

COVID-19 CRISIS

Sector Research Findings

Summary Report

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INTRODUCTION & EXECUTIVE SUMMARY

Over the course of two weeks in March this year, the nation's museums and galleries closed their doors to the public, without knowing when or how they would be able to open them again. In the days that followed, it became clear that exhibition and education programmes, fundraising plans and community engagement programmes would need to be rethought – rapidly and radically – and that for the majority the financial impact would be serious and sustained. As public funding bodies moved quickly to support the worst hit, Art Fund were acutely aware of the need to adapt our own support to help as many museums as possible come through this crisis period. And so we asked museums and galleries to tell us how the Covid-19 pandemic had impacted their work and organisations, what they needed and how Art Fund could best help them.

The detailed results of two surveys, focus groups and a series of one to one conversations, conducted in partnership with Wafer Hadley, follow here.

We hope that there is much in here to inform and support the work of many agencies and funders. For Art Fund, some key themes have emerged: the future of collections and exhibition programming; the agile and adaptable digital skills and infrastructure needed to open up collections and reach audiences online now and in future; how to encourage visitors to return once museums reopen and the practical and financial challenges that accompany social distancing in museums; and how to support an expert and passionate workforce through a period of continued uncertainty.

The result of this survey will feed into our planning now and for the future to adapt our grant programmes in response to what we have learned, and will have more to say in June on what else we will be doing to help. In the meantime, many of our funding programmes remain open and flexible in this current crisis.

Our thanks go to the 427 museum directors and professionals who took the time to respond to our survey, participate in a focus group or one to one conversation. We are grateful to be a part of such a generous and collaborative sector.

METHODOLOGIES & RESPONSES

Art Fund's research was carried out between mid-April and the beginning of May 2020 and involved:

Two surveys

- 106 directors
- 321 museum and gallery professionals
- Representation from across all nations, scales and types of organisation

22 in-depth telephone interviews with museum and gallery directors carried out by the Art Fund team

Two focus groups

- Marketing / audience professionals
- Curatorial / collections professionals

This summary report draws together the findings from all three strands of the primary research.

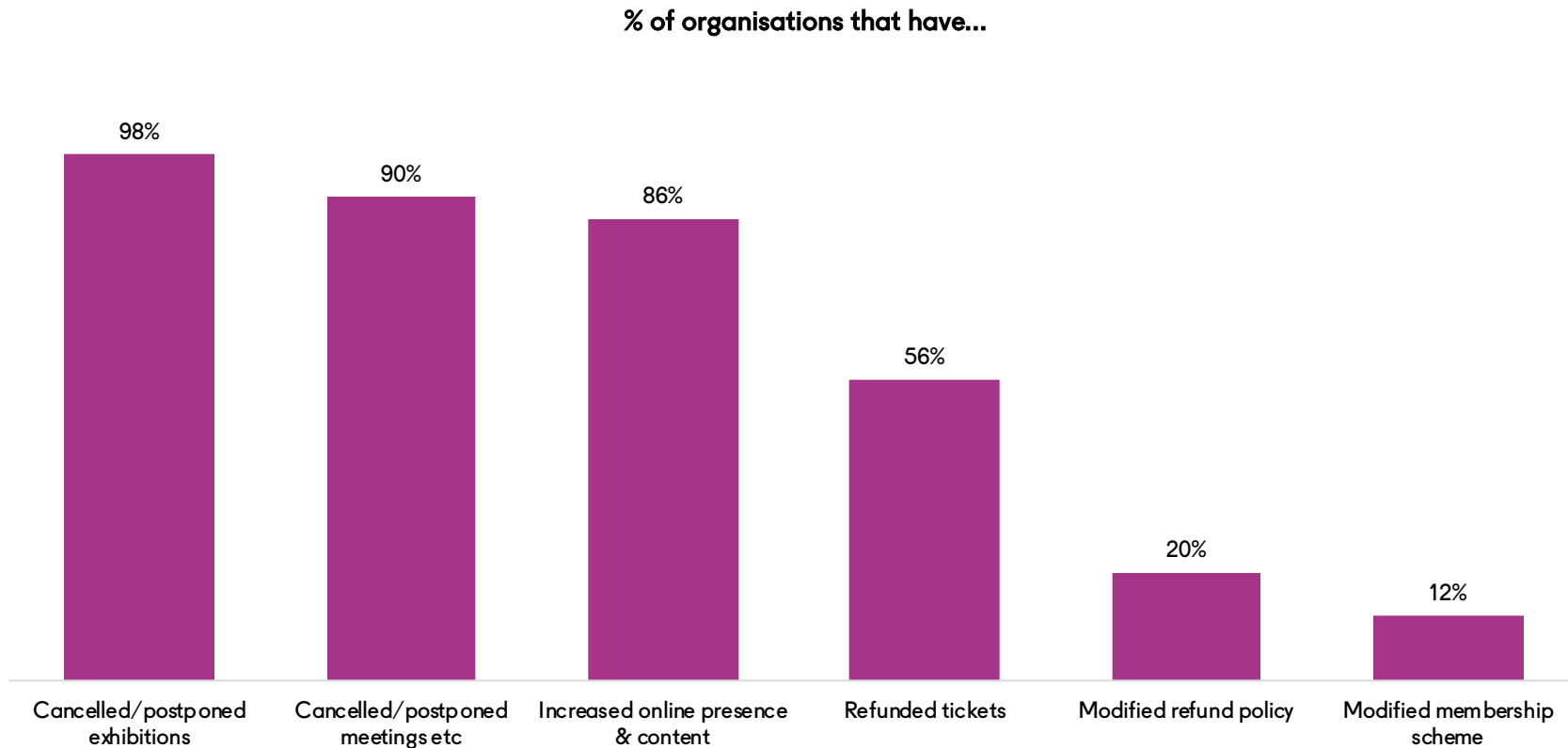
PART 1:
THE SECTOR LANDSCAPE
NOW

TAKING THE TEMPERATURE

- On a personal level, museum and gallery sector staff are remaining positive.
- More than 80% of Independents and Nationals have furloughed some or all staff. Only 5% of Local Authority services have done so.
- The vast majority of those still working are operating from home (82%).
- Just under half of those still working have seen their jobs change – with some roles narrowed and some broadened. Covering the work of furloughed colleagues is a common experience.
- Just over half feel they are getting the advice and support they need, but there are numerous examples of staff feeling abandoned by management and trustees.
- Furloughed staff can feel 'alienated' from, and 'unvalued' by, their organisations.
- Over half of staff are worried about their roles: this is more the case in Independents and Nationals than in Local Authority services.
- Overall more than half of staff are worried about the future of their organisations, but this is much higher in Independents (74%) and higher in Local Authorities (61%)



