



Survey on the impact of the COVID-19 situation on museums in Europe

Final Report

Introduction

The global Coronavirus crisis has had and will have an unprecedented impact on museums all over the world. In order to better understand the situation over the past weeks confronting museums, particularly in Europe, the [Network of European Museum Organisations](#) began documenting and analysing the economic impact on museums, while also demonstrating digital opportunities that museums have seized and continue to make full use of.

Museums have been quick and proactive in their response to the pandemic, shifting their focus to addressing needs within their communities in this situation. Museums supported the provision of medical materials and donated masks and gloves to hospitals. Museums contributed to the reduction of isolation and loneliness by increasing their digital services to engage people staying at home. Museums stimulated a sense of trust and community by requesting people to share objects and stories to preserve and learn from this moment. Museums maintained their informal education role remotely by providing quizzes, games, and educational materials online.

The report has analysed nearly 1,000 survey responses collected between 24 March and 30 April 2020 from museums in 48 countries, the majority from Europe. The survey findings result in recommendations for immediate action, for mid-term considerations and for long-term strategy urging:

1. Economic support for museum operations;
2. Investment in digital cultural heritage; and
3. Making museums fit for crises

that NEMO is directing to stakeholders at all levels. There is no fast track back to normal - rather than making a return to normal our goal, we must learn from this crisis in order to effectively respond, mitigate, adapt and integrate.

NEMO's recommendations join a chorus of others who have recognized for a long time already that our systems require review and restructuring in order to weather future storms.¹ Moving forward, new measurements of success should be considered in concert with the ways in which museums responded with solidarity and support for their communities mid-crisis. We must seize this moment of reflection and finally take the courage to look beyond our standard tools of assessment and consider the eudaimonic value of

¹ A great example is Amsterdam's planned post-pandemic embrace of a new economic model:
<https://www.theguardian.com/world/2020/apr/08/amsterdam-doughnut-model-mend-post-coronavirus-economy>
(accessed 11 May 2020)

museums,² especially while public health and safety will necessitate reigning in short term economic returns and require investing in future crises preparation.

NEMO would like to thank all contributing museums for helping to capture the impact of the crisis on the sector, as well as partners and colleague networks for promoting the survey through their individual channels. The analysis and interpretation of the data would not have been possible without the collaboration of Trilce Navarrete, specialist in the economics of digital heritage from the Erasmus University Rotterdam.

Summary of Survey Findings

1. **The majority of museums in Europe and around the globe are closed.** A survey of NEMO shows that many museums in Europe are opening their doors to the public again in May/June 2020³. Museum operations as we used to know them, however, will not be the same for a long time.
2. **3 out of 5 museums reported losing an average of €20,300 a week due to closure and travel halt.** While some museums have found their budget minimally impacted as of yet, many museums reported a considerable **loss of income of 75-80%, with larger museums and the museums in touristic areas reporting weekly losses adding up to hundreds of thousands of Euros.**
3. The majority of museums in Europe have **not had to lay-off staff yet. However, 3 out of 10 museums have put on hold contracts with freelance workers and 3 out of 5 museums have stopped entirely their volunteer programmes.**
4. Relying on a diversified spectrum of income sources makes museums agile and resilient. However, private income sources are more susceptible to market changes. **The survey showed that museums relying mostly on private funding reported greater vulnerability in the past weeks.**
5. Museums are **directly and heavily impacted by the global decrease of tourism, beyond the immediate crisis.** OECD has predicted a 50-70% decrease in global tourism activities.⁴ Considering that cultural tourism accounts for 40% of all European tourism and 4 out of 10 tourists choosing their destination based on its cultural offering⁵, **a long-term dramatic decrease of income through museum tickets, shops and cafes is expected to last until the end of 2020.**
6. **4 out of 5 museums have increased their digital services** to reach their audiences, often by having staff take over new tasks to cope with the circumstances. Almost half of the respondents stated that their museum is now providing one or more new online services.
7. **2 out of 5 museums reported an increase in online visits, ranging between 10 to 150%** during the reporting time.

² Briguglio, Marie: Museums, Markets and Eudaimonia - Economic Insights for Museums; 2019 <https://www.ne-mo.org/news/article/nemo/museums-positive-impact-across-sectors.html> (accessed 11 May 2020)

³ <https://www.ne-mo.org/news/article/nemo/an-interactive-map-by-nemo-shows-museum-re-opening-plans.html> (accessed 12 May 2020)

⁴ [G20 Tourism Ministers Extraordinary Virtual Meeting on COVID-19](https://ec.europa.eu/growth/sectors/tourism/offer/cultural_en) (accessed 6 May 2020)

⁵ https://ec.europa.eu/growth/sectors/tourism/offer/cultural_en (accessed 6 May 2020)

8. Without additional input, there is no increase in output: Our survey has shown that the **museums that were able to change staff tasks and/or add resources were also able to increase their digital services and observed an increase in their online visits.**
9. People seek museums because of their education and collections related content. Museums reported that next to social media, both **educational and collections related materials**, including video and film content, **were most popular** with online audiences.
10. This survey has evidenced that museums online are important extensions and complements of physical museums, but that a **sound metric to benchmark online visits is missing.**

Recommendations

The implications of the “new normal” will occupy museums and museum professionals for months to come and will touch nearly every aspect of museum work. Current discussions include identifying elements from the current experience that can be beneficial and help to transform museums into agile responsive members of their communities. The changing context calls for stronger investments and revised measures of success.

Economic support for museum operations

- **NEMO asks for adequate support provided by European, national, regional and local bodies to mitigate losses of museums all over Europe**, to guarantee salaries of staff members, to ensure the maintenance of quality core activities through projects and continuous investment in additional actions of museums to connect people to their collections.
- Museums will suffer from income losses and changed visitor behaviour related to the pandemic even after the first immediate crisis is over, due to the considerable decrease in global tourism and new health security measures representing considerable additional costs. **NEMO urges governments at all levels to support museums and close the gap of income losses, enabling them to keep their staff and structures alive during these challenging times. In addition, governments must support ongoing adaptation of museums by providing the resources required by a new post-pandemic environment.**

Investment in digital cultural heritage

- NEMO calls on stakeholders at all levels to **acknowledge that digital cultural heritage and digital engagement have demonstrated its value** in the past weeks by bringing people together, encouraging creativity, sharing experiences, and offering a virtual space to build ideas collectively.
- **The acknowledgement should be translated into investments in digital services and infrastructures in the future.** Considering digital services and activities of museums together with the engagement of digital audiences as factors of success in assessment frameworks has proven essential best practice.
- **Harmonised metrics to measure online visits** can facilitate benchmarking and assist decision-making and resource allocation. Museums lag behind in the digital literacy transformation: Museums have

done visitor research and analysis on exhibitions and educational programs onsite, they should be provided with skills and resources to do so in the online environment.

- **Invest in what makes museums unique: their collections and rich content.** Fun, engaging and creative digital offers will be part of museums' digital future. This requires adequate resources to enable museums to compete with other digital services and provide state of the art cultural experiences online.

