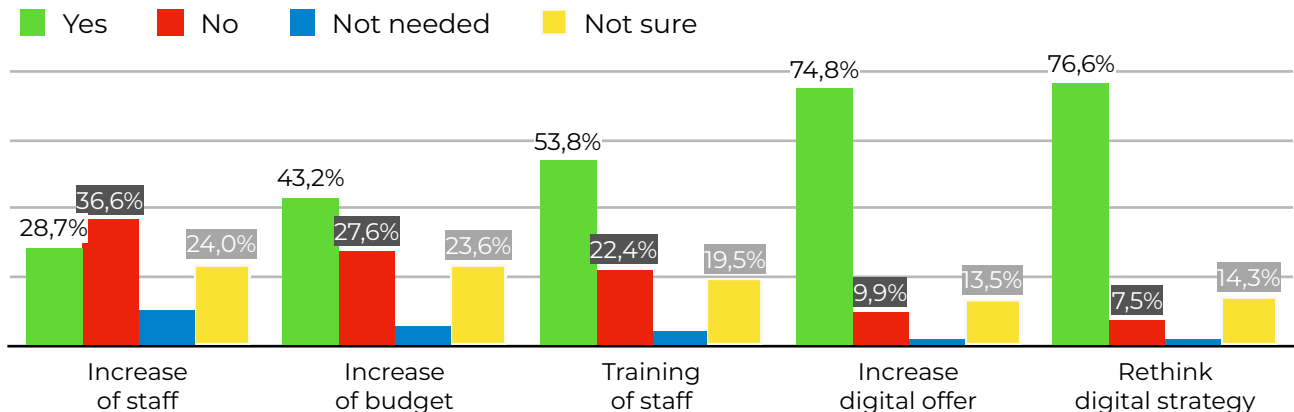
What percentage of your overall budget is dedicated to communication and digital activities?



What digital services does your museum provide?



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



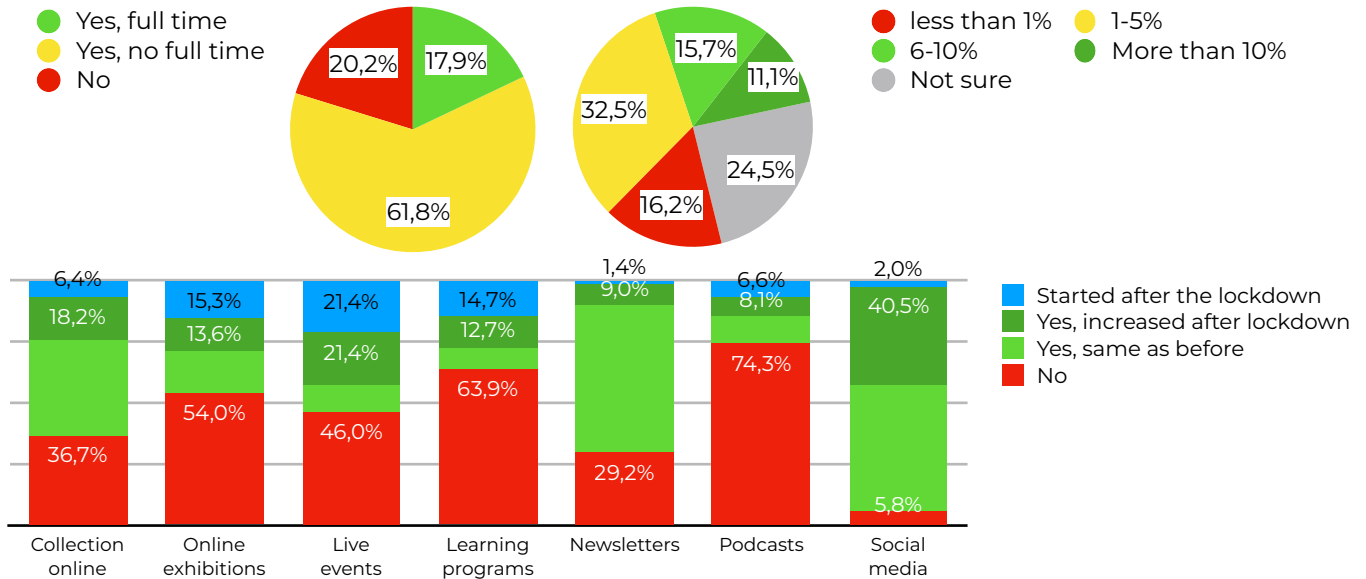
What is certain is that the COVID-19 crisis has changed museums' perception of the digital world forever, highlighting existing issues and accelerating changes that were already in progress. Although the resulting economic crisis will obviously be a major obstacle in terms of the economic and human resources that museums will be able to invest, more and more institutions are now aware of the fundamental importance of digitization. To facilitate this transition, it is imperative that governments and international organisations support museums in their processes of digital transformation.

Regional comparison

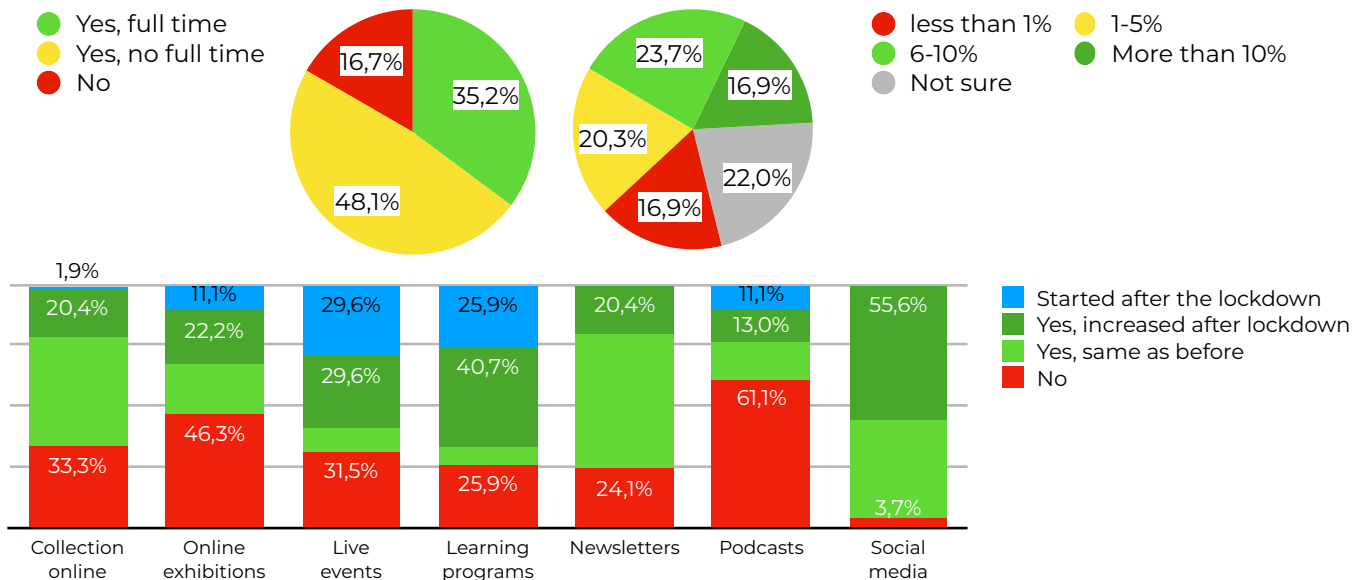
The first three graphs in this section are presented by region, attempting to compare the availability of economic or human resources with the institutions' ability to react to the current crisis.

The last graph, on the other hand, shows a comparison of the activity of the different regions, and illustrates the percentages of negative responses. The higher a region is located, the fewer museums offer a certain digital service. With the exception of social media, which is a common and widespread tool of digital communication and engagement, the percentages vary considerably from region to region, depending on the level of resources museums are able to make available for such activities.