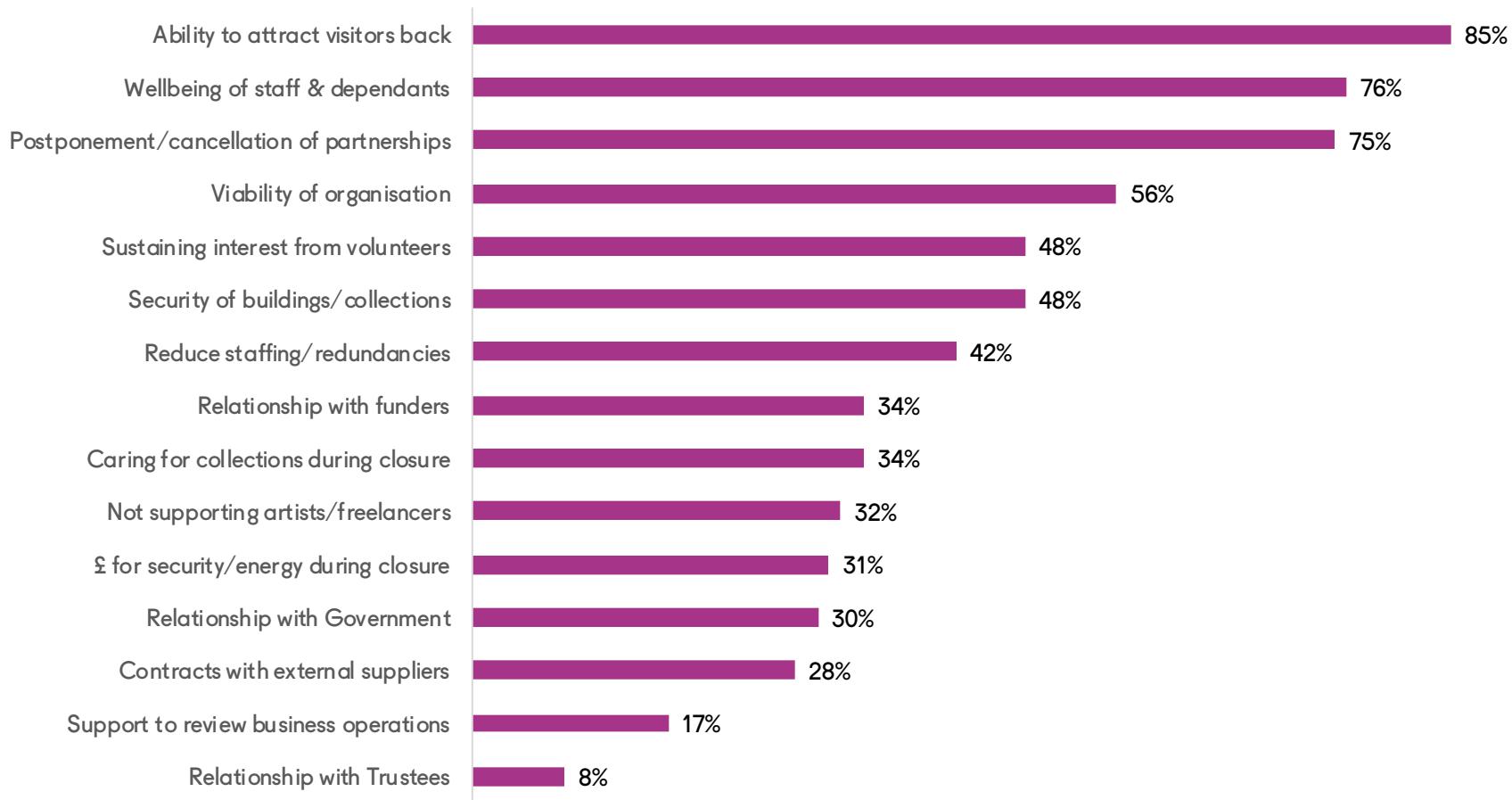
WHAT IS (AND ISN'T) HAPPENING



- Most exhibitions are postponed until 2021.
- Some venues are planning to open in late summer, some in autumn and some in the new year, but everyone is planning for multiple scenarios.
- Re-opening is likely to start first with outdoor areas and larger indoor spaces.
- The costs of managing social distancing in smaller spaces might outweigh the benefits of re-opening.
- The prospect of managing hygiene in highly interactive experiences is causing concern.
- The core audiences of many museums and galleries may be the slowest to return, especially older visitors, tourists, and schools.



DIRECTORS' KEY CURRENT CONCERNS



DIRECTORS' CONCERNS

- While simply attracting visitors back is the number one concern for most, others are more worried about how to manage visitor numbers in a socially distanced world.
- Very popular exhibitions will have to be postponed until social distancing measures are lifted. This will also have a knock-on effect on international tours, particularly for Nationals.
- Business plans are being revised and remodeled and may look very different. This experience is underlining the importance of agility.
- Senior professionals are looking further ahead to a radically-changed environment, anticipating the future challenges and opportunities.
- There will be less money available from philanthropy and sponsorship going forward.
- There will be more collections-based shows and fewer bought-in exhibitions and blockbusters over the next few years.
- There are opportunities to work in new ways as a result of the crisis: more people working from home, more video-conferencing, more sharing of staff and resources between organisations.

DIRECTORS' CONCERNS



I think there are three phases to this: the current lockdown phase; a second phase where we re-open to the public but in very different circumstances around social distancing; and a third phase where we adjust to a 'new normal' of considerably reduced budgets. Art Fund could really help with thinking about this latter phase: e.g. how do we work with fewer blockbusters; how do we change the model which assumed constant growth; how do we seize the opportunity to advance the green agenda; how do we collaborate more; how do we shrink our organisations to fit the resources.

(Chief Executive, Independent)

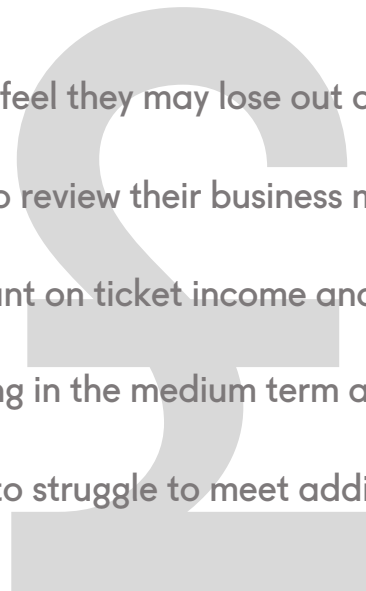
Particular challenges are going to be about recovery planning in the face of so many imponderables, foresight on audience behaviours, closing the gap between lost income during closure and beyond, and required expenditure. Art Fund could help by leading on the sharing of information across these areas and supporting financially. Important too will be how museums and galleries can reinvigorate their programmes through working with contemporary creativity, mindful of their responsibility to creative practitioners, and so financial support for this would be very helpful, as support for this sort of activity will be very challenging to find.



(Director, National)

THE FINANCIAL POSITION

- Large deficits and cash-flow issues are widely expected.
- Those with larger reserves are currently more protected, but because of this feel they may lose out on funding to more vulnerable organisations.
- A reactive 'survival mode' is common, but some are taking the opportunity to review their business models and 'reimagine'.
- Independents look to be hardest hit in the short term, particularly those reliant on ticket income and summer visitors.
- Local Authority services appear safer at present but are likely to be struggling in the medium term as the overall financial impact of the pandemic bites.
- Those with current large capital projects may be cushioned now but expect to struggle to meet additional fundraising targets.
- Anticipated capital projects may be in doubt.
- There is a strong feeling that not all museums and galleries can or will survive this.



THE FINANCIAL POSITION

// As a Local Authority museum, my sense is that the impact of Covid-19 is less likely to be immediate... we are, to an extent, cushioned financially within the council's annual budgeting processes and the council has pressing immediate concerns and priorities that it needs to focus on. However, the impact in the aftermath or medium term may be significant as the council reviews its priorities and deals with additional funding challenges... my concern is that Local Authority museums may therefore 'miss the boat' in terms of gaining relief support as the need is not immediately felt.

(Curatorial/Collections, Local Authority)

