New England Museums Report on Early Impacts from COVID-19

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Survey Design and Respondent Demographics

From April 21 to May 1, 2020, the New England Museum Association, with the cooperation of other regional and national museum associations, conducted a survey of museum institutions designed to quantify the impact of the coronavirus pandemic on financial and educational outcomes in the last few months. We hope the results will be useful in providing data and stories to help all museum professionals advocate for relief funding with their local, state, and national representatives, and also within the field for benchmarking and inspiration. While the analysis below focuses on New England organizations, the patterns from our region were echoed in the national results.

Of the 310 surveys completed nationally, 150 were from institutions located within New England. Smaller budget organizations and history organizations were the largest subsections represented in the data, so it is important to read the following analysis with that in mind. Many of these smaller historical organizations are also highly seasonal; as they are either not open yet for the tourist season (generally May-October), or their attendance January-April is habitually slow, so their initial COVID-related impacts have been low and are likely to increase. Revenue and attendance losses, staff impacts, and reopening projections for larger budget institutions are significantly more extreme, and are underrepresented in this survey compared to the range of institutions in New England. Art museums are particularly underrepresented: while they constitute roughly 25% of NEMA’s membership, they make up only 13% of the data presented here.

The largest subsection of New England respondents by budget is institutions with annual operating budgets of $0-$50,000, at 24%. The smallest represented section of museums is those with budgets of over $10 million (4%). For context, in NEMA’s 2018 benchmarking survey on trends in museum membership, 44% of respondents reported operating budgets of over $1 million; in this survey, that contingent makes up only 27%. This means that the averages in revenue loss, staff impacted, and attendance lost are significantly lower than would be with a more proportionate survey response. Many more all-volunteer institutions also answered this survey than do most of NEMA’s benchmarking efforts.

This survey therefore best presents a view into the processes, projections, and plans of small to mid-sized museums, many of which are underrepresented in current media coverage. Hopefully the following analysis will help to round out the picture of museum impacts to better illustrate the museum field as a whole.

Assessing Financial Impacts

This survey provides a snapshot of immediate lost revenues, but it is important to remember when looking at the following numbers that many forms of museum revenue have a long tail: membership revenues are likely to decrease over time, depending on how long the crisis continues. Events and site rentals, which are a significant portion of many museums’ budgets, continue to be canceled or pushed back to 2021 and beyond. Companies may have diminished
funds for corporate sponsorships of exhibits and events. Private donations are likely to suffer. 'Blockbuster' exhibits and annual festivals will have attendance caps or simply see diminished attendance due to visitor anxieties. [For more information on audience intent to visit, see the ongoing studies published by Colleen Dilenschneider of IMPACTS] Little of those projected losses can be reflected here, though some museums did try. “Our summer and spring art camps are our largest sources of educational revenue--we estimate a loss of $75,000 by summer's end,” wrote one national respondent, and “we [are] anticipating a loss of $10,000 in fundraising as well as $20-40,000 in lost gift shop sales,” wrote a New England organization.

Asked to report their total lost revenue since the start of the pandemic (for a period ending within the run of the survey, April 21-May 1), 111 New England museums reported a sum of over $21 million, or an average of $190,000 lost per institution. Within that number is revenue lost from attendance, memberships, programs, events, food and gift shop sales, and site rentals. To best gain a sense of the revenue drop, we compared 2019 year to date revenue with 2020: 79 museums reported a total difference just in attendance revenue of $5.8 million, or an average of $74,000 per institution. Again, it is important to remember that many of these organizations are smaller and seasonal; this is by far an underreporting of loss. Of the 99 museums who reported rental income lost, the total was over $1.84 million, or an average loss of $18,600 per institution. And the projected losses continue: one New England respondent stated, “My museum is small but has about 6,000 visitors every summer. They make donations, which keeps the museum going. It is hard to imagine that I will be able to open it this summer.”

Given the average size of the responding museums, and the number who said they had successfully applied for and received relief funding through specifically the Paycheck Protection Program loan (PPP) (30% applied but not yet received, 35% applied and received), the immediate impacts on staffing levels are lower than might be expected. 24% of New England museums responding said they had to reduce employee’s paid hours; 13% have staff currently furloughed, and 6% have laid off employees.

Most organizations that had initially furloughed or laid off staff were able to at least temporarily re-hire those staffers to take advantage of the PPP. However, as respondents from the larger national survey pool remarked, “We will make it through this quarter. The next two years look more ominous.” Beyond the eight weeks of payroll expenses covered by the loan, many museums regionally and nationally are unsure what measures they may be forced to take. In New England, 13% of those organizations who had already made staff reductions said they would possibly or definitely need to take further reductions within the next 30 days, and an additional 18% of those organizations who hadn’t made staff reductions yet think it likely they will within that same time frame. In both groups, roughly a quarter of responding organizations simply weren’t sure yet if staff reductions would be needed. One organization noted that some staff decisions were also out of their hands: “We rely on work-studies from the nearby college and they are gone so [we] anticipate cuts to services/programs as [there are] no funds to hire additional help.”
Not everyone has yet received funding they’ve applied for, however, and some were not able to apply at all, either because they were part of a larger entity, such as a university, or because of internal decisions. One museum respondent stated, “My board wouldn't let us apply for PPP saying it wouldn't look good to locals if we got it. The perception being ‘we have lots of money in our endowment.’”

