Museums during COVID-19:
Crisis response and future implications

Julia Pagel | NEMO - Network of European Museum Organisations

07.10.2021 | ERIH Annual Conference 2021 | Ghent

Hello everybody, thank you very much for the invitation. I am really REALLY glad to be here – in person! It has been a too long time to really connect and exchange, and I thank the organisers and hosts for all their work to make a hybrid event like this happen.

My name is Julia Pagel, secretary general of NEMO, network of European museum organisations.

About NEMO

NEMO
Network of European
Museum Organisations

before I start my presentation, Let me just quickly introduce NEMO to you:

We are a network representing and speaking for the museum community in Europe. Currently, we have 130 members in 40 countries in Europe – among them national museum umbrella organisations, other networks of museums, museums interested in European cooperation and training and brand new we also admit to our network, businesses and research institutions offering services to museums in order to truly reflect the European museum ecosystem

| We **advocate** | We **co-operate** | We **share** | We **train** |

NEMO
Network of European
Museum Organisations

Just to give you an idea of our main activities: We advocate for museums vis-a-vis policy makers, mostly EU institutions, we initiate and support international cooperation between museums, we act as information platform and place to share good practices, and we offer capacity building to museum professionals in Europe.

COVID-19 and Museums Survey

NEMO
Network of European
Museum Organisations

We are 1 ½ years in the pandemic. One would think that has taught us how to deal with it, but – and this is a very personal reflection – have only learned for sure that whenever you think you have a good overview the situation it changes again.

For sure we know that even after the pandemic, we – museums, heritage, sites – will have to re-think our general conditions, the business model.

But thinking something freshly only works if you have a basis from where to start. And here we come to NEMO's survey on the impact of the Coronavirus on museums in Europe. This is what we did in May 2020 (and again at the beginning of this year: take stock of the situation of museums, in order to understand the status quo, the biggest challenges, and emerging topics from the situation.

more than 1000 museums from more than 45 countries responded to the survey.

Financial Losses

▶ Causes of financial losses
▶ Alternative funding
▶ State support

Digital Development

▶ New digital applications
▶ Digital skills and infrastructure
▶ Digital visitor research

Crisis Adaptation

▶ Adapted crisis operations
▶ New ways of working together
▶ Future challenges

6

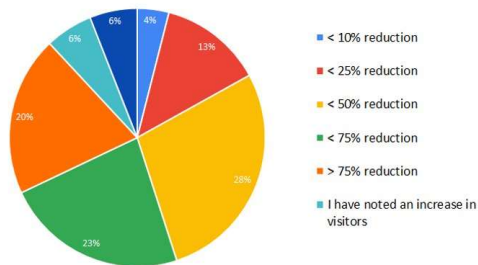NEMO Network of European Museum Organisations

This survey looks into the fields of
- financial losses of museums and their support,
- the development of digital services
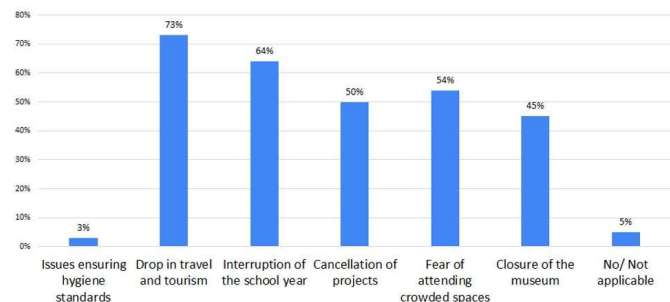- and how museums adapt to the pandemic / the crisis, which by the way can well be the climate crisis, too

What I will do in the following is to present the main survey findings for the themes finances, digital and crisis adaptations, and look at the long-term implications, not only for museums, but for the sector in general. I am actually really interested to hear, whether our findings and new challenges are coinciding with the industrial heritage sector!

