

ANNUAL

National Snapshot of United States Museums

Fielded March-April 2023



American
Alliance of
Museums

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Introduction

In March and April of 2023, the American Alliance of Museums (AAM) and Seattle-based research firm Wilkening Consulting conducted a survey of museum directors to gain a window into the current state of the museum field. This survey builds upon key metrics the Alliance began collecting in June 2020 to assess the impact of the COVID-19 pandemic on museums, as well as other topics of concern for the museum field.

340 museum directors responded to this survey on behalf of their organizations, which represent a broad cross-section of the field in geography, size, and discipline. This provides a margin of error of +/- 5.13 percent at a 95 percent confidence level for the population of museum leaders within AAM's database.

The results of this survey demonstrate that while museums are continuing to recover from the profound damage inflicted by the COVID-19 pandemic, it will take years for many of them to return to pre-pandemic levels of staffing, revenue, and attendance. Two-thirds of responding museums have not rebounded to their pre-pandemic attendance figures, and one quarter have not rebounded to their pre-pandemic staffing levels. Overall financial recovery has been inconsistent across the field, with museums reporting a wide range of financial changes since 2019, including gains, losses, and plateaus. Reflecting the transforming landscape of American workplaces, many museums are also struggling to fill open positions, and many are making changes to compensation packages and working conditions.

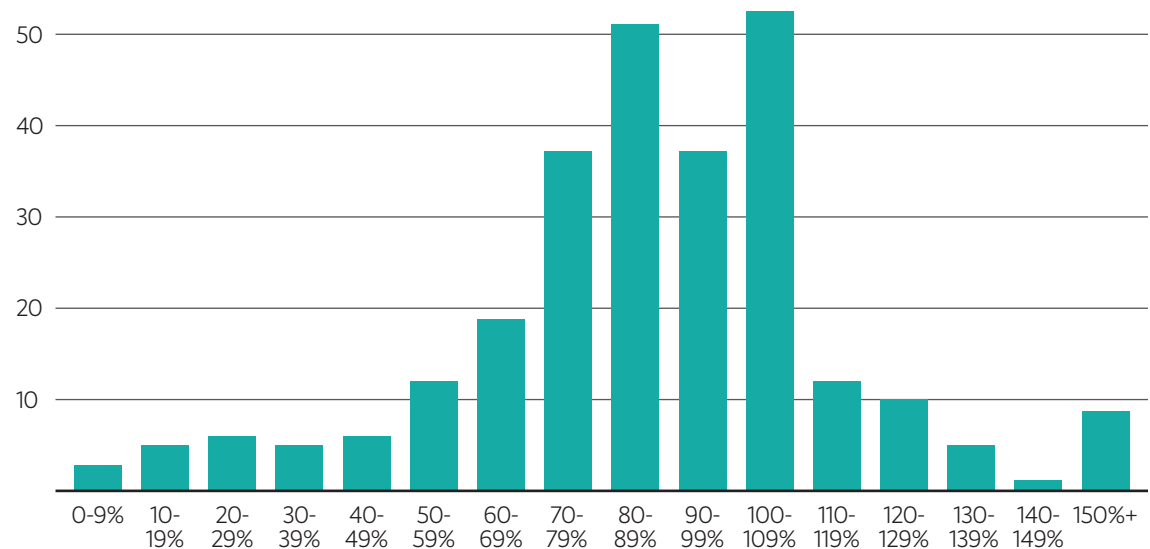
This research also highlights the importance of our Alliance's advocacy work, as billions of dollars of federal relief funding secured during the height of the pandemic proved to be of critical importance for many museums.

Attendance

Only one-third of responding museums (33 percent) have recovered to 100 percent or more of their pre-pandemic attendance levels.

Two-thirds of institutions continue to experience reduced attendance. These institutions are on average experiencing 71 percent of their pre-pandemic attendance.

Number of responding museums



Current attendance as a percent of pre-pandemic attendance

These post-2019 attendance losses vary by types of visitors:

- Forty-one percent of respondents are experiencing lower visitation in general attendance.
- Forty percent of respondents are experiencing lower visitation from K-12 in-person field trips.
- Thirty-six percent of respondents are experiencing lower visitation from group tours.
- Twenty percent of respondents are experiencing lower visitation to special events.

