international council of museums Brasil

EXECUTIVE SUMMARY

DATA TO NAVIGATE THROUGH UNCERTAINTIES

SEARCH RESULTS WITH MUSEUM PROFESSIONALS AND AUDIENCES

Brasil

PRESENTATION

In difficult times, as is happening across the museum sector due to the COVID-19 pandemic, information and evidence are crucial. Accessible and well-interpreted data are important navigation tools on a journey whose destination is still uncertain.

Since the beginning of the pandemic, ICOM (International Council of Museums) and other international organizations have gathered information about its impact on museums from different angles. In the light of these surveys, ICOM Brazil (Brazilian Committee of International Council of Museums), in partnership with Tomara Educação & Cultura, decided to provide Brazilian museums with relevant information.

The idea was to conduct a survey that not only provides a picture of the pandemic on the sector, but also pointed out possible paths and trends for the future. Therefore, our survey was divided into two cycles, each focusing on the perceptions and suggestions of two key groups for the future of museums during and after the pandemic: the professionals (Cycle 1) and the audiences (Cycle 2).

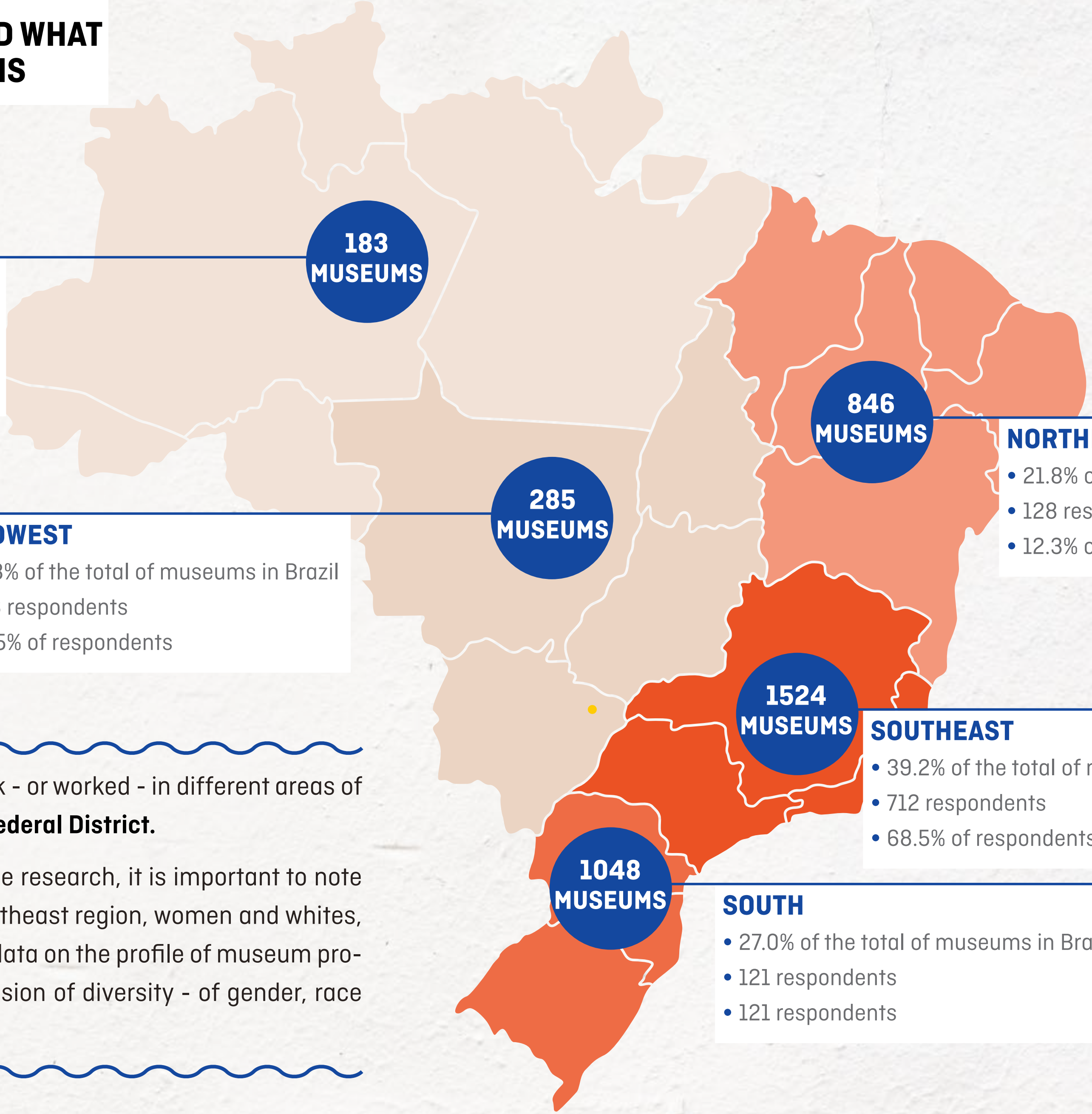
This executive summary presents the synthesis of the two cycles, with a selection of the main results. We hope that this listening work will inspire transformations and be another step in the dialogue between museums, their professionals and their audiences.

