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THE SHOW MUST GO ON… LINE.
MUSEUMS AND THEIR AUDIENCES DURING THE LOCKDOWN IN ITALY

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Abstract

As museums worldwide were forced to close in 2020, the overall attendance of the world's 100 most- visited art museums dramatically dropped by 77% in 2020—from 230 million in 2019 to just 54 million. COVID-19 has acted as a huge crash test "on the role, structure and functioning of museums. It has increased the existing gaps and differences (…), has demonstrated that lacking skills and knowledge, lacking flexibility and agile structures as well as diverse sources of income can lead to museums having to decrease or abolish their main activities and tasks in service of society, or even facing the threat of permanent closure" (NEMO 2021). On the other hand, the pandemic shock forced museums to become aware of the importance of digital resources as a tool to keep alive their relationship with their audiences and to activate new relationships with new demand segments, which so far were unreachable.
Based upon an online survey carried out in Italy among museumgoers during the lockdown, the article describes how the virtual visitors evaluate their experience of digital contents and discusses how the future scenarios – the New Normal - will be shaped by lessons learned and new, emerging audiences

Keywords

Museum visitor studies, digital engagement, audience segmentation, museum shutdown.

1. *How bad it is*

As museums worldwide were forced to close in 2020, the overall attendance of the world's 100 most- visited art museums dramatically dropped by 77% in 2020—from 230 million in 2019 to just 54 million. This is one of the findings of the Art Newspaper's annual survey, released at the end of March 2021. The decrease in attendance spans from -22% for Australia, between 27% and 39% in Denmark, New Zealand, Switzerland, and San Marino to over 80% in Scotland, Russia, Taiwan, the Usa, Japan, Greece, Italy and the UK[1]. "On average, museums were shut for an extra 145 days, which adds up to a staggering 41,000 days in total—more than a century's worth of museum visits missed last year" (Sharpe and Da Silva, 2021).

When, in March 2020, the WHO officially designated Covid-19 as a pandemic, about 250 million Europeans went into their first lockdown and governments adopted severe restrictive measures, including the total shutdown of museums. On average, the European museums surveyed by Art Newspaper were closed for 112 extra days, and attendance to the top 100 European museums, which in 2019 was close to 83 million, in 2020 barely reached 24 million.

After the period of the strictest lockdown, partial re-openings were allowed worldwide, however with limited quota access. Not all museums have reopened. In autumn, the new wave of contagion led to new closures in many countries.

Speaking strictly for the cultural sector and the cultural heritage world in particular, COVID-19 has acted as a huge crash test "on the role, structure and functioning of museums. It has

[1] A browseable table can be found at the address: https://airtable.com/shrrZApfjJZ7ntH40/tblD989a8xZANYqBr/viwJTHqsAtjpoTfpR?backgroundColor=gray

increased the existing gaps and differences (...), has demonstrated that lacking skills and knowledge, lacking flexibility and agile structures as well as diverse sources of income can lead to museums having to decrease or abolish their main activities and tasks in service of society, or even facing the threat of permanent closure" (NEMO, 2021). On the other hand, the pandemic shock forced museums to become aware of the importance of digital resources as a tool to keep their relationship with their audiences alive and to activate new relationships with new demand segments, which so far were unreachable.

2. *Going digital to cope: a European scenario*

Between 30 October and 29 November 2020, the Network of European Museum Organisations (NEMO) carried out a survey, answered by 600 museums from 48 countries, the majority from Europe. 93% of the respondents had increased or started online services during the pandemic. More than 75% had either increased their social media activities or started new ones, and 53% increased or started creating video content. More than a third had added budget or resources to intensify their online presence or communication in the pandemic. However, only 7% of the responding museums had hired new staff to manage their boosted online activity, while over 40% had changed tasks of existing staff to managing their online deeds. Almost 50% of the museums responded that online visits either have remained at the same level since reopening their museums or have increased their numbers. Almost 40% of the museums, however, either did not track or did not know about the development of their online visitor numbers, which points to a lack of digital measurement frameworks and methods. The most popular digital offers for the online audiences since the onset of the COVID-19 pandemic were social media activities, which almost 60% of the responding museums reported as more popular than before, followed by video content (42%) and virtual tours (28%).