VISITOR DROP
after re-opening

Drop in visitors since reopening the museum after the first public closure
601 responses

- < 10% reduction
- < 25% reduction
- < 50% reduction
- < 75% reduction
- > 75% reduction
- I have noted an increase in visitors

If a loss of visitors has been witnessed, are there any clear causes?
578 responses

7 | NEMO Network of European Museum Organisations

During our first survey in May 2020, 98% of all museums surveyed were closed between March and June 2020.

But even after their re-opening later in the pandemic, the visitors numbers have not reached their pre-pandemic numbers, and they won't for a long time.

8 in 10 museums noted a drop in visitors. 4 in 10 museums experienced their visitor numbers dropping by half or even 75%.

When asked for the causes of low visitor numbers the Drop in travel was mentioned first, followed by the interruption of the school year, and subsequent loss of cooperation with schools.

Another aspect is that museums – like any other public institution – are not allowed to admit the same amount of visitors anymore and mostly in pre-set time slots, and only if they are vaccinated, recovered or present a negative test, which is another barrier for many people to visit the museum.
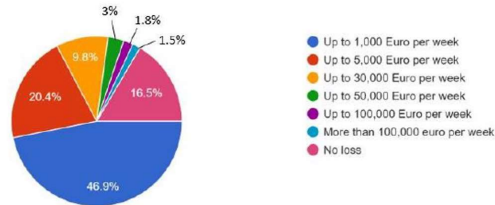
INCOME LOSS
During closure and after re-opening

Reported Weekly Lost Income (Euros)

- Up to 1,000 — 44%
- Up to 5,000 — 31%
- Up to 30,000 — 18%
- 50,000 or More — 8%
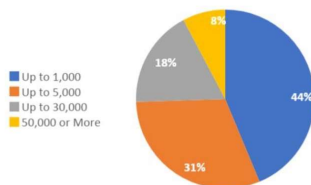
Can you estimate the pro-medium of the museum's weekly income loss (in Euro per week) after the re-opening?
599 responses

- Up to 1,000 Euro per week — 46.9%
- Up to 5,000 Euro per week — 20.4%
- Up to 30,000 Euro per week — 9.8%
- Up to 50,000 Euro per week — 3%
- Up to 100,000 Euro per week — 1.8%
- More than 100,000 euro per week — 1.5%
- No loss — 16.5%

8

NEMO Network of European Museum Organisations

Less visitors and an increased security framework resulted in considerable income losses. However, since in Europe around 80% of the museums are at least partly publicly funded, only a handful of museums had to close down.
As you can see in the 2 pie charts - on the left the one when museums were closed and on the right after the re-opening - museums have dealt with a considerable income loss, even after their re-opening.
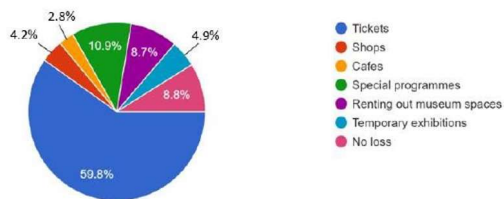Museums in touristic regions were taking an exceptional income loss of 75-80% of their normal income, and larger Museums report losses of more than 100.000 Euro per week.
Especially in countries where museums have to contribute to their budget with a considerable amount, like around 50% in NL and UK, museums were and are suffering from the situation.
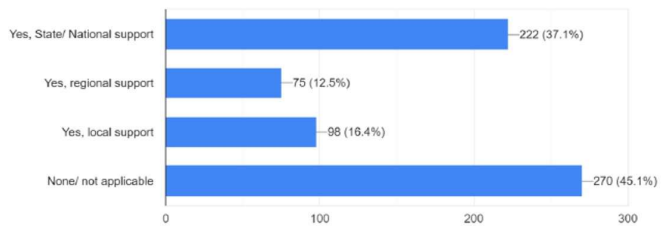
INCOME LOSS
Income loss areas and emergency support

If your museum has lost income, please identify where you have lost the most income:
577 responses

- 2.8%
- 4.2%
- 10.9%
- 8.7%
- 4.9%
- 8.8%
- 59.8%

- Tickets
- Shops
- Cafes
- Special programmes
- Renting out museum spaces
- Temporary exhibitions
- No loss