The average is calculated by adding all the numbers in a data set together, then dividing by the number of data points.

The median is calculated by listing all the numbers in a data set in numerical order, then identifying the number in the middle of the data set.

Staffing

The rebuilding of staffing numbers varies across the museum field.

Encouragingly, a much higher percentage of museums have increased their staff size than when AAM last surveyed the field in winter 2021-2022. At that time, only 12 percent of responding museums reported having increased their staff since 2019.

26%

ONE QUARTER (26 PERCENT)

of responding museums have not recovered to their pre-pandemic staffing levels, and have seen their staff sizes decrease by a median of 20 percent as compared to pre-pandemic numbers.

38%

THIRTY-EIGHT PERCENT

of responding museums have increased their number of staff as compared to 2019, seeing their staffing level grow by a median of 20 percent.

36%

THIRTY-SIX PERCENT

of responding museums are currently at the same staff size as they were in 2019.

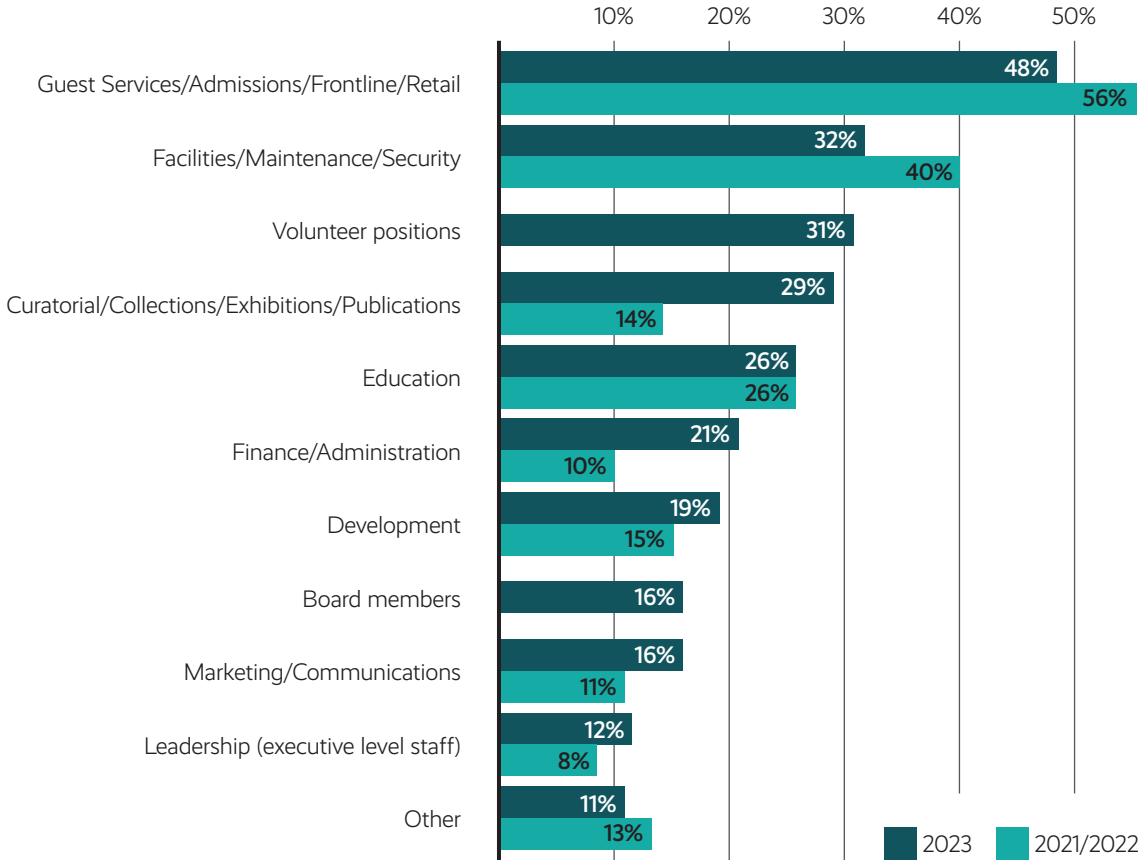


Of those museums recruiting for job openings, **SIXTY PERCENT** report that they are having trouble filling open positions.

Like many other industries across the country, museums are experiencing America's labor shortage. Of those museums recruiting for job openings, 60 percent report that they are having trouble filling open positions.