The digital response appeared as the *natural way out*, at least temporarily (Ciecko, 2020; ICOM, 2020; Merritt, 2020; Diamond, Tabacchi and Gustafsson 2020; Alexis, 2020). This solution, however, was only feasible for museums with adequate technological and skill resources. The majority of larger museums (81%) in the NEMO survey increased their digital capacities during the COVID-19 pandemic, while only 47% of smaller museums did. Over 8 in 10 museums needed additional support with digital tools (40% of them requiring assistance with building a digital strategy, 23.2% for new digital infrastructure, and 18.7% for training of staff). Small and medium sized museums expressed a greater need (37% respectively 39%) than large museums. Another key element was the operational possibility to produce digital content, depending on the internal organization of work. This is by no means easy when starting from scratch and with reduced staff or staff working from home.

Looking ahead, in the medium-term scenarios, attendance in Europe, especially for countries and museums that relied heavily on international tourism, is not expected to recover to 2019 levels in 2021. People are more likely to attend nearby places and venues that more easily allow for social distancing and freedom of movement, like zoos, parks, and gardens (outdoors) at the expense of museums and theaters (indoors and associated with touching objects) (Dilenschneider, 2020). This means that digital participation, at best in a mixed mode with some limited physical attendance, will remain the primary solution for museums and other venue- and audience-based cultural activities. This also means that most museums will have a smaller budget for their cultural activities, since often revenues from admission tickets and visitor services constitute an important portion of their self-generated income. This will obviously also influence the possibility of allocating additional budget for the creation and dissemination of the digital contents of the museums

3. *Museums and their public in Italy: a survey*

3.1 The forced closure and the digital divide

Italy's museums are distributed throughout the country in a widespread and capillary manner. In 2019, over 4,880 museums[2], monuments and archaeological sites were active and open to the public: one every 50 square kilometers. One Italian municipality out of three has at least one museum,

[2] Microdata from 2020 census survey carried out by the Italian National Statistical Institute, in collaboration with the Ministry of Culture and the Regional Goverments: https://www.istat.it/it/archivio/167566.
See also: https://www.istat.it/it/archivio/253108.

archaeological area or monument; 13.8% of the venues are located in towns and villages with less than 2 thousand inhabitants and 19.3% in towns between 2 thousand and 10 thousand inhabitants.

From 2006 to 2019, admissions have grown by almost a third (34%), and by nearly 1.5 million in 2019 alone, reaching a record figure of around 130 million before the pandemic. International visitors in 2019 are estimated at 53.9 million and represent more than half (53%) of the total number of entries. On the other hand, the data on the participation of Italian residents, while growing steadily over the last decade, indicate that in 2019 just under two-thirds of them had never visited a museum or an archaeological site in a twelve-month period. In 2020 museums were totally closed for 126 days and for 172 days they were allowed to open in a partial way (i.e. excluding weekends) and with a limited quota of entries.

The pandemic has violently rewritten the rules of the sector, and blockbuster institutions that counted on millions of foreign visitors will have to revise their strategies in two directions: territorial proximity in the medium term and digital offerings.

When the Government decision to shut down all cultural venues entered into force, only a minority of museums were prepared to produce digital contents as an alternative response, thus continuing to be active and maintain contact with the public, through their own websites and the social network channels and platforms (in particular, Facebook, Instagram and YouTube). On the other hand, it should also be considered the total shutdown of museums made very difficult, if not impossible, to outsource the production of digital contents to external collaborators.

When partial and conditional re-openings were authorized, the support of the digital offer has proved useful and capable of reaching segments of demand not previously involved. Many museums, however, have suffered the forced closure unprepared, without the skills and technological equipment to successfully implement the necessary changes.

Data referring to 2019 show that only 38% of museums had digitised the catalogue of their collections and only three out of ten had completed it. Digitisation, of course, is just the first step: production of content and virtual exhibitions requires different skills, attitides and equipment. The main reason given by museums that had not started digitising their collections (65.7%) was a lack of resources or staff, while 19.8% did not considered it a strategic activity to invest in. The most used tools to convey and make accessible online collections were the museum's website and specialist web platforms (28.8% and 27.9% respectively). The social media were chosen by 13%. In almost half of the museums (45%) the collections were not accessible online. Six out of ten (62%) had undertaken digitisation in order to improve the management of their collections, but the idea that digital content may be useful for educational, recreational and relational purposes was alas still underestimated (6.6% and 1.1% of the respondents of the Census survey, respectively).

In 2019 less than two out of three (63,4%) Italian museums owned a dedicated website, just over half (57,4%) a social media account (Facebook, Twitter, Instagram, etc.) and only 27% were able to offer tours and virtual visits on their website. 34.3% of the museums were not able to set up a website of their own due to a lack of staff with adequate skills to deal with the design, management and technical maintenance of the site, while 11% lacked the adequate economic resources.