Has your museum received COVID-19 emergency support from the government/local authorities?
599 responses

Yes, State/ National support	222 (37.1%)
Yes, regional support	75 (12.5%)
Yes, local support	98 (16.4%)
None/ not applicable	270 (45.1%)

0   100   200   300

9

NEMO Network of European Museum Organisations

Identifying the source of income loss: The majority (60%) of museums reported that the loss of ticket sales was the main cause. This was followed by programme discontinuation and the cancelation of external events.
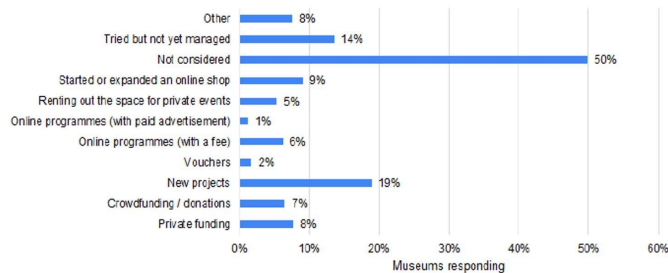
66% of the respondents declared that they received emergency support from the national/regional/local government to help them operate during the COVID19 crisis. We have heard that especially privately run museums had a difficult time getting emergency funds from the governments.
we can safely say, that for at least this year, and even if museums are open, the pandemic has and will dramatically change the traditional system of how museums can connect and be meaningful and valuable to their visitors.
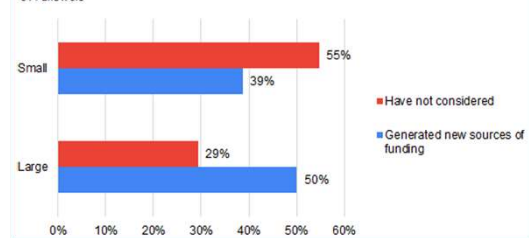
Alternative sources of income

Other forms of financial support generated
762 answers from 598 museums

Category	%
Other	8%
Tried but not yet managed	14%
Not considered	50%
Started or expanded an online shop	9%
Renting out the space for private events	5%
Online programmes (with paid advertisement)	1%
Online programmes (with a fee)	6%
Vouchers	2%
New projects	19%
Crowdfunding / donations	7%
Private funding	8%

Museums responding

Museum size & new sources of funding
314 answers

	Have not considered	Generated new sources of funding
Small	55%	39%
Large	29%	50%

10
NEMO Network of European Museum Organisations

We also asked museums whether they had looked into generating alternative funds to meet the income loss gaps: 50% indicated that they had not considered generating financial support outside of state assistance.
This does not reflect an absence of need for additional sources of income, it rather reflects the missing capacity and resources in the museums necessary, to look for new, innovative funding schemes and opportunities.
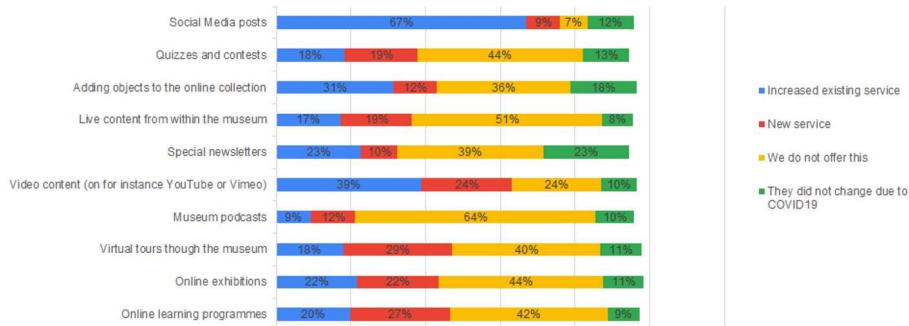
Larger museums (50%) have been more engaged in seeking alternative sources of funding than smaller museums (39%). This finding supports the suggestion that smaller museums many times are lacking the capacity (in skills, human resources, budget) to initiate fundraising activities.