Have a good reading!

CYCLE 1

SEARCH RESULTS WITH MUSEUM PROFESSIONALS

WHO PARTICIPATED IN THE RESEARCH AND WHAT THIS CAN SAY TO BRAZILIAN MUSEUMS



NORTH
- 4.7% of the total of museums in Brazil
- 52 respondents
- 5.0% of respondents

MIDWEST
- 7.3% of the total of museums in Brazil
- 26 respondents
- 2.5% of respondents

NORTHEAST
- 21.8% of the total of museums in Brazil
- 128 respondents
- 12.3% of respondents

SOUTHEAST
- 39.2% of the total of museums in Brazil
- 712 respondents
- 68.5% of respondents

SOUTH
- 27.0% of the total of museums in Brazil
- 121 respondents
- 121 respondents

The survey was attended by **1039 professionals** who work - or worked - in different areas of museums located in **23 Brazilian states, including the Federal District.**

Despite the geographic and sector diversity present in the research, it is important to note the significant participation of respondents from the Southeast region, women and whites, between 30 and 49 years old. In the absence of national data on the profile of museum professionals, this information is a reminder that the expansion of diversity - of gender, race and age - should be an industry-wide goal.

HOW DO PROFESSIONALS FEEL MOSTOF THE TIME?

44% Anxious

28,1% Overburden

26,6% distressed

23,4% tired

14,8% discouraged

13% stressed

11,5% hopeless

- 20.7% are feeling emotionally fragile.
- 26.4% indicate they need psychological/emotional support.
- 30.6% feel anxious about their professional future.
- 16.7% feel very concerned about the pandemic and do not focus on work.
- 5.1% lost a loved one during the pandemic and are dealing with grief.

POINTS OF ATTENTION ON IMPACTS AND WORKING CONDITIONS OF PROFESSIONALS DURING THE PANDEMIC

The analysis of the emotional conditions and impacts of the pandemic on professionals identifies the areas and profiles most affected. Most of those who identify themselves with "emotionally fragile" are in Education (31%), one of the sectors most affected by the crisis in museums around the world. Among the professionals who say they are "distressed about their professional future", 41% work in the areas of Institutional Relations/Fundraising. Mid-career professionals have also been significantly impacted: the highest rate of those who declare themselves distressed (33%) is between 30 and 39 years old.

It is also essential to monitor the impact of the pandemic on work situations. One out of three professionals (30.2%) suffered a salary reduction; and one in five was fired (19.6%). The risk of these professionals migrating to other sectors must be the subject of attention and prioritized by the leaders, as the skills of these professionals will contribute to the own response to the crisis faced by museums.