Even essential digital services such as online ticketing, which would allow to book visits remotely and manage flows more efficiently, were available only in 14.9% of museums in Italy in 2019. Essential devices, such as those for the automatic and real time quantification of visitors (turnstiles, people counters or Wi-Fi tracking devices), which are now technologically and economically accessible, were also scarce. They are fundamental to ensure the respect of the safety conditions of visits in presence.

3.2 The digital experience of Italian museumgoers during the lockdown

As mentioned in the previous section, the percentage of Italian residents who in 2019 had been to a museum at least once in 12 months did not reach 34%. However, there is a part of the population that is very familiar and has a special affective relationship with institutions of art and history, which they visit, on average, almost 10 times a year. The sudden and total closure from March to May 2020, due to the measures to combat the COVID-19 pandemic, has deprived these people of the opportunity to frequent museums, places they love.

In order to explore the relations between people and museums during the lockdown, the General Direction for Museums of the Italian Ministry of Culture commissioned Annalisa Cicerchia and Ludovico Solima[3] a survey, with a questionnaire administered online. Between May and July, the questionnaire collected approximately 7,000 valid responses, which have been post-sampled and weighted to represent the geographic and demographic characteristics of museumgoers as described by Italian official statistical surveys (sample characteristics are presented in Fig. 1).

A significant part of the survey concerns access, participation and use of digital content offered by museums, in Italy and abroad, during the closing period and the likelihood that the virtual dimension will continue to play a relevant role in the future of cultural heritage.

In 2020, the Internet users in Italy were estimated to be 49.5 million. 92% of them accessed the Internet from mobile devices. There were 35 million active social media users between the ages of 16 and 64. The average daily time spent surfing the Internet from mobile devices was 2 hours 42 minutes.

During the shutdown, 72% of the respondents to the questionnaire visited websites or social profiles of museums, in Italy or abroad, and accessed their digital content. The PC and the smartphone are the devices preferred by 68% and 62% of respondents respectively. Museum websites, Facebook, YouTube and Instagram were the platforms and channels chosen by 74%, 56%, 38% and 36% of respondents respectively.

The favorite and most appreciated content were videos (76%), photos (56%) and online lectures and seminars (34%). Virtual tours have proved to be much less popular (2%). This is confirmed by international studies (Alexis 2020) and is probably to be associated with an active attitude of the virtual visitors, who prefer those digital contents, like videos and photos, which can be reorganised in a personal experience of the museum, rather than a rigid sequence of objects and places as in a virtual visit (Fig. 2).

91% of the respondents think that museums should continue to offer new digital content in the future, even after reopening, and in particular in-depth information, lectures, short educational texts and activities (58%), videos (20%) and contents that can only be used in the virtual dimension (13%).

With the hoped-for reopening, 44% of the respondents think they will continue to use the museum's digital resources. Only 5% expect an increase in the consumption of digital content, while 50% expect a reduction. After the reopening, a large majority of respondents (66%) think that a high-quality digital offer can contribute to the re-launch of in-person visits. However, for about one third of the entrants, virtual cannot absolutely replace the real experience.

59% of the sample would be willing to pay €3 for a remote guided tour of a museum in the company of the museum director or an expert at their complete disposal.

3.3 Digital engagement

Italian museums' audiences are still unaccustomed to interacting digitally with the cultural organisations, probably more due to a lack of familiarity with two-way communication with cultural institutions than to technical inexperience (as mentioned, Italian spend on average nearly 3 hours daily surfing the Internet from their mobile devices). The reason of this lack of specific interaction can be related to the fact that the vast majority of Italian museums (84%, according to ISTAT data released in 2020) do not have staff permanently dedicated to the management of digital activities and interaction with users of their social media accounts. This explains why as many as 73% of those who visited the museums' websites and social media profiles during the lockdown did not attempted any kind of feedback, and those who posted comments were only 13%.

3.4 Users profiles

From the analysis of the questionnaire data, five different profiles have emerged, which are characterised, among other things, by specific relations to the digital solutions adopted by museums in the context of the first lockdown in spring 2020.

The profiles are:

- The Enthusiasts (2,937 respondents, 48% of the sample
- The Insiders (1,418, 23% of respondents).
- The Regulars (911 respondents, 14.8%).

[3] Michela Cascasi and Simona Staffieri also collaborated in the survey.