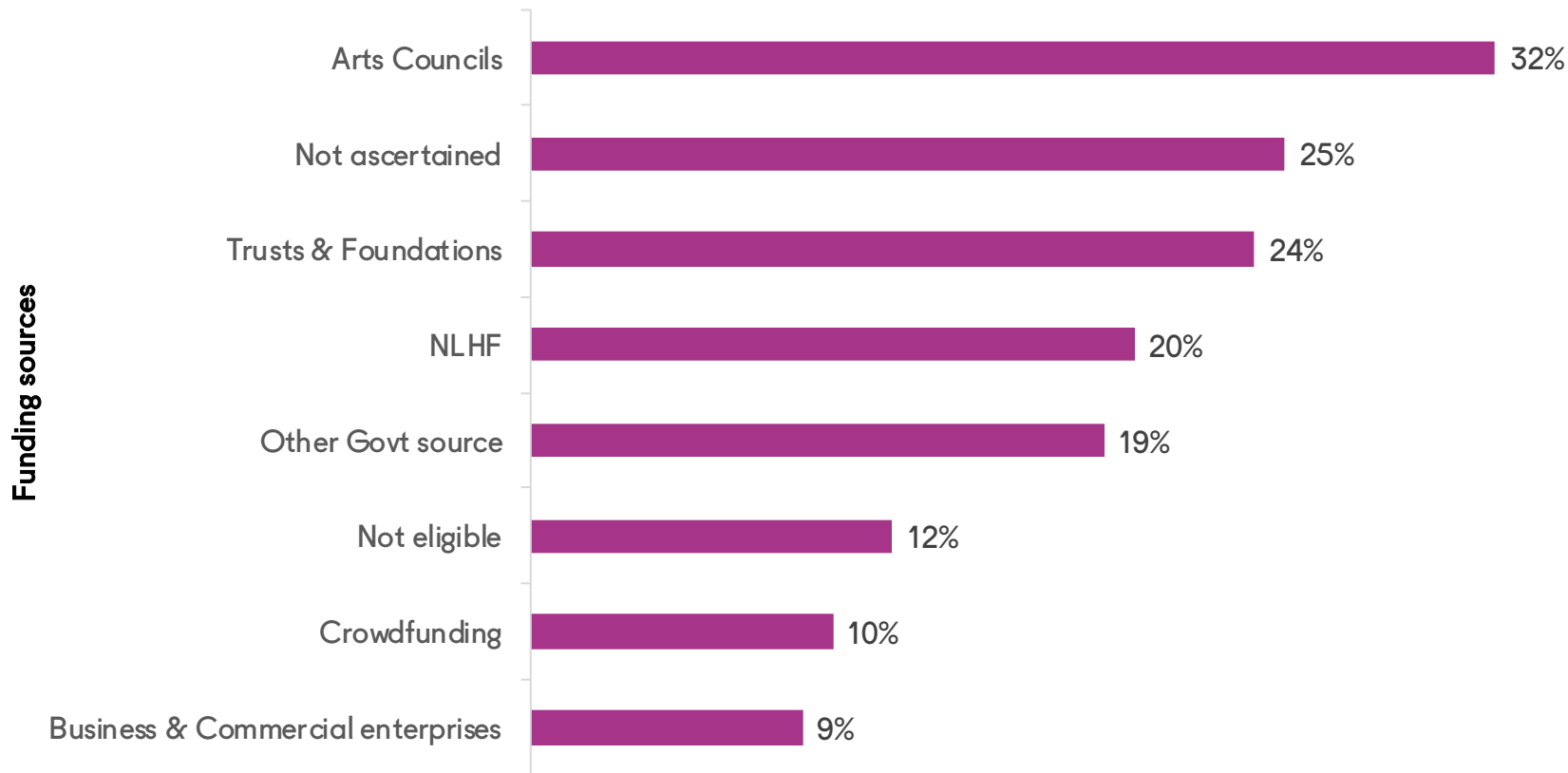
We are in the Development Phase of a capital project and are submitting a Round 2 NLHF application by 1 June. This project was always essential, but Covid-19 has emphasised how urgent it is and it's therefore a very high priority – however, the combination of reallocation of some funding streams and the stock market crash means that match funding is even harder to obtain.

(Director, Independent)

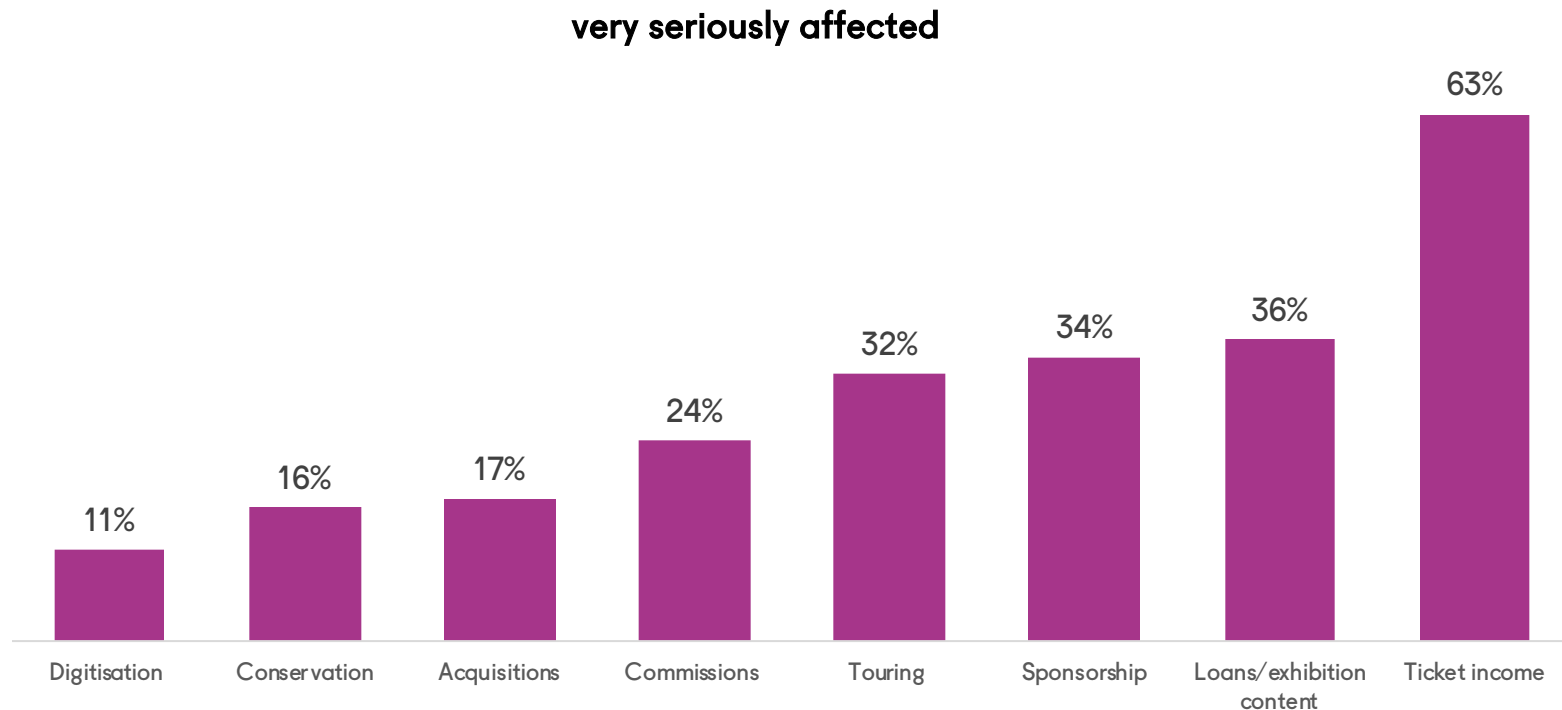
Three of our sites are admission-based, which means that we're going to suffer hugely from losing our self-generated income. //

(Curatorial/Collections, National)

APPLYING FOR EMERGENCY FUNDS



IMPACT AREAS: CURATORIAL & COLLECTIONS



COLLECTIONS



It has given people the opportunity to do a lot of data cleaning and embellishing records on our collections information system, so in a way that's the kind of thing you always wish you had time to do.

(Curatorial/Collections, Local Authority)

I think there are concerns that organisations are going to go under and there may be support needed in re-housing and re-homing those collections.

(Curatorial/Collections, Local Authority)

We are, like other people, trying to also improve our cataloguing, our copyright status, and trying to get as much of our collection online as possible. Enquiries have gone up... we're getting lots of picture library enquiries... people are writing their books or catching up on their research of family history.

