

REFERENCES

Arts Institutions in the Time of COVID-19: Your Audience's Expectations and Intentions

National Association of State Arts Agencies

April 21, 2021

Introductions and Data Sources

[IMPACTS Experience](#) specializes in data and analysis for visitor-serving entities, featuring 95%+ confidence-level market research on behavioral and perceptual trends impacting cultural organizations. Our research focuses not only on people who visit these organizations, but also – critically – the people who do not. Market and audience research enable cultural entities to make informed decisions based on visitor (and non-visitor) perceptions and expectations.

- [Audience vs. Market Research: A Critical Distinction for Cultural Organizations](#)
- [Why Forgetting That Industry Experts Have Biased Perspectives Hurts Cultural Organizations](#)
- [Eight Realities to Help You Become A Data-Informed Cultural Organization](#)
- [The Few, The Proud, The Nerdy – Why Your Organization Needs Data Advocates](#)

Market potential and distribution of demand

Market potential is a modeled measure of the size of the market for a particular experience, such as visiting arts institutions, at a particular time. These analyses are reliable predictors of annual attendance. Other metrics, including intent to visit (when people plan to attend) and distribution of demand (which types of organizations people plan to visit) offer insights into visitor behavior patterns.

- [Market Potential by Quarter in 2021: Projected Attendance to US Cultural Entities \(DATA\)](#)
- [Market Potential: What Attendance Volume Can Cultural Entities Expect in 2020? \(DATA\)](#)
- [Do People Plan to Travel for Spring Break 2021? \(DATA\)](#)
- [Vaccination News Has Already Changed Plans to Visit Cultural Entities in 2021 \(DATA\)](#)

What will make people feel safe

The top factor current audiences say will help them feel safe is requiring masks (and enforcing those requirements).

- [Safety First: Museum Visitors Expect Better Mask Enforcement \(DATA\)](#)
- [Vaccination News Has Already Changed Plans to Visit Cultural Entities in 2021 \(DATA\)](#)
- [Mask Up: Here Are the Safety Measures Visitors Want \(DATA\)](#)
- [Performance vs. Exhibit-Based Experiences: What Will Make People Feel Safe Visiting Again \(DATA\)](#)

Current trends in travel

People currently prefer to take day trips via personal vehicles due to safety concerns. These travel preferences are impacting both how people visit (with shorter lead time, and different motivating factors) as well as who visits (increased first-time and non-recent visitation).

- [Quicker Decisions & Redemptions: The Pandemic Has Changed Visitation Timelines](#)
- [More First-Time Visitors Are Attending Cultural Entities During the Pandemic \(DATA\)](#)
- [Perceptions Matter – How Welcoming Are Cultural Organizations? \(DATA\)](#)
- [How Well Are Cultural Entities Welcoming Racially Diverse Attendees? \(DATA\)](#)

Changemaker: Digital engagement

Digital platforms are primary sources of information, and usage has grown over the past year. This increase is influencing how quickly some entities are recovering (those who invested in marketing and remaining top of mind vs. those who did not); has elevated audience expectations for ongoing online engagement; and has increased perceptions that organizations are relevant not just in the physical space but beyond their walls as well.

To engage audiences, meet them where they are. Right now, they're online.

- [More People Really Are Engaging With Cultural Entities Online During the Pandemic \(DATA\)](#)
- [Why Marketing Matters During COVID-19 Closures – Key Factors to Consider \(DATA\)](#)
- [It's True. Social Media Followers Are More Likely to Visit Cultural Organizations \(DATA\)](#)
- [Game Changer: Social Media Followers Report Better Experiences at Cultural Organizations \(DATA\)](#)
- [Which Social Media Platforms Are Most Important for Organizations?](#)
- [Social Media is More Important Than Ever for Cultural Entities – Here's What You Need to Know](#)
- [Top Information Sources for Likely Visitors to Cultural Organizations by Generation \(DATA\)](#)
- [Do Pre-Visit Information Sources Vary by Household Income? \(DATA\)](#)

Supplemental Resources

The following topics were not covered directly in the presentation but may be of interest for further reading on the topic of audiences, behaviors, and trends.

Negative Substitution and Visitor Types

Attendance is impacted by trends such as negative substitution, in which cultural organizations are not engaging new audiences at the same rate active visitors are leaving the market. Inactive visitors – those who have interest in attending but have not, or who fit the behavioral and psychographic profile of active visitors – represent an opportunity to expand and diversify audiences.

- [Negative Substitution: Why Cultural Organizations Must Better Engage New Audiences FAST \(DATA\)](#)
- [Same People, More Visits: What Growing Repeat Attendance Means for Cultural Organizations \(DATA\)](#)
- [How Often Do People Really Revisit Cultural Organizations? \(DATA\)](#)
- [Active, Inactive, and Unlikely Visitors: What Cultural Organizations Need to Know \(DATA\)](#)
 - [Active Visitors: Who Currently Attends Cultural Organizations?](#)
 - [Inactive Visitors Are Interested in Attending Cultural Organizations. Why Don't They?](#)
 - [They're Just Not That Into You: What Cultural Organizations Need to Know About Non-Visitors](#)

Barriers to Visitation

Inactive visitors express interest in visiting cultural entities. Why don't they actually visit? In previous years, the top barrier to attendance was simply that this audience group preferred to do something else (alternative leisure activity). However, the pandemic has created barriers to visitation not seen in 2019. Audiences require changes such as mask mandates to feel safe, and how people travel has changed due to safety concerns.

- [The Five Biggest Barriers to Attending Cultural Entities in 2020 \(DATA\)](#)
- [Why People Say They Won't Visit Cultural Entities, COVID-19 Aside \(DATA\)](#)
- [Why Those with Reported Interest Do Not Visit Cultural Organizations \(DATA\)](#)
- [Breaking Down Data-Informed Barriers to Visitation for Cultural Organizations \(DATA\)](#)

Contact

For all inquiries:

Bethany C. Gotschall, Project Coordinator | bcbgotschall@impactsresearch.com