Making museums fit for crises

- NEMO asks governments to immediately **support museums in preparing their re-opening to the public, equipping the museums with adequate health safety measures and infrastructure.**
- Museums and society at large are obliged to work for **stronger crisis awareness**, preparedness, control and response methods in the future, including emergency plans for both the public and internal work processes.
- New working methods and more flexible work responsibilities in museums that have been sparked by this crisis should be considered for the future, including **more flexible work methods and structures in museums in general.**
- Museums are not islands, like any other work, the success of museums happens in a global context. **In times of crisis it is most important to support transnational collaboration**, to learn from each other, to benchmark, and to create a stronger voice for common concerns. Networks are an important platform for this.

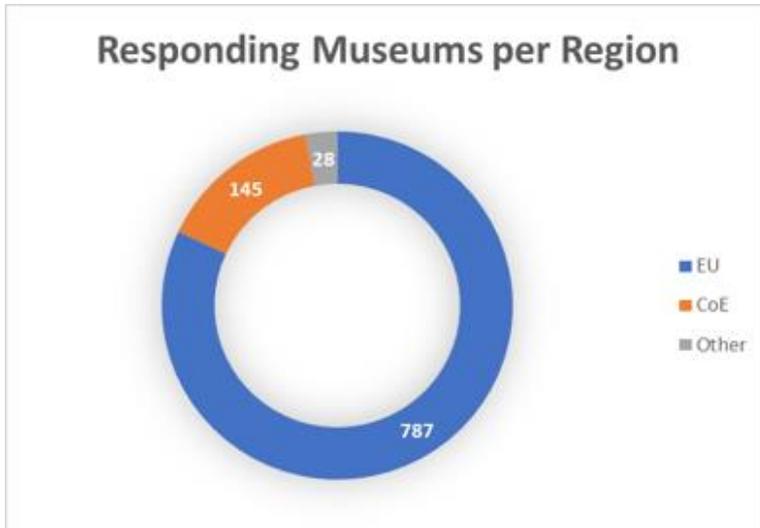
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I. General Overview

i. Overview of responding museums

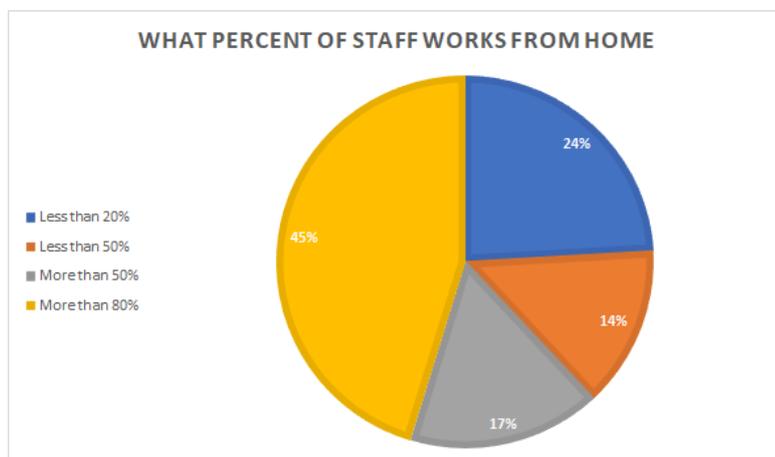
961 responses have been collected and analysed from 24 March - 30 April 2020. Responses came from 48 countries in total, including all 27 EU Member States.



Most museums around the globe are closed (93%). Many museums in Europe are opening their doors to the public again in May/June 2020⁶.

ii. Museums work at home

A total of 930 museums reported the percentage of their staff that has been working from home. **Almost half of the respondents report that more than 80% of their staff has been working from home.** 155 report that more than 50% of their staff has been working from home, 130 report less than 50%, and 224 museum professionals responding to NEMO's survey reported that less than 20% of their staff has been working from home.

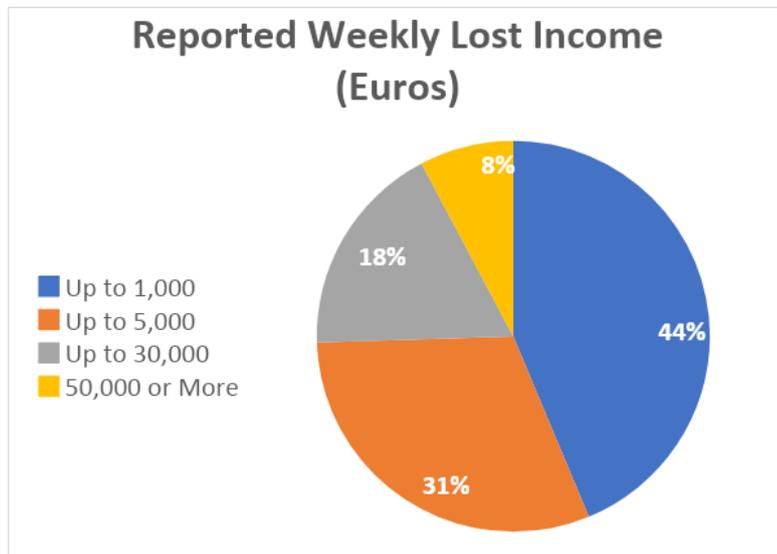


⁶ <https://www.ne-mo.org/news/article/nemo/an-interactive-map-by-nemo-shows-museum-re-opening-plans.html>
(12 May 2020)

II. Economic Impact

i. Income loss

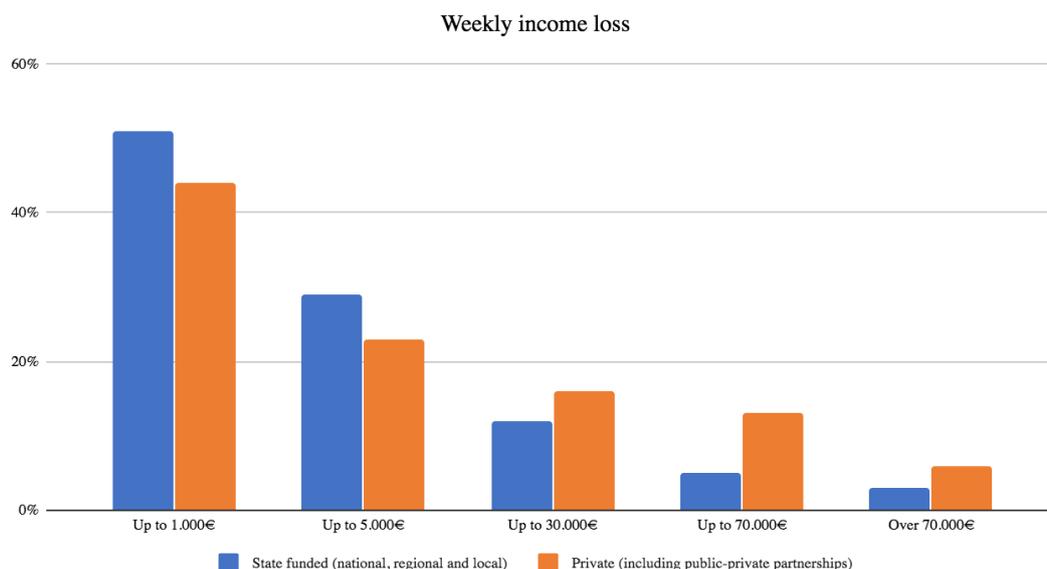
Income loss results from lost revenue for tickets, shops, café and other services. From the museums providing data, 44% are losing up to 1.000 Euro per week. 31% of the museums lose up to 5.000 Euro per week, 18% lose up to 30.000 Euro per week, and 8% lose over 50.000 per week.