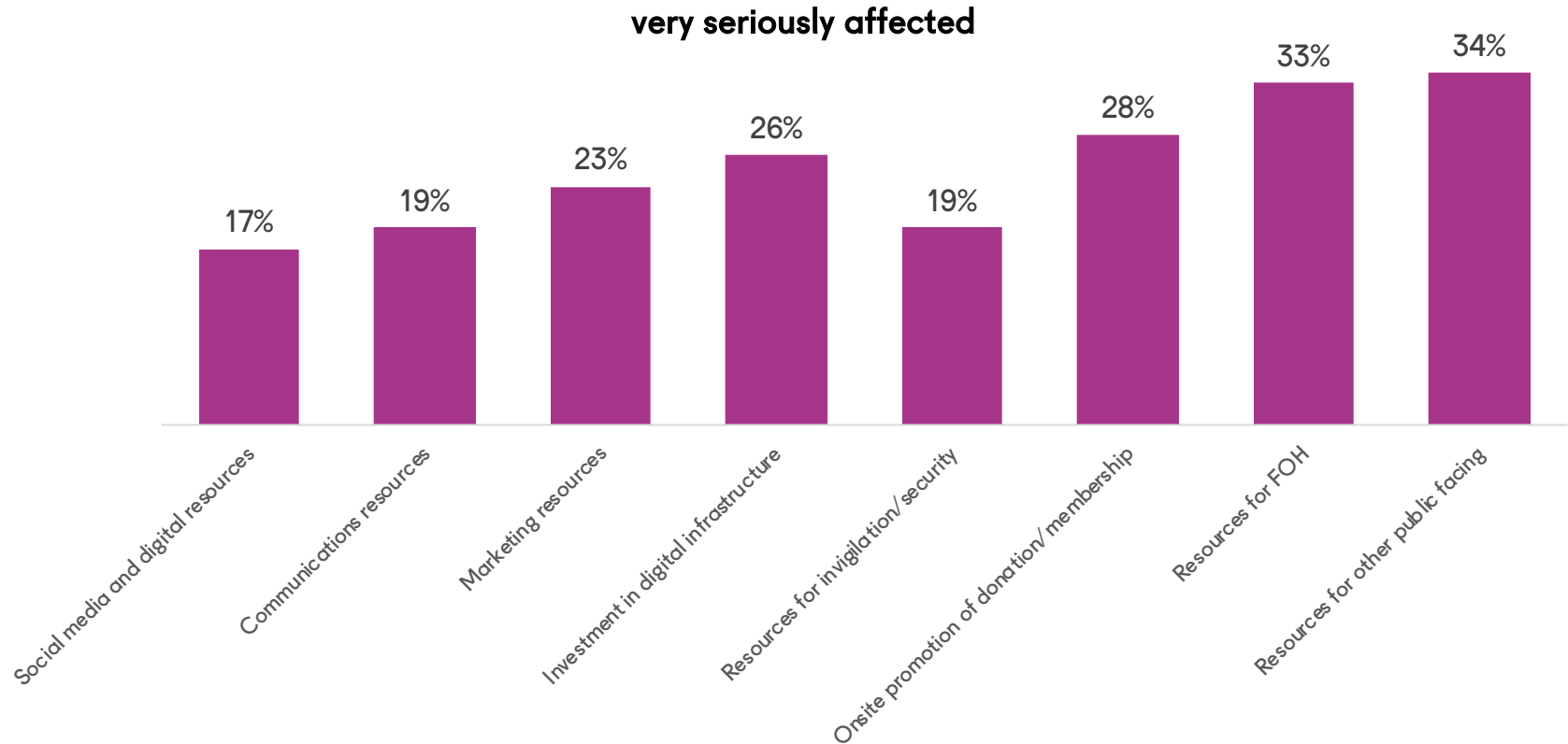
(Curatorial/Collections, National Museum)

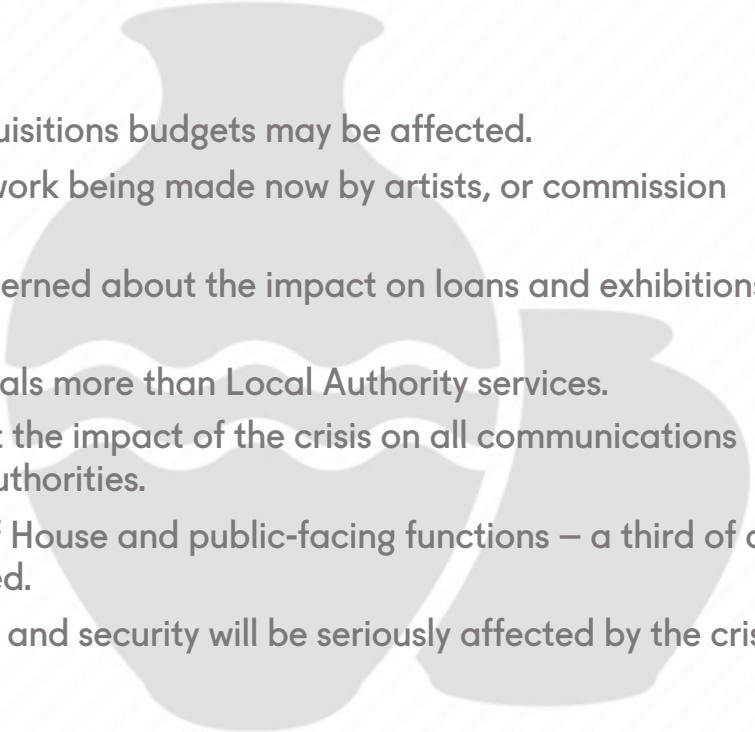
Various fashion houses have started making PPE, so we've actually contacted them and they're now gifting stuff to the collection and we're getting those donations even though we're closed. So, there is a bit of collecting still happening, but not quite in the proactive nature that we would normally do so.

(Curatorial/Collections, National Museum)



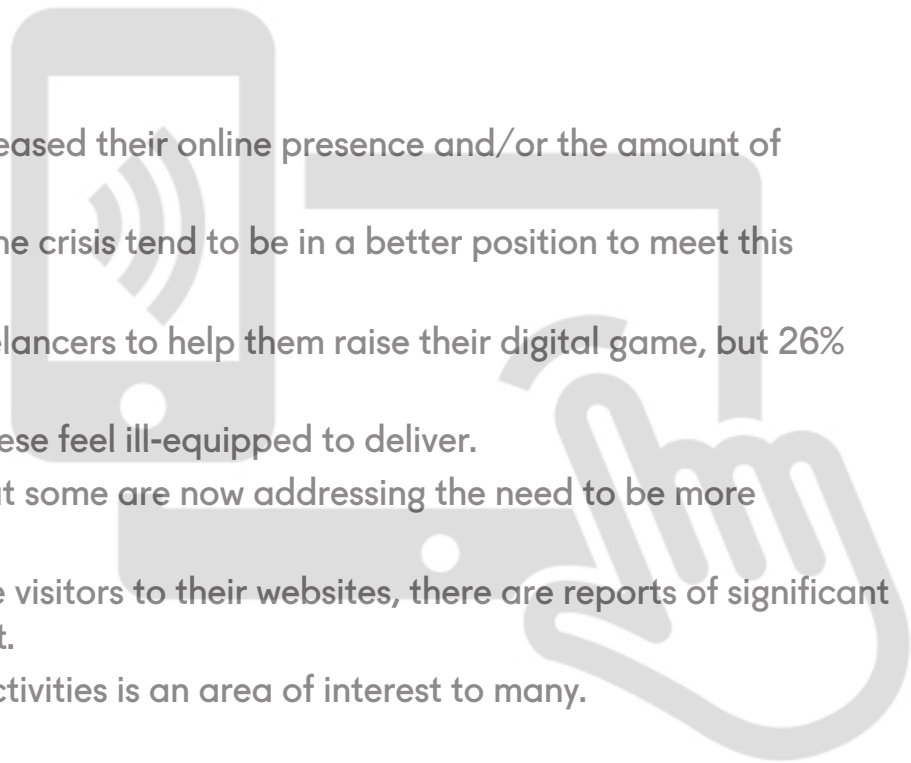
IMPACT AREAS: COMMUNICATIONS & OPERATIONS



- 
- The acquisition landscape will change and some acquisitions budgets may be affected.
 - There is a need for organisations to be able to purchase work being made now by artists, or commission work, in order to reflect experiences of the time.
 - Staff working in Local Authority venues are the most concerned about the impact on loans and exhibitions – 44% felt they would be very seriously affected.
 - Loss of ticket income will affect Independents and Nationals more than Local Authority services.
 - Staff working in Nationals are much less concerned about the impact of the crisis on all communications budgets than those working in Independents and Local Authorities.
 - Re-opening is likely to have a major impact on all Front of House and public-facing functions – a third of all organisations thought they would be very seriously affected.
 - Local Authority staff expect that resources for invigilation and security will be seriously affected by the crisis – Independents and Nationals are less likely to think so.

GOING DIGITAL

- The vast majority of organisations (86%) have increased their online presence and/or the amount of content available online.
- Those that had already invested in digital before the crisis tend to be in a better position to meet this challenge. Others are struggling to catch up.
- Very few organisations have hired new staff or freelancers to help them raise their digital game, but 26% would like funding to be able to do so.
- 22% have redeployed existing staff, but some of these feel ill-equipped to deliver.
- There has been a rush to get 'everything' online, but some are now addressing the need to be more strategic in an overcrowded marketplace.
- While less than half have seen an increase in online visitors to their websites, there are reports of significant increases in engagement with social media content.
- Finding ways to generate income through online activities is an area of interest to many.



DIGITAL



We are in a fortunate position in that a year ago today we appointed a digital engagement curator... so we kind of had laid the foundation work for how we engage with audiences online, particularly around the collections, so it was good in that we were able to look at how we ramp that up.

