



National COVID-19 Study Report



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BACKGROUND AND APPROACH

The purpose of the National COVID-19 Survey Report is to identify the impact of Covid-19 on future visitation, to what level support can be expected, safety measures potential visitors define to be important, and how visitors have interacted digitally. Additionally, information regarding demographics, household characteristics, and usage was collected.

An online survey of more than 40 cultural attraction's visitors, members, donors, and social media followers was conducted. Participants were invited via an email invitation and on social media by each participating organization. More than 95,000 surveys were conducted.

The survey project was designed with leadership from The Getty Center in Los Angeles. Additional guidance was provided by California Academy of Sciences. Participation in the survey was (continues to be) free. The survey results are intended to be shared with any cultural attraction.

PARTICIPANTS

Results were collected and tabulated by Morey Consulting. The following organizations participated:

Akron Zoo	Mystic Aquarium
Arizona Museum of Natural History	Nassau County Museum
Arizona Sonora Desert Museum	National Civil Rights Museum (at the Lorraine Motel)
Bakken Museum	New York Botanical Garden
Bay Area Discovery Museum	NHMSD
Birmingham Zoo	NYSCI
Boston Children's Museum	Oakland Zoo
Broad Museum	Phipps Conservatory and Botanical Gardens
Buffalo Zoo	Phoenix Zoo
California Academy of Sciences	Port Discovery Children's Museum
Cheyenne Mountain Zoo	Pretend City Children's Museum
Children' Museum Houston	Queen Mary
Children's Discovery Museum of San Jose	Reuben H. Fleet Science Center
Cincinnati Art Museum	Riverbanks Zoo and Garden
Delaware Art Museum	San Diego Natural History Museum
Desert Botanical Garden	Science Museum of Minnesota
Franklin Park Zoo	Seattle Art Museum
George Washington's Mount Vernon	Space Center Houston
Green Bay Botanic Garden	St. Louis Aquarium
Harvard Art Museums	Walt Disney Family Museum
Huntington Library	Zoo Miami
i.d.e.a. Museum	Zoo New England
J. Paul Getty Museum	ZooTampa at Lowry Park
Mesa Arts Center	
MOXI	

KEY RESULTS & CONCLUSIONS

Visitation

Generically, visitation demand for Botanical Gardens and Zoos has increased 12% and 5%, respectively. This suggests local market visitation will increase after one year of being open.

Visitation demand has decreased for Aquarium (-9%), Art Museums (-16%), Children's Museums (-18%), Museums (-7%), and Science Centers (-9%). This suggests that local attendance could decrease by as much as these amounts over a one-year period. This may not be realized if capacity limitations are applied as a safety measure.

On average, 87% of survey respondents visited the Cultural Attraction in 2019. On average 67% will definitely visit the same cultural attraction within one year of reopening and 21% will probably visit.

- If an organization does not convert any probable visitors to actual visitors (unlikely), local attendance will decrease by 23%.
- If an organization can convert 50% of potential visitors to visit, local attendance will decrease 10%.
- If an organization can convert 100% of potential visitors to visit (unlikely), local attendance will remain the same as in 2019 -- assuming average party size and visit frequency remain the same.

These results demonstrate the importance of converting probable visitors to actual visitors. Our audience acquisition studies indicate that probable visitors tend to have lower advertising awareness, less brand recognition, and lower visitor satisfaction than definite visitors. ***Steps should be taken to increase awareness, strengthen brand attributes (engaging experiences, new, unique), and reinforce highly rated visitor experiences.***

Organizations who will not experience significant attendance decreases have the following characteristics:

- Their constituents were more likely to have engaged with them digitally (44% vs. 34%)
- They have slightly higher visitor satisfaction (73% vs. 69%)
- Their visitors are less concerned by COVID-19 (53% vs. 65%) and are less likely to think safety measurements are necessary (48% vs. 54%)
- They are more likely to "cherish" the organization (49% vs. 34%)
- They are less likely to have children in their household (45% vs. 60%)
- They are less educated (77% have a college degree vs. 86%)
- They have less income (54% make less than \$100,000 compared to 43%)
- They are younger

The average satisfaction rating as excellent (9 and 10) was 71%.

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4% of constituents believe cultural attractions should open prior to stay at home orders being lifted, 13% immediately after stay at home orders are lifted, 21% within one week, 32% within two weeks, 35% within 3 weeks, 55% within one month. 45% do not know when cultural attractions should reopen.

Demand varies but is relatively strong. 35% of visitors intend to visit (on average) within three months of reopening, but 68% of visitors at one cultural attraction anticipate visiting within three months compared to 16% at another.

Of those unlikely to visit, 59% cited Covid-19 concerns, 11% cited economic concerns, and 4% cited unemployment. The percentage that cited unemployment is interesting given 17% of respondents are unemployed due to COVID-19. These results suggest visitation will not return to normal until first, COVID-19 health concerns are eliminated AND second, economic conditions improve.

The most important safety measures cultural attractions can provide to mitigate the negative effects of Covid-19 are...

- 87% believe it is very important to constantly clean high touch areas
- 77% believe it is very important to provide hand sanitizer
- 65% believe it is very important to limit capacity
- 62% believe it is very important to post hygiene etiquette signage
- 57% believe six-foot distancing should be enforced
- 52% believe it is very important that staff wear masks
- 52% believe it is very important to have touchless ticketing
- 50% believe it is very important that mask wearing is enforced
- 50% believe it is very important to post signage regarding cleaning policies
- 37% believe it is very important to route traffic one direction
- 35% believe it is very important to implement timed ticketing
- 24% believe it is very important to screen temperatures
- 15% believe it is very important to provide gloves

We recommend deploying any safety measure in which 60% or more believe to be important and consider implementing those that 50% or more of the public deems important.

Support

79% like to visit their cultural attraction, 67% believe their cultural attraction is important to the community, 48% support their cultural attraction's mission, 42% cherish their cultural attraction, 32% are program participants, and 31% consider themselves to be supporters.

There is a significant difference in the percentage of respondents that support their cultural attraction as a community resource compared to supporting the mission of the cultural attraction. We believe this difference is significant and reflects a finding from another study we recently conducted which found successful membership programs had higher percentages of those that support the cultural attraction as a community resource compared to its mission. ***We strongly advise cultural attractions to reference how it serves the community in order to raise support as opposed to the mission it serves.***

Additional support of organizations is tepid, but there may be an opportunity to increase membership.

- 36% would become a member
- 31% will share social media
- 13% would purchase tickets now for future visitation
- 12% would donate unused membership instead of adding an extension
- 9% would donate to a Covid-19 recovery campaign

50% will definitely renew their membership, but this percentage can vary dramatically by organization type (children's museums and science centers tend to have lower renewal rates compared to art museums). The highest renewal rate is 81% compared to the lowest of 13%.

11% will definitely contribute to an annual fund or other donation request.

Digital Interactions

55% of constituents have interacted with cultural attractions digitally since stay at home and travel restrictions orders have been in place. 40% have interacted digitally with their cultural attraction.

- 58% have followed cultural attractions social media.
- 57% have watched a virtual tour or behind the scenes video.
- 45% have visited website to see exhibits.
- 38% have watched webcams.
- 29% have watched online lectures or talks.
- 17% have participated in e-learning/online classes.
- 13% participated in a hands-on activity during or after watching a video

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Those interacting digitally were most likely to do so for entertainment, learning, or distraction (relaxation, humor, joy).

- 54% interacted for entertainment.
- 52% interacted to be distracted (relaxation, humor, joy).
- 55% interacted to learn.
- 44% wanted to stay connected to a cultural attraction.
- 36% wanted to stay informed.
- 33% wanted to find educational ideas for children.
- 19% wanted activities for children to do while working.
- 18% wanted to find family time activities.
- 11% wanted to virtually connect with others.

Even after reopening, we strongly recommend continuing to invest in development of online engagement tools for two reasons, 1) those that had greater digital engagement have higher visitor loyalty and 2) it is likely there will be more closures, not just related to Coronavirus, but natural disasters and weather events constantly “close” cultural attractions.

We recommend generating a variety of different content targeting different audiences ranging from relatively generic content that can be shared via social media to more detailed programs that can be shared via webinars and Zoom calls. All content should be engaging, educational, and entertaining,

Demographics and Household Characteristics

78% of respondents were female and 19% were male.