The big museums, such as the Rijksmuseum, the Kunsthistorisches Museum Vienna, the Stedelijk Museum **lose between 100.000 Euro and 600.000 Euro per week.**

Museums in touristic regions are looking at an exceptional income loss of 75-80% due to the complete halt of tourism and the potential continuation of restrictions into the summer period.

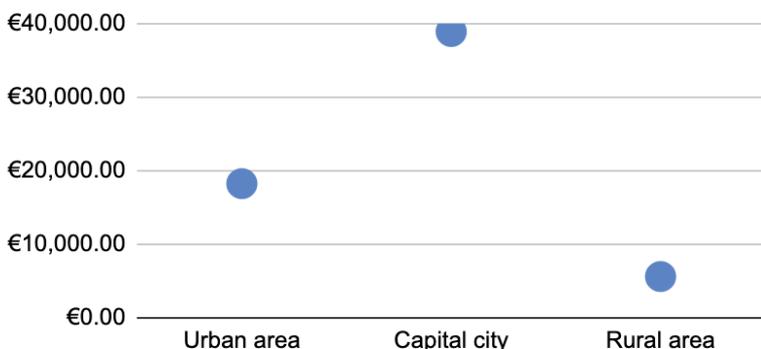
Private museums typically draw the biggest part of their revenue from sales. Some of those museums indicated that their **entire budget for the period over which the museum is closed is lost.** Some of the most impacted museums fear that they will eventually have to close permanently.



Museums in capitals are the most severely affected most by loss of income, which is not surprising, as they are the ones benefiting most from tourists and a greater population density in general.

Weekly losses

Average by location



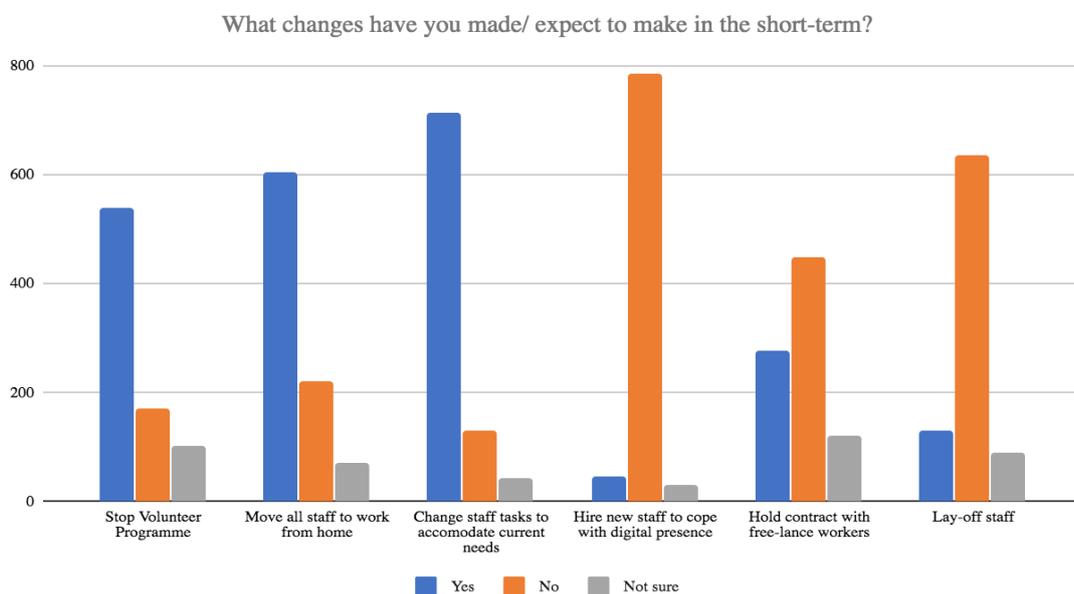
ii. Other activities

Lending and borrowing are affected: most international exhibitions in 2020 are postponed, since international transports and loans cannot be planned for the next months (lack of transport services availability, partially closed borders, lack of human resources to handle loans).

Many museums have reported that the projects which have been placed on hold are chiefly **future long-term infrastructure projects**, which will be wholly re-considered due to possible crisis-related budget constraints.

iii. Impact on staff

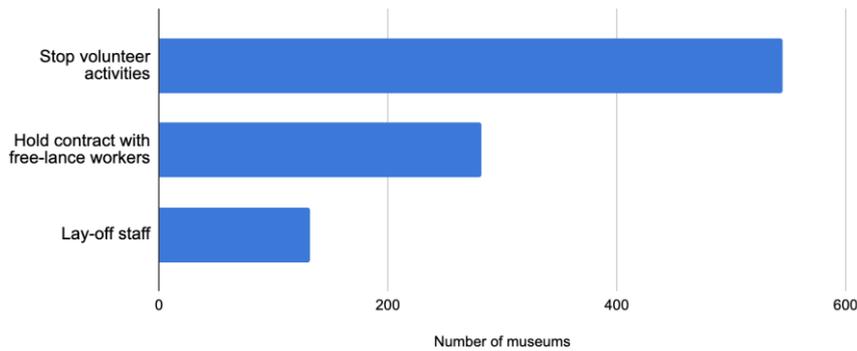
The good news is that the **majority of museums have not had to lay-off staff**. Around 70% of the museums report that they have changed staff tasks to accommodate current needs.



However, a majority (73%) of museums reported **having to reduce their expenses by reducing costs related to staff and to volunteer programs.**