Considering that 7 in 10 museums expect budget cuts in the coming years, the issue of finding new sources of income, or review our business models completely, will get even more important.

New and increased online services

How online services have changed since COVID19

600 responses

Service	Increased existing service	New service	We do not offer this	They did not change due to COVID19
Social Media posts	67%	9%	7%	12%
Quizzes and contests	18%	19%	44%	13%
Adding objects to the online collection	31%	12%	36%	18%
Live content from within the museum	17%	19%	51%	8%
Special newsletters	23%	10%	39%	23%
Video content (on for instance YouTube or Vimeo)	39%	24%	24%	10%
Museum podcasts	9%	12%	64%	10%
Virtual tours though the museum	18%	29%	40%	11%
Online exhibitions	22%	22%	44%	11%
Online learning programmes	20%	27%	42%	9%

- Increased existing service
- New service
- We do not offer this
- They did not change due to COVID19

GOOD NEWS 👍

93% of museums have increased and/or started new online services

NOT SO GOOD NEWS 👎

¼ of museums do not track and/or evaluate their digital activities at all

NEMO — Network of European Museum Organisations

Coming to the DIGITAL section: We asked, how the museums had developed their online services since the onset of the pandemic: 93% Of the responding museums had increased or started a new online service.
More than 75% of the museums said they had either increased or started new social media activities, and 53% of the museums increased or started creating video content,
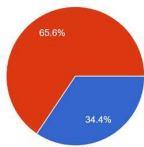
New and increased online services

Online services that visitors are most interested in

600 answers

Service	No change	More popular
Quizzes and contests	14%	24%
Features of individual objects from the online collection	18%	30%
Social media activities and hashtags	19%	59%
Updates to the online museum collection	21%	22%
Live content within the museum	11%	28%
Special newsletters	26%	16%
Video content (on for instance YouTube or Vimeo)	16%	42%
Museum podcasts	10%	15%
Virtual tours though the museum	12%	32%
Online exhibitions	13%	29%
Online learning programs	14%	29%

■ No change
■ More popular

0% 10% 20% 30% 40% 50% 60% 70%

12

NEMO Network of European Museum Organisations

looking at the demand side, at what online visitors liked most. Museums reported that social media activities, followed by video material and learning programmes was most successful with online audience.
The graph also tells us: we will urgently need to invest in tools that help us understand what online audiences are interested in, since: ¼ of museums don't track whether their online activities are successful or not, nor do they track their online visitors.

MUSEUM ONLINE SERVICES

Resources for online services

Have you added budget/resources to increase online presence/communication?
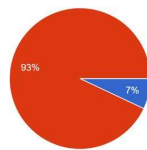601 responses

● Yes
● No

65.6%

34.4%

Additional budget/resources for online services

Have you hired new staff to manage the increased online presence?
601 responses

● Yes
● No

New staff for online services

93%

7%

Have you changed staff responsibility so that someone who usually doesn't work with digital services is managing the online presence?
589 responses

● Yes
● No

Shifted tasks to digital from existing staff

59.4%

40.6%

13
NEMO Network of European Museum Organisations
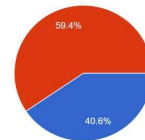
We also had a look at the resources dedicated to digital activities:
More than a third of the responding museums reported that they had added budget and/or resources to increase their online presence or communication in the pandemic.
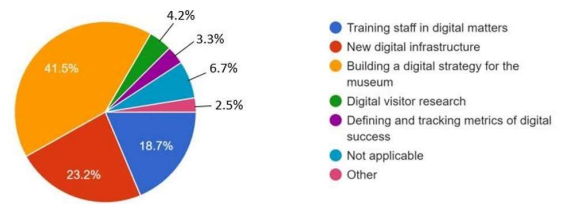
While hardly any museums hired new staff for their digital activities, over 40% of the museums claimed that they had changed staff tasks of existing staff to work on the online activities. So almost half of the museums asked staff to work on activities they are not necessarily skilled and trained for.... and I think this is a strong argument for urgent investment in digital literacy, as NEMO, Europeana, ICOM and all museum organisations have repeatedly pointed at.