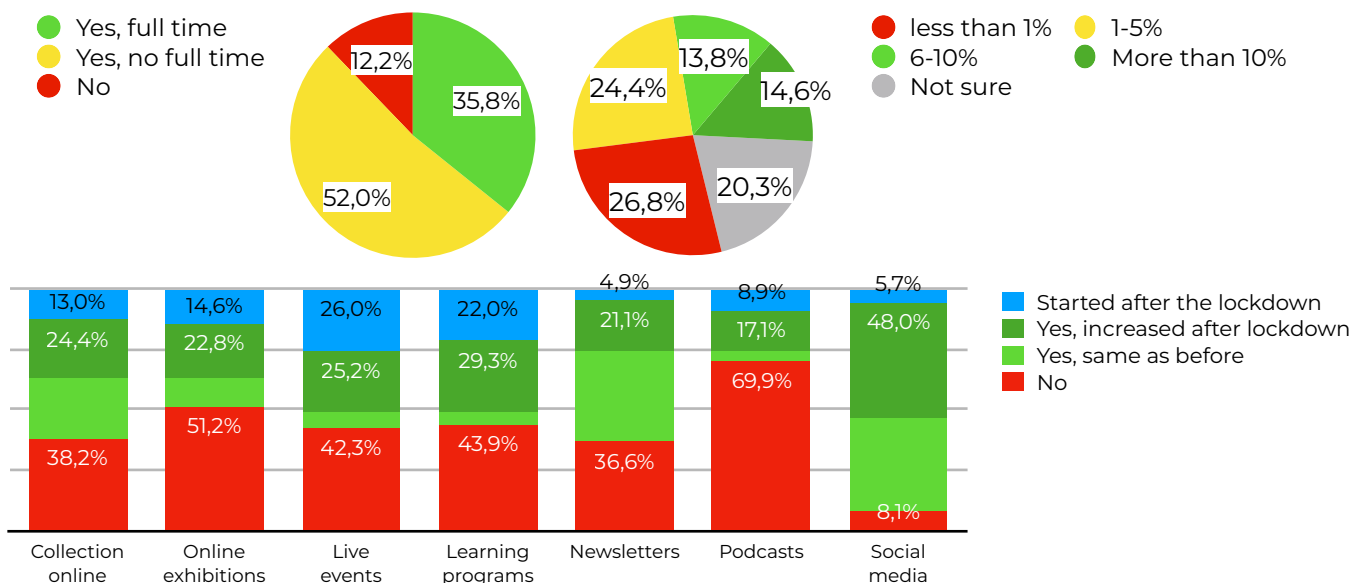
Europe



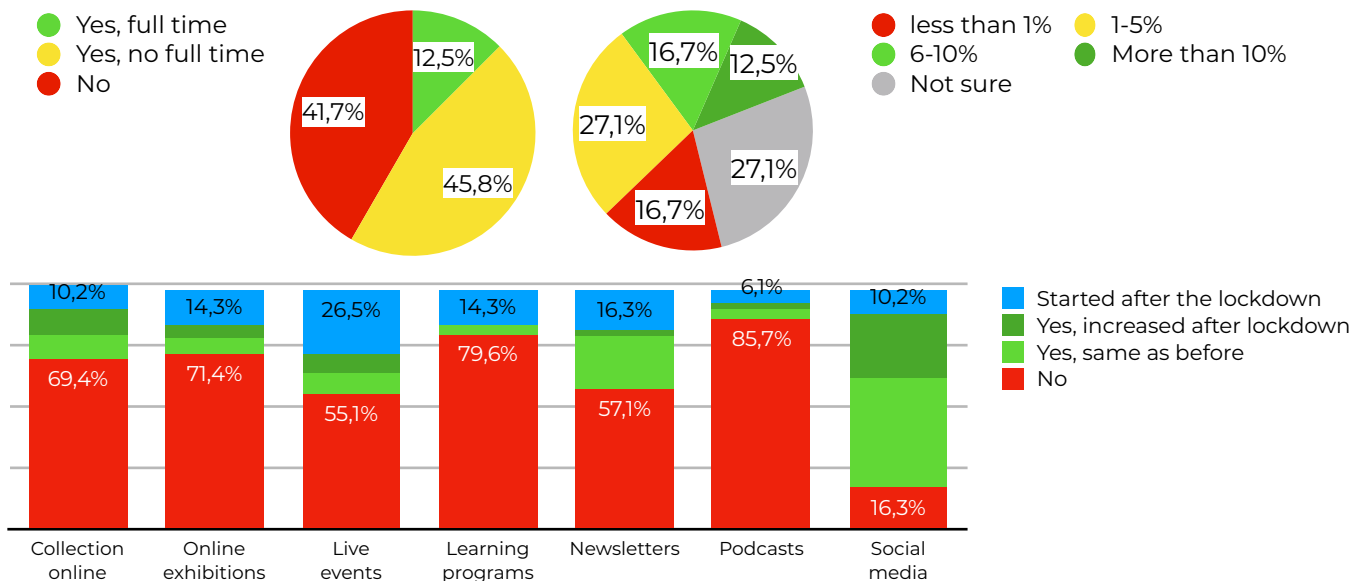
North America



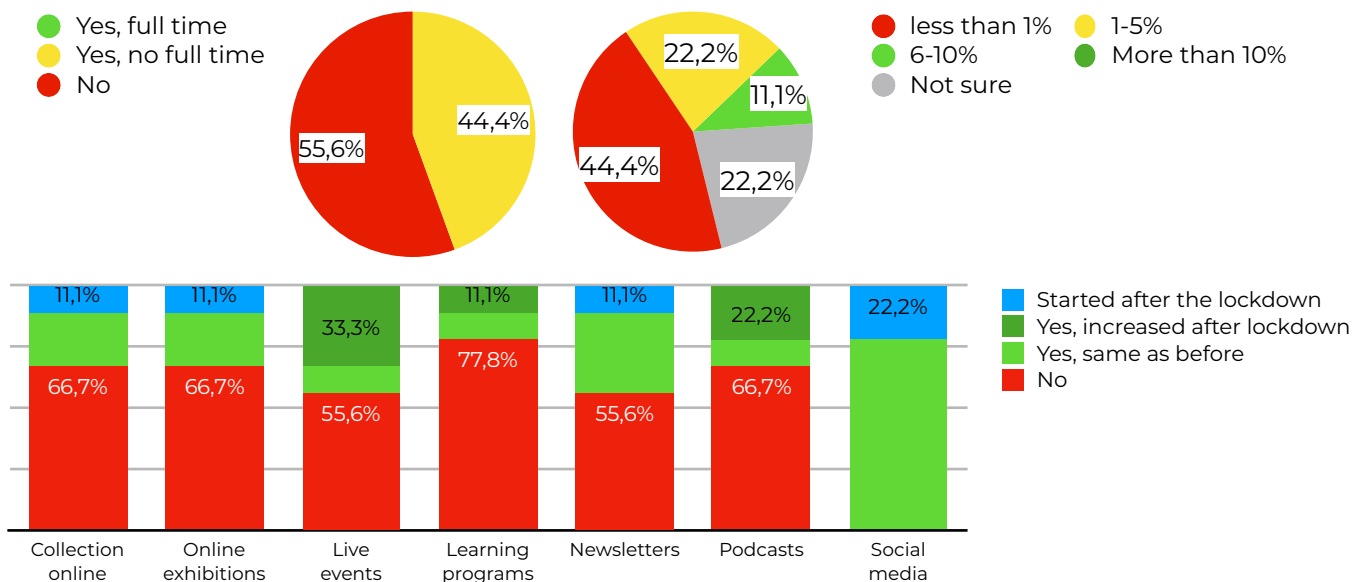
LAC



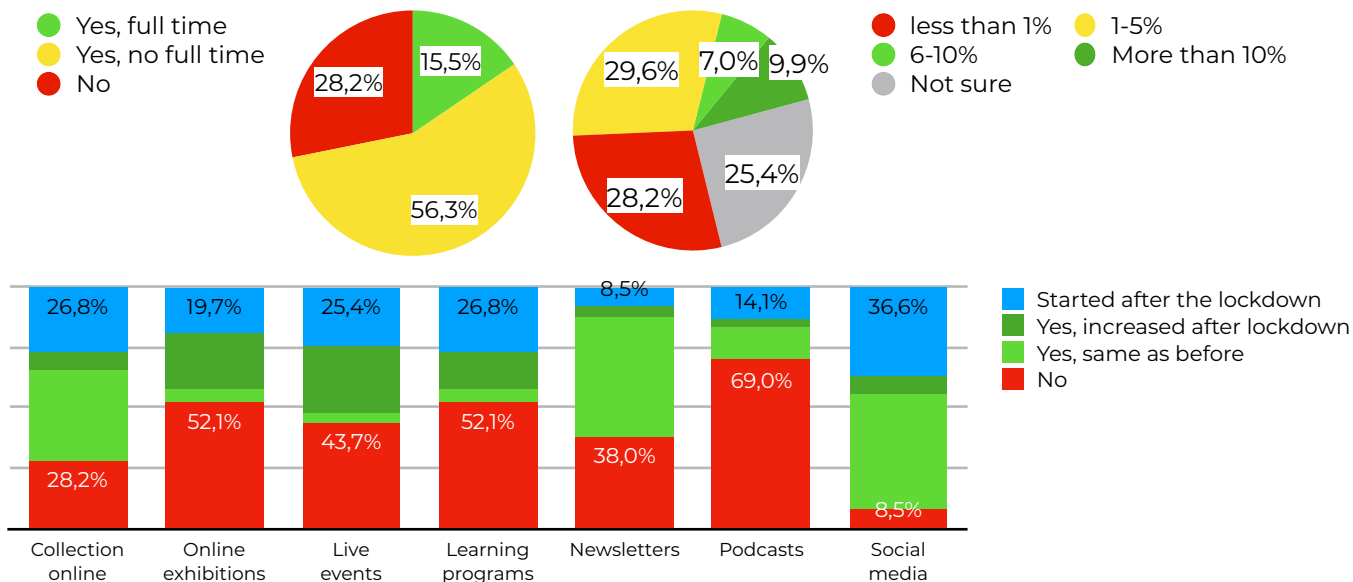
Africa



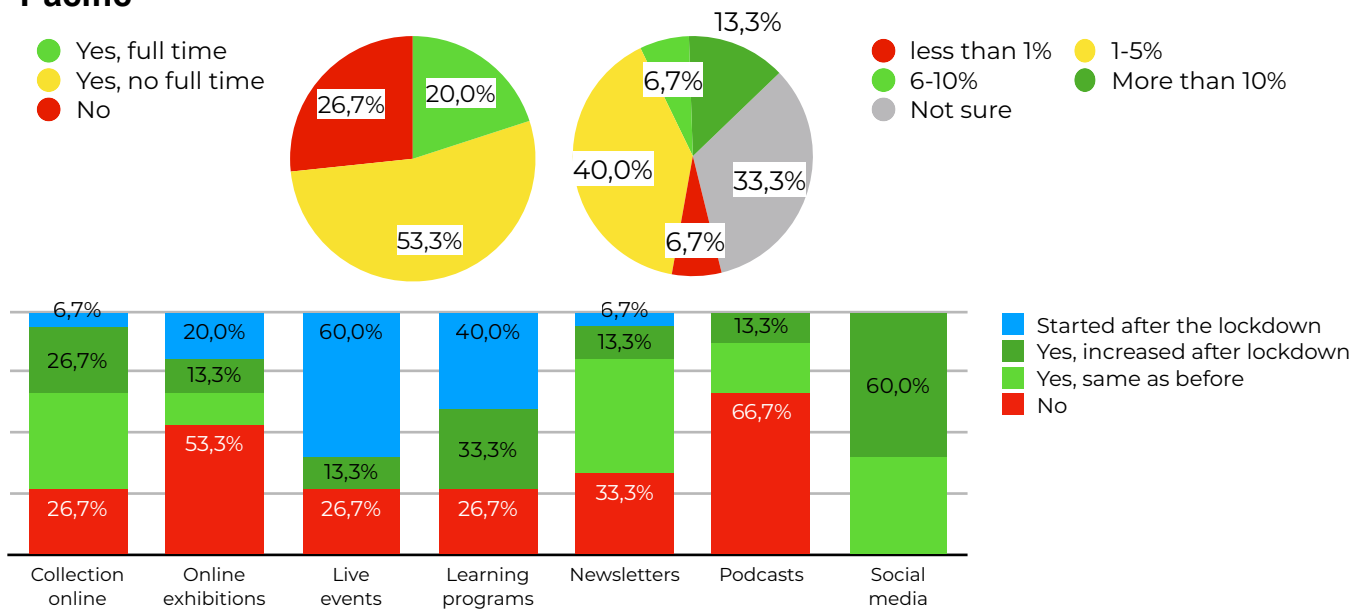
Arab Countries



Asia



Pacific



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



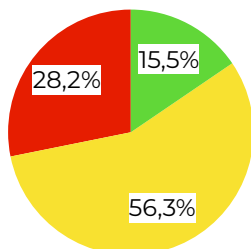
Funding structure comparison

A comparative analysis by funding structures shows that museums that depend mainly on public funding, generally make less economic and human resources available for digital and communication activities. This may be due to the fact that museums that depend on public funding, mostly public museums, are not able to be as flexible and redirect their annual budget. This is also reflected in the activities themselves, and such museums have not been able to develop digital activities to the same extent as other categories.

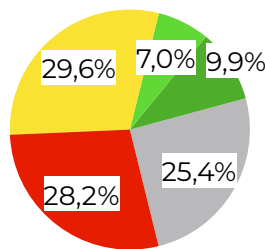