- The Occasional Visitors (733, 11.9%).
- The Lukewarm: this group, due to their small size (they represent less than 2% of the sample), will not be described in the pages that follow.

3.4.1. The Enthusiasts

The Enthusiasts define themselves through these words: "Art and culture are part of who I am". 94% of them missed the museum, and, in particular, 42% felt it very much: 96% plan to return to visit one as soon as possible and 64% already have in mind a specific museum. During the March to May 2020 closure, more than three quarters of Enthusiasts accessed the digital content of the museums. Around 42% indicated computer as their preferred device, 39% phone, 13% tablet and less than 6% television. In terms of access channels and platforms, the museum website comes first (30% of respondents), followed by Facebook (21.3%), then Instagram and YouTube at 14%.

As for the most appreciated digital contents, 35% of the Enthusiasts indicate videos. Virtual tours, for them, are almost non-existent: less than 1% selected this option.

93% of the Enthusiasts believe that museums should continue to produce new digital content in the future: insights, lectures, short educational texts and activities (56%), videos (21%) and cultural material available exclusively in digital format (14%). Only for 2%, if high quality digital contents were available, an online visit could replace a visit in person. For 66% this is out of question, but a good digital offer could induce them to visit the museum or complete the visit in person. This does not prevent that 45% of the Enthusiasts are convinced that they will continue to use the digital offer of museums also after the reopening; 49.5% even think that they will do it more intensively and only 5.5% expect a decrease.

3.4.2. The Insiders

The second profile belongs to cultural workers: "I work in art and culture, which is my daily life"; 23% of respondents. It is among the Insiders that one finds the highest percentage, 74%, of people who have accessed the digital offer of museums from a computer; smartphones are also very frequent (68%). The museum website and Facebook are the most widely used platforms (67%), followed by Instagram (46%), and YouTube (41%).

About one fifth of the Insiders show interest in digital educational activities, and online conferences and seminars reach 45.4% of the choices. More than 80% are fairly or very satisfied with the quality of the proposals. However, as they are insiders, the proportion of those who are dissatisfied - 15% - is the highest of the entire sample. Nearly one in four people sent photos, 11% videos. With 38% reporting having contributed, this group is the most keen to interact digitally. 64% of people with this profile indicated in-depth lectures, talks, tutorials and interactive activities as the ideal digital content for the future, which they will continue to use to the same or even greater extent than in the past (98%), while excluding in peremptory terms, with the highest percentage of the sample (37%), that no digital museum experience, however excellent, will ever replace the in-person one.

3.4.3. The Regulars

The Regulars are those respondents who described their attitude towards art and culture as: "I like to participate often in cultural and artistic activities". They represent just under 15% of the sample. The impossibility of going to the museum in person was felt very strongly by 58.2% of the Regulars, definitely less than the average of the sample (64.3%), and obviously less than the Enthusiasts.

This regular, but not assiduous relationship with cultural sites, is also reflected in the share of Regulars who profited of the digital offers of museums during the spring 2020 closure: 68.5%, three points lower than the sample average. This seems to point to the fact that the digital offer alone was not sufficient to sustain a new demand among audiences that are well-disposed to, but not particularly involved with museum life.

Among the digital platforms, the vast majority (72.2%) of the Regulars relied on museum pages or sites. Facebook received 46.9% of the consensus, YouTube 40%, Instagram 19.2% and 18.7% landed via links from other sites. Videos were the most popular format and attracted the interest and approval of almost three quarters of the Regulars. Photos were liked by 60% and texts by 21.1%, while virtual tours attracted as low as 3.5%.

88% of the Regulars suggested that museums should keep producing digital contents also once they return to in-person visits. 55,2% would appreciate insights, lectures, short educational texts and interactive activities; 20% videos and 12,8% contents that can be produced or received only in digital format. It is among the Regulars that was reached the highest percentage, 4.3%, of those who believe that if high quality digital content were available, an online visit could replace a visit to a museum in person.

3.*4.3. The Occasional visitors*

The Occasional visitors were those who selected as self-description: "I like art and culture, but I do not consider myself a passionate user". This group amounts to about 12% of the sample. 64% of them do not go to the museum more than three times a year and only 47% chose to access digital content during the closure, (the lowest value of the whole sample). The devices used are mainly the smartphone (64%) and the computer (50%). For 70% of the occasional visitors the access was from the museum website, Facebook reached 44%, Instagram 28%, YouTube 26%. The occasional visitors were attracted by videos (75%), photos (60%) and texts (21%), Only 14% of these users had a dialogue with the museums, sending comments, appreciations, photos or videos. Almost 54% intend to enjoy the digital offers more intensively after the reopening, and 36% think they will maintain the same pace: 57% of them would like to see insights, lectures and interactive activities. For the Occasional visitors, relatively more distant from cultural heritage than the other profiles, the digital option seems to offer a bridge capable of overcoming some barriers.