MUSEUM ONLINE SERVICES

Challenges going digital

Do you feel your museum needs support in coping with digital tools and transition?
601 responses

- Yes
- No

83.2%
16.8%
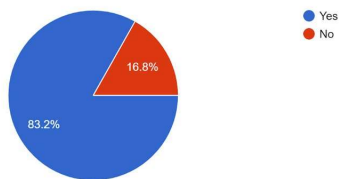
If yes, what is the priority for your museum?
552 responses

4.2%
3.3%
6.7%
2.5%
41.5%
18.7%
23.2%

- Training staff in digital matters
- New digital infrastructure
- Building a digital strategy for the museum
- Digital visitor research
- Defining and tracking metrics of digital success
- Not applicable
- Other

14

NEMO Network of European Museum Organisations

And maybe that is also reflected in the fact that more than 80% of the museums said that they require additional support with digital tools and transition, specifically small museums, that haven't even started their digital transition sometimes.
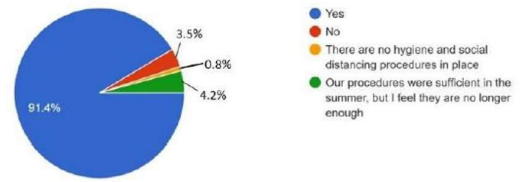
Support is mostly needed to build a digital strategy, followed by the need for new digital infrastructure and training of staff. So what we see is that museums need support for the very basic skills mostly!

Safety during the pandemic

Considering hygiene and social distancing procedures taken at your museum, do you think the public is safe at your museum?
595 responses

1.5%
1%
4.5%
92.9%

● Yes
● No
● There are no hygiene and social distancing procedures in place
● Our procedures were sufficient in the summer, but I feel they are no longer enough
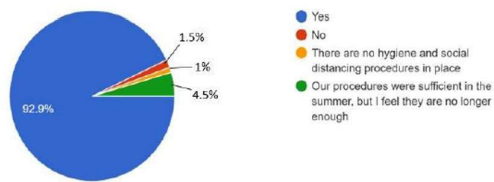
Considering hygiene and social distancing procedures taken at your museum, do you feel safe at work?
595 responses

3.5%
0.8%
4.2%
91.4%

● Yes
● No
● There are no hygiene and social distancing procedures in place
● Our procedures were sufficient in the summer, but I feel they are no longer enough

15 NEMO Network of European Museum Organisations

Closing the digital chapter and coming to the operations adapted to the pandemic. we see that 9 in 10 museums feel that both visitors and staff are safe in the museum, with sufficient hygiene/safety protocols in place.
I think that's just another good argument for museums being well-equipped to allow for a COVID-19-safe experience.
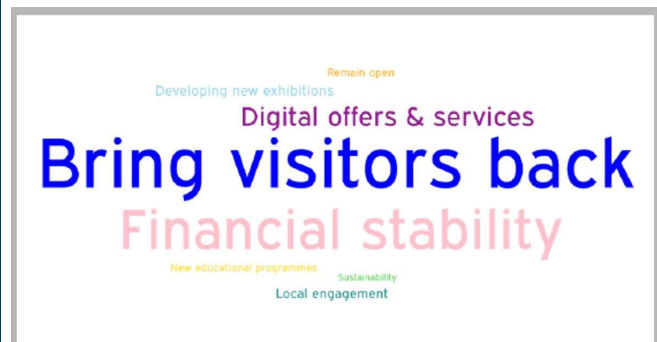- outdoor activities
- remote work

CRISIS ADAPTATION

Safety during the pandemic

New metrics of success

Future challenges

16   NEMO Network of European Museum Organisations

But when we are thinking of crisis adaptation, what challenges are the museums thinking about for the future?

I would like to show to you 2 word clouds that we built from the feedback we received from the museums with regard to:
-what themes are going to be important for their success in the future and
-the biggest challenges:

As you can see, Digital impact, and bringing visitors back sustainably to the museum are the most important topics for museums during and after the pandemic.