17% of respondents are unemployed as a result of Covid-19.

51% have children living in their household, 10% have grandchildren living in the area.

81% have a college degree.

50% have an annual household income of \$100,000 or more.

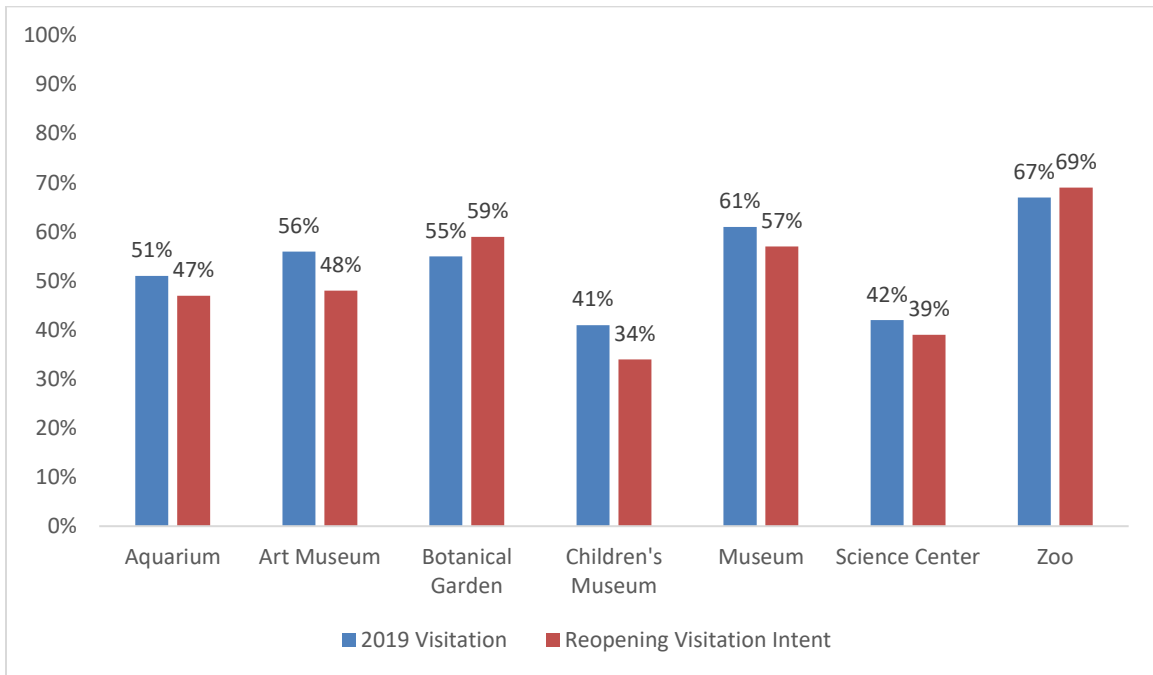
79% of respondents are Caucasian, 7% Asian or Pacific Islander, 6% Hispanic or Latino, less than 3% were of another race.

REVIEW OF RESULTS

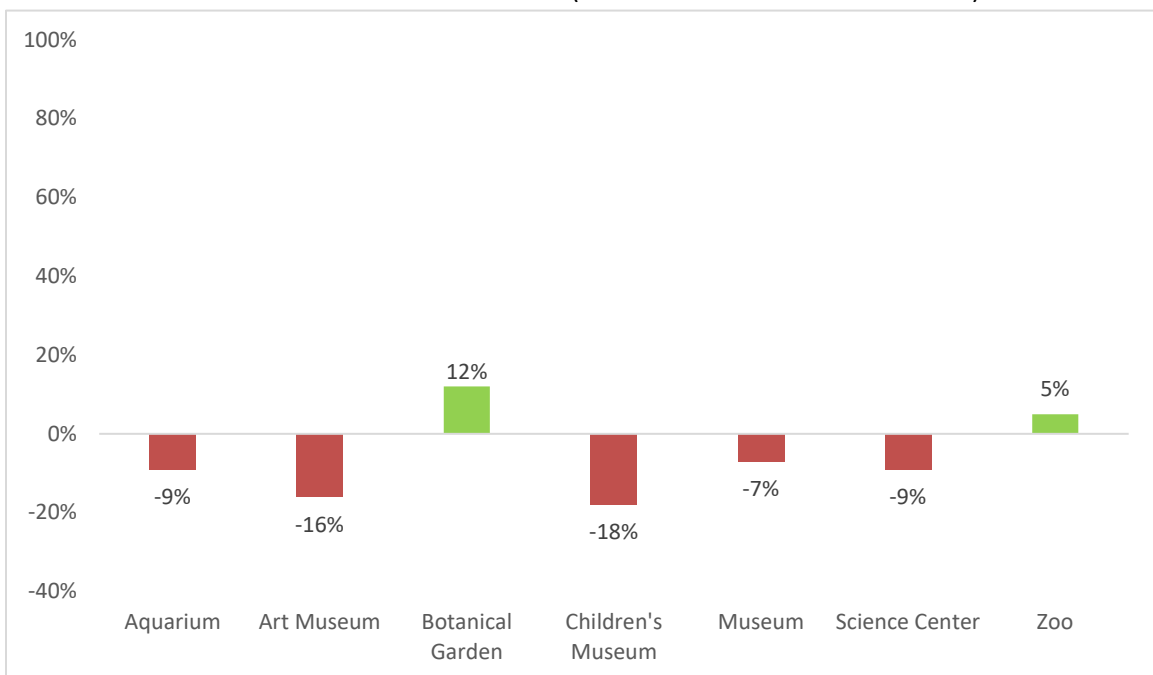
VISITATION

In 2019, did you visit any of the following?

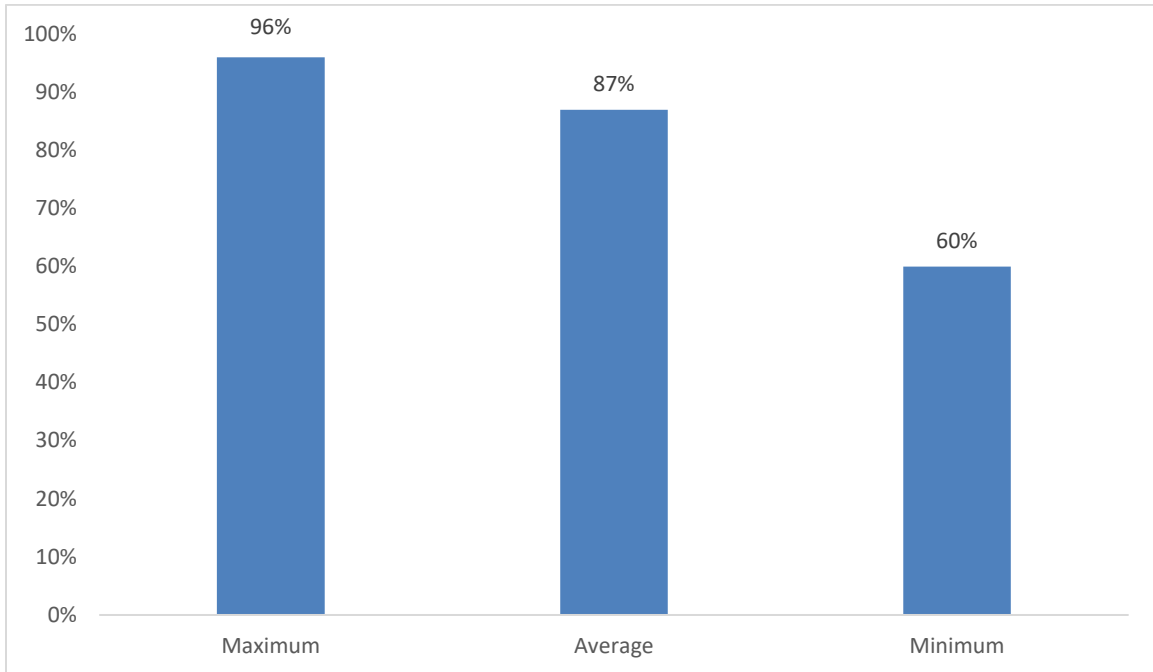
When stay at home orders and travel restrictions are lifted and cultural attractions reopen, which of the following will you visit in the proceeding 12 months?