The museums that have shown the greatest reactivity in digital communication are those that have stated that they rely the most on earned income and endowment funds, which are also the two types of museums that invest the most resources in this field.

Public funds

- Yes, full time
- Yes, no full time
- No

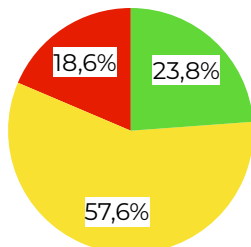


- less than 1%
- 1-5%
- 6-10%
- More than 10%
- Not sure

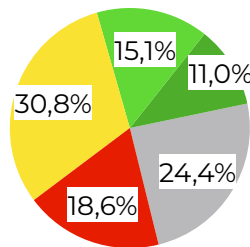


Private funds

- Yes, full time
- Yes, no full time
- No

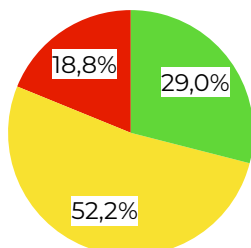


- less than 1%
- 1-5%
- 6-10%
- More than 10%
- Not sure

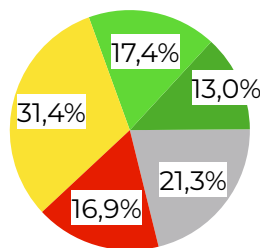


Earned income

- Yes, full time
- Yes, no full time
- No

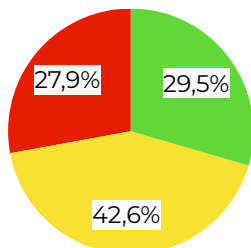


- less than 1%
- 1-5%
- 6-10%
- More than 10%
- Not sure

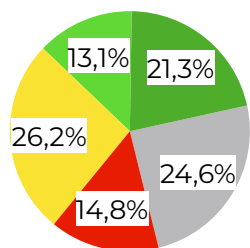


Endowment

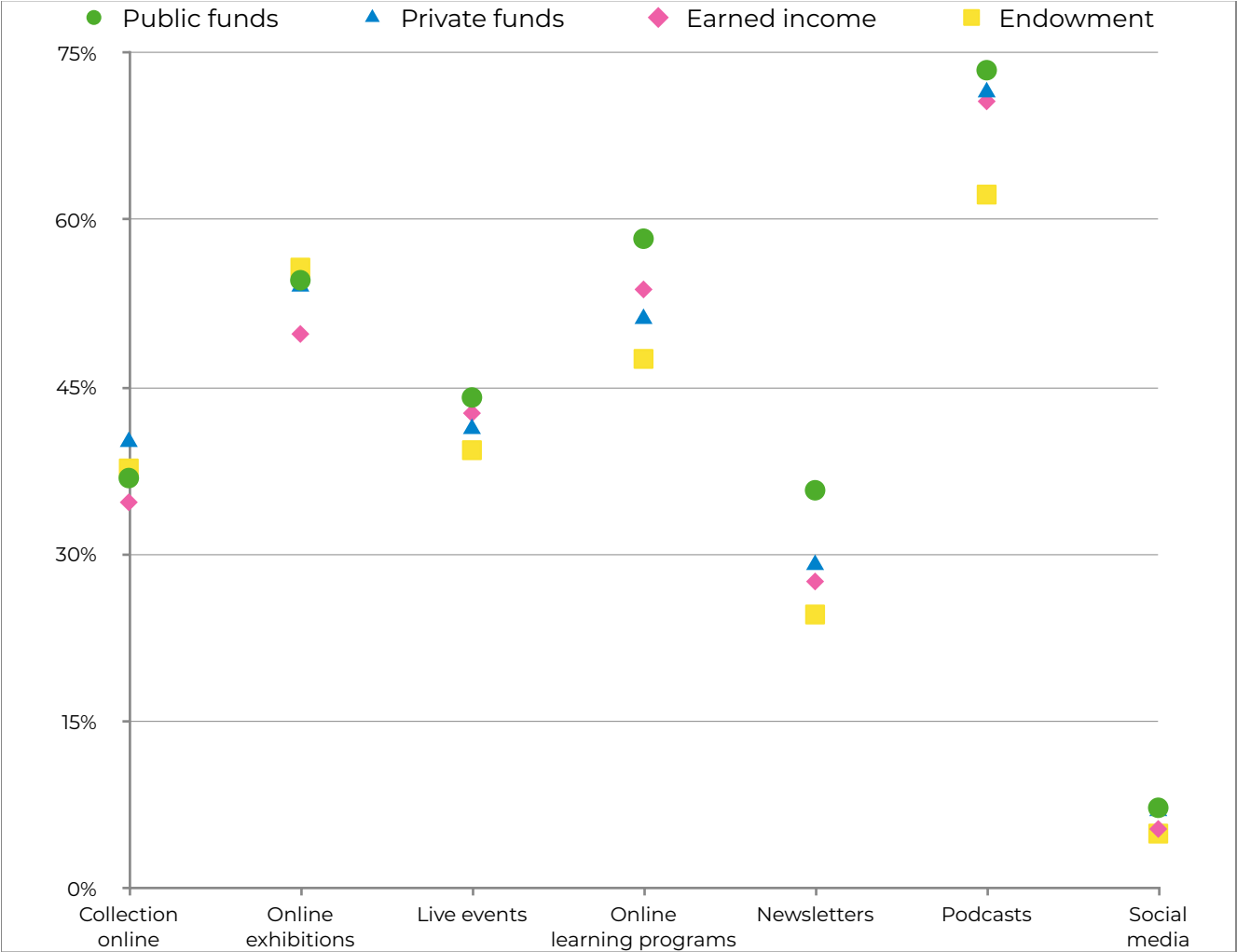
- Yes, full time
- Yes, no full time
- No