This is what we are going to look at now, at the implications! and: where our study about the impact of COVID19 and museums end s– hooray: no more graphs you need to look at!

**Learnings
from the pandemic**

NEMO Network of European Museum Organisations

I would now like to take the next step – looking ahead, by
- distilling some learnings from the pandemic that will have a longer-term impact, and by
- offering some concrete steps for museums and recommendations to policy makers to make the sector more resilient to future crises

Museums are more flexible than we think!

▶ immediate wave of digital offers
▶ remote work and changed staff tasks to accommodate needs
▶ innovation as a structural component

Museums without visitors lack their main reason for existence!

▶ importance of local communities
▶ importance of outreach and other programmes to engage with full spectrum of society
▶ importance of understanding digital visitor needs

Museums are more than cultural entertainment!

▶ they are places of learning
▶ they offer public spaces for encounter
▶ they are contributing to individual and community well-being

18 NEMO Network of European Museum Organisations

Let's start with the learnings and implications of the pandemic. I would like to share 3 learnings with you:

Learning no 1) Museums are more flexible than we think, probably that they thought themselves. We have all witnessed the immense digital offers that museums came up with within the first weeks of shutdown in April last year. There was a digital wave of offers, learning material, videos, online games, social media challenges – all done without any additional resources, by shifting staff tasks, by improvising.

Now we have to think about how to keep that digital or maybe even broader: innovative wave up, we need to level it up with investment in staff, infrastructure, strategic reviewing, because what we have seen is innovation at its best! Innovation can come through ruptures and unprecedented situations like the pandemic, but to make innovation a structural component of cultural organisations, we need serious and targeted support.

Learning no 2) A Museum without visitors is lacking its main reason of existence, because a museum is for people. That has been reflected in all of our surveys

when we asked museums what their biggest challenge and the most important topic of their future conversations was: to bring back visitors to the museum!

We have noticed that the local community has been and will be playing a bigger role, which means that the engagement will be more vertical instead of horizontal with visitors, maybe fewer exhibitions, but more forms of engaging with it, building on relationships that make people come back to the museum. The digital extension was a good tool to help connect to visitors online during the shutdown and surely there is lots of potential, especially in the learning and the creative area to be explored, but I would argue that before we move to these amazing projects, we need to do some groundwork, understand our digital users…and the non users….to create the best possible access for everybody. And for this we need expertise, new museum job profiles and…a growing network of experiences and best practices.

Learning no 3) Museums are more than just cultural spaces: They are places of encounter, they provide public spaces in growingly commodified cities or infrastructurally weak regions, they have shown during corona how much they can be actual places of learning, of health, and support etc

A colleague of mine, director of a mid-size German museum said to me when I was mentioning this meeting today, that she has one message she would like to share: she said: Policy Makers could ask way more from museums for different agendas, if they acknowledged how museums are already impacting on society, in education, for cohesion and democracy".

And I would like to add, that this message does not only go to policy makers, it also goes to museums or the heritage sector themselves, because they need to be aware of their social importance and potential, in order to fully tap it.

**Resilience for
the future**

Network of European
Museum Organisations

So how can we make museums more resilient to future crises?
One thing that we have learned from Corona is that it acted as magnifying
glass for many issues, it made problems grow bigger, it also triggered all kinds
of incredible innovation and creativity, so can we use this moment to find
answers to the challenges that have been there already, but come mor visibly to
the surface now?
The question of how to become future-proof, be it for crises, for a changing
society and within technological development, has been debated for long. We
have been discussing about organizational transformation, innovation deficits in
the and missing the pace of social change for quite some time.