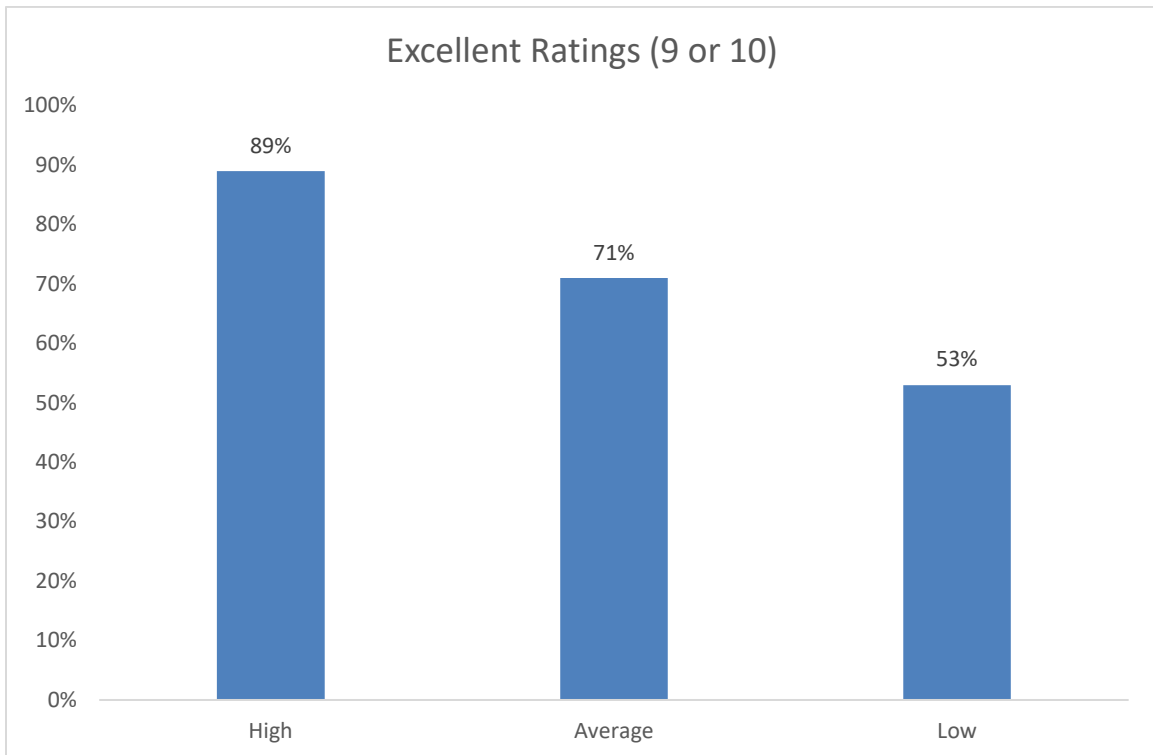
PROJECTED VISITATION IMPACT (EXCLUDING TOURIST VISITATION)



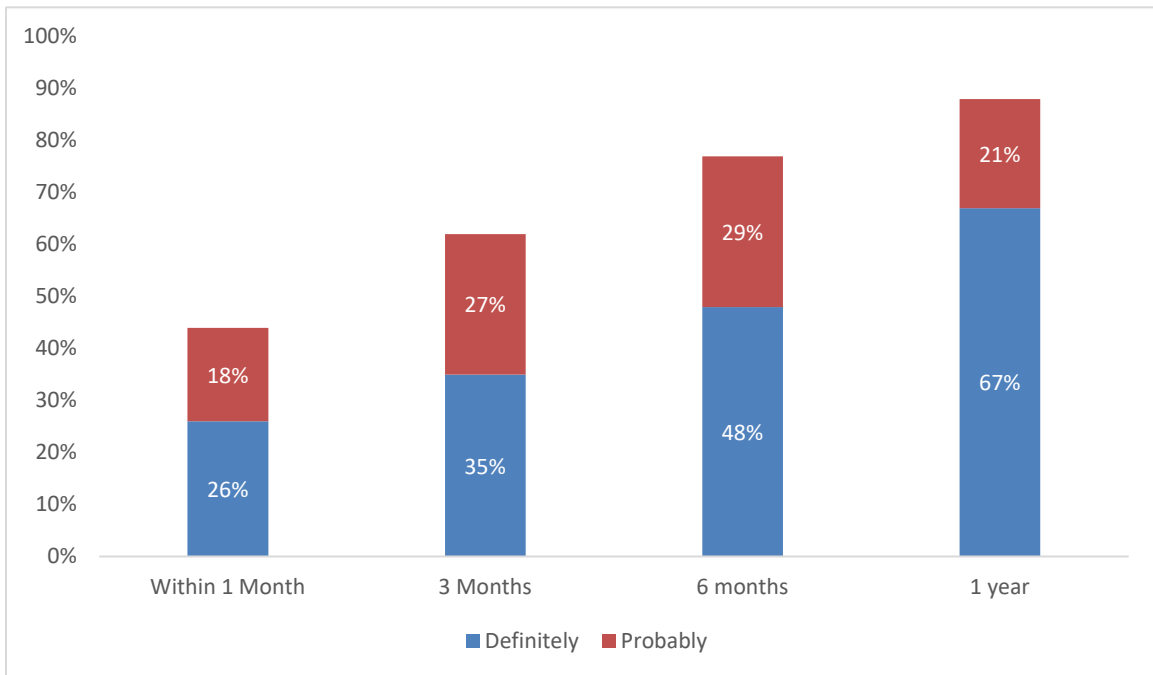
In 2019, did you visit CULTURAL ATTRACTION?



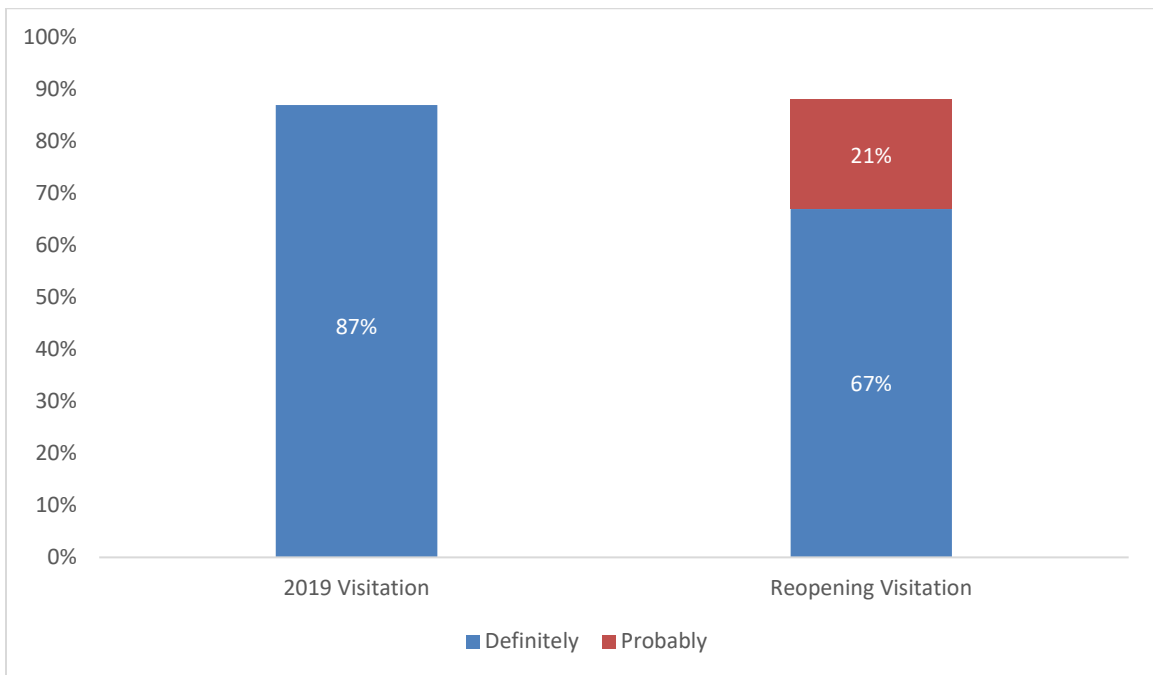
On a scale of 10 to 1 with 10 being excellent and 1 being poor, how would you rate your overall satisfaction with your last visit to CULTURAL ATTRACTION.