- less than 1%
- 1-5%
- 6-10%
- More than 10%
- Not sure



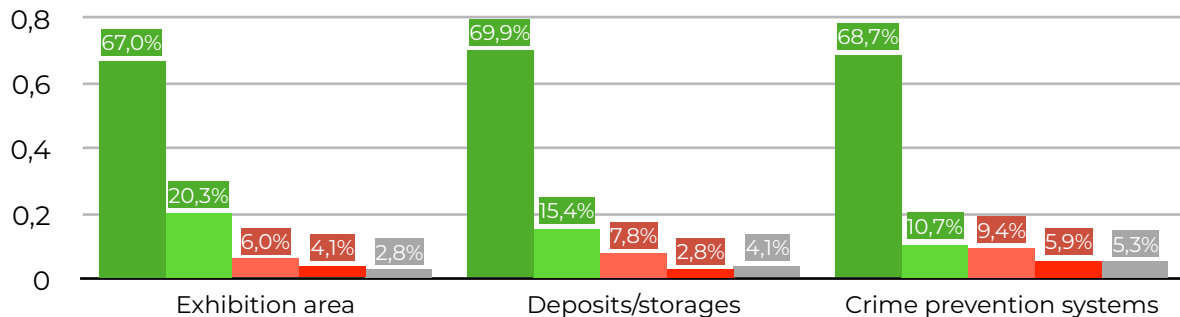
What digital services does your museum provide? % “No” answer



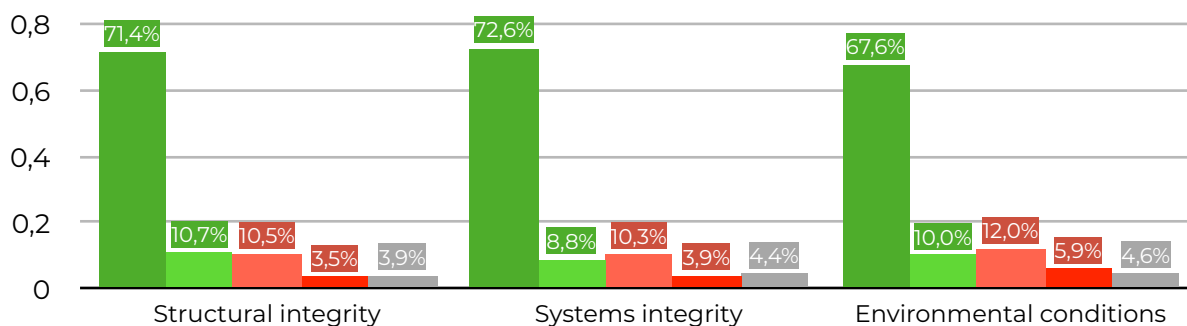
4. Museum security and Conservation

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

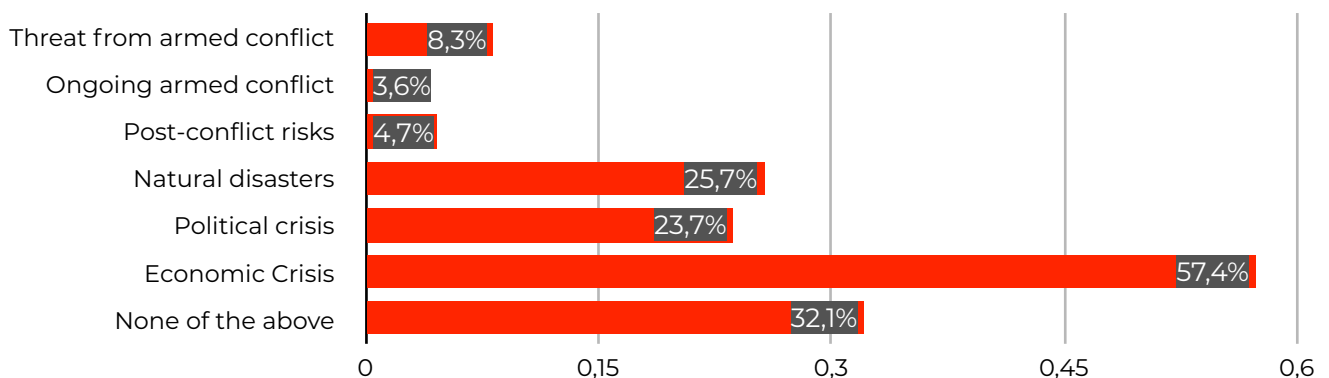
■ Yes: usual measures ■ Yes: additional measures ■ No: usually insufficient
■ No or insufficient additional measures ■ I don't know



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



Is your country confronted with other security issues? (multiple choice question)