Museums cutting resources

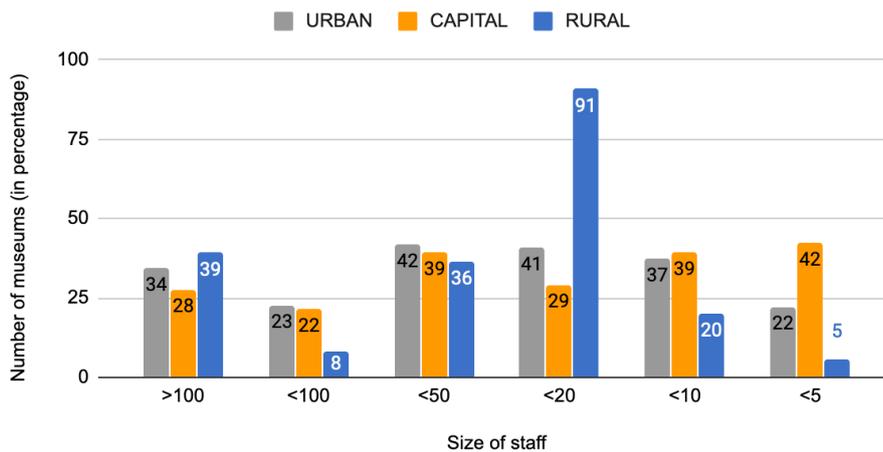
Staff and services



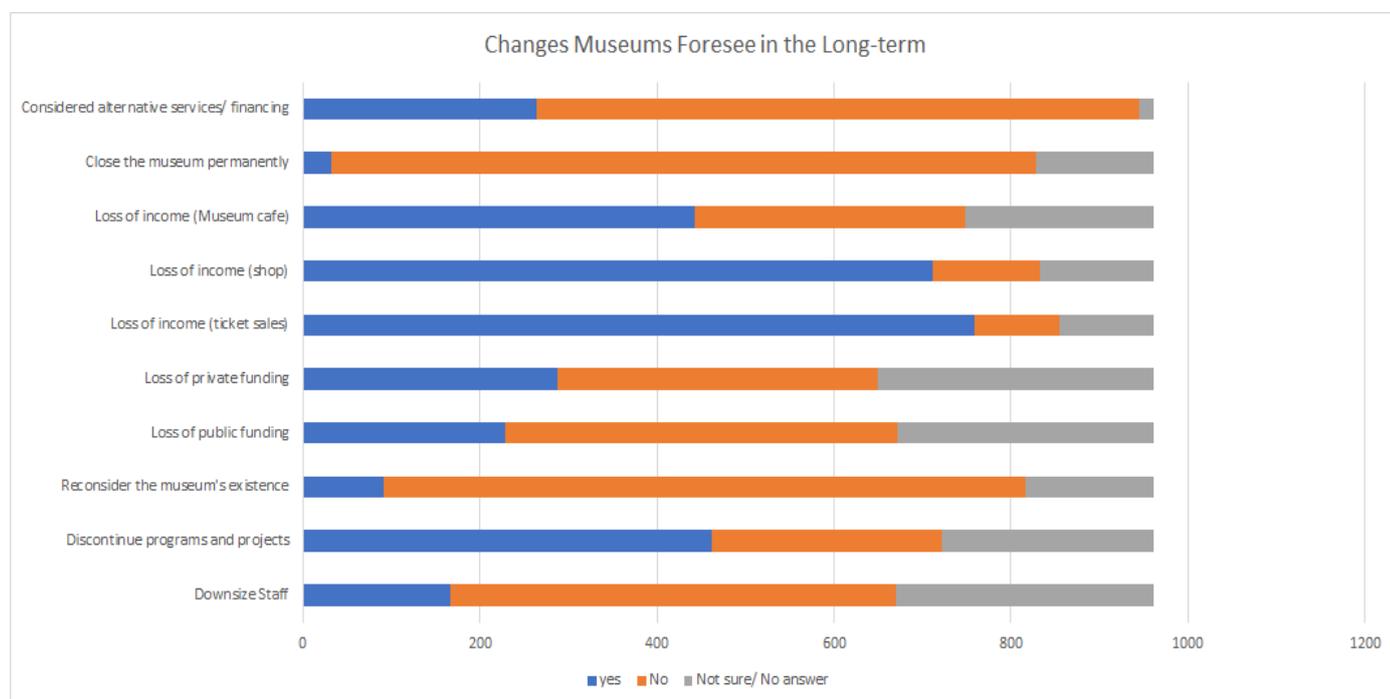
The **reduction of staff (by halting free-lance contracts and laying off staff)** was most noticeable for small to midsize rural museums.

Staff downsize

By size and location



When asked about the **long term effect** that museums expect from the past weeks, respondents foresaw that the loss of income would continue in the long term. **50% of the respondents expect discontinuation of specific programs and projects in the future.** Around 25% of the responding museums reported that they expect to reduce their staff in the future.



iv. Alternative funding resources

Many museums report current or future access to **national coronavirus emergency funding schemes**. These schemes mostly include the coverage of salaries and/or lost income.

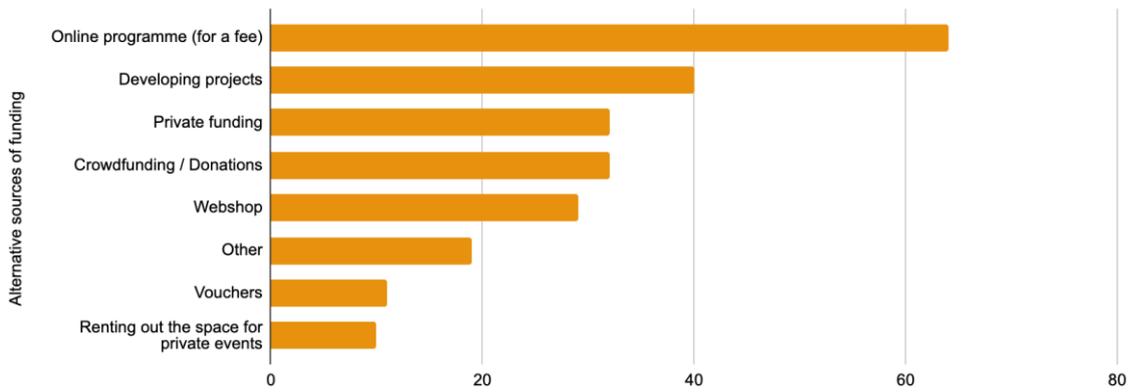
A majority of respondents from 15 different countries reported that discussions for an emergency culture fund were underway, while majority responses from 12 countries indicated that a fund was already in place. A majority of reports from 21 countries revealed that there was no emergency funding scheme available for cultural institutions.

Emergency funding schemes differ from country to country: some cover publicly funded organisations only, some apply only to freelancers. In general responses about existing funding schemes and their coverage have differed considerably, even within the same countries. This might be related to various reasons, among them the short time period in which the schemes were set up, or insufficient communication about the details of the funding scheme provided.

Only a few museums (15%) are considering looking for **alternative funding sources** to cover their lost income. Of those considering, museums reported mostly considering charging for their online programming (7%).

Number of museums seeking additional funding

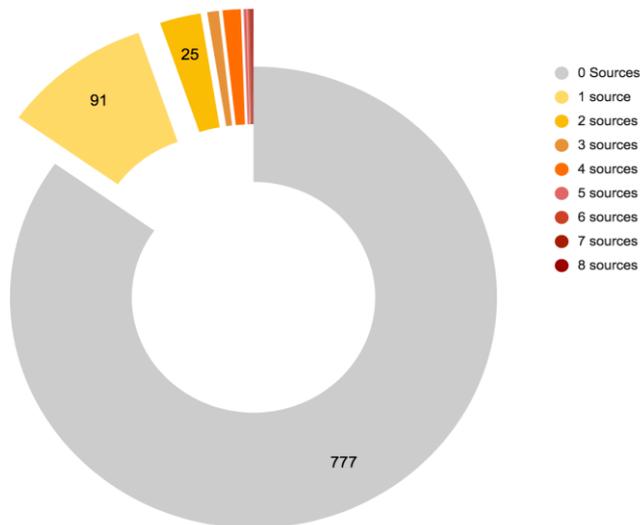
Per source



Few museums reported considering looking into various alternative resources of funding parallelly.