Perception is also at issue when looking at museums’ ‘invisible’ costs. While museums have many things in common with the small businesses also targeted by the CARES Act, certain kinds of overhead are unique to our field and, while vital to museums’ survival, are not uppermost in the minds of legislators or the general public. As one respondent to the national survey said:

“Maintaining our collections storage facility is very costly, both in terms of staff time and utilities for our temperature and humidity controls. This part of our mission was our loss leader, being supported by many other parts of our business and donors. We are committed to continuing to preserve the 1/2 million objects and archives in our collections, but it is an invisible expense to the public and making the case that they should support the collection right now feels strange and difficult.”

**Losses to Community & Educational Opportunities**

Losses in staff time are exacerbated by the museum field’s reliance on volunteers to carry out many programs and projects: 121 reporting New England museums said they had lost over 36.5 thousand hours of volunteer work in March and April, or an average of 373 hours per museum. This is an artificially low number, as previously suggested, because seasonal museums have not yet opened, and so their impacts will only increase as the spring turns to summer. This is a loss not only to the organization, but to the volunteers as well, who take well-deserved pride in their efforts to help their institution, and who gain a good deal of community and friendship through their volunteer duties. This impact is one that is likely to linger beyond declarations of ‘safe’ reopening: as this and several other museum respondents said, “Most of our volunteers are in the vulnerable category. We will need to be extremely cautious when opening up to these vital and enthusiastic volunteers.”

Spring is also traditionally the busiest time for school field trips to museums: losses to both the students and the museums in this equation are sizable. 128 New England museums reported that they had been unable to welcome over 280,000 Pre-K to Grade 12 students since the coronavirus closings, and lost the opportunity to bring outreach programs to another 62,200. This does not include a further 12,500 college and graduate students, who would have visited New England museums for classes, internships, projects, and fellowships this spring.

Sadly, though many museums have attempted to offer virtual visits, programming, and teacher support, these efforts don’t always reach their intended audiences. One New England organization mentioned “About 10,000 field trip students hadn't booked yet when this hit so our numbers don't reflect what we were on track to do for the year. Additionally, while we have
created virtual programs, the majority of the kids we would normally be seeing in the spring do not have access to technology, including internet, so we have no way of reaching them right now and our school district is not doing anything to rectify that situation.” At the national level, another museum colleague noted with evident and understandable frustration: “School closures and their own scramble to establish virtual classrooms limited our ability to get educators' attention, even to offer assistance. Further, our state governor established categories of essential workers that forced us to place our museum educators on stay-at-home leave, so they are not working.”

One bright spot: where possible, recognizing that many children who benefit from museum field trips are cut off from virtual learning, museums have gone ‘old school’ and been mailing or making available for curbside pickup lesson plans, art making kits, science experiments, and more. “We were able to help offset some of the loss to youth education programs through an outreach we did that has put lesson plans and art supplies in the hands of 1,100 kindergarten to 2nd grade students across our county,” reported one national respondent, and another highlighted “We are trying to continue to serve our under-served low income 2-5 year old STEM programs that are grant funded. To do so we must incur the expense of mailing the materials which impacts the long term funding.”

Aside from school-organized field trips, many museums serve historically-disadvantaged communities. These services too have been interrupted and/or reimagined where possible. Some, like early childhood education efforts, are on hold until schools resume: “We were in the midst of launching a Head Start to History program with the local Head Start early ed program for April which is now completely cancelled,” reported a New England museum. Apprentice programs for low income high school students, after school programs with local public schools, youth refugee services, and group visits for Alzheimers patients were all on the list of things lost or postponed. Just 14 New England museums tallied their losses for services to low-income or disadvantaged communities, but in that handful, they reported 32,280 people who would have participated in museum activities under normal circumstances. 22 New England museums specifically called out a loss of over 2,000 visits by special needs groups and visitors, and 12 museums reported 745 lost veterans’ visits.

Finally, though more than 1,000 public programs were canceled by museums in New England in March and April, many are making plans to reschedule whenever possible. Those museums which are already making plans are overwhelmingly rescheduling for September 2020, though the second most popular option for the slightly more optimistic is July 2020. A handful reported that their largest events planned for this spring have been rescheduled for 2021, including weddings and rental functions.

**Plans & Concerns for Reopening**

Museums are contemplating their futures, and while there remain more questions than definite answers surrounding protocols for reopening, state by state guidelines for public health, and the audience appetite for museum visits, museum leaders are generally being thorough in their
scenario planning. 85% of respondents are considering plans for adjusted operation on reopening, and 62% say they are also planning for what a succession of closures and reopenings might entail should there be further outbreaks. 22% report that they are having to plan for a scenario in which they are unable to reopen at all. Most report an intention to increase outdoor programming, or to open their campuses in advance of their buildings. Many also commented that they wouldn’t reopen to the public until they were ensured of a safe work environment for staff first.

The most popular adjustments that museums are planning for reopening include signage requesting/reinforcing social distancing behavior for visitors (83%), gloves, masks, and other protective equipment for front-line staff (79%), lower attendance limits in galleries and programs (74%) and more sanitization stations than usual (73%). Some are changing from guided tours to cell-phone or self-guided walking tours, some are planning on handing out masks to visitors, and some museums mentioned changing the flow of exhibit spaces to encourage one-way travel or more even spacing about smaller rooms (as opposed to the barriers often used in historic houses to confine visitors to ‘safe’ walkways). Museums with interactive elements also reported intentions to remove (28%) or redesign them (29%) for visitor comfort and safety.

These plans will take time, though how nimbly is a matter of scale. Most of the smaller organizations responding indicated that when permitted by state regulations, they project being able to reopen within a few days to a week. “We are hoping only 1 week. We are planning now, but it will somewhat depend on how much staff we can afford to un-furlough to bring them back for preparations.” Most of the rest said within two weeks, and only the larger institutions predicted 30-60 days or longer. The longest specific prediction said 8 months would be needed for a complete reopening. One New England museum predicted “Staff in offices: one month Public in galleries: two months Public in studios: three months.” Another said, “We will reopen to staff as needed; small groups; limited attendance/entries allowed; eventually build up to full opening sometime in fall. We anticipate not returning to 'new normal' for 18 months.”

Nor will the staff and volunteer experience look the same upon reopening. It is good to note that museums remain a people-centric field: 51% of reporting museums in New England said they were planning to allow flex time and adjusted schedules to reduce office crowding and offer staff relief. One New England museum specifically mentioned continuing remote work for employees who needed to provide childcare. Another expressed concern for the individual teaching artists, who, as independent contractors, were especially hard hit by canceled classes and income loss.

Once reopened, the museum experience will still suffer some lag as we all catch up on lost time. As one New England museum noted, “Major exhibits are generally created as collaborative projects. Since this has not been possible, there is at least a 3-month lag time for the next year's exhibits.” Another noted, “While we can conceptually develop programs via phone and online, we cannot work in the attic, basement, archives, closets, to check on, find, the materials we want to use. For example, I was planning a special exhibit on the local women’s suffrage movement leading up to 1920…I borrowed the CD with our local newspapers from the early 20th century and have gathered information from those documents, [but] I cannot spend time in
the archives with the archivist digging deeper…and matching objects with the people in the stories.”

“Momentum!” lamented one national respondent, “We have just adopted a new mission and vision for our organization and have built many new relationships in the community in the last 2 years. That momentum feels abruptly stymied by the pandemic.”

**Final Thoughts**

Not all is bleak: museums are working hard to stay creative, relevant, and in communication, with each other and their communities. One national respondent noted that “enthusiasm for education, curatorial, marketing and development staff putting content online has increased morale and collaboration across departments.” A New England organization noted that the current reality and creative solutions are likely to have sticking power: they are “Anticipating becoming a hybrid of a historical society and media organization. We are planning for a continuation of online services even after this passes.”

23% of responding New England organizations are offering weekly programming online; another 10% each are doing so occasionally or daily. 26%, while not specifically creating online programming, have significantly increased their social media presence. 88% of reporting museums have seen an increase in their followers and interactions on social media, and 57% have seen an uptick in website traffic. Nearly half have also seen increases in their email open rates. 24% have put new or increased educational resources for students, parents, or teachers on their websites, and 25% have also added more of their collections online. One respondent did note that the museum corner of the internet is currently an “intensely noisy and competitive environment,” which will require new metrics and learning goals to stay relevant and catch attention going forward.

Finally, museums are contemplating their place in the communities they serve and are currently missing. What does it mean to be a gathering place in this reality? How do we help the grieving? How do we capture this moment for future generations and make sure the best-rounded, most equitable stories are told? As one of our New England colleagues contemplated:

“To me the question isn't how or when to reopen, but what it will mean to be relevant to a pandemic traumatized populous. We can get wrapped up in the logistics of public health measures. They are critically important but implementing those measures is an exercise in problem solving … We are all very good at that. More important to me than rigorous planning is assessing if our institution has the skills to ‘read’ our public at the time of reopening and can we create an experience that is meaningful to them…My instincts tell me that successful museums will need to consciously balance public safety and the social elements of a patron's experience. It will take a high degree of institutional empathy to thread this needle.”