

Sense-making In Real Time: Responding to Visitor Data During COVID

Association of Science and Technology Centers Annual Conference
Wednesday, October 6th, 2021



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Collaboration for Ongoing
Visitor Experience Studies

The Model

- a common instrument & shared measures
- institutional flexibility
- analytical assistance
- evaluation capacity building resources
- dynamic reporting
- systematic comparison



Methodology overview...pre-COVID

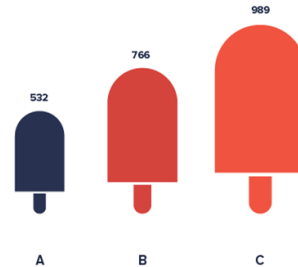


Onsite survey with exit intercept



Systematic random sampling

Sample size proportional to
institution size



Monthly data cleaning and upload





Methodology now



Onsite exit survey OR emailed survey

Systematic random sampling onsite
OR send to all or subset of emails



Real-time data updates

COVID Visitor Survey Insights: Who's Coming, Who's Not, & Why?

Beth Katz, Director of Evaluation & Museum Impact

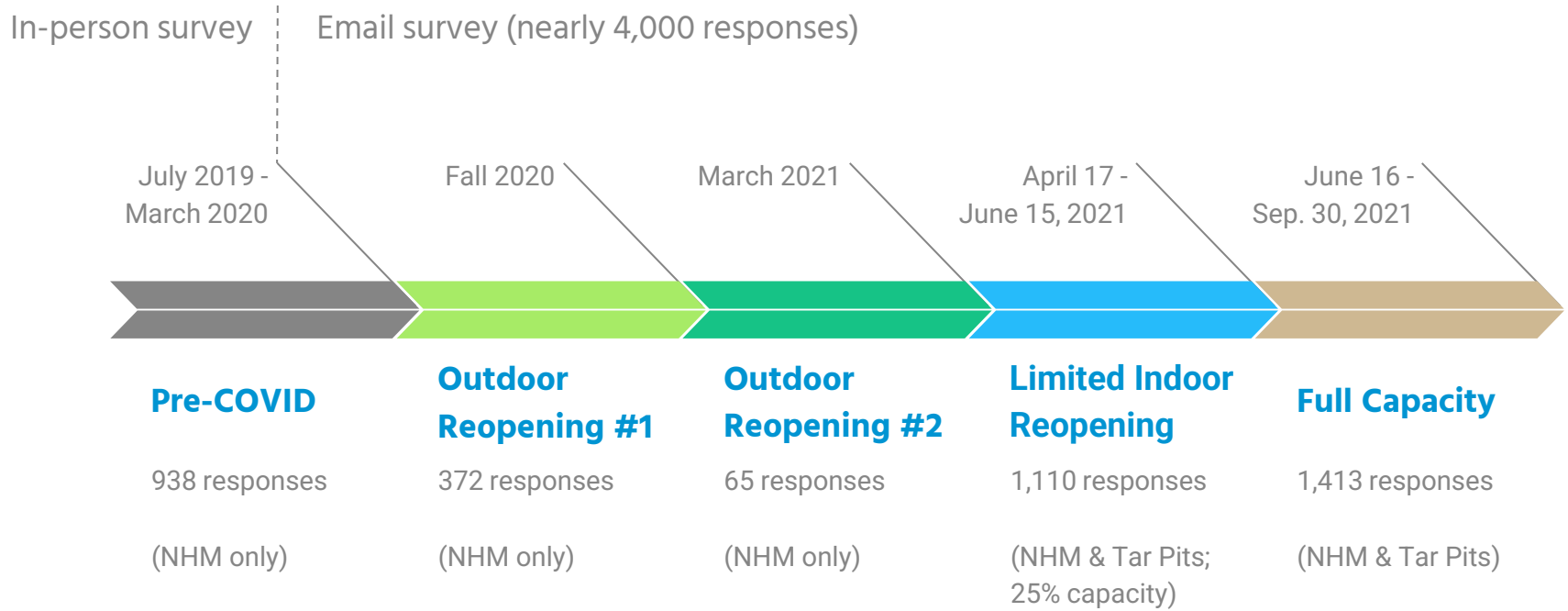
Natural History Museums of Los Angeles County

NATURAL
HISTORY
MUSEUM

LA BREA
TAR
PITS

WILLIAM S.
HART
MUSEUM

After Closing in March 2020, We Reopened in Stages and Administered the COVES Survey over Email