Number of alternative sources of funding

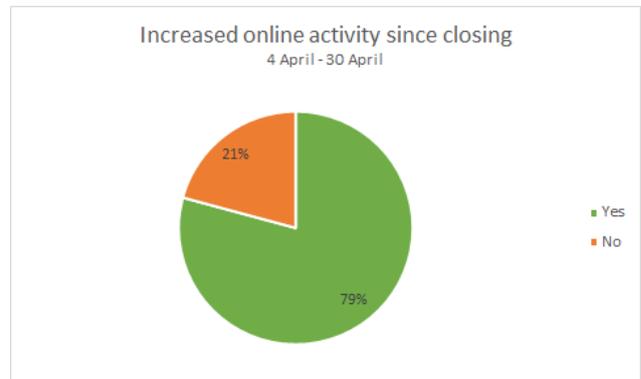
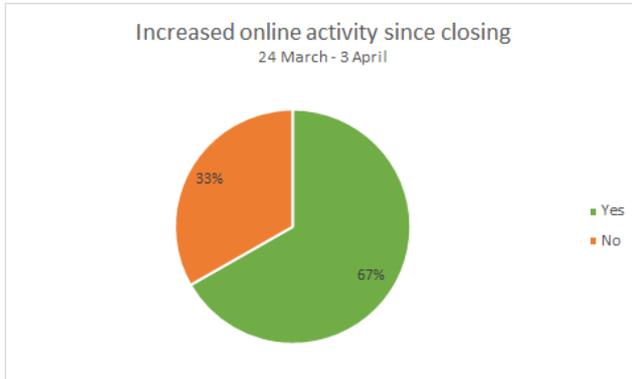
Number of museums



III. Digital Activities

i. Online presence

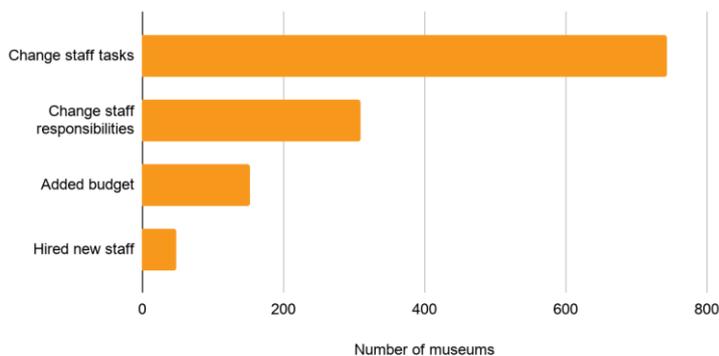
Almost **70% of the museums increased their online presence** since they were closed due to social distancing measures. **After 3 weeks of closure to the public, already 80% of the museums had increased their online activity**, reacting to the general increased visibility of digital cultural heritage on the internet.



Almost **80% of the museums have changed staff tasks to accommodate current needs**, while over **30% of the museums have changed staff tasks dedicatedly to add to the digital team**. 16% of the responding museums have increased their budget for online activities.

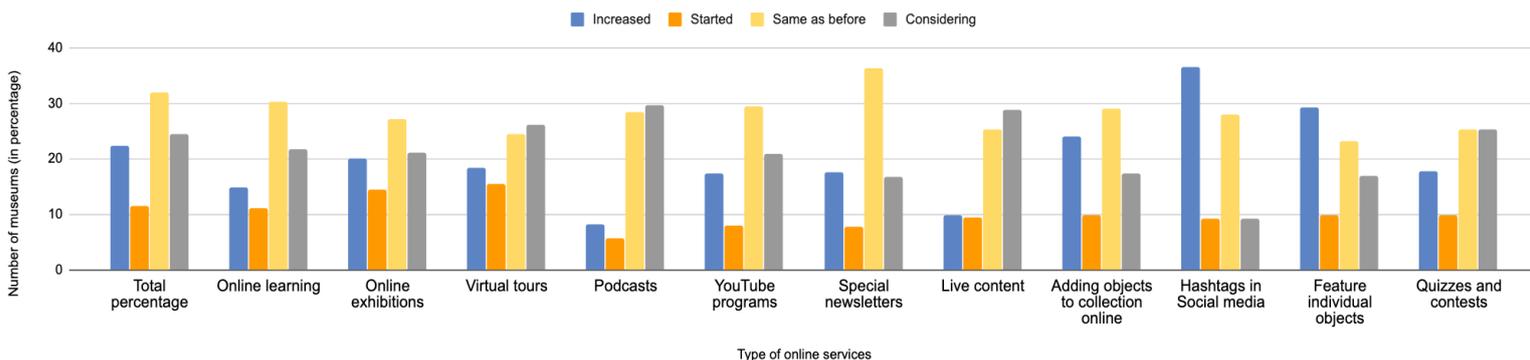
Change in use of resources

Increase resources for digital activities



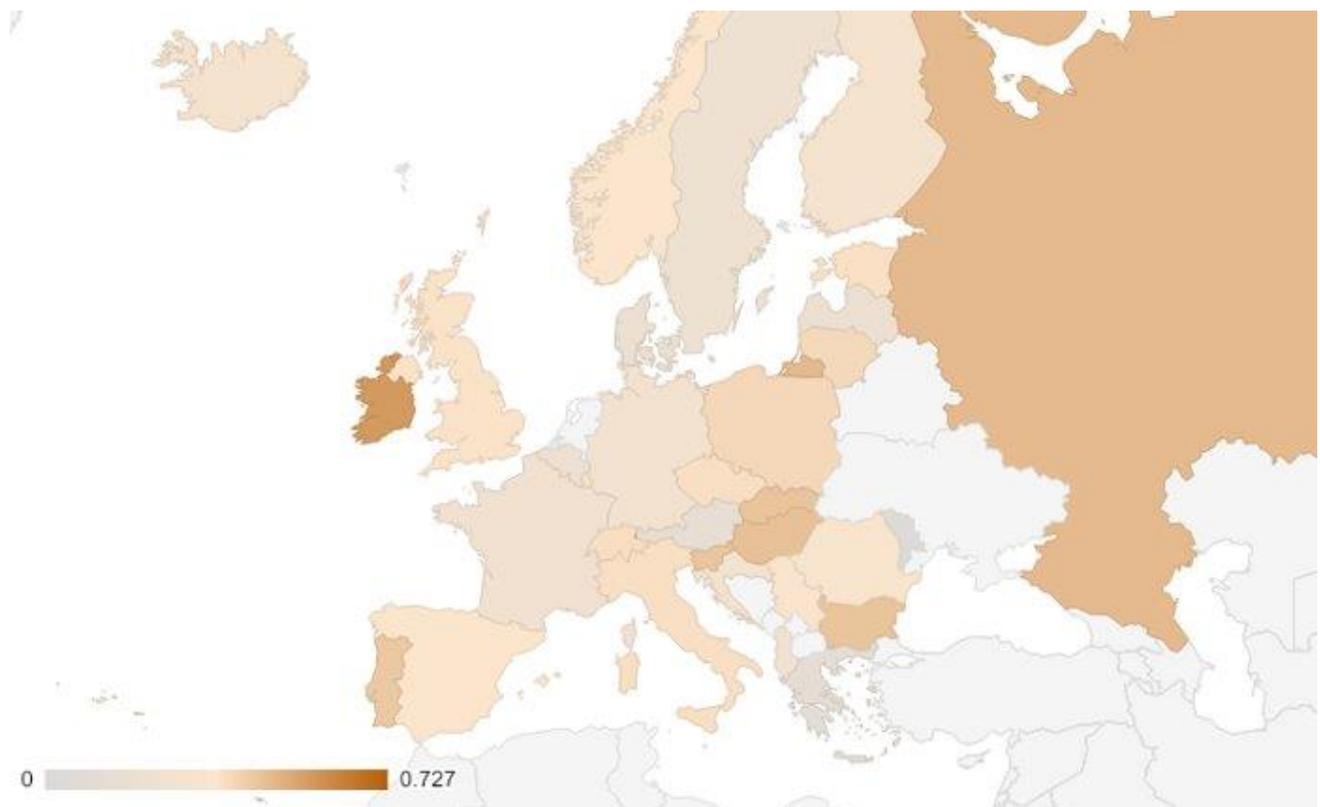
Looking at both the increased and initiated digital activities, museums are using **social media more than before**. In addition, **virtual tours and online exhibitions have increased**.