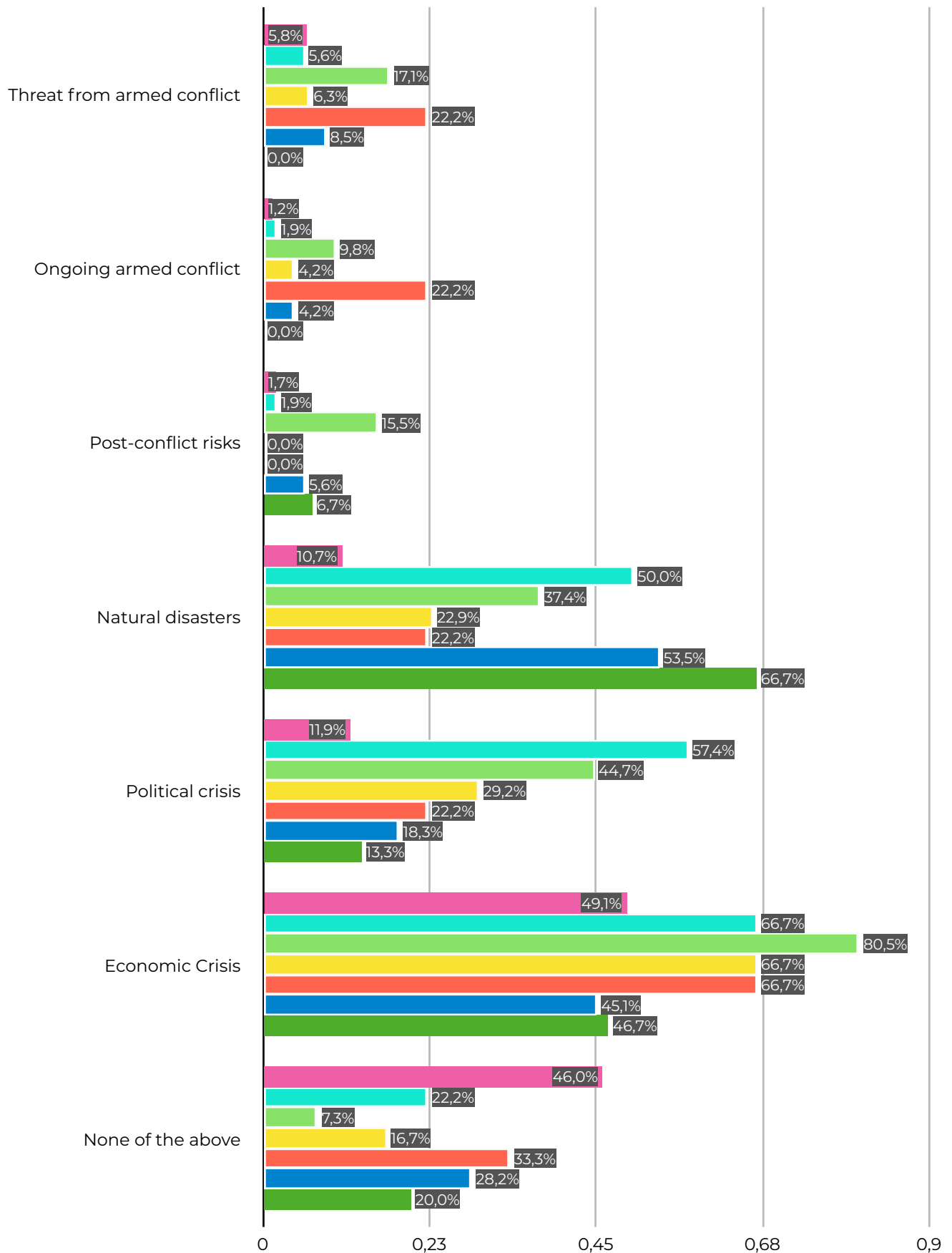


With regard to museum security and the conservation of collections, overall the percentage of positive responses remained similar to the first survey, with around 80% of participants or more, feeling confident about these two key aspects of museum management.

Breaking down the responses, a higher number of participants stated that their institutions had taken additional measures in four of the six areas, especially regarding security in exhibition and storage areas, where the additional measures increased by +8,5% and +6,1% respectively compared to the first survey. The values remained stable for the crime prevention and environmental systems, which also show slightly higher percentages of inadequate standard or additional measures (15,3% and 17,9% respectively).

Regional comparison

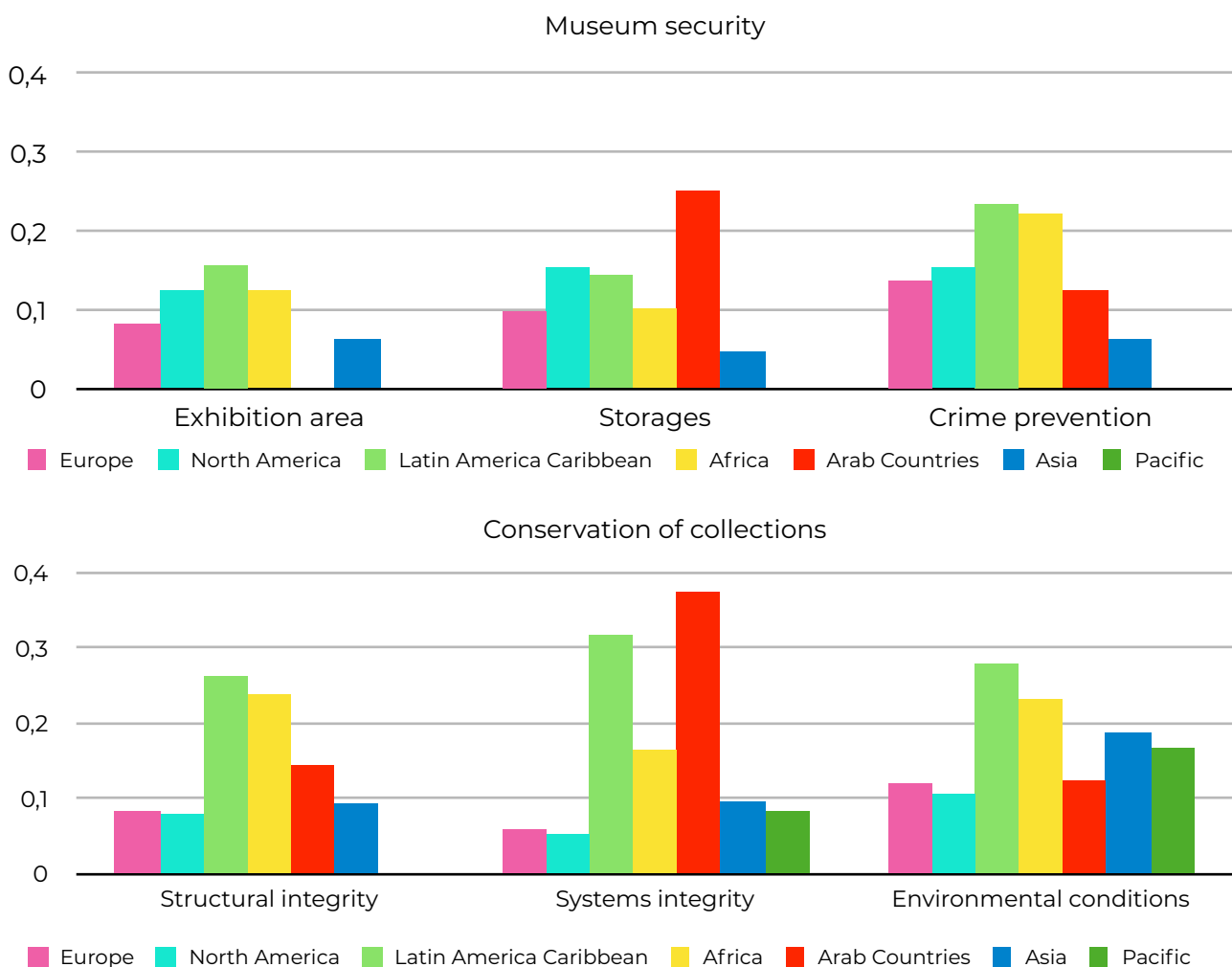
Europe North America LAC Africa Arab Countries Asia Pacific



We asked the participants whether their museum faced other risk factors. With the exception of the anticipated economic crisis, European participants were generally less concerned by additional security issues than other world regions.

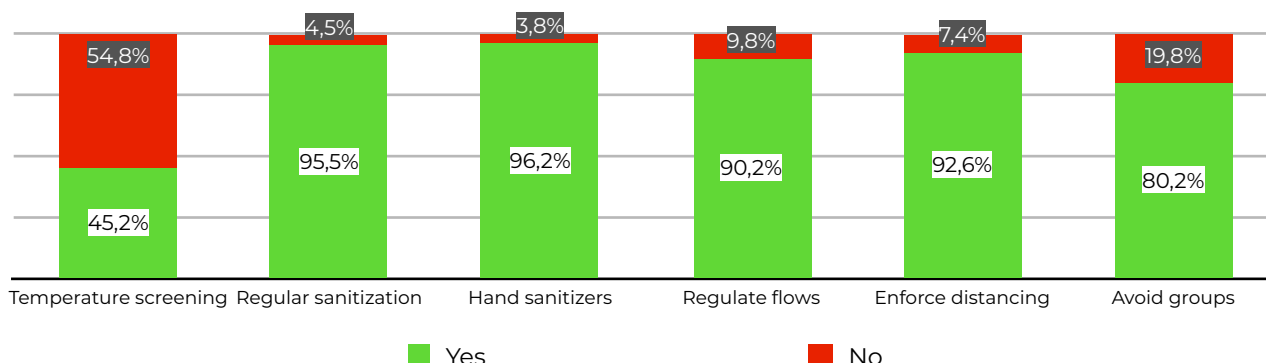
Political crises, armed conflicts and natural disasters are a source of concern for a considerable percentage of museums in other world regions. These factors can all directly or indirectly affect the sector, exacerbating the current or future crises. For this reason it is necessary to strengthen museums professionals' capacity to respond to emergencies, including pandemics.

Taking into account the security and conservation of collections, the separate analysis of regional data reveals further inequalities, with major concerns coming mainly from the Latin American and Caribbean, African and Arab regions. The two graphs below illustrate the total number of the negative answers "insufficient standard and/or additional measures" for each question, by region.