Museums need to guarantee and transmit security to their professionals supporting them in the resumption. More than a third of the survey participants claimed to belong to a coronavirus risk group. Two out of three professionals (61.3%) would not necessarily want to return to face-to-face work and 55.1% are afraid of how museums will operate after reopening and returning to face-to-face work.

WHICH FACTORS INSTITUTIONS SHOULD ENCOURAGE AMONG THEIR TEAMS TO RESPOND TO CRISES BETTER

Despite the negative impact of the situation on most respondents, the survey also registered some other perceptions. For example, there are professionals who consider themselves productive (21.1%), hopeful (18.9%) and calm (13.1%). Two out of five professionals (38.4%) have participated in new projects of the institution during the pandemic, and have also had more contact with professionals from other areas of the institution with whom they had not previously worked. (20.3%). It is also noteworthy that 33.6% produced content for the institution's website and/or social networks.

Professionals want to be more active in building the future of museums. 63.6% of the participants felt that they could contribute more in the development of projects and/or solutions for this moment of crisis. This percentage reaches 72% among professionals in the Administrative and Exhibition sectors.

To carry out their *activities* and meet the new needs of their institutions, professionals need specific knowledge. In this regard, 87.8% of the research participants consider having specific training and/or knowledge to develop the *activities* required by the administration and management at this time. On the other hand, around 20% of the professionals in the Education sector consider that they do not have specific training and/or knowledge to develop the activities assigned to them.

In general, professionals believe that the presence on the internet and social networks at this time has brought benefits to their museums. The percentage is higher in mixed management (84.5%) and private (80.4%) museums, but also quite high among public management museums (77.2%). On this point, professionals in the areas of Documentation/ Conservation, Curationship/Research and Education are less certain about these benefits.

A resilient institution should encourage cooperation and learning, leveraging the diversity of teams, including generational diversity, which the institutions typically have little explored. The good news that the research brings is that museums already have the main resource for the during and the post-pandemic: skilled professionals with the potential to help institutions in the transformations ahead, but it is important to enable and engage them for new contexts.

WHAT ARE THE EXPECTATIONS AND SUGGESTIONS FROM PROFESSIONALS FOR MUSEUMS AND WHAT ARE THE TRENDS POINTING TO THE FUTURE OF THE SECTOR?