Online service activity: Increased, Started, Same as before or Considering



Considering the amount of new and increased digital museum services by country, **certain countries had a greater diversification of the services provided.** The map depicts countries with the most varied digital services by shade, with the darkest shades coinciding with the greatest variety of new or increased online services.

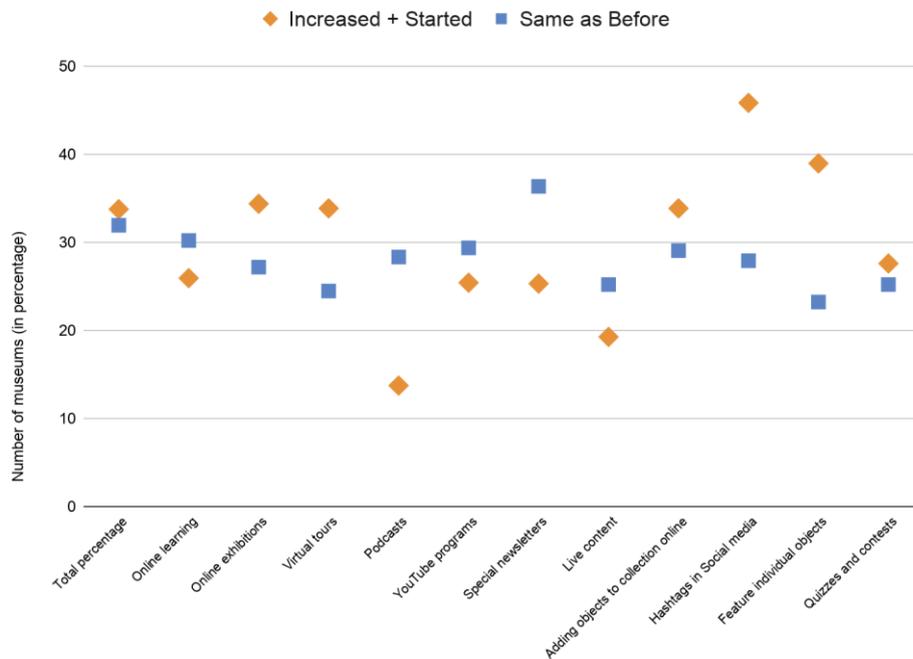
The countries reporting lower rates of increased/initiated services may reflect general larger digital offers available to the public. That is, the lighter shade does not represent a lack of digital response to the crisis, but rather the darker shade signals a greater diversification of digital activity during the crisis.



Increased 0 services online - Increased up to 10 services online

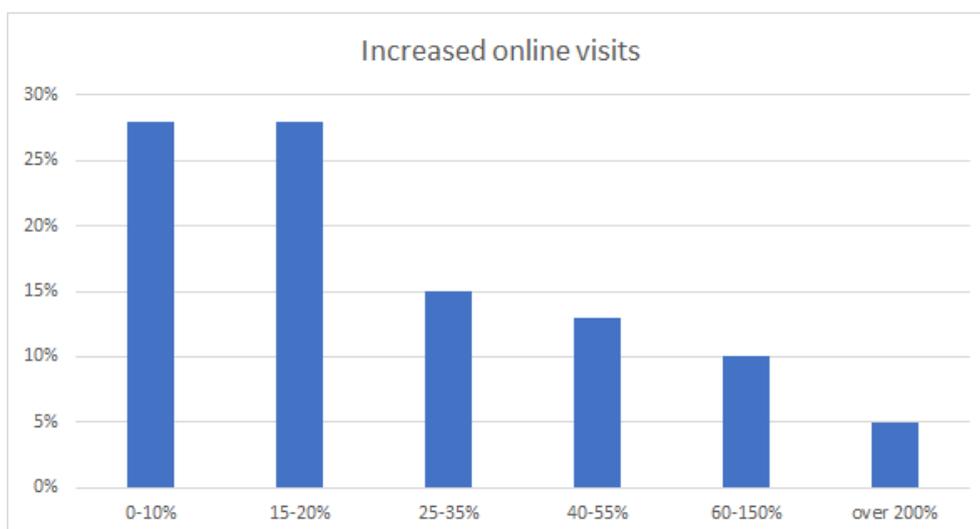
Responses show that **online services that require less additional financial resources and/or experience and skills are the ones increasing the most** (hashtags on social media or activities around an already existing online collection), while **services that require time, resources and skills (podcasts, live content, online learning) are the ones that increased the least.**

Online Service Activity



ii. Visitor increase

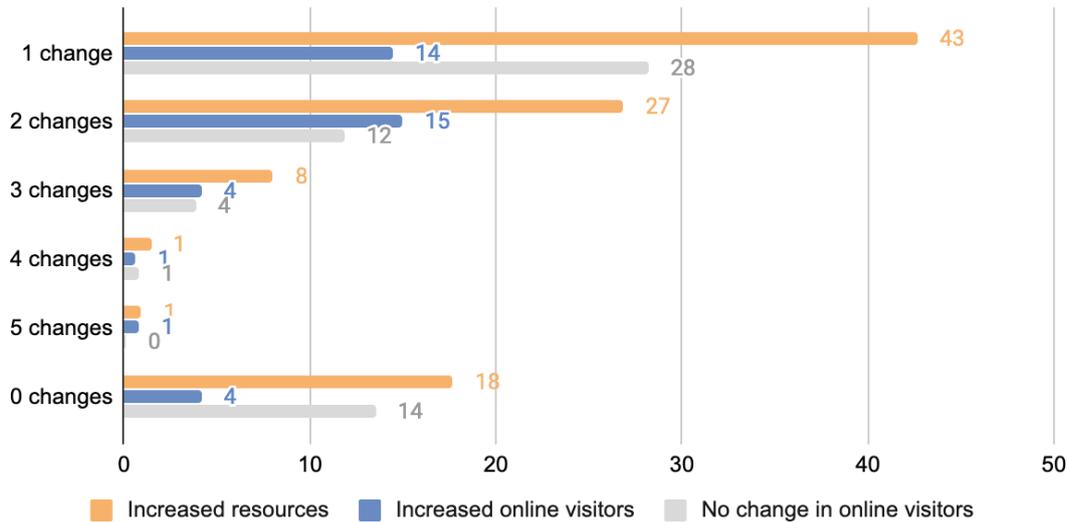
More than 40% of the survey respondents noticed increased online visits to their museum since it has been closed. Of those museums reporting increased visits, more than 25% responded they have increased their online visits by 0-10% and by 15-20% per week, while 15% of the museums claimed a 25-35% increase. 13% reported an increase of 40-55% and 10% of the responding museums reported an increase between 60% up to 150%. 5% of the museums even reported an increase of over 200%.