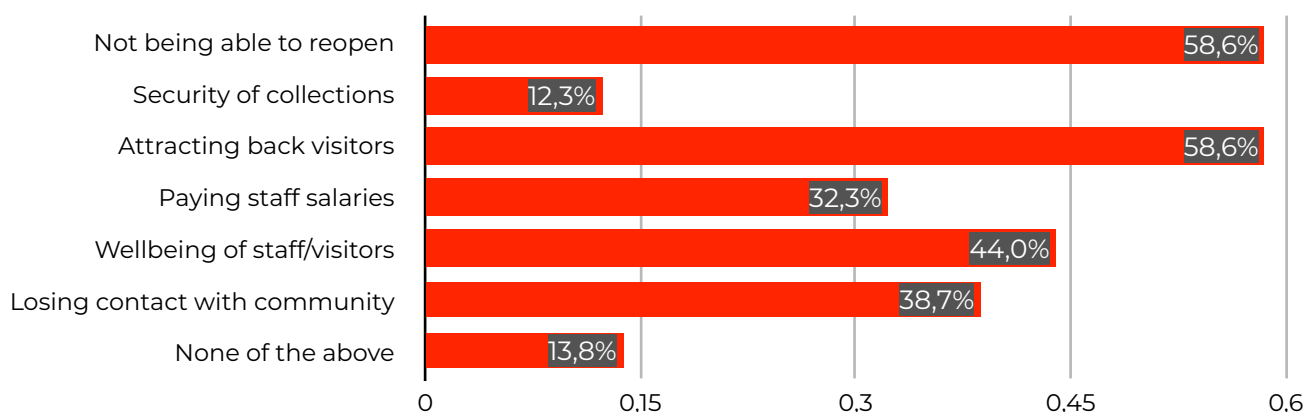


5. Reopening

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



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



As we have seen, 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 time. To ensure the safety of staff and visitors, cultural institutions must comply with government directives and meet specific safety measures.

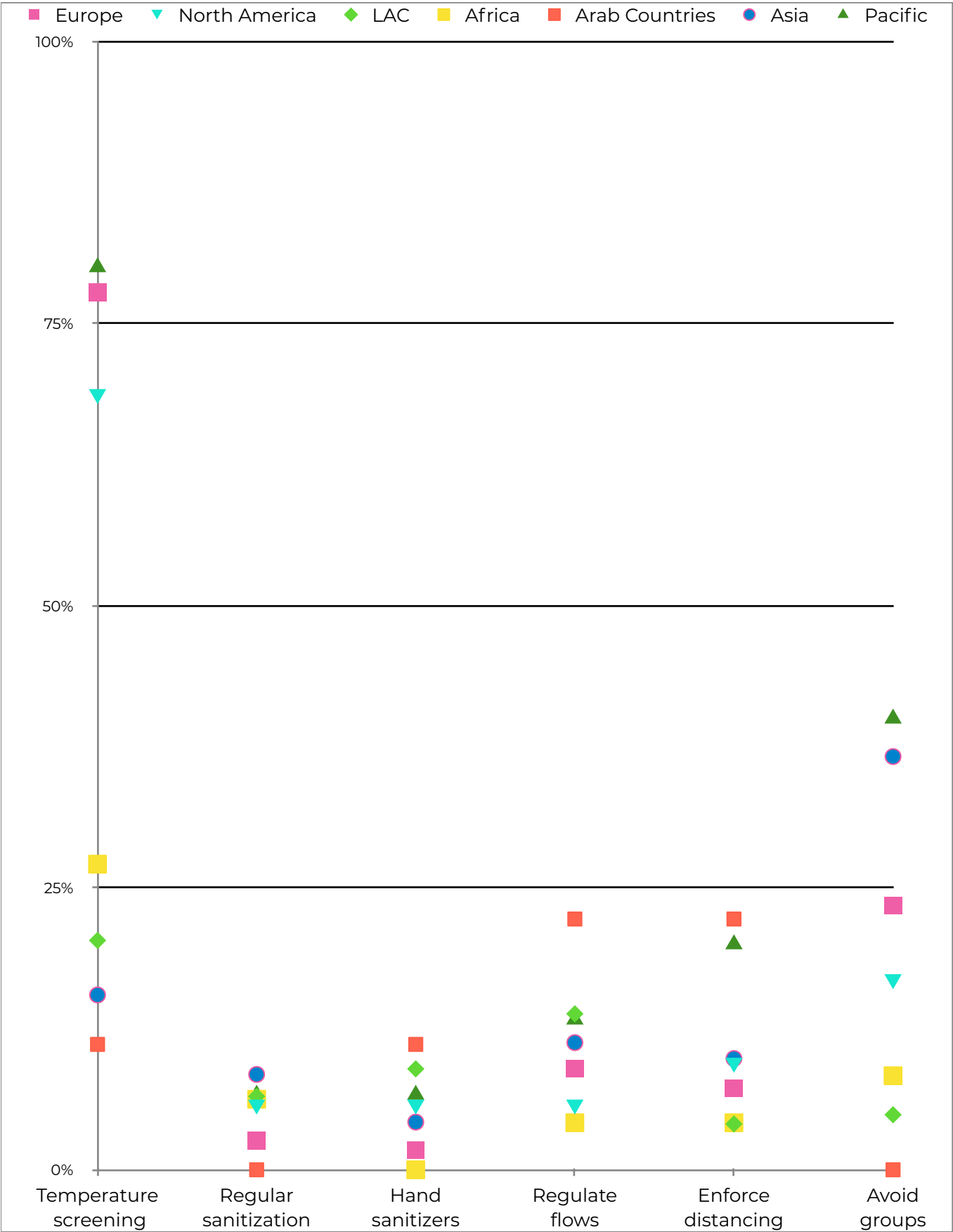
Providing a temperature screening at the entrance seems to be a potential limitation for museums, as well as avoiding the formation of groups, albeit to a lesser extent.

Not being able to reopen and failing to attract back visitors are the two main concerns of participants, but almost half of them are also worried about how to ensure the wellbeing of staff and visitors in a socially distanced world.

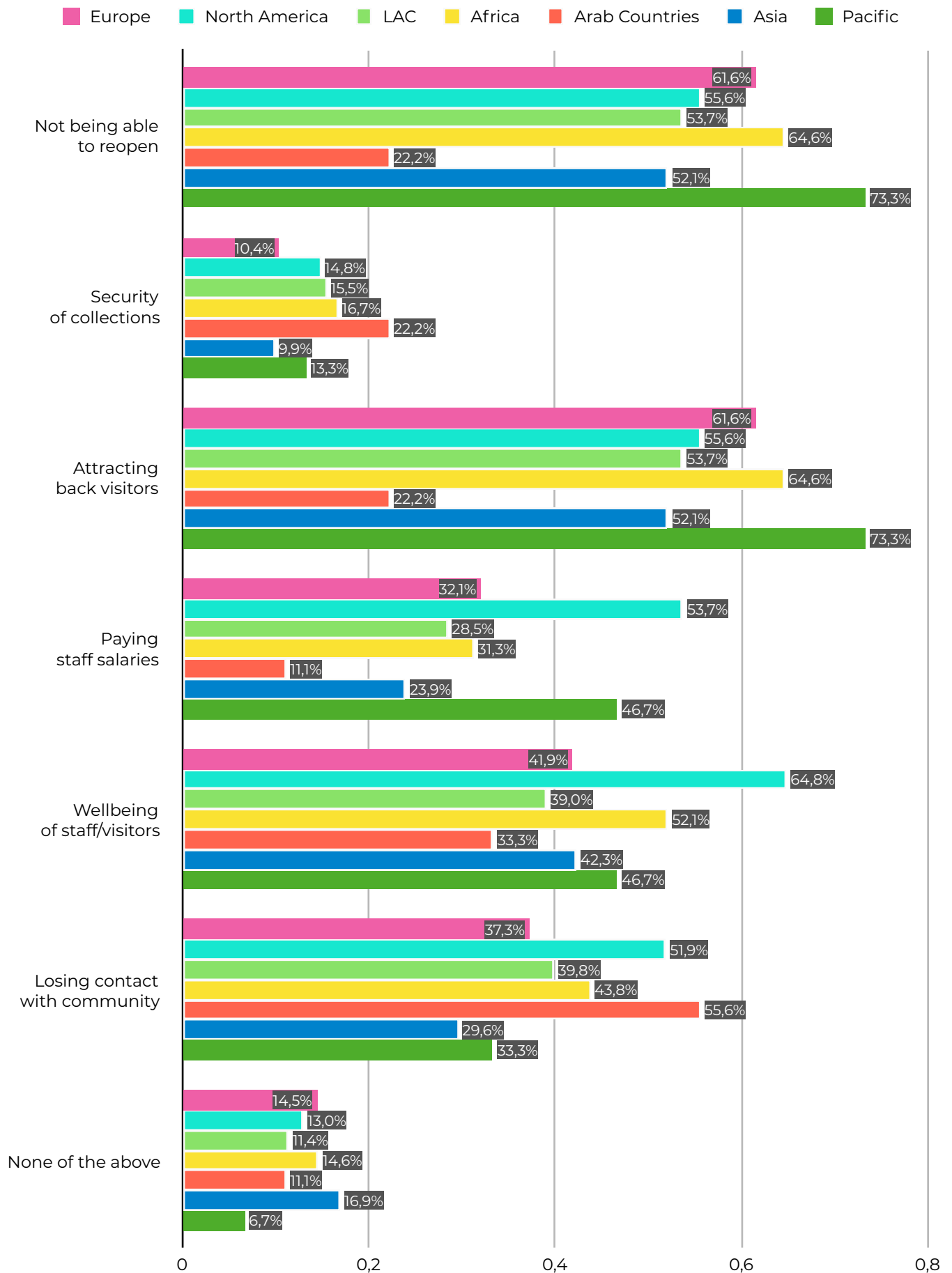
The short and long-term effects of the lockdowns on museums' links with the local community are another major factor of concern, as is the ability to pay staff as a result of loss of revenue and the economic crisis caused by the pandemic.

