

SITUATION IN ITALY IN THE CULTURAL SECTORS DURING COVID 19

In Italy, the crisis caused by the pandemic affected all productive sectors in 2020, although with (relatively) different intensities between sectors.

The cultural sector was one of the most affected economic sectors.

(That which= The one that) includes activities related to cultural, entertainment and leisure and other services saw a contraction in value added of 14.6% (source: Istat).

The share of cultural and entertainment enterprises with a serious risk of closure was over 60% in 2020 (source: Istat).

All cultural activities are affected by the decrease, in particular theatre performances (-4.6 percentage points compared to 2019) and visits to museums and exhibitions (-4.5 percentage points).

In 2020, state-owned museums recorded just over 13 million admissions, a decrease of over 41 million admissions compared to 2019 (-75 per cent), due to museum closures because of the pandemic and in the reopening phase to visitor quotas to comply with anti-Covid regulations.

In 2020, there were 479 museums, monuments and archaeological sites open to the public in Italy, and the number of visitors fell by more than 41 million, from almost 55 million in 2019 to just over 13 million in 2020.

The Italian Government has launched extraordinary measures to provide economic and financial support to operators in the arts sector.

Article 89 of the "Decreto Cura Italia" (Decree Law no. 18 of 17 March 2020) - Emergency Fund for Entertainment, Cinema and Audiovisual - establishes two funds with a total endowment of 335 million euro for the year 2020.

Subsequently, Article 183 of the Relaunch Decree further increases the Funds for emergencies in the performing arts and cinema and audiovisual sectors.

The health emergency and the lockdowns and restrictions that closed museums and other cultural activities throughout Italy and then, in the periods when museums reopened, the restriction of visitor access to comply with anti-Covid

security regulations, resulted in a 75 per cent drop in attendance compared to 2019.

Another sector that has suffered a drastic contraction in supply and demand as result of pandemic closures and restrictions is the audiovisual sector. In 2020, the number of live theatre, cinema and concert performances fell sharply compared to 2019.

However, this has not stopped Italians from enjoying cultural products. After an initial moment of bewilderment, Italians have experimented with new ways of attending shows and concerts. In particular, it was found that since the start of the pandemic, 33% have followed social networks in which famous musicians and singers performed from their homes, 13% have virtually visited exhibitions, museums and archaeological sites, 6% have watched streaming theatre shows and 4% have attended virtual concerts directly from their PCs, paying for a ticket.

The lockdown initially disoriented, especially the regular users: the live experience of cultural events and activities was very much missed.

At the same time, however, the lockdown stimulated and imposed choices and strategies to compensate for the lack of live attendance, which turned out to be satisfactory.

Digital has therefore played a key role in cultural fruition during the lockdown: it has added new ways of fruition, filled a gap and widened the audience, allowing new, less experienced users to approach the world of culture and show interest in the sector.

For new users of the sector, the lockdown was a moment of experimentation and discovery, an opportunity that made the enjoyment of culture simpler and more accessible, and a familiar sharing, capable of bringing younger people closer to culture.

But if for the new audience, the lockdown was a moment of experimentation and discovery, for the regular users the lockdown was a moment of intense dissatisfaction.

Theatre

Again from an ISTAT source, in 2020 15.7% of people said they (had gone= went) to the theatre at least once in the last twelve months, theatre (being=is), among the forms of cultural participation, the one that declined the most compared to 2019.

Theatres have suffered particularly because (often very) strict distancing rules have penalised all those forms of entertainment based on presence; theatre is an art that needs the simultaneous presence of actors and audience, it thrives on physical proximity.

But the impact on the theatre goes beyond the closure of the facilities. In fact, after the reopening, other challenges had to be faced, for example, the "logjam" of productions, in which performances scheduled for spring 2020 and winter 2020/2021 were postponed. Once the theatres reopened, audience capacity was initially reduced and consequently there was less space for new programming.

The halt in theatre activity not only meant economic hardship, but also undermined the foundations of a healthy theatre scene with a thriving new generation of artists.

SIAE <small>DALLA PARTE DI CHI CREA</small>		CONFRONTO TRA 2020 vs 2019			SIAE <small>DALLA PARTE DI CHI CREA</small>	
2019	Eventi	Ingressi	Spesa Al Botteghino	Spesa del Pubblico		
B Attività teatrale	132.201	23.328.382	426.034.487,92 €	485.232.848,57 €		
2020 vs 2019	Eventi	Ingressi	Spesa Al Botteghino	Spesa del Pubblico		
B. Attività teatrale	-86.201	-16.495.600 -	334.204.579,93 € -	378.176.782,39 €		
2020	Eventi	Ingressi	Spesa Al Botteghino	Spesa del Pubblico		
B Attività teatrale	46.000	6.832.782	91.829.907,99 €	107.056.066,18 €		
2020 vs 2019	Eventi	Ingressi	Spesa Al Botteghino	Spesa del Pubblico		
B. Attività teatrale	-65,20%	-70,71%	-78,45%	-77,94%		

Source: SIAE

Museums, exhibitions and archaeological sites

According to an ISTAT survey in 2020, 27.3% of people said they (had) visited a museum or (gone=went) to an exhibition in the last 12 months and 25.3% (had) visited an archaeological site or monument.