Not surprisingly, those museums that were able to **reallocate resources also noticed an increase in online visits**. The museums reported an increase in online visitors, which generally responded to the increase in digital services provided.

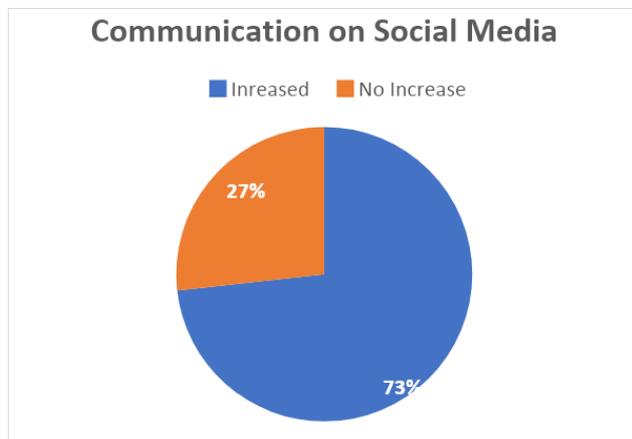
Change in input and resulting outcome

Increased resources and increased visits



iii. Social media use

Over 70% of respondents reported their museum has increased social media activities.



Almost 80% of the respondents state their museum uses Facebook mostly, with almost 20% using Instagram as the platform of choice for their activities.

MOST ENGAGING SOCIAL MEDIA

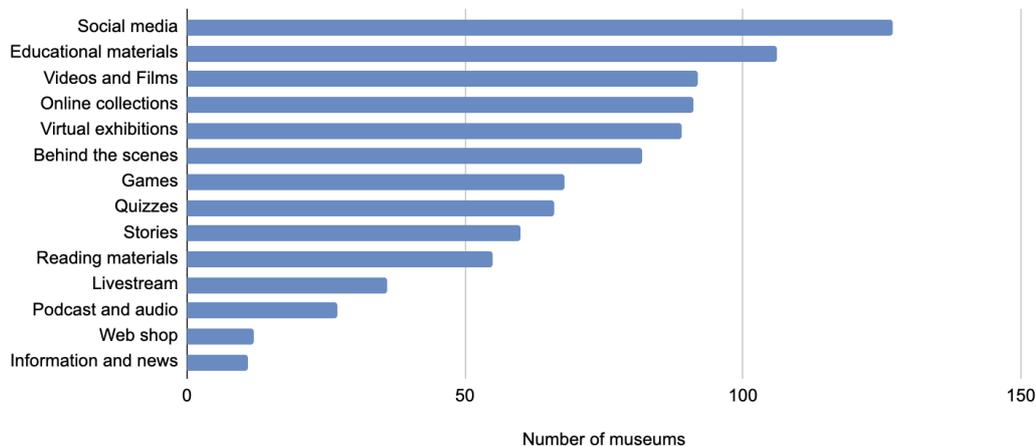
Facebook Instagram Twitter LinkedIn Youtube Other/ NA



iv. Popularity of online services

Museums reported that next to social media, **online services such as educational material are most popular** with online visitors, followed by videos and films, viewing the collection, and behind the scenes materials.

Popularity of museum online services



IV. Best Practice Examples

i. Immediate responses

Stiftung Preußischer Kulturbesitz, Berlin, Germany

As cases were rising and the availability of personal protective equipment was becoming a concern, the Prussian Cultural Heritage Foundation **donated protective clothing and disinfectants**, materials otherwise used to protect restorers. The equipment was sourced from the National Museums and the Berlin State Library and donated to the National Association of Statutory Health Insurance Physicians.



ii. Digital initiatives

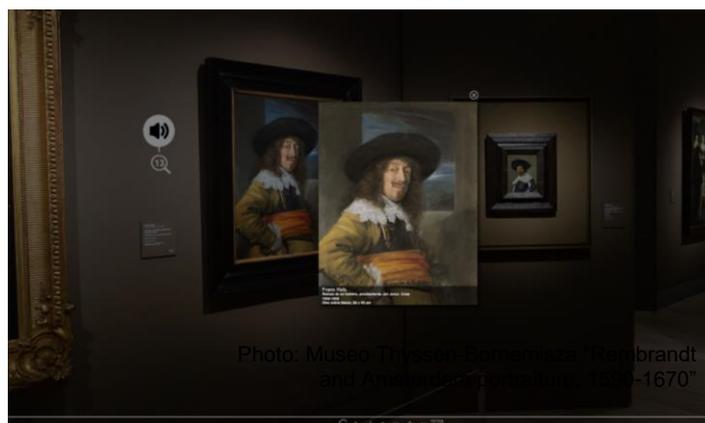
MuDA - Museum of Digital Art, Zürich, Switzerland

The MuDA, together with its partners, was quick in offering live streamed **Creative Corona Classes**. The classes were grouped according to target group (age, language, keywords) and people could easily join by clicking on the class.



Museo Nacional Thyssen-Bornemisza, Madrid, Spain

The museum swiftly adapted the new exhibition “Rembrandt and Amsterdam portraiture, 1590-1670” to a digital format. A curator led audio guide accompanies the [virtual museum visit](#) to create an immersive experience with added value. The museum has noted a 56% increase in online visits between 13 March - 13 April 2020 compared to the same period in 2019.



iii. Post pandemic approaches

Museums are re-opening to the public with directive hygiene posters and established protocols regarding disinfection, distancing, and ticketing procedures. Some innovative ideas include providing art-inspired face masks or redesigning a ‘socially distanced’ version of the museum logo. For information on when museums will be open and more examples of the approaches and measures being taken, peruse our [map of museums opening across Europe](#) and our [webpage dedicated to museums during COVID-19](#).

Latvian Museum Association

The [Latvian Museum Association](#) has initiated a campaign to encourage visitors to return to the museum, assuring them of the additional measures taken on behalf of public health and wellbeing. The campaign “TiekamiesTagad” (“Let’s meet now!” or “See you now!”) is accompanied by the internationally understood symbol for “Fragile: Handle with care”. The theme of this visual will be maintained in the hygienic and distancing posters displayed throughout Latvian museums.



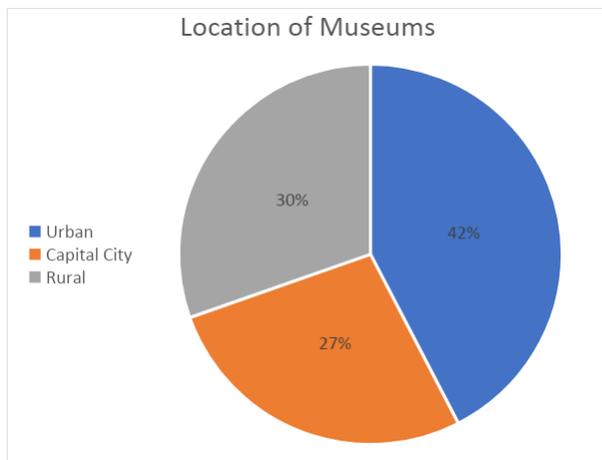
“Museums take the requirements of the sanitary protocol very seriously. However, the chosen hashtag #TiekamiesTagad also demonstrates that museums are keenly looking forward to reconnecting with their visitors in person [...] We offer the hashtag #TiekamiesTagad not only to museums, but to every organisation that will reopen its doors to the public.”