Regional comparison

Safety measures implementation: % “No” answer



Perceived threats

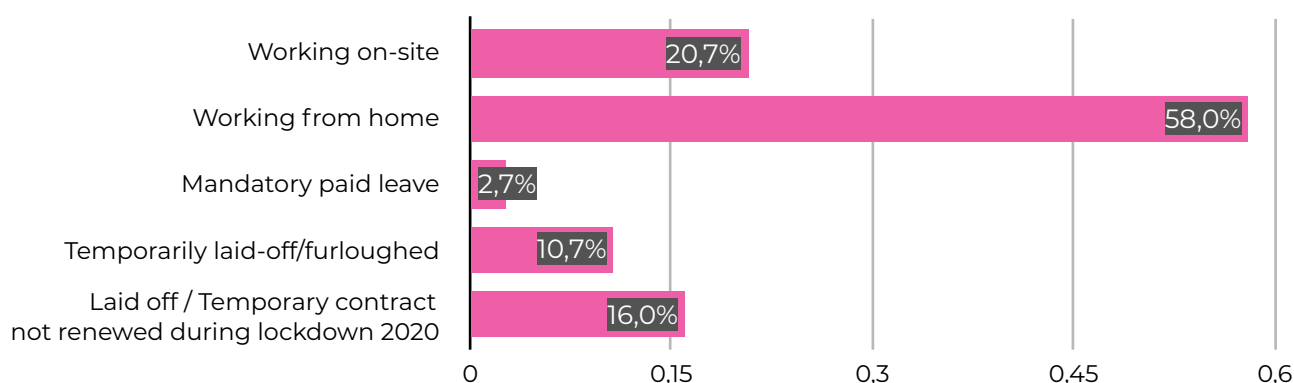


6. Freelance professionals or consultants

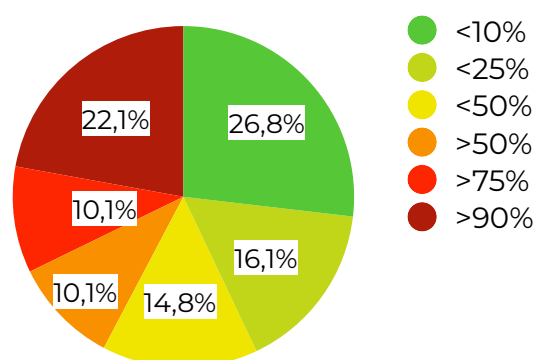
Given the lower number of responses, for this section we will only present aggregated world data. Respondents have highlighted a critical situation, which will have serious repercussions for the self-employed or freelancers in the museum sector (which in many countries make up a large portion of the total museum workers and are key for the vitality of the sector) both in the medium and long term.

In many cases, these professionals are not only currently unemployed, but they are also the most exposed to systemic economic recessions in the cultural sector. Compared to our first survey, the percentage of respondents that stated that consultancy work for museums represents 50% or more of their income lowered from 56,9% to 42,3%, but it is still one of the main source of income for the majority of participants. This is consistent with the fact that 27,5% of participants said they may have to change their career as a consequence of the COVID-19 crisis.

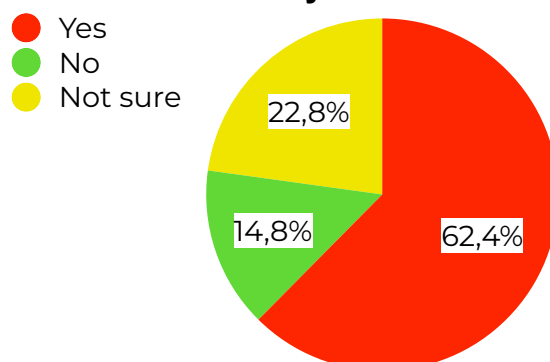
What is the current situation of the staff of your firm?



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

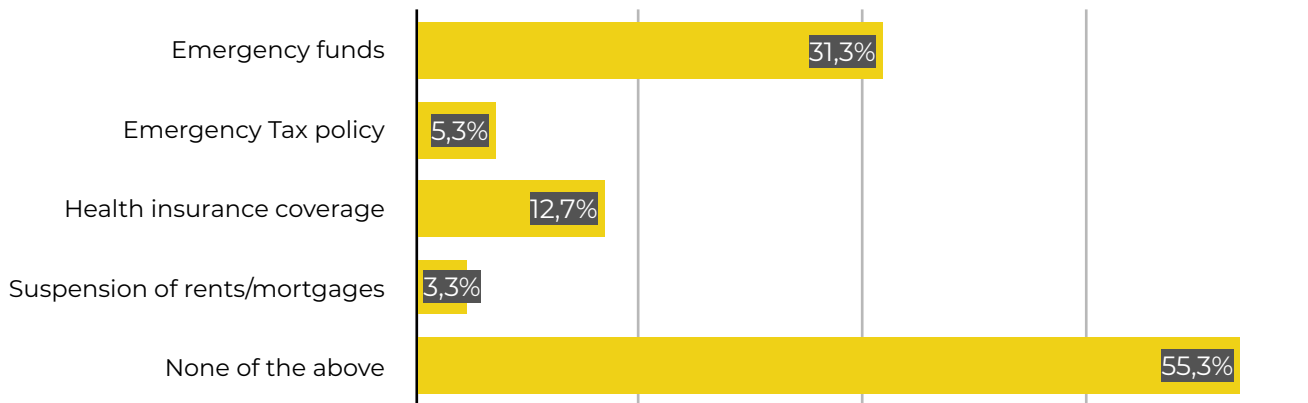


Is the crisis threatening the future of your work/firm?

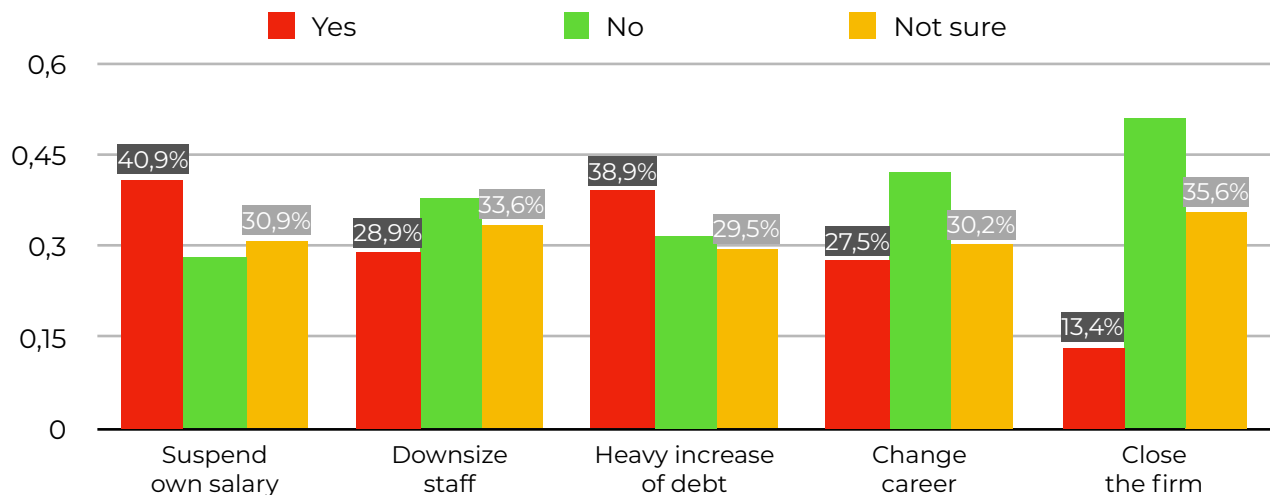


The situation for freelance museum professionals is alarming: 10,7% of the respondents said they were temporarily laid-off, and 16% did not have their contract renewed during the lockdown. For 62,4% of them the future of their work itself is at risk, rising from 54,4% of our first survey.