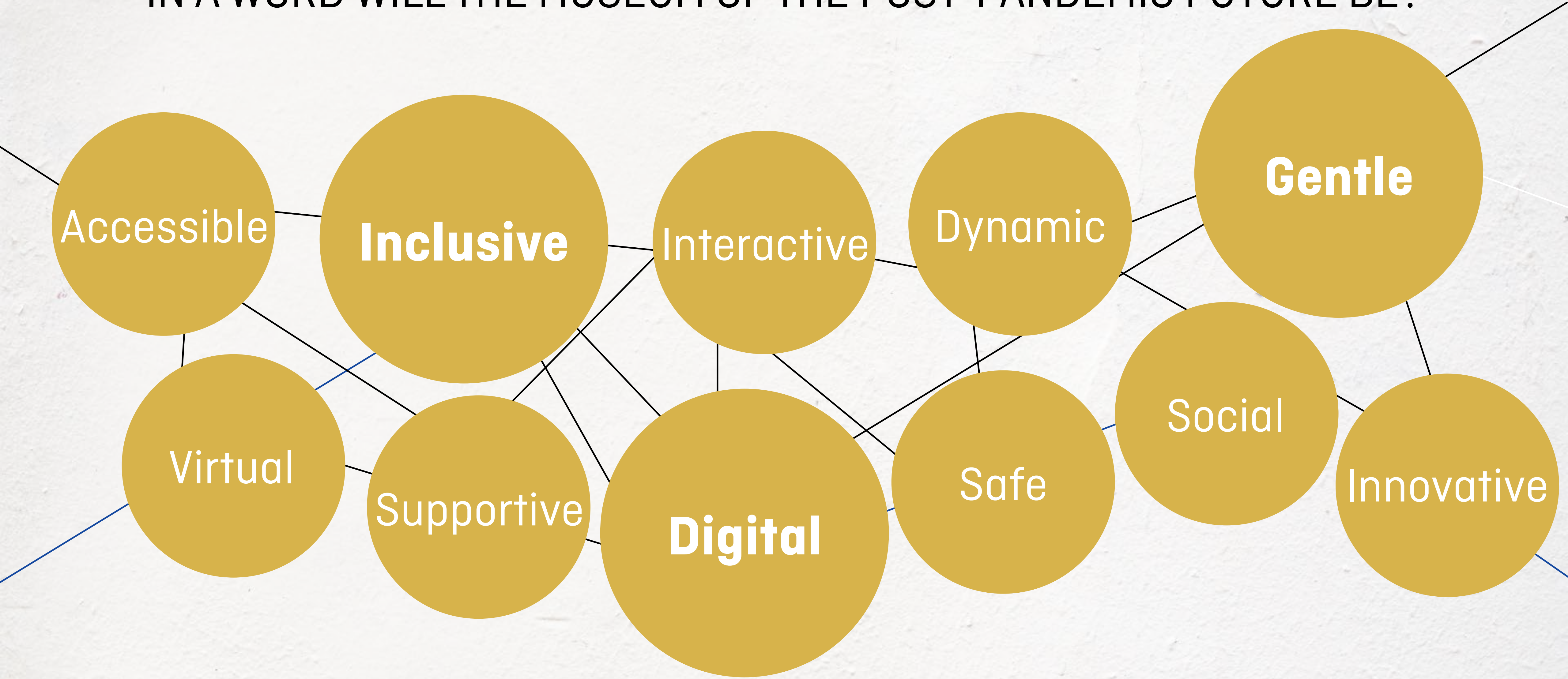
Overall, approximately three out of four survey participants believe to some extent that their institution did relevant work for its audiences during the period of social isolation. However, it is worth noting some differences in perceptions among professionals: approximately 1/3 of professionals in the areas of Curatorship/Research (35%) and Documentation/ Conservation (32%) are not confident about the relevance of the actions carried out by their museums. In the Exhibitions sector, this percentage reaches 39%. The perception of relevance is greater among the sectors of Communication/Marketing and Institutional Relations/Fundraising, but it still calls attention that 22% and 14% of professionals in these sectors, respectively, are not fully confident about the relevance of the offer of museums for audiences during social isolation.

Open-ended responses reveal the desire for future projects and measures that improve the relationship between museums and their communities. Among the total respondents, 43.4% of all respondents disagree that the institution has strengthened their relationship with the community. This percentage is slightly lower in museums with mixed management (37.1%) and reaches 45% between museums with public and private management.

From a group of statements, we asked participants to give their opinion about on the most important trends for museums in the coming months or years. Museum professionals see a more digital future, which will make use of new technologies and forms of interaction, communicate more actively with their audiences, and which will establish new work practices, with a combination of face-to-face and remote activities in the new routines.

Trends less emphasized by professionals also bring important messages about how little confidence that changes in the sector will take place that bring museums closer to citizens. The future trends less indicated by the participants relate to museums that are more active and transparent in their internal and external communication and show a more uniform and civic behavior with greater social relevance in times of crisis. And something even more serious: almost 11% of professionals believe that museums will be less accessible and will serve a less diverse audience after the pandemic.