In their Own Words: the Visitor Experience

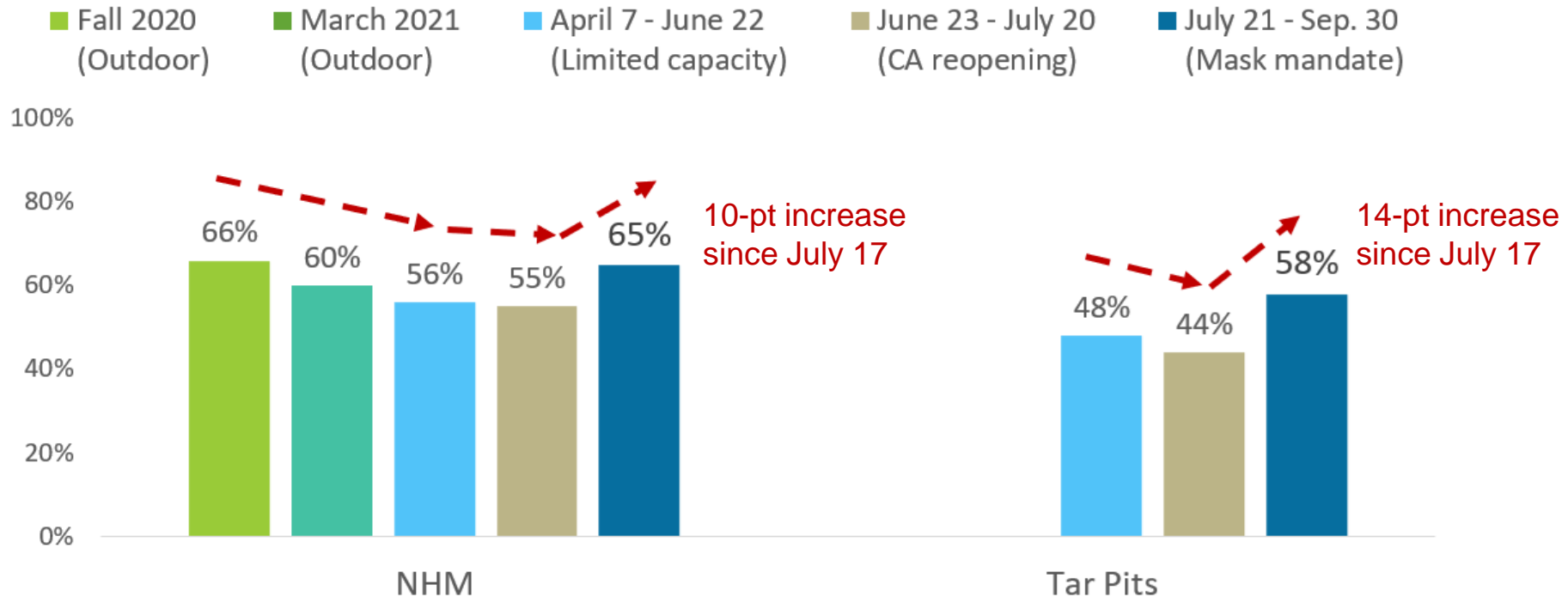
COVES Survey Comments

Focusing on Visitor Comments in Real Time Was Eye-Opening

- Wayfinding was a challenge - even for returning visitors!
- Purchasing tickets online was frustrating (demand > supply)
- Appreciation for museum staff members was reassuring
- Visitors supported the museums' decision to maintain an indoor mask requirement
- Visitors appreciated capacity restrictions... until they were lifted

Health Concerns Returned with the Delta Variant

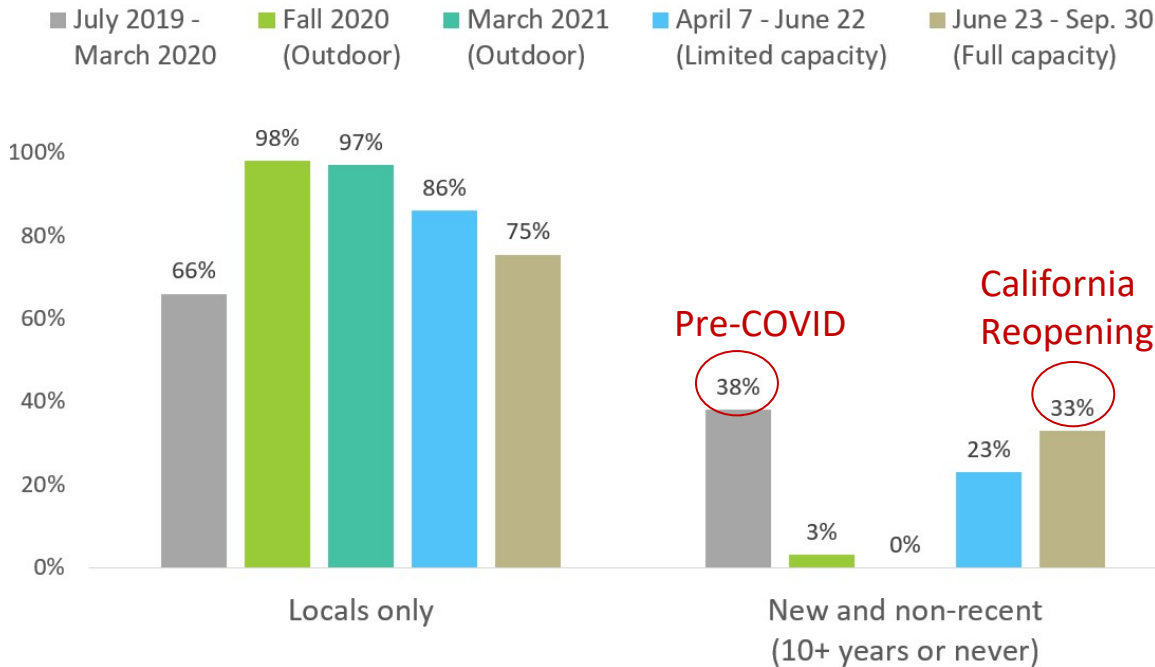
The percent of visitors “a little,” “moderately,” or “extremely” concerned about health and safety prior to their visit increased after California reinstated the indoor mask mandate on July 17, 2021



Visitor Demographic Trends

Who's Coming and Who's Not?

Pre-COVID, NHM Served a Diverse, Local Audience