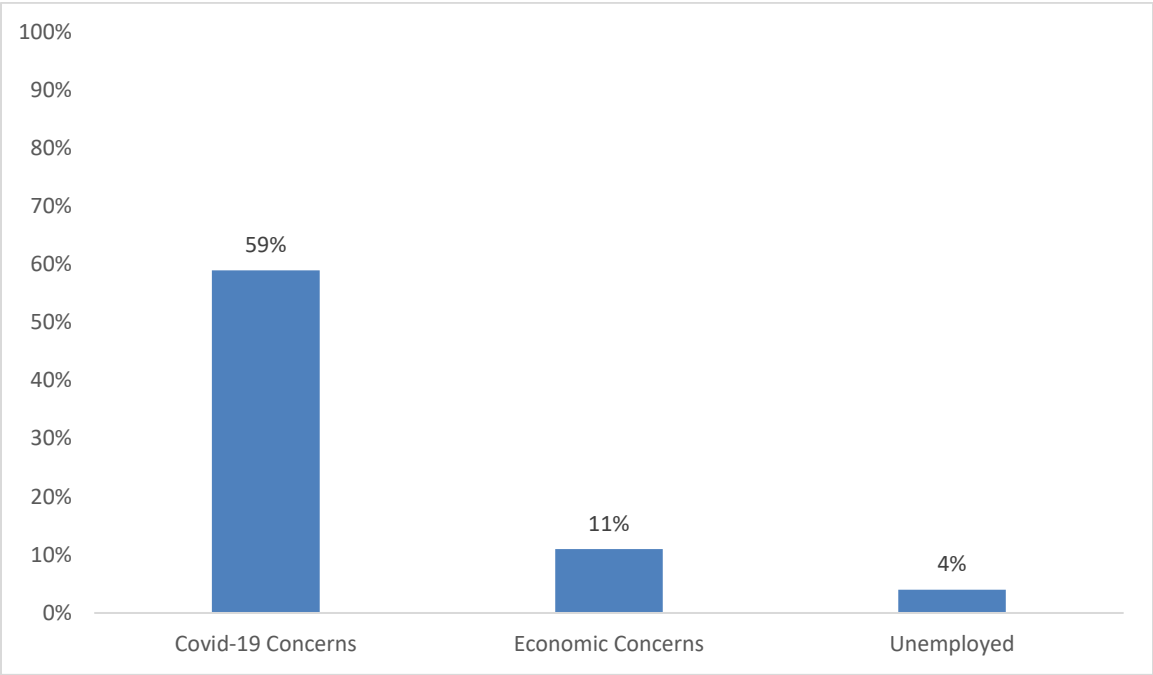
When stay at home orders and travel restrictions are lifted and we reopen, how likely are you to visit CULTURAL ATTRACTION?



PROJECTED VISITATION IMPACT

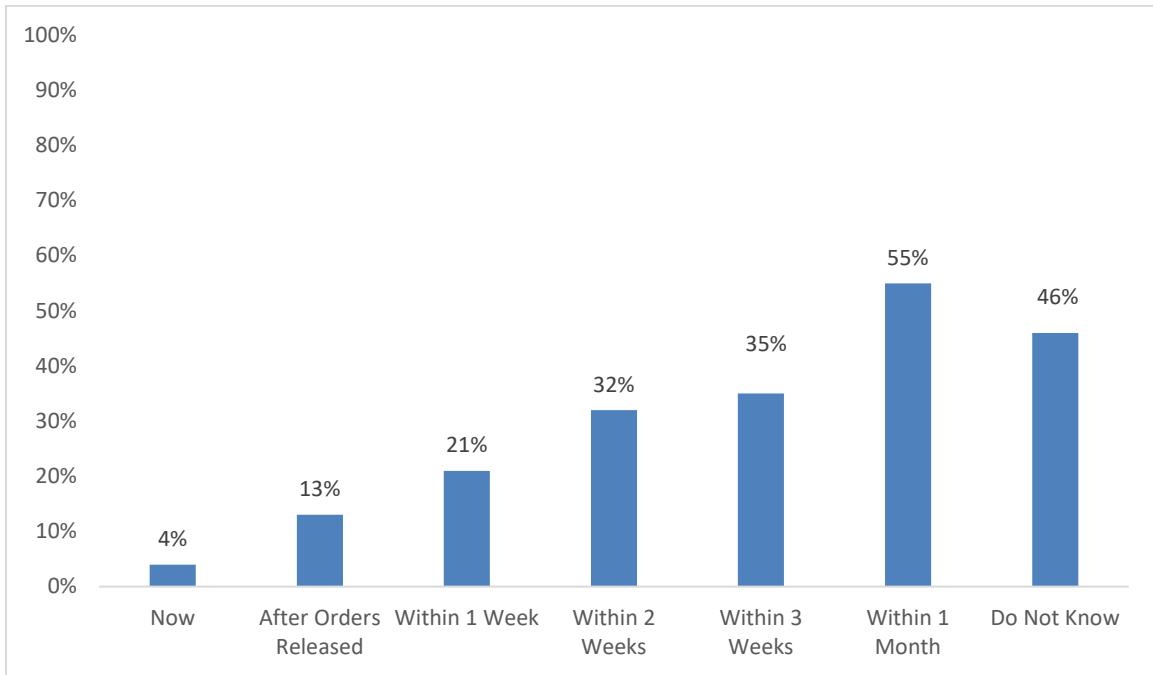


If you are less likely to visit when we reopen, why?

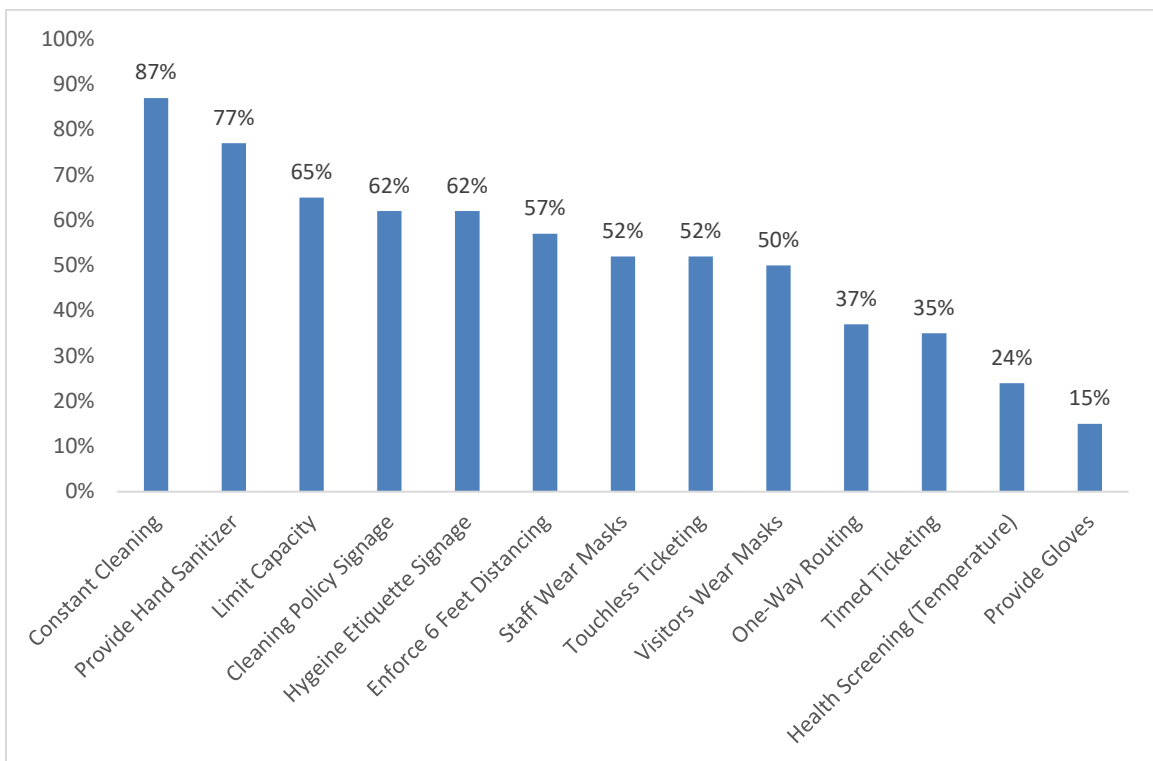


SAFETY MEASURES

When do you expect CULTURAL ATTRACTION to reopen?