-Elīna Vikmane, head of #TiekamiesTagad campaign

V. About the responding Museums

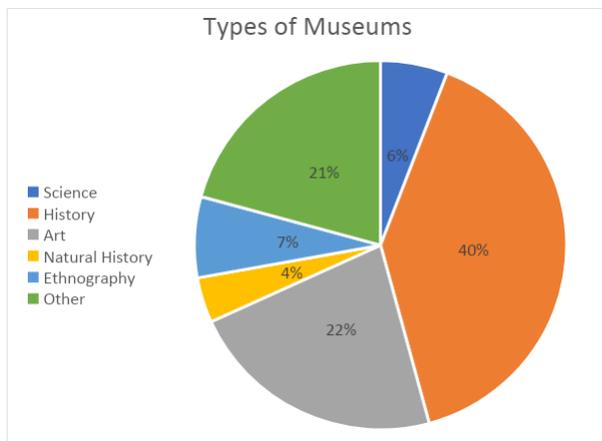
Location of the museums

42% of the responding museums are located in an urban area. 30% are located in a rural area. 27% are located in a capital city.



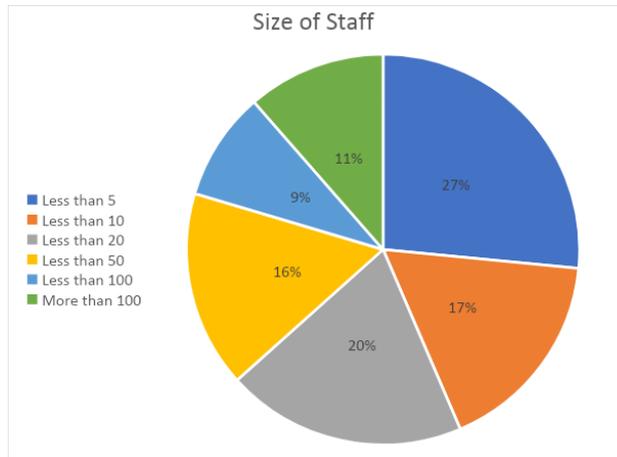
Museum Type

The majority of respondents work in historical museums (40%), while 22% of the respondents work in art museums.



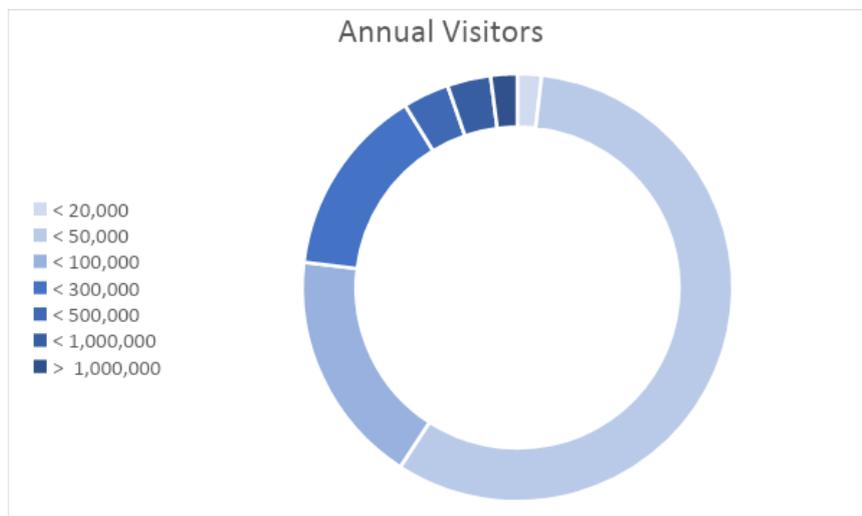
Size of the museum (by staff)

More than 40% of the responding museums have less than 10 staff members. While 11 % of the responding museums have more than 100 staff members.



Size of the museum (by annual visitors)

1% of the respondents reported welcoming less than 20,000 visitors to their museum annually. A majority of respondents (58%) reported that their museum welcomes up to 50,000 visitors annually. This is followed by 18% of respondents who estimated up to 100,000 annual visitors and 14% estimating up to 300,000. A tally of 500,000 annual visitors was reported by 4% of responders, 3% calculated 1,000,000 and 2% claimed more than 1,000,000.



Total number of museums and originating country

The 961 respondents completing this survey originated from

Members States of the European Union

Austria: 124, Belgium: 42, Bulgaria: 3, Croatia: 13, Cyprus: 4, Czech Republic: 23, Denmark: 19, Estonia: 15, Finland: 38, France: 30, Germany: 75, Greece: 24, Hungary: 15, Ireland: 5, Italy: 33, Latvia: 32, Lithuania: 33, Luxembourg: 10, Malta: 7, The Netherlands: 30, Poland: 16, Portugal: 26, Romania: 28, Slovakia: 2, Slovenia: 16, Spain: 62, Sweden: 62

Member States of the Council of Europe (excl. previously mentioned Member States of the EU)

Albania: 3, Azerbaijan : 2, Georgia: 14, Iceland: 10, Liechtenstein: 1, Moldova: 2, Norway: 60, Russia: 11, Serbia: 20, Switzerland: 5, United Kingdom: 17

Other Countries

Brazil: 1, Canada: 1, Fr. Polynesia: 1, Iran: 1, Malaysia: 1, Mozambique: 1, New Zealand: 2, Pakistan: 1, Philippines: 2, United States: 17

VI. Disclaimer and Photo Credits

Disclaimer

This report including the underlying data from the survey was gathered, analysed and interpreted by NEMO in collaboration with Trilce Navarrete, specialist in the economics of digital heritage from the Erasmus University Rotterdam.

Best practices included in this report were not chosen methodically and are only a few examples of many great initiatives undertaken by museums in response to the pandemic.

This was a voluntary survey, without traceability or accountability for the accuracy of statements from participating individuals, nor verification of their profession. Any identifying attributes of the respondents (name of museum) shall remain private under the management of NEMO. The results are a partial view yet capture an international perspective of the current state of the museum sector. The following describes some of the harmonizing efforts undergone on the raw results of the online survey concerning museums during the COVID19 pandemic:

- Country names were harmonized; (i.e. "GREECE" became "Greece" and "Netherlands" became "The Netherlands").
- Responses containing the dates of closure/reopening were adjusted in two ways. Dates which were incomprehensible (i.e. 01/00/0001) were deleted. Dates which were senseless as originally input, but which were both clarified with an adjustment of format, were adjusted (i.e. estimate reopening on "05/01/2020" is impossible, "01/05/2020" is reasonable).
- In the 'income loss' section, unknown currencies were deleted. Non-Euro currencies were transferred to Euro. Middle amount was taken from a range (i.e. "between 1,000 and 1,500" became "1,250").
- In the 'home office tools' section, answers such as "computer, phone, internet" were deleted.
- In the 'annual number of visitors' section, when answers did not suit the given parameters, they were altered to fit our format (i.e. "10,000" became "<20,000"). Incomprehensible responses were deleted.

While submissions and results are not guaranteed as representative of current circumstances in their respective localities, this report nonetheless offers a view into the perceived consequences and challenges faced by museums as well as their efforts to overcome them and serve their communities during a pandemic.

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