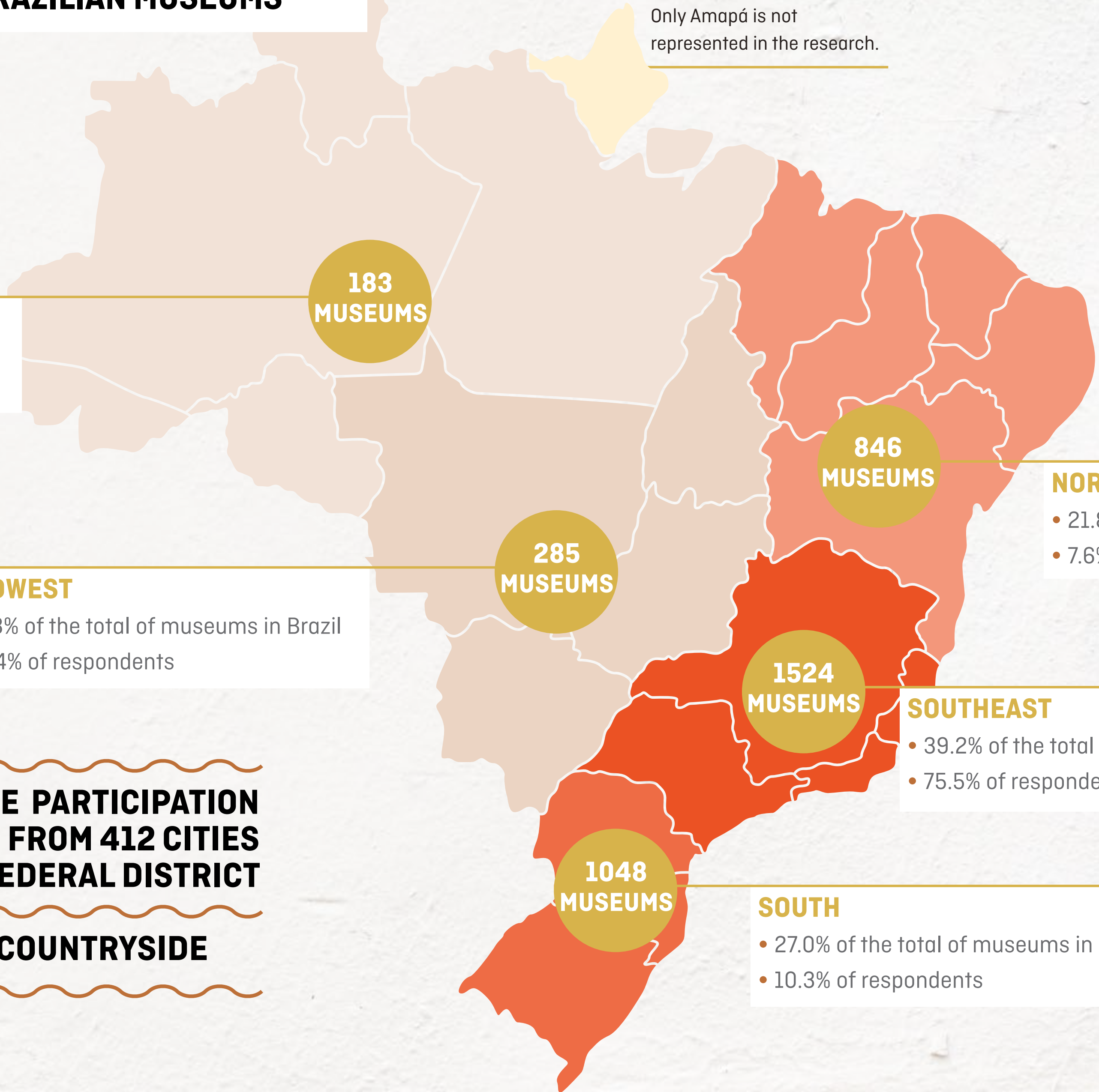
IN A WORD WILL THE MUSEUM OF THE POST-PANDEMIC FUTURE BE?



CYCLE 2

SEARCH RESULTS WITH MUSEUM AUDIENCES

WHO PARTICIPATED IN THE RESEARCH AND WHAT THIS CAN SAY TO BRAZILIAN MUSEUMS



Only Amapá is not represented in the research.