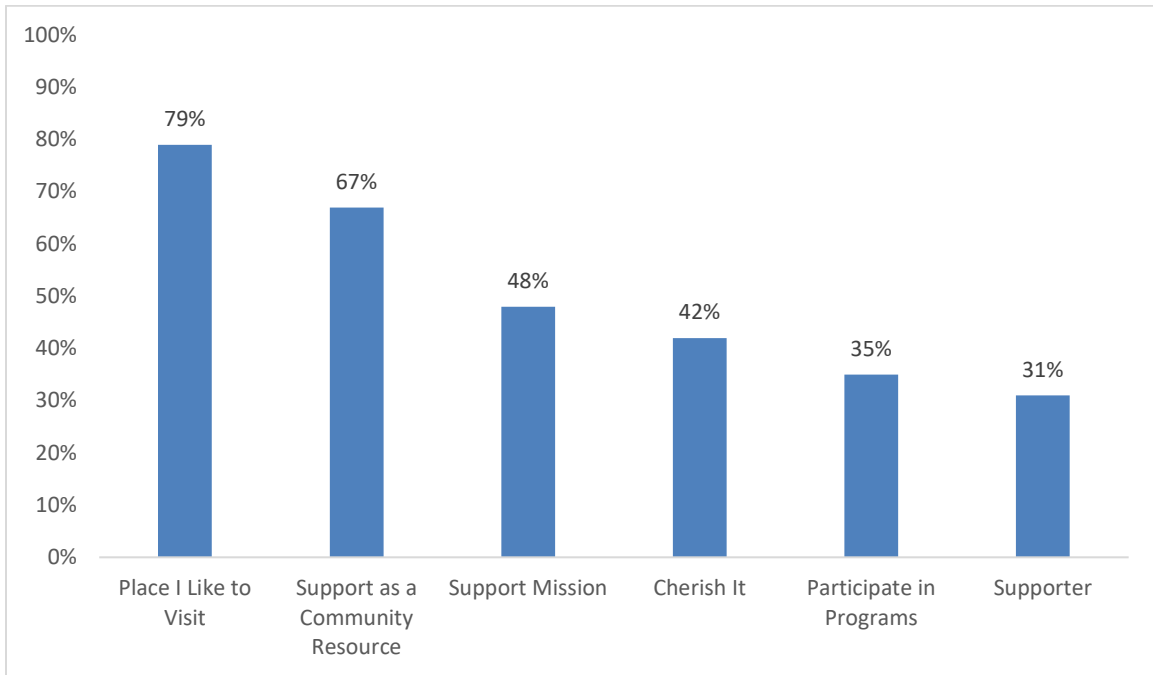


When the stay at home orders and travel restrictions have been lifted and we reopen, how important is it for us to do the following to ensure your visit safety?

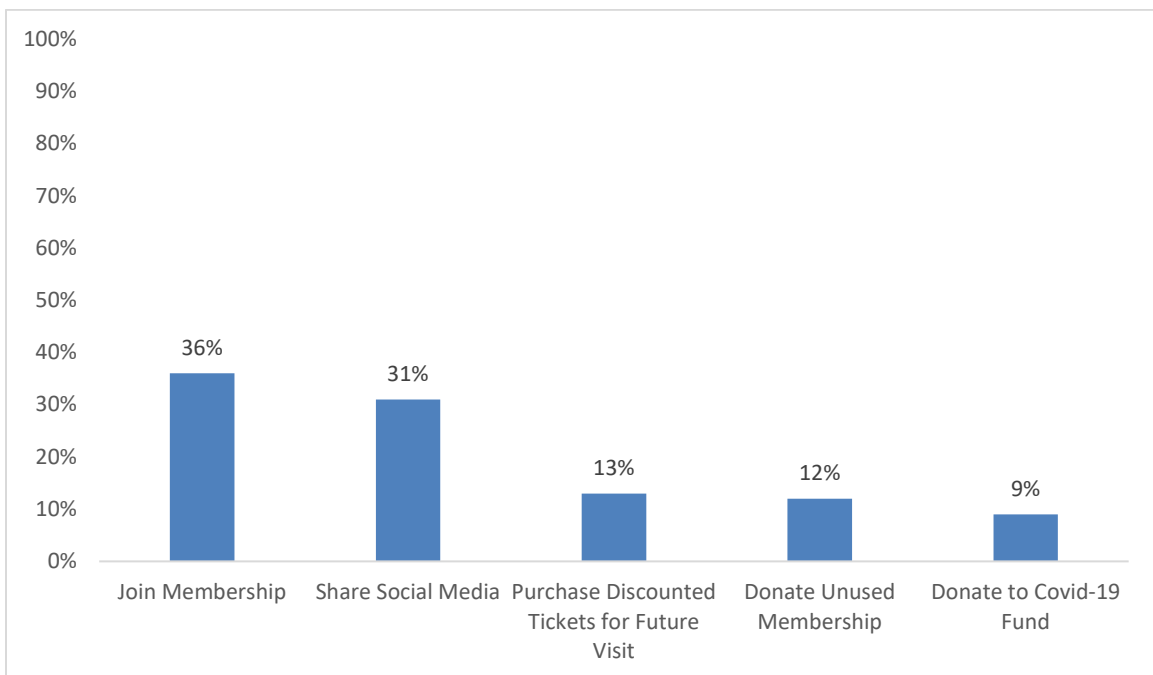


SUPPORT

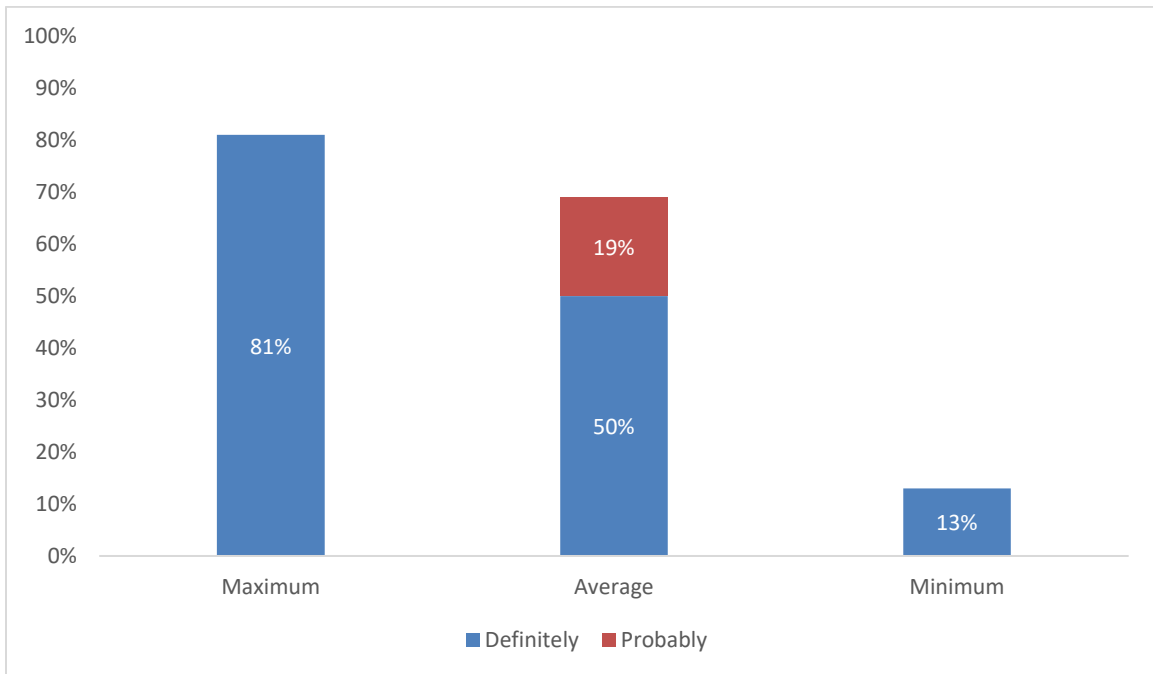
Which of the following statements describe your feelings about CULTURAL ATTRACTION?