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

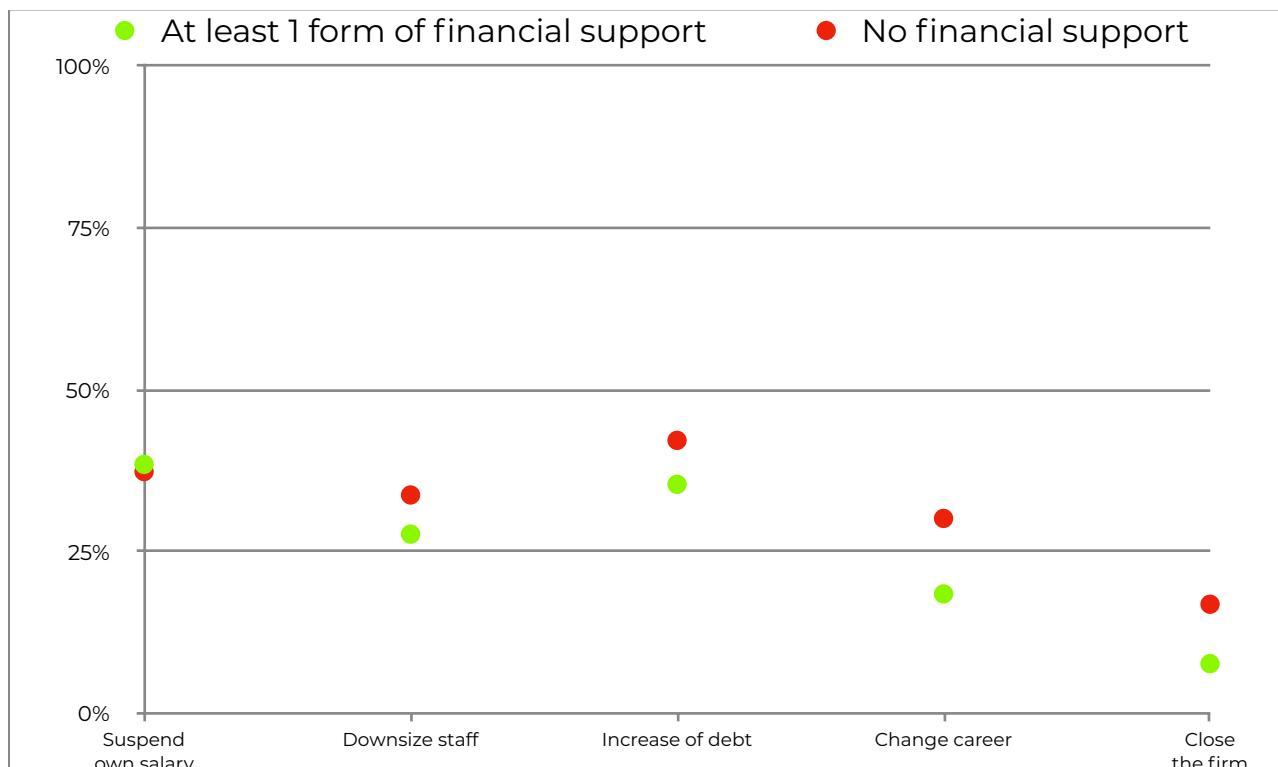


What do you think will be the economic impact of COVID-19 on your work?

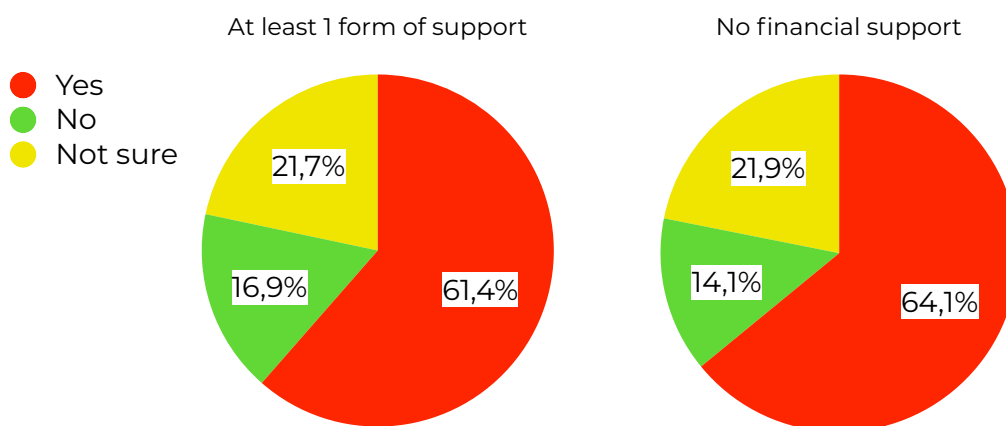


Financial support (or lack thereof) comparison

As with museums, we compared the expected economic impact for freelancers that declared that they have not received any financial support so far and for those that stated that they have benefitted from at least one source of financial support. Again the data shows that, for all categories with the exception of “Suspend own salary”, the percentage of positive responses (*corresponding to an expected negative impact*) are generally lower for the latter. This further highlights the absolute necessity to make appropriate financial support available museum professionals and freelancers

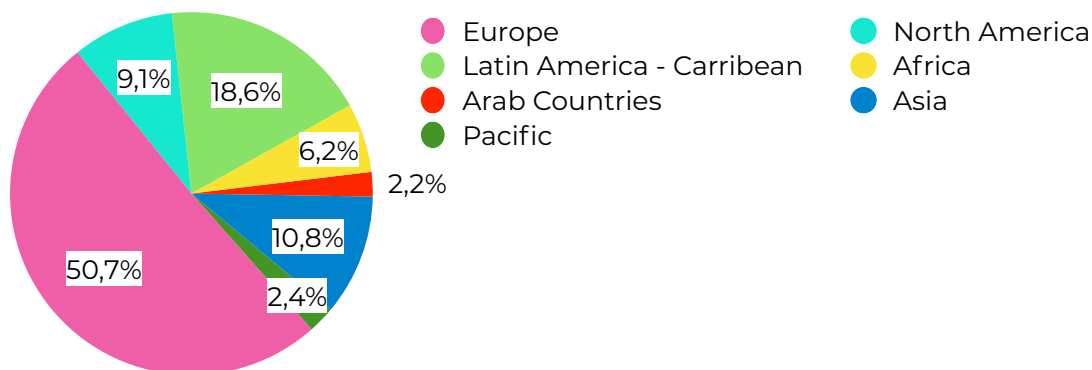


Is the crisis threatening the future of your work?

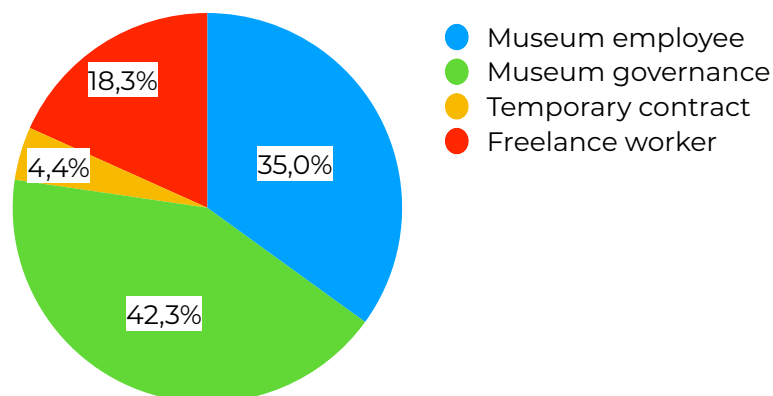


7. Participants profile

50,7% of respondents come from Europe, 9,1% from North America, 18,6% from Latin America and the Caribbean, 10,8% from Asia, 6,2% from Africa, 2,4% from the Pacific and 2,2% from the Arab Countries region.



Among the respondents, the number of employees and governance is quite balanced (39,4% and 42,3% respectively). Among the employees, 4,4% of them have a temporary contract, while the remaining 18,3% work as freelancers or consultants.



Final notes

This report and the underlying data from the survey was gathered, analysed and interpreted by Alessandro Gaballo with the support of the Communications and PR Department and the ICOM 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: Follow up survey” 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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