NORTH
- 4.7% of the total of museums in Brazil
- 2.1% of respondents

MIDWEST
- 7.3% of the total of museums in Brazil
- 4.4% of respondents

NORTHEAST
- 21.8% of the total of museums in Brazil
- 7.6% of respondents

SOUTHEAST
- 39.2% of the total of museums in Brazil
- 75.5% of respondents

SOUTH
- 27.0% of the total of museums in Brazil
- 10.3% of respondents

Despite the geographic, it is important to note the significant participation of respondents from the Southeast region, women and whites, between 30 and 49 years old with a high level of education. The profile of the participants reminds us that expanding the diversity of audiences - in terms of race, social class, gender and age - must be a banner and a goal for the entire sector.

THE RESEARCH HAD THE PARTICIPATION OF 4,210 RESPONDENTS FROM 412 CITIES IN 25 STATES AND THE FEDERAL DISTRICT

69,8% CAPITAL *X* 30,2% COUNTRYSIDE

NEW LENSES MUST BE USED TO SEE MUSEUM AUDIENCE

For almost 1/3 of the public, the museum is primarily a place of knowledge (29.1%), of reflection on the past, the present and the future (27.9%) and inspiring (26.3%). On the other hand, less than 3% consider museums to be places of tourism or entertainment. Only 16 of the more than 4,000 respondents said that museums are annoying, boring and old-fashioned places.

The pandemic has impacted people in very different ways and museums can also classify their audiences based on their profiles and emotional needs. In addition to a high percentage of people who are taking the opportunity to learn new things (38.3%), the survey found that 1/4 of the respondents are adapting well and enjoying staying at home. However, there is the same proportion of people who are stressed and/or distressed (24.5%) and still feel bored (13.1%) or lonely (11.3%). Pandemic mourning is also a topic present for 5.8% of respondents.

All audiences have a thirst for novelty and, among reasons for visiting a museum, seeing new exhibitions was the most marked option in all age groups. Before the pandemic, in addition to the exhibitions, what made the public go to a museum was: visit the museum (53.5%), participate in cultural programming or educational activities (37.7%), review the museum's collection (30.9%), go out with children, family or friends (20.7%), researching (10.7%), taking part in school or tourist trips (5.6%).

The museum is a social gathering place and many people visit museums for reasons not necessarily linked to the collection or exhibitions on display. The sum of other response options reveals that 22.5% of respondents went to museums to meet people, stroll in the garden/park, go to the cafe/restaurant/shop, use the library or simply to be in an accessible space, with resources inclusive. For these people, what will be the motivations for returning to the museum space, even if virtually, during the pandemic?

CULTURAL EXPERIENCES OF AUDIENCES DURING THE PANDEMIC AND LEARNING FOR THE PERFORMANCE OF MUSEUMS IN THE DIGITAL ENVIRONMENT

More than half (51.2%) of the survey participants did not participate in any digital activity promoted by any museum, despite being quite active on the internet and looking for pleasant *activities* during the pandemic.

The expansion of the digital presence of museums was accelerated due to the pandemic, but it was no longer a novelty. Online activities have a great potential to attract new visitors as well as to retain those who already know or visit museums: 24.1% of respondents said they had their first contact with the museum through some digital activity during the pandemic. Almost the same percentage (25.3%) of those who classified themselves as regular visitors (had visited more than once).

Online activities most accessed by the research participants were: online classes, courses, workshops or webinars (71.4%); lives and/or live broadcasts of cultural events/ artists (concerts, plays, presentations) (59.7%); online debates, meetings or discussions (50.8%); Online exhibitions and/or virtual visits to museums and galleries (33.3%).

Platforms are preferred or used most frequently by audiences to visit and/or participate in virtual activities promoted by museums: YouTube (64.7%), Museum Website (54.5%), Instagram (53.5%), Facebook (28.8%), Google Arts & Culture (20.5%).

Digital activities well planned and connected with the institutional mission are powerful tools for disseminating knowledge about assets, collections and themes of museums. In addition, they expand the accessibility and reach of museums, reaching audiences in other states and cities - some of whom have never visited or would visit the museum in person.