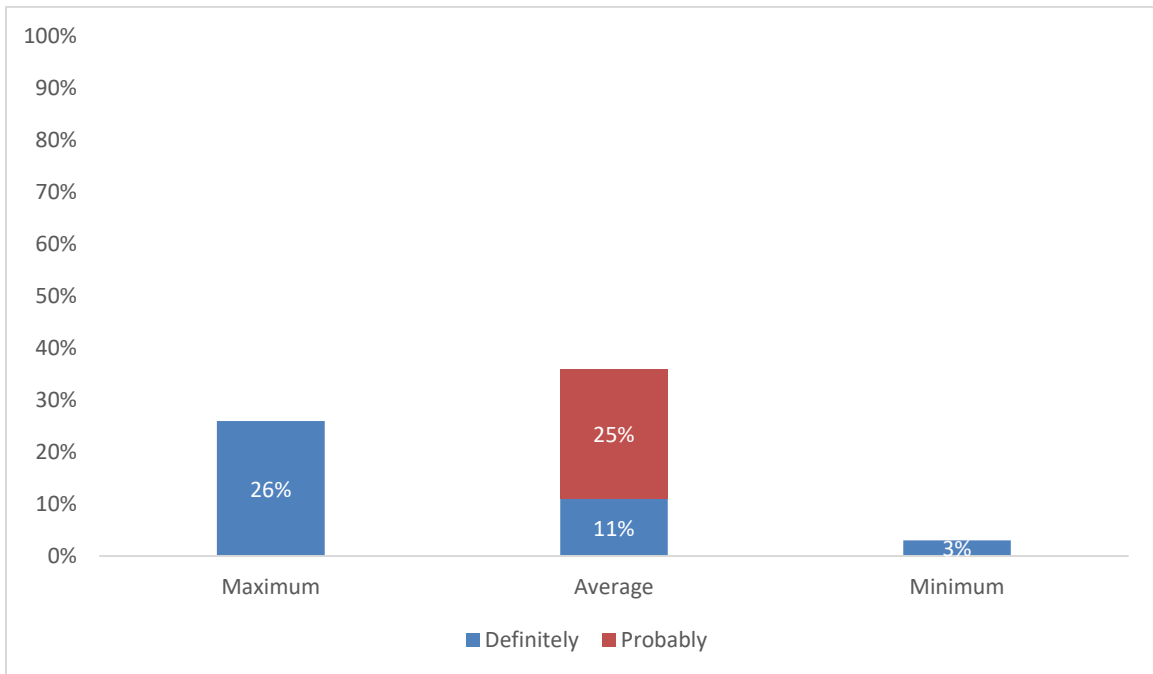
We, like most organizations need help. How likely are you to do any of the following to help us while we are closed or when we reopen?



How likely are you to renew your membership?



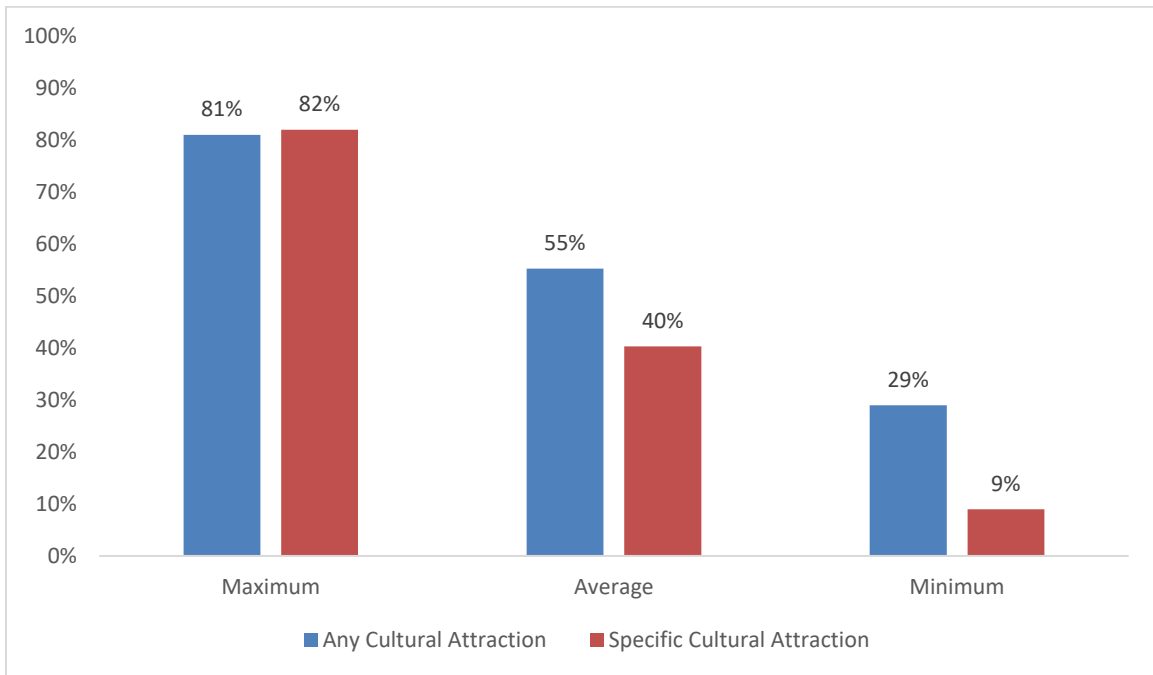
THIS IS NOT A SOLICITATION: In the next 12 months, how likely are you to support CULTURAL ATTRACTION via a donation to our annual fund or other fundraiser?



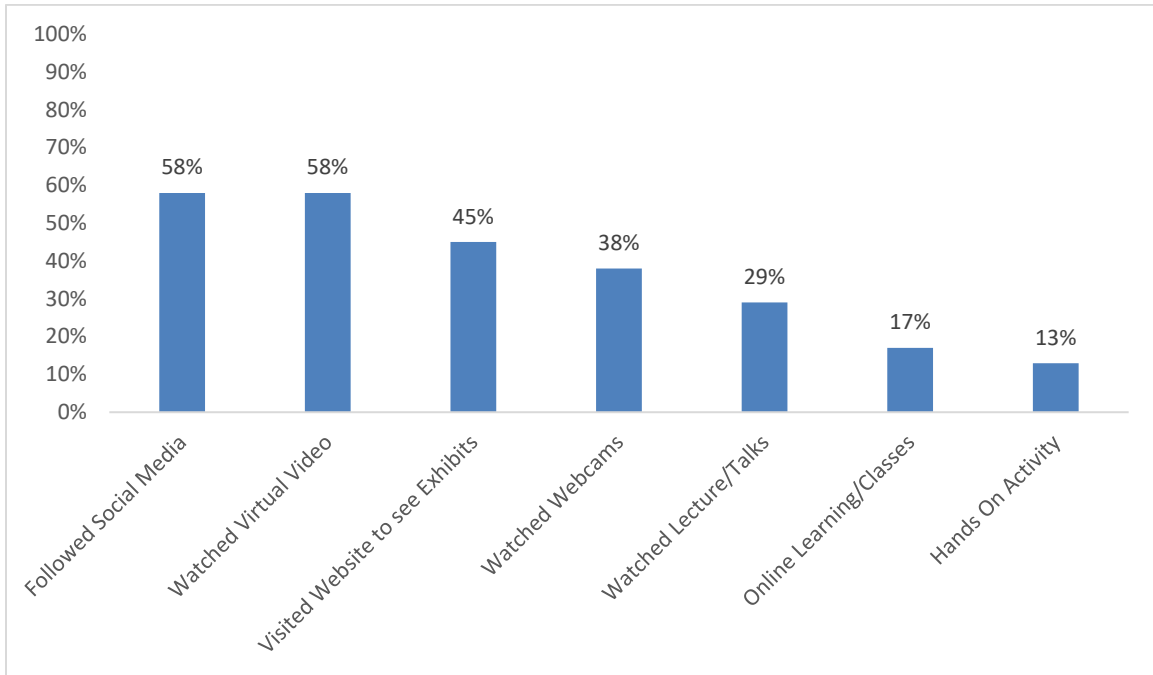
DIGITAL ENGAGEMENT

Since the stay in place and travel restriction orders have been placed, have you interacted digitally with any cultural attractions (museum, zoo, botanical garden, science center, aquarium, etc.)?