(Curatorial/Collections, Local Authority)

Because we don't have a team, a digital media team, we don't have a collection online yet, we can't jump on board that opportunity of all the digital stuff that's going on... we can't brainstorm about what amazing digital project we can do, because nobody can do it.

(Curatorial/Collections, Local Authority)

Our engagement across social media has been really, really positive. I think it's a mixture of me finally having the time to really dedicate to it, but also, I think people are looking for content and looking to engage with it more... we've gained loads of followers, engagement's been really high. Things like our online shop which is tiny – we've sold 50 books in the last few weeks, which for us, is massive numbers.

(Marketing/Audiences, Historic House)



PART 2: AN ART FUND RESPONSE

PERCEPTIONS OF ART FUND



They're always simple, easy and always honest and open in the response, they're super and they helped us have the confidence to acquire things which are really important.

(Curatorial/Collections, Local Authority)

The Art Fund has always been there for us when we've needed them.

(Curatorial/Collections, National Museum)

The acquisitions fund, hugely important to us over the last 20 years, and we just couldn't have saved some of the things for the nation without their support.

(Curatorial/Collections, National Museum)

It's sort of a collective, as in, we're all arts organisations together, it's quite nice to have that togetherness.

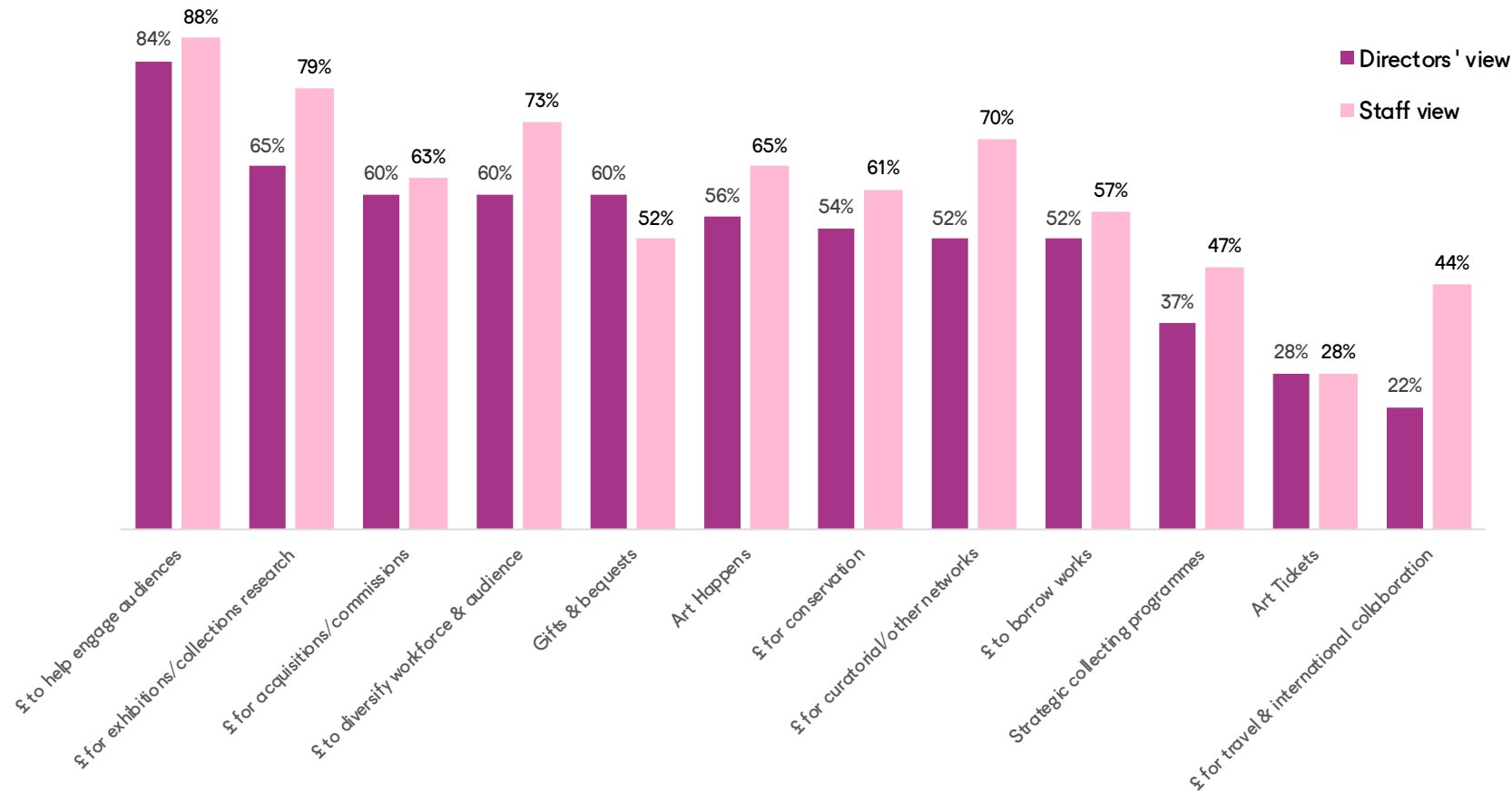
(Marketing/Audiences, Independent)



EXISTING ART FUND ACTIVITY & SERVICES

SHORT-TERM

Extremely helpful/helpful



EXISTING ACTIVITY & SERVICES

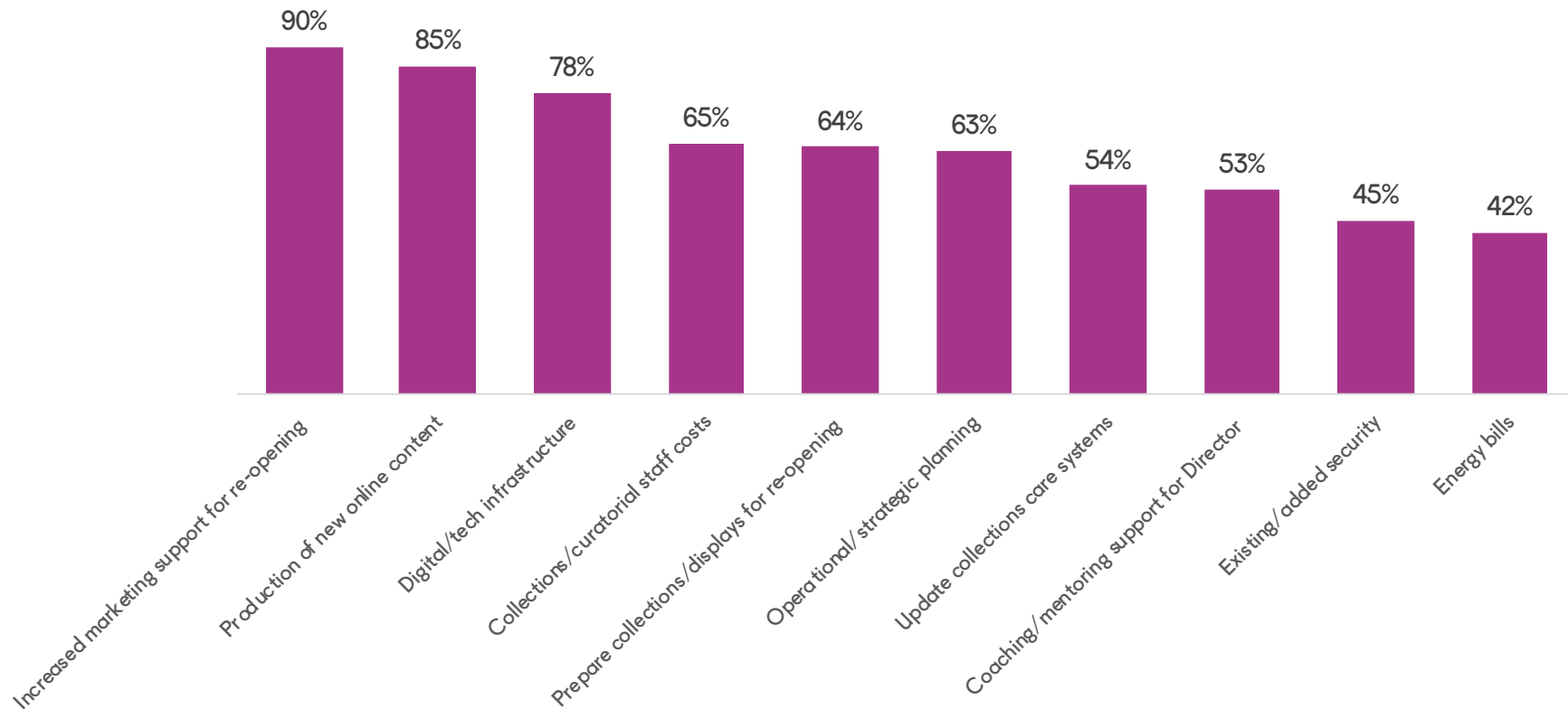
SHORT-TERM

- Both directors and their teams agree that funding support to help them engage audiences would be most helpful right now. This is particularly the case for Independents and Local Authority sites, rather than Nationals.
- Overall, continued funding to support borrowing of works, conservation and acquisitions is welcome, but is much more important for Local Authority-run museums and galleries than it is for Independents or Nationals.
- Funding for 'diversifying workforce and audience' appears relatively high on the list, particularly among the museum and gallery professionals, rather than directors. This is likely to be in response to the new Arts Council Strategy and a genuine desire for this diversity priority not to get lost. It is also likely to reflect a need to find new types of audiences as core older audiences, tourists and volunteers may not return in the same numbers.