The audience appreciates the opportunity of getting to know the museums from the inside, not only with digital visits, but also meeting and listening to curators, directors, teams and artists. Participation in digital activities increases connection and interest in visiting or returning to museums in person when possible. However, there is an expectation that even after the physical reopening, institutions will continue to perform digital activities.

It is essential to understand digital activity as a specific type of experience. For 91.9% of those who participated in some online museum activity during the pandemic, the experience was good or excellent, but the testimonies of the public point out points of improvement for museums to offer even more meaningful and pleasant experiences for their audiences.

People who have not yet participated in digital museum activities would be attracted to an activity out of interest by a specific guest, artist, theme or content (52.9%); launch of a virtual exhibition on a topic of interest (50%); curiosity about some new format or experience (40.8%); willingness to get information or learn something (35.9%); virtual educational visits (21.6%).

WHAT ARE AUDIENCE EXPECTATIONS AND WHY IT IS IMPORTANT TO LISTEN THEM

The last section of the survey was dedicated to the ideas and suggestions about the future of museums. Almost 3,000 participants, of all ages, answered the open and optional question on the topic, which shows that audiences have a lot to say and want to be involved in the future of museums. Research shows that audiences not only want museums to become more digital, but above all to make them more accessible and closer to their communities.

Even with fear, the public trusts the reopening of museums, with almost half (45.9%) of the survey participants fully believing that the museum they most frequently visit will be able to implement the necessary security measures for its reopening.

Some themes were present in the responses. Digital and educational actions were highlighted, followed by actions to increase the accessibility of museums, to improve their relationship with the surrounding communities and to expand their social role. The public also expects to see new exhibitions and several respondents shared the desire that museums address, from their different perspectives, themes related to the pandemic, health and the future.