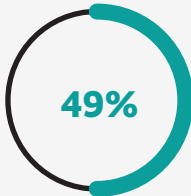
Among those respondents that are struggling to fill open positions, the most difficulty, by a large margin, has been in hiring for front-line roles such as guest services, admissions, and retail.

Percent of respondents having trouble filling position type, among respondents who are struggling to hire



Among museums that are hiring, museums that report larger pre-pandemic operating budgets are more likely to report struggling to fill open positions as compared to smaller museums.

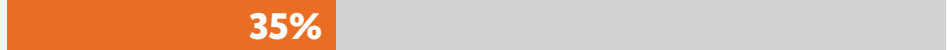
As the landscape of American workplaces continues to evolve, many museums are making changes to staff compensation packages and working conditions.



HALF of responding museums (49 percent) have shrunk the gap between their institution’s highest and lowest salaries as compared to 2019, or are planning to do so in the next year.



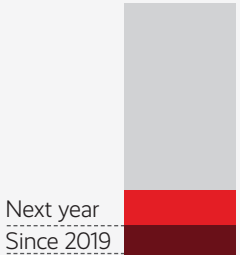
EIGHTY-FOUR PERCENT of responding museums have increased the hourly rate of their lowest paid employees as compared to 2019, or are planning to do so in the next year.



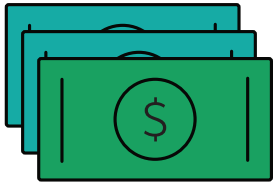
THIRTY-FIVE PERCENT of responding museums have made changes to their benefits package as compared to 2019, or are planning to do so in the next year.



FIFTY PERCENT of responding museums have implemented new initiatives to enhance staff wellness as compared to 2019, or are planning to do so in the next year.



ELEVEN PERCENT of responding museums have automated some processes or tasks formerly performed by staff as of 2019, and an additional **15 PERCENT** are planning to automate some processes or tasks currently performed by staff within the next year.

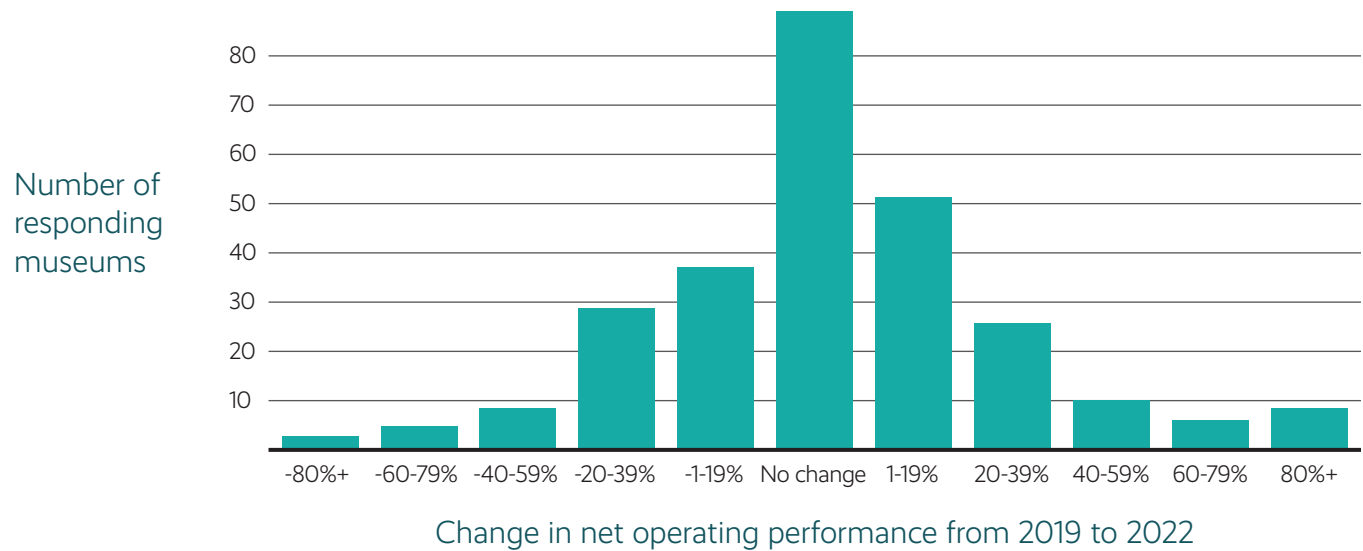


Finances

Financial recovery from the damage of the COVID-19 pandemic has been inconsistent across the museum field.