3.4 Lessons learned

The post-pandemic scenario will be characterised by a progressive increase in the importance of digital resources, without however determining a complete shift in demand towards these new and different forms of cultural experience. In other words, the real and the digital will coexist, albeit in a different balance than before the lockdown.

During the pandemic, in the specific case of Italian museums, insufficient attention was paid to the possibility of producing and disseminating digital content, also with the aim of activating ongoing relations with an (increasingly significant) portion of their audiences. These relationships - and this is another of the lessons learnt - can also be bi-directional, as the digital audience of museums has shown its interest and desire to be protagonists of an active and engaging relationship with the cultural institution, and not just passive spectators, as has most often been the case so far.

The propensity to involve museum audiences, which emerged during the pandemic to an unexpected extent, has therefore given a new and different dignity to those who do not physically visit the museum, but who are interested in following its activities and interacting with it also through new channels and digital platforms. This redefines the perimeter of the museum's sphere of influence, which is not limited to residents and therefore to the local area, nor to its ability to intercept flows of tourists, both national and international. The post-pandemic museum is therefore a museum potentially without boundaries, except for those dictated by its ability to imagine new forms of relationship with its public. In reference to this, Jones (2000) proposes new audience segmentations. “We’re accustomed to targeting audiences based on things like demographics, geography, or interests— or to think about their learning needs or their recreational needs. But being relevant to audiences in the Age of Quarantine means meeting their emotional needs”. As examples of new museum (virtual) -goers, Jones lists people working from home, desperate parents who are feeling inadequate as educators of their kids, eager learners, grieving people, professors now teaching online, lonely people, people caring for/living with/loving medical providers and essential services workers, people who need relief from anxiety and stressed out/scared people.

In the occasion of a web conference, Italian Museum directors and Museum Educational experts, brought together by Palazzo Strozzi on April 22, 2021[4], have stressed that “During the pandemic they had been able to continue their programmes of inclusion and care of the most vulnerable users in new forms. From this difficult context we learned important lessons, acquired elements that will not be lost. As we look to the future, it will be important to take advantage of this new perspective that allows us to bring the

[4] Oltre la ferita. Musei e fondazioni a confronto al tempo del Covid-19.
https://www.youtube.com/watch?v=O7VwplNu8RE

museum out into people's homes and the homes into the institutions”[5].

The legacy of the pandemic may help reshaping the ranking criteria of museums at national and international level, which until now have been essentially based on the number of admissions per year. The time has come to redesign the attractiveness of the museum (as well as the set of indicators to measure it), considering not only the number of people visiting exhibitions based - entirely or predominantly - on loans, but also the number and the intensity of digital users, who "consume" the museum through virtual experiences.

This may also have impacts on the financial dimension, e.g. in the definition of sponsorships and donations, considering that the potentially reachable audience can be much wider than the one usually taken into account, i.e. the physical visitors of the museum.

With drastic reductions in conventional income sources, the experience of closure has challenged the ability of museums to self-generate new financial resources to sustain their activities. From this point of view, the willingness to pay - declared by the respondents to the questionnaire - for the access to quality digital contents in a live mode, with museum directors or curators available to provide explanations and insights in real time, is also noteworthy. New ways of providing services on a paying basis are possible, which could help to alleviate the lack of revenue from the still limited mobility of domestic and international tourists. New revenue models are possible. “While galleries of masterpieces have lain empty for months, museums have poured their energies into digital channels in a bid to stay connected with audiences confined at home. And amid the torrent of free 360-degree tours, webinars and social media challenges, a handful of institutions are testing out a new revenue-generating model: selling on-demand exhibition films, expert talks and art education classes online. In a world where more than 200 million people pay for Netflix and 155 million are premium subscribers on Spotify, cash-strapped museums are slowly waking up to the monetary gains of online content” (McGivern, 2021).

Finally, there is a need to revise the contents of the museums' strategic planning, considering the opportunity to develop a real "digital strategy", to shape the digital resources available to each museum into a system, which should be considered as a key part of the intangible endowment that contributes to the processes of generation and dissemination of cultural, social and economic value.