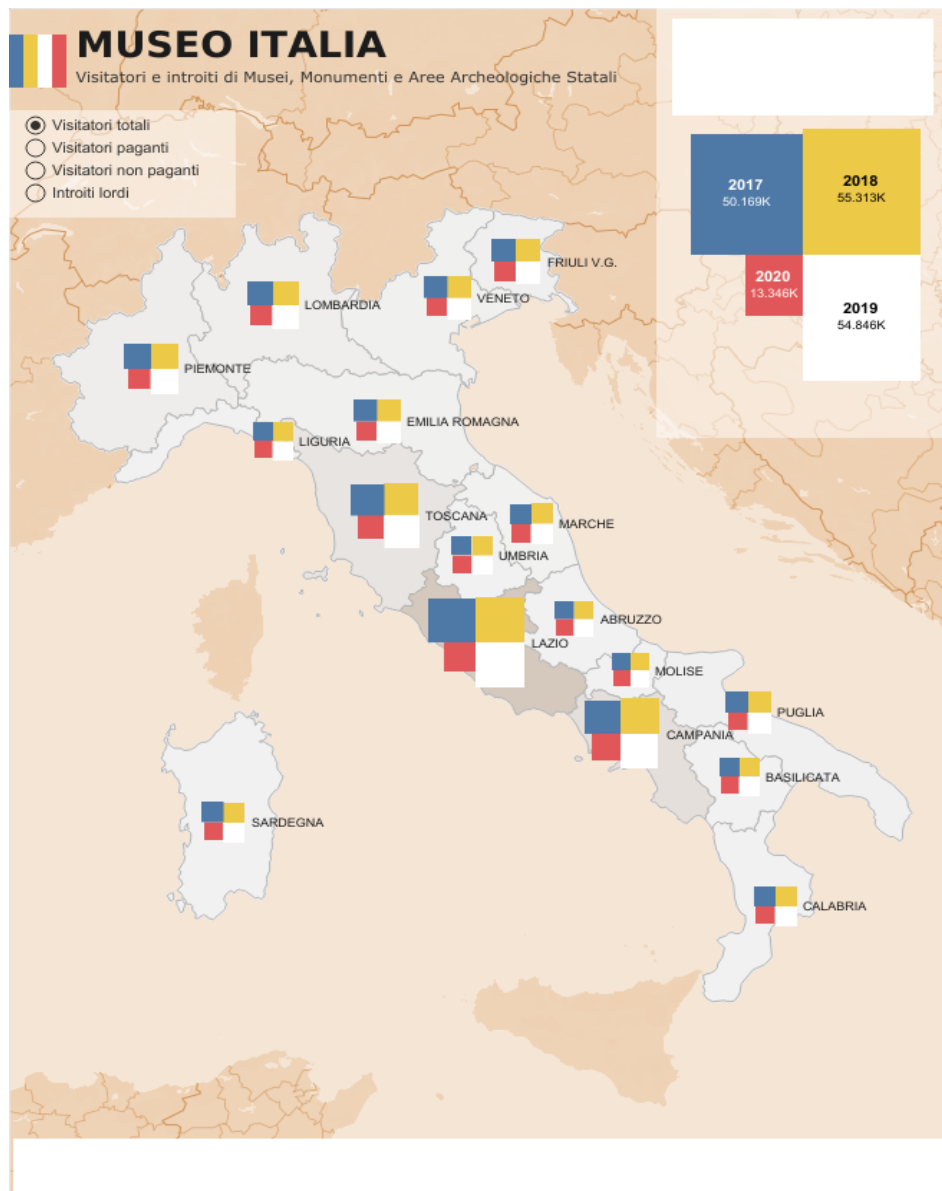
Among the users of museum heritage we have young people, however in this age group, participation rates dropped dramatically compared to 2019.

In general, compared to 2019, the biggest decreases for these activities are observed among children and young people aged 6-17 years, who did not attend school due to the restrictions caused by the pandemic and saw fewer opportunities to participate in cultural activities.

Analysing the data at territorial level, residents in the Centre-North show a greater propensity to visit museums, exhibitions or archaeological sites: 31,7% and 28,6% respectively, against 19% of the inhabitants of the South.

It has gone from almost 55 million visitors in 2019 to just 13 million in 2020. This is the situation after one year of pandemic, which has brought Italian museums to their knees. These numbers translate into huge amounts of lost revenue, which has gone from over 242 million to just 52 million last year, a loss of 78.4%. This is a figure that reverses a virtuous trend that has been going on since the 1990s, which has seen a significant increase in visitors and receipts.

Below is a graph analysing the number of visitors to Italian museums from 2017 to 2020:



Source (Sole 24Ore)

Therefore, while there was an immediate drop in attendance at exhibitions, museums and archaeological sites, it is also true that the restrictions on mobility due to the pandemic did not stop museums, galleries and exhibitions, which, through innovative and totally technology-supported solutions, immediately responded by giving the opportunity to enter the halls of art and culture virtually.

For example, immersive tours have been created, i.e. virtual tours of temporary or permanent exhibitions through videos, commented and explained by experts, or interactive tours, which in addition to the visit include activities and games, often aimed at families and school groups, with real video games or treasure hunts or reconstructions of environments in 3D.