Ingredients for a resilient museum

Autonomy · Green Operations · Long-term funding · Informed decision-making · Innovation Focus · Funding for core activities · Open Structures · Skills development

NEMO
Network of European
Museum Organisations

Which are the basic ingredients to an agile, open, transformative organisation? On the table we find
- Autonomy…on organizational and individual level.
- Innovation-focus, pro-activity, and daring to experiment (and sometimes…to fail!).
- Long term funding for core activities: Hardly any of those ingredients are part of the public funding logic. On the contrary: We have seen large amounts of money going into digitization projects for a great virtual tour in a museum (and don't get me wrong, I love that!), but hardly any support for infrastructure building…or maintenance.
Services, such as further training or skills development, or funding to develop a comprehensive digital strategy are hardly supported.
- Informed decision-making: the sector needs to get better at collecting and analyzing relevant information about their customers. We need sound metrics and methods to understand visitor needs better, especially in the digital world, where museums are competing with everybody else online – including the big and most user-friendly applications link amazon or google
- Green operations – talking about resilience for the future, the maybe most important paradigm shift is having sustainability at the core of our

development, for our planet and for society. heritage can help work for that. We have to make sure that we become green in our own operations, and in that context to understand that the message that we convey to our visitors has to be reflected in the museums, the site itself, be it in the functioning of the museum café or shop, or the diversity of museum staff, or in choosing the appropriate donors.

- We have to use our capacity as advocates for a green and sustainable future, because we have the capacity to break down very complex issues into understandable nibbles through exhibitions and programmes, and to allow time and space for reflection.

- To make a long story short: museums need support less for project-and output-driven one-off initiatives, they need support for long term, sustainable, organizational adaptation, and change.

RECOMMENDATIONS TO POLICY MAKERS

Developing skills, support organisational change and sustainability

- Invest **in** and **develop museums' skills and knowledge to manage organizational change** and keep up with communities' needs

- **f**or digital development, a **strong focus on the basics, the development of digital skills and infrastructure of museums**, including development of sound metrics and methods to track digital activities and success

- **invest in green transition** and development of comprehensive frameworks to measure sustainable operations, and **acknowledge the role heritage can play in raising awareness**

21

NE MO Network of European Museum Organisations
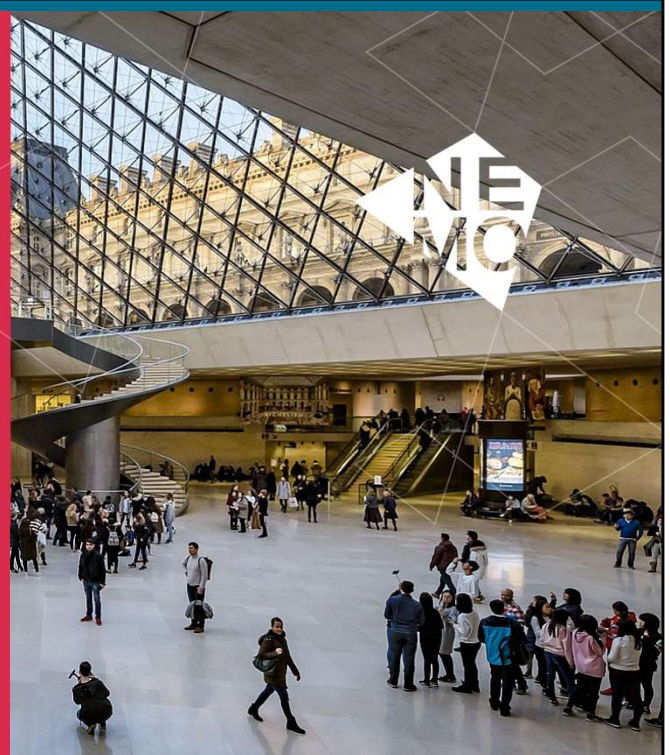
This builds the bridge to two concrete recommendations for decision makers
As you can see, all point lead to the strengthening and update of our core activities through informed decision making, skills development and appropriate infrastructure for that, whether that related to our work with communities, in the digital sphere or for our sustainability.

And with this pledge I would like to close and I am looking forward to the coming discussions!

Thank You!

Julia Pagel | Network of European Museum Organisations

Twitter: **@JuliaPagel2**
Facebook: **@nemooffice**
LinkedIn: **www.linkedin.com/company/nemooffice**

pagel@ne-mo.org
www.ne-mo.org