[5] Comune di Firenze, Portale Giovani https://portalegiovani.comune.fi.it/urlnews/webzine/39310.html

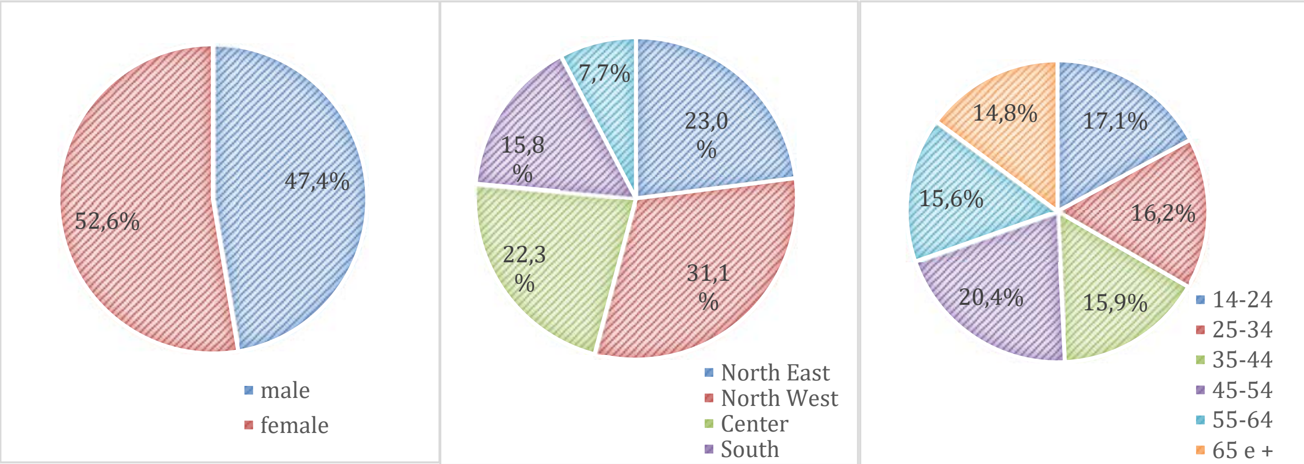

Fig. 1: Sample characteristics

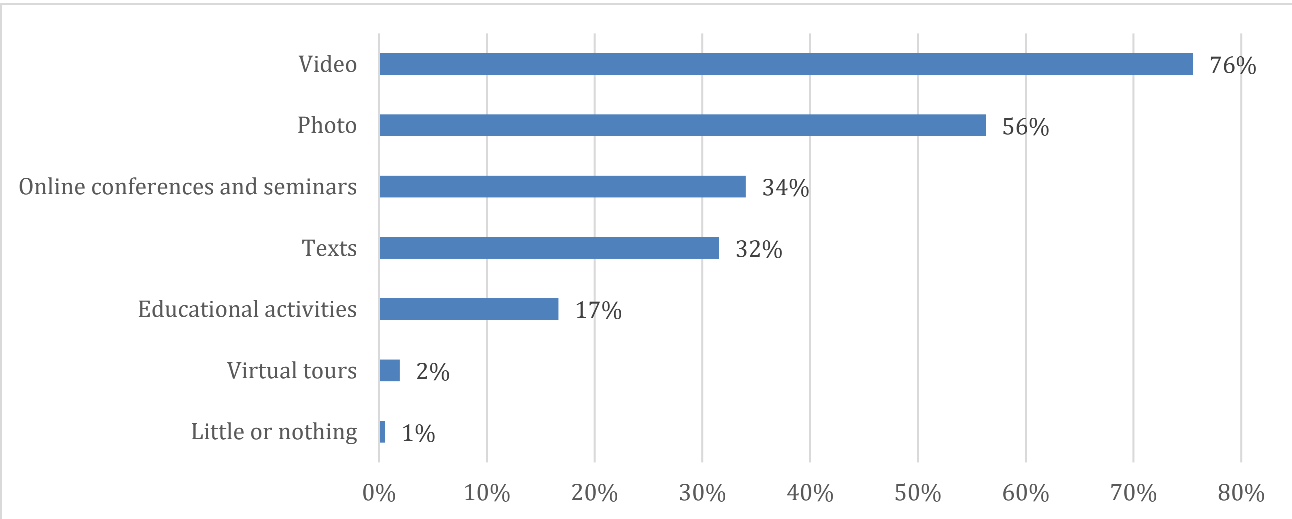

Fig. 2: Most popular contents (percentages on cases)

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