NEW ART FUND ACTIVITY & SERVICES

SHORT-TERM

Extremely helpful/helpful



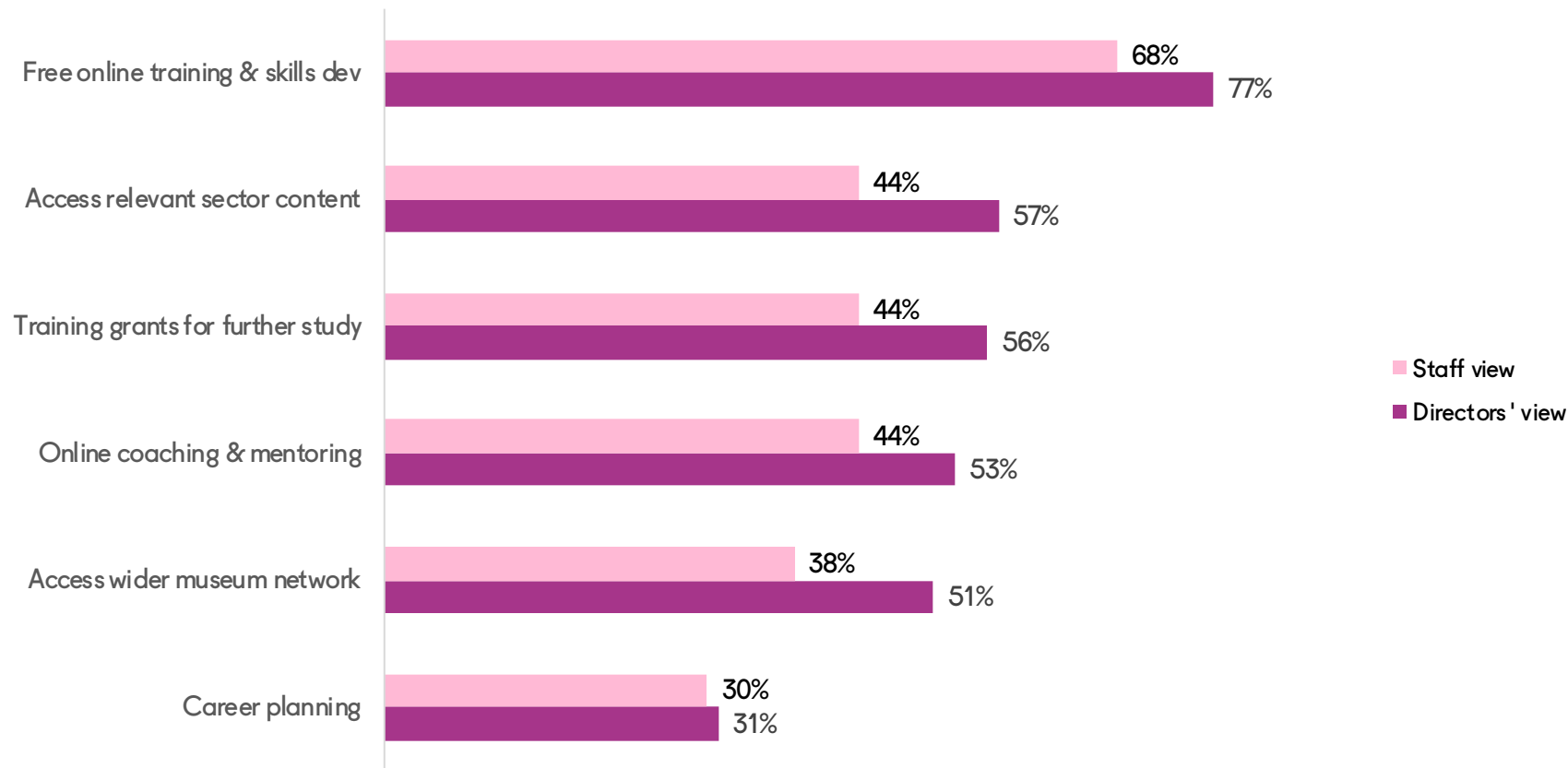
NEW ACTIVITY & SERVICES

SHORT-TERM

- With the major focus on attracting visitors back to museums and galleries, directors view the provision of increased marketing support as the most helpful new activity Art Fund can provide.
- Support for digital activities is also at the forefront of their minds – both the creation of new content to engage existing and new followers, and support for the infrastructure to develop digital engagement within organisations.
- An important area of support continues to be around collections – ensuring they are well cared for and that museums and galleries can draw on them for exhibitions and re-displays prior to re-opening.
- Behind all these priorities is a need to support the staff working in the sector as they adapt to new ways of working and financial challenges.

TRAINING & DEVELOPMENT SUPPORT

SHORT TO MEDIUM TERM



TRAINING & DEVELOPMENT

SHORT TO MEDIUM TERM

- The directors tended to be more positive about all the training and development options than the staff. It is worth noting that they were reflecting the needs of furloughed staff and volunteers, who were not represented in any great numbers in the general museum and gallery professionals survey.
- Free online training (webinars etc.) seen as the most useful area of support, particularly at present.
- There are immediate needs in basic digital skills, particularly for those new to developing content and communicating successfully via social media.
- More advanced training and support in areas such as measuring digital engagement and producing digital content (e.g. online exhibitions) would be welcomed.
- Case studies and sharing ways of working with similar organisations would be helpful.
- Staff still working would welcome bite-sized information and short webinars/discussions (30 mins) that can fit into their busy schedules.
- However, it was noted that the market for online courses is oversaturated, and one of the most helpful things Art Fund could offer is a hub for information on existing and well-rated courses and resources.

TRAINING & DEVELOPMENT



I think being able to share much more closely with other Art Fund members would be a really great thing to do.

(Marketing/Audiences, Independent)

It's a really good time to reflect on what each institution stands for now... it's really easy in the day-to-day life of a museum to get involved in the small things and you kind of lose sight of what you stand for, so it's quite nice to take this time and set aside time that is specifically about assessing your position once you re-open or assessing your place, and I think that's a good subject to be explored through webinars.

(Marketing/Audiences, Historic House)

Keeping the staff and volunteers motivated is tricky... signposting some of the online training that's available out there...

(Curatorial/Collections, National Museum)

I'm definitely interested for myself and assistant in webinars... I mean we have particular needs right this minute which is mainly around things like... captioning videos... there's quite a lot of training out there at the moment, so you'd need to do a bit of an audit of what there is and some of it is great.

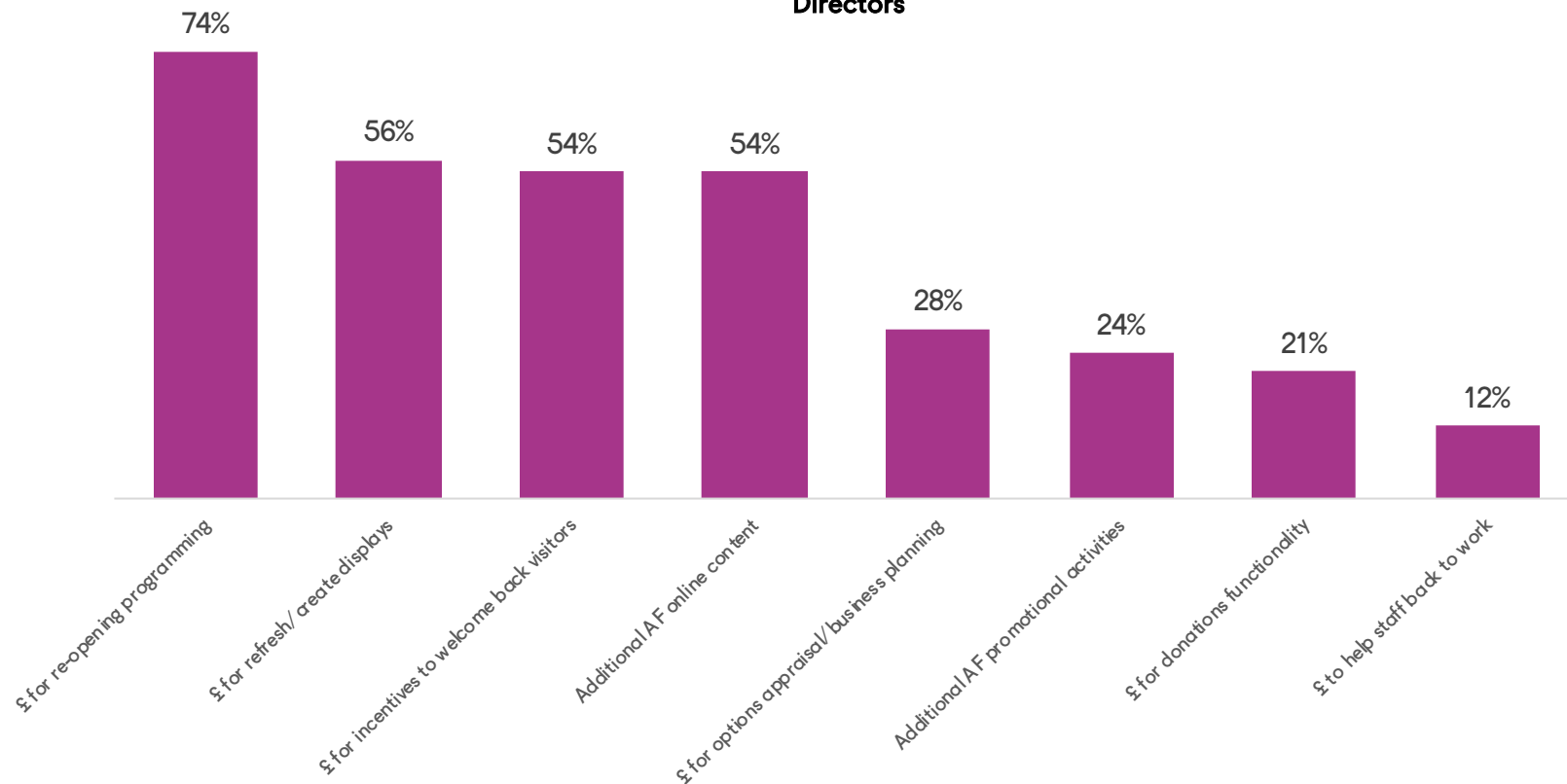
(Marketing/Audiences, Independent)



RE-OPENING FUNDING & SUPPORT

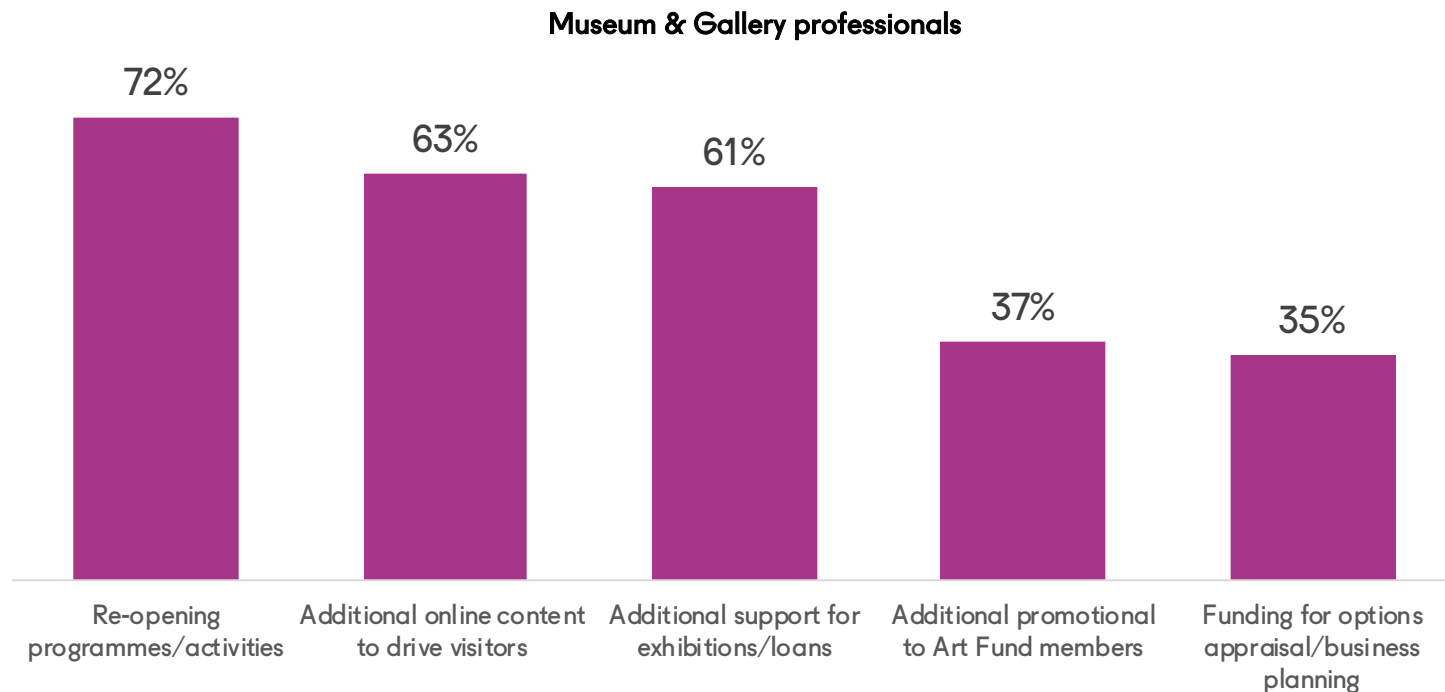
MEDIUM TERM

Directors



RE-OPENING SUPPORT

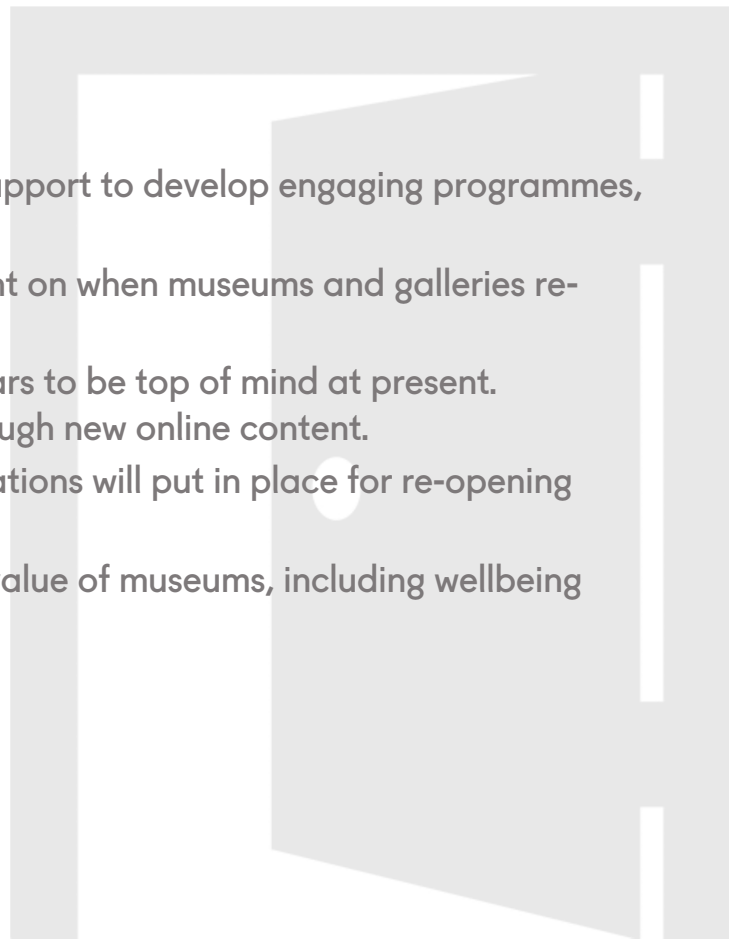
MEDIUM TERM



RE-OPENING SUPPORT

MEDIUM TERM

- Directors and museum and gallery staff would value Art Fund support to develop engaging programmes, displays and activities for the re-opening period.
- However, the timing of such funding support is heavily dependent on when museums and galleries re-open. There may be a need for 'rapid response' funding.
- The marketing challenge of encouraging visitors to return appears to be top of mind at present. Organisations would love Art Fund to drive visitors to them through new online content.
- Promoting to the wider public the safety measures that organisations will put in place for re-opening would be welcomed. Perhaps through a kitemark scheme?
- Art Fund has the potential to carry out wider advocacy for the value of museums, including wellbeing messages.



RE-OPENING



The realisation that people won't immediately want to come back, they won't feel secure, they won't feel safe and looking at how we can engage them in other ways... looking at how we meet the schools' needs when they may not be able to visit our museum sites.

(Curatorial/Collections, Local Authority)

We're worried about how do we enforce things like social distancing.

(Marketing/Audiences, Independent)

How do we make this just feel safe? Do we look across the sector at whether we kitemark museums and galleries who are meeting certain standards?

(Marketing/Audiences, Independent)

I think people are going to be quite traumatised, confidence levels dropped, so if that wellbeing agenda could be sort of communicated by Art Fund in a more bite-sized shareable way...

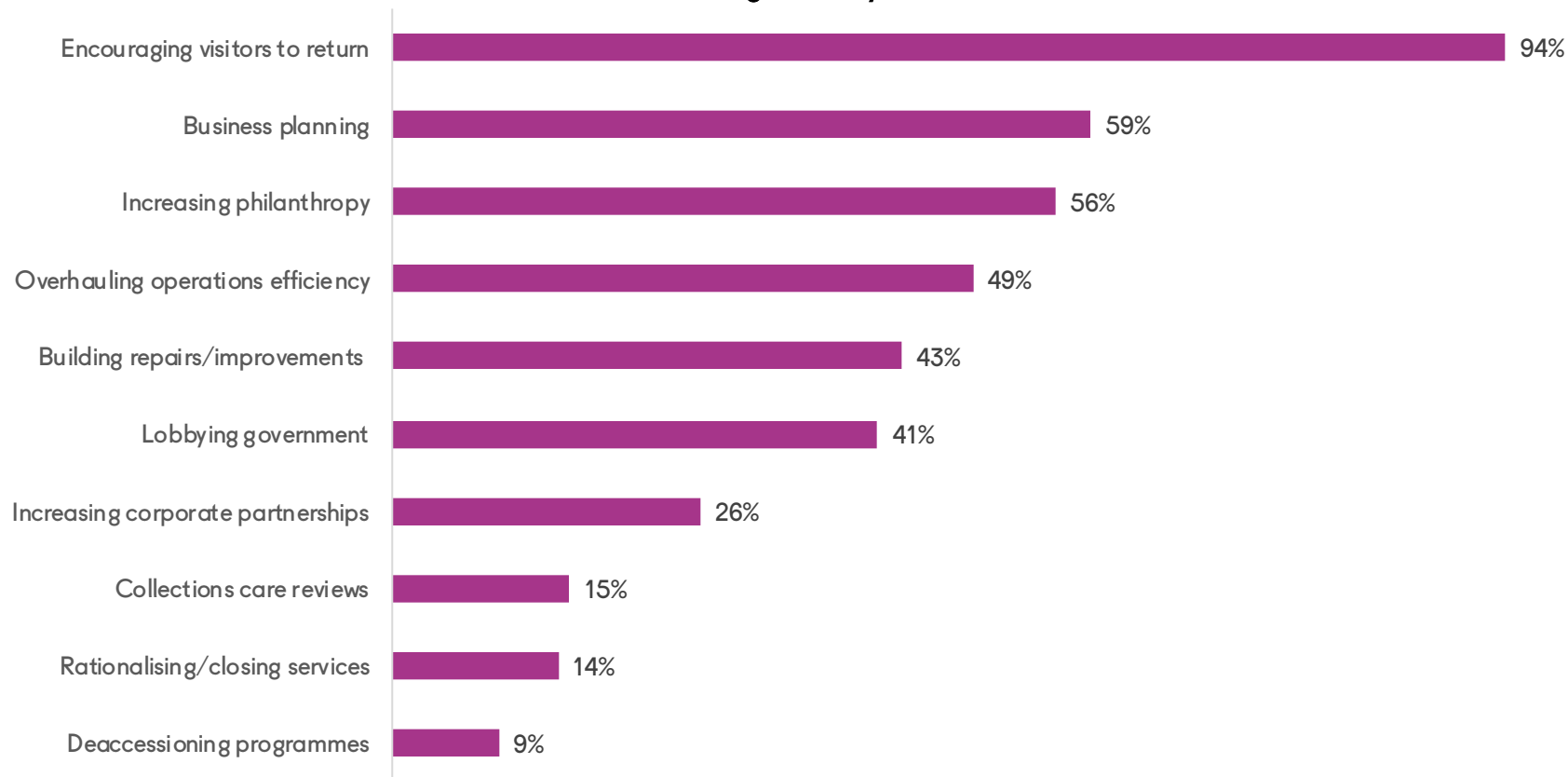
(Marketing/Audiences, Independent)



POST COVID-19 PRIORITIES

LONGER TERM

High Priority



CONCLUSIONS

- Art Fund is a much-valued independent supporter of museums and galleries all over the UK. Art Fund is perceived as well-placed to advocate for the sector as a whole, both to government and to the public. Lobbying for the support of Independents and for maintaining the DCMS-funded building repairs budget are seen as critical.
- The most pressing concern for almost all organisations is the relationship with visitors. When can spaces re-open and what experience can they offer? Who will come and who will stay away? How can the sector keep visitors engaged digitally in the meantime? Organisations are looking for insight into what visitors need and want, but also see the potential to widely communicate the many benefits of museum and gallery visiting, particularly improved wellbeing.
- Independent organisations and trusts appear to be in the most immediate need of financial assistance. They may need support to cover core costs in the short term if they are ineligible for other funds. The impact on Local Authority run services is likely to be felt later. Managing the balance between crisis funding and recovery funding across the sector will be key. Funding needs to be phased.
- The pressure to create online content is immense, but the resources and experience to do so are uneven and a digital equality is apparent. However, done well, this activity can reach new audiences and unlock new income streams.

- There are some gaps in the provision of direct training and development opportunities in the sector, but the biggest gap is for a hub of information on well-rated webinars and resources that already exist. This is likely to be beneficial into the long term.
- Although support for collections might not rise to the top of the list of concerns for museums and galleries at present, support for acquisitions, conservation, collections research and curatorial skills will be much needed in the near-future, particularly with a re-focusing on collections rather than toured-in shows.
- There may be a need to work with organisations considering deaccessioning collections or any collections that need re-housing.
- Networks and providing a sense of belonging are more important than ever. This feeling of belonging might be extended to furloughed staff and volunteers through training and support to keep them engaged.
- Most organisations are focused on the immediate challenges of getting 'back to normal', but in the longer-term new models and ways of working will have to evolve. Facilitating those discussions and providing support and encouragement, particularly on sharing and mutual support models, will be vital.
- In a changing funding landscape, it's important for funders to work closely together to create solutions that address the sector's needs.

About Art Fund

Art Fund is the national charity for art.

We give grants to help UK museums and galleries acquire and share works of art, support the professional development of curators, and inspire and engage new audiences.

For the latest news and funding opportunities, sign up to receive our regular Museum Bulletin at artfund.org/bulletin artfund.org/supporting-museums

About Wafer Hadley

Wafer Hadley is a cultural insight consultancy. Since 2006, the company has worked with arts, heritage and funding organisations around the UK on a wide range of projects. Its services include strategic planning, research, bid writing and evaluation.

waferhadley.co.uk

Art Fund_

WAFFER HADLEY

CULTURAL INSIGHT