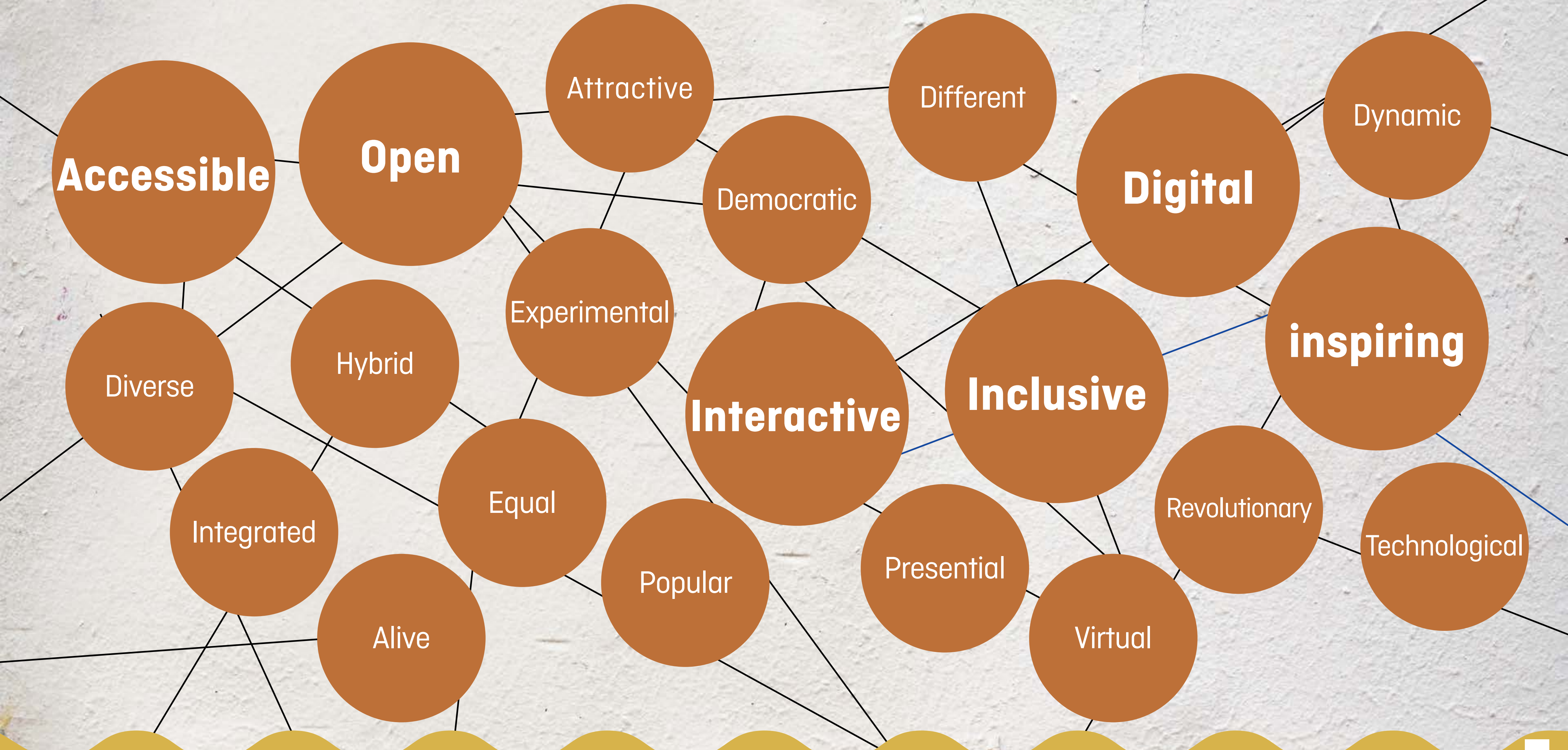
In 2018, the International Museum Council (ICOM) started the process of reviewing the current definition of museum. The initiative aims to seek a definition that embraces the challenges of the 21st century and the current expectations of societies. Although there is still no consensus on the new definition, the discussion shows that there is an expectation that museums will be more present in the communities, that they are more sustainable, diverse, inclusive and that dialogue with important problems and agendas in each each country.

CHANGES THAT WOULD MAKE MUSEUMS MORE INTERESTING TO PUBLIC

Regarding the performance and positioning in society: Be more diverse, inclusive for all people and accessible to different audiences (42.9%); support social causes in your community, including local artists. (37.9%); expand and diversify the cultural program, including new exhibitions more frequently (36.5%); address important social and political themes and agendas, such as racism, feminism, gender inequality, etc. (27.9%); be less formal or more fun (14.6%).

Regarding their schedule and activities, the main notes were: being cheaper or free (25.4%); being more digitally accessible and expanding online programming (24.7%); be more participatory and/or interactive (23.3%); having professionals prepared to welcome different audiences (18.4%); have more content for children and teenagers (8.2%).

THE MUSEUM OF THE FUTURE WILL BE...



CREDITS

REALIZATION:

ICOM Brasil

President and Vice-President
Renata Vieira da Motta
Vera Lucia Mangas da Silva

Board of Directors
Marília Bonas
Roberta Saraiva Coutinho

Communication Advisory
Renata Beltrão

Executive Secretary
Lucimara Varejano

PARTNERSHIP:

Tomara! Educação e Cultura

General Management and Research Coordination
Clara Azevedo
Júlia Serra Y. Picchioni
Ana Luiza Mendes Borges
Camila Iwasaki

Assistant
Clarissa Batalha

Associate Researcher
Beth Ponte

Compendium
Roberto Padovani
Mariana Fandinho
Hyago Souza

Graphic Deign
Maria Clara Viana Stoqui

Parceria:

TOMARA! EDUCAÇÃO & CULTURA

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Transformando dados em informação.

Apoio:

ABRAOSC
Associação Brasileira das Organizações Sociais de Cultura

Museu de Arte Moderna
Rio de Janeiro

ICOM international council of museums Brasil