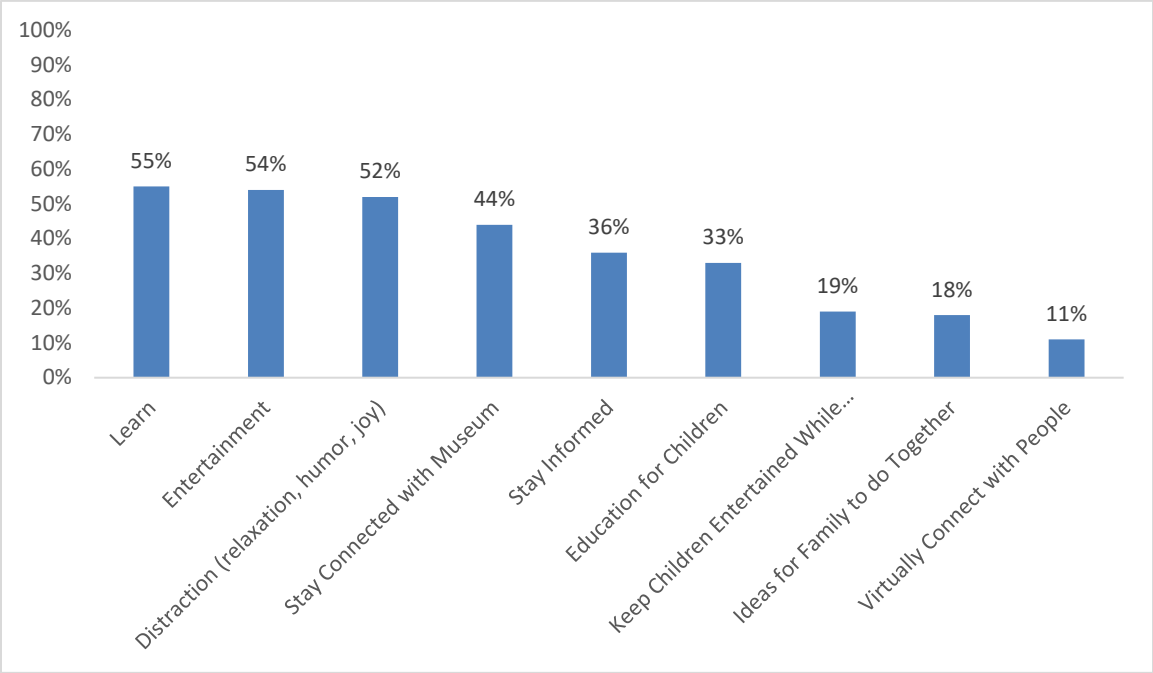
Since the stay in place and travel restriction orders have been placed, have you interacted digitally with CULTURAL ATTRACTION?



How have you interacted with cultural attractions?

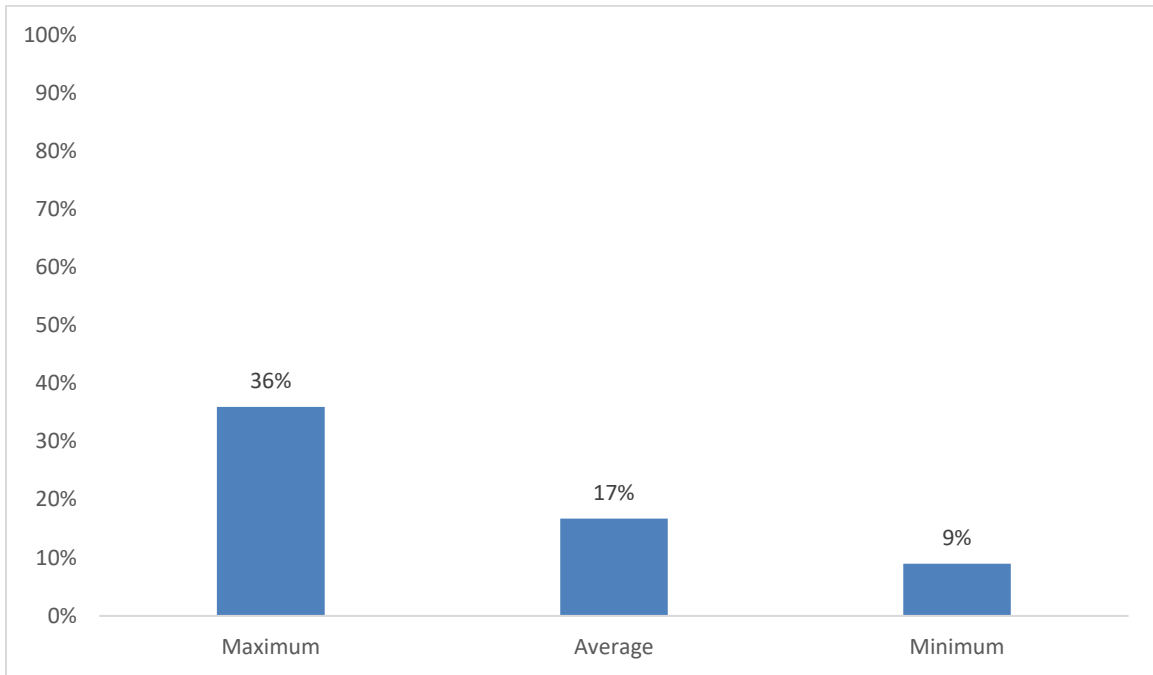


Why do you use cultural attraction digital content?

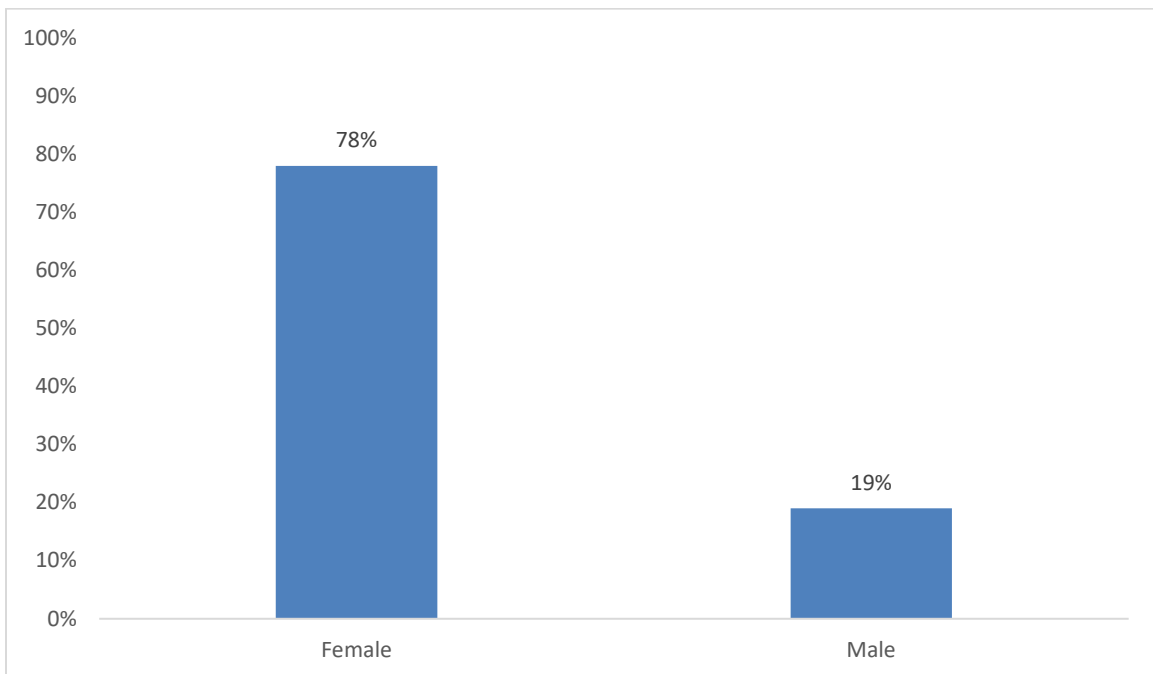


HOUSEHOLD CHARACTERISTICS

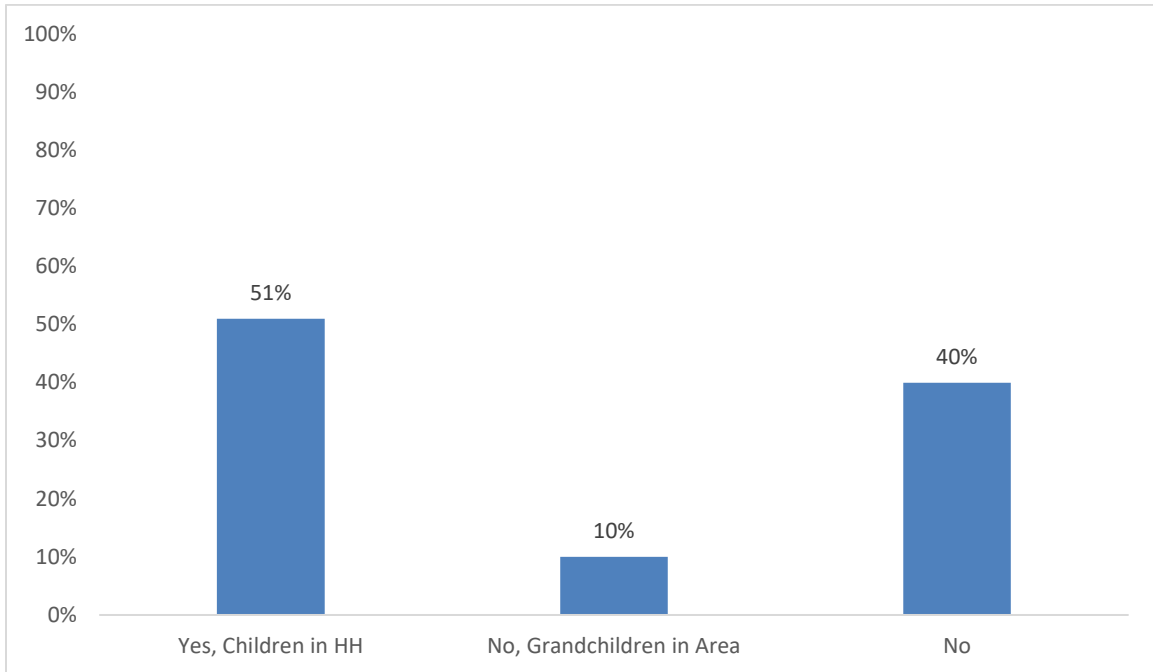
As a result of the Coronavirus pandemic, are you unemployed?



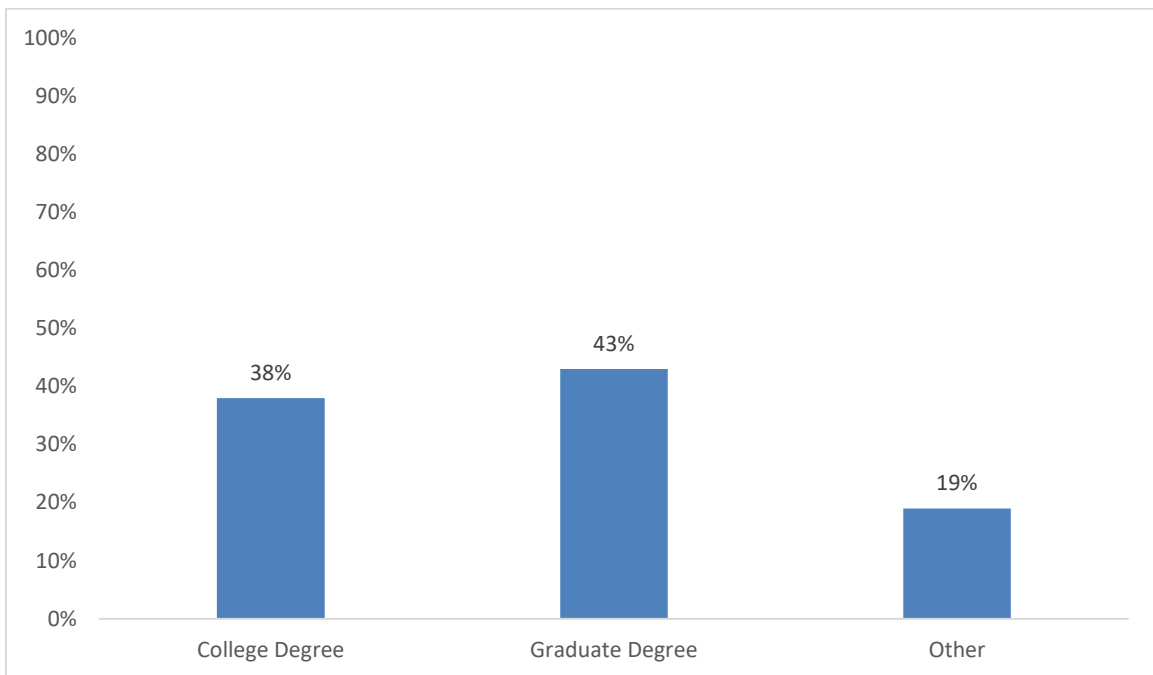
What is your gender?



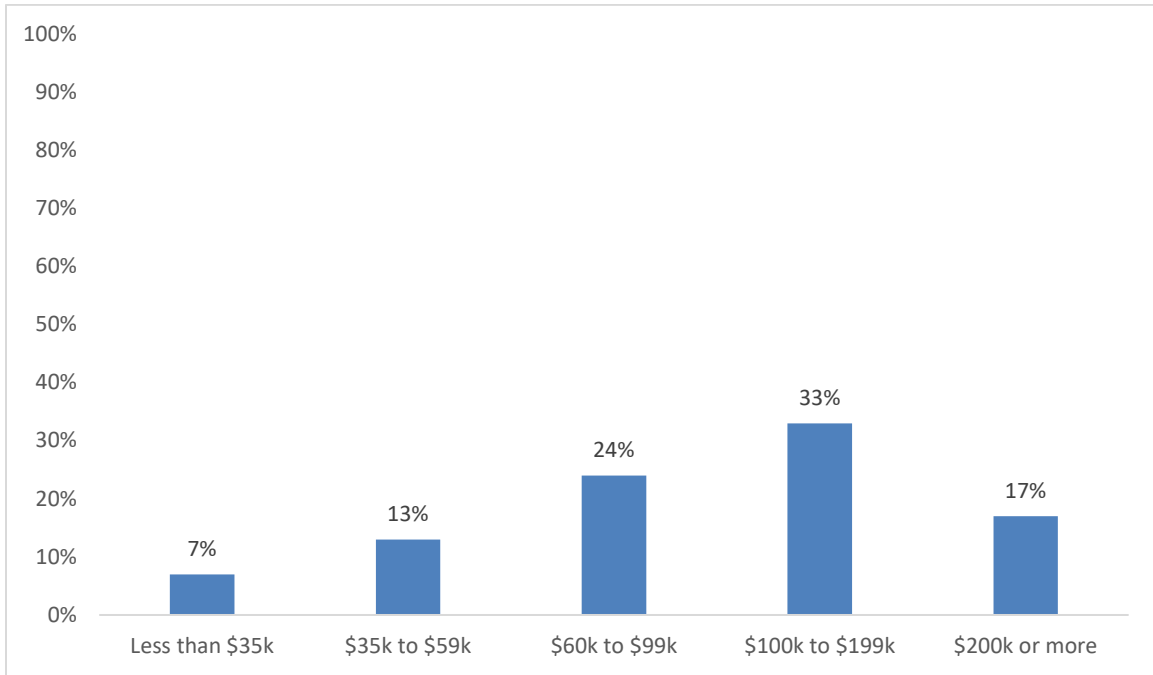
Do you have children under the age of 18 living in your household?



What is your highest level of education?



In which of the following categories is your annual household income?



Which of the following best describes your ethnicity? (May select more than one)

