

MUSEUM VISITATION, PRE- AND MID-PANDEMIC

A 2021 ANNUAL SURVEY OF MUSEUM-GOERS DATA STORY



As we all know, the COVID-19 pandemic devastated museum visitation, with visitation plummeting at virtually all museums. And as the pandemic has progressed, some museum-goers have returned to visiting museums, while others have continued to pull back. Tracking this, and when it returns to normal, is important.



The timing of the Annual Survey of Museum-Goers ended up being fortuitous in terms of visitation data: each year we are in the field in January and February, pulling survey results on March 15.

That means, back in 2020, we closed the survey right when things began shutting down, inadvertently creating the cleanest pre-pandemic sample possible.



For 2021, we made a very deliberate decision to keep our two visitation questions *exactly the same*. And once again, we closed the survey on March 15, creating a clean "year one" mid-pandemic sample.

This allowed us to track self-reported visitation rates pre- and mid-pandemic, and then observe the decline over that first pandemic year. It also will allow us to track the return to museums during the second full pandemic year (through March 15, 2022) and thereafter.



There are two specific lenses through which we look at individual museum visitation patterns among frequent museum-goers:

- 1 Self-reported repeat visitation rates at "their" museum
- 2 How many *different* museums they visit



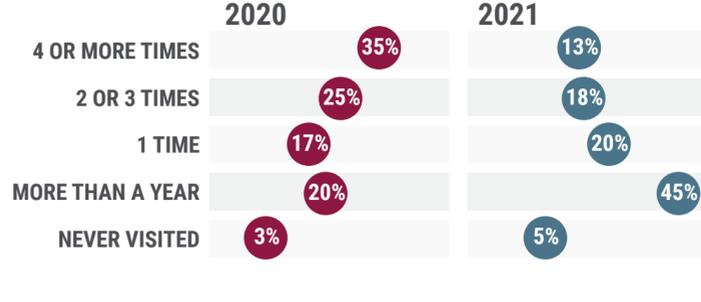
Looking at this data, along with an individual museum's actual visitation numbers, gives a more complete picture of how the pandemic has affected museum-going.

First, let's look at that repeat visitation.



Participating museums in the Annual Survey send out the survey request, and the first question asks respondents how often they visited that museum in the previous year *in person*.

We took the aggregate responses from March 2020 (pre-pandemic) and compared them with March 2021 (end of the first pandemic year).



As you can see, the majority of frequent museum-goers pulled back significantly from visiting "their" museum.

Pre-pandemic, 60% of respondents were visiting two or more times a year, but in 2021 that dropped to 31%.



Additionally, in 2021 half of respondents said they had not visited in the past year at all.

This is a really big shift.



There were three main factors that seemed to affect how individual museums fared:

1



Red state/blue state geography. Museums in blue states faced longer times during which they were required to be closed and/or restrict visitation than museums in red states, which reopened more quickly. This had a pretty significant effect on visitation, with museums in red states generally seeing greater visitation than those in blue states.

Age of respondents. Younger museum-goers were slightly more risk-tolerant than older respondents, so museums that serve generally younger audiences saw less attendance pressure.



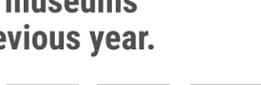
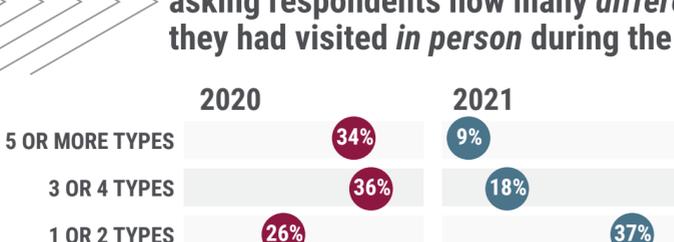
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3



Type of museum. Museums that had plenty of outdoor spaces (e.g., zoos, gardens) had more robust visitation than primarily indoor museums.

We also looked at museum visitation more broadly, asking respondents how many *different* museums they had visited *in person* during the previous year.



Back in 2020, 70% of frequent museum-goers were visiting three or more different museums each year. But in 2021, that had fallen by nearly two-thirds, to only 27%.

And the percentage that reported visiting no museums jumped a whopping 9 times ... from 4% to 36%.

Overall, what this represents is a massive pull-back from museums during the first pandemic year. Museum-goers were generally showing high degrees of risk-aversion, and choosing to wait until they felt safe to return.

That return to museums has likely been bumpy.

After a promising spring and early summer, concerns about the transmissibility of the Delta variant is likely keeping many museum-goers from visiting museums as often as they would like. There likely will continue to be geographical differences in return rates as well. And for many museums, it may be another year or two before repeat visitation rates return to pre-pandemic levels.



We'll keep tracking these visitation patterns in the 2022 Annual Survey of Museum-Goers, and as long as it takes until a new normal emerges.

Annual Survey of Museum-Goers Data Stories are created by Wilkening Consulting on behalf of the American Alliance of Museums. Sources include: • 2021 Annual Survey of Museum-Goers, n = 53,217; 140 museums participating • 2017 - 2020 Annual Surveys of Museum-Goers

*Data Stories share research about both frequent museum-goers (typically visit multiple museums each year) and the broader population (including casual and non-visitors to museums).

More Data Stories can be found at wilkeningconsulting.com/data-stories.



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