- Thirty percent of responding museums have seen their net operating performance decrease as compared to 2019, with a median decrease of 20 percent.
- Thirty-nine percent of responding museums have seen their net operating performance increase as compared to 2019, with a median increase of 19 percent.
- Thirty-one percent of responding museums have seen no change in their net operating performance as compared to 2019.

These financial trends are consistent across museums of all budget sizes.





Looking ahead, almost half of responding museums (46 percent) project that their bottom line will increase this year as compared to 2022, by a projected median of 10 percent. Thirty-eight percent of responding museums project no change in their bottom line as compared to 2022.

However, museums that anticipate a decrease in their bottom line are projecting this change to happen by a wider margin than those who expect to see an increase. Sixteen percent of responding museums anticipate that their bottom line will decrease by a projected median of 15 percent.



FORTY-SIX PERCENT

of responding museums project that their bottom line will increase in 2023 as compared to 2022, by a projected median of 10 percent and average of 18 percent.



SIXTEEN PERCENT

of responding museums project that their bottom line will decrease in 2023 as compared to 2022, by a projected median of 15 percent and average of 24 percent.

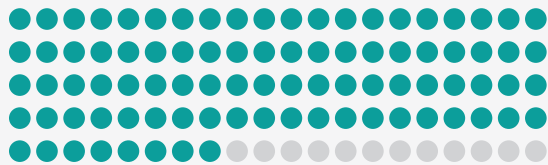


THIRTY-EIGHT PERCENT

of responding museums project no change in their 2023 bottom line as compared to 2022.

Advocacy & Pandemic Relief

The pandemic inflicted grave damage on US museums, the vast majority of which are 501(c)(3) nonprofit charitable organizations. In 2020, we built on years of dedicated advocacy for museums, steady relationship-building, and recent funding increases to avoid the same threats of the 2008-09 financial crisis, when museums were nearly excluded, and zoos and aquaria were excluded, from stimulus funding. We secured museums' access to billions of dollars of Federal relief funding, including PPP and SVOG funds—financial lifelines enabling many museums to survive and saving thousands of museum jobs. Many museums benefitted from this funding, and for some it saved their institution from closing altogether. The importance of these programs demonstrates the tremendous value of ongoing advocacy for museums.



Sixty percent of responding museums received a Payroll Protection Program (PPP) loan during the pandemic, with the majority receiving both PPP1 (First Draw) and PPP2 (Second Draw) loans. Of the institutions that received a PPP loan, **88 PERCENT** said either that it was very important to helping their institution survive the pandemic or that they probably would not have survived the pandemic without it.



One-third of responding museums (34 percent) utilized the Employee Retention Tax Credit (ERTC) to help retain staff during the pandemic. Of those that utilized the ERTC, **66 PERCENT** said either that it was very important to helping their institution survive the pandemic or that they probably would not have survived without it.

78%

Seventeen percent of responding museums received a Shuttered Venue Operators Grant (SVOG), a more limited program than the PPP or ERTC with stricter eligibility requirements. Of museums that received a SVOG, **78 PERCENT** said either that it was very important to helping their institution survive the pandemic or that they probably would not have survived without it.

In Closing

As these figures show, museums have largely weathered the disruptions of the pandemic, with substantial help from federal relief programs. However, for many, losses in attendance, staffing, and revenue may not rebound to pre-pandemic levels for years. Going forward, improving the ability to attract and retain employees and supporting the museums that have seen ongoing financial losses will be paramount to rebuilding the field. Advocacy efforts may be among the most important strategies for achieving these ends.

This data is critical to AAM's advocacy work and would not be possible without the participation from museum leaders across the country. Thank you to all those who responded to this survey. To help grow this survey and provide more nuanced data for the field—including assessing impact across a variety of factors including museum size, location, and type—we need your participation in each year's survey.

Thank you to our partners at Wilkening Consulting for their important work on this research.





**American
Alliance of
Museums**

2451 Crystal Drive, Suite 1005
Arlington, VA 22202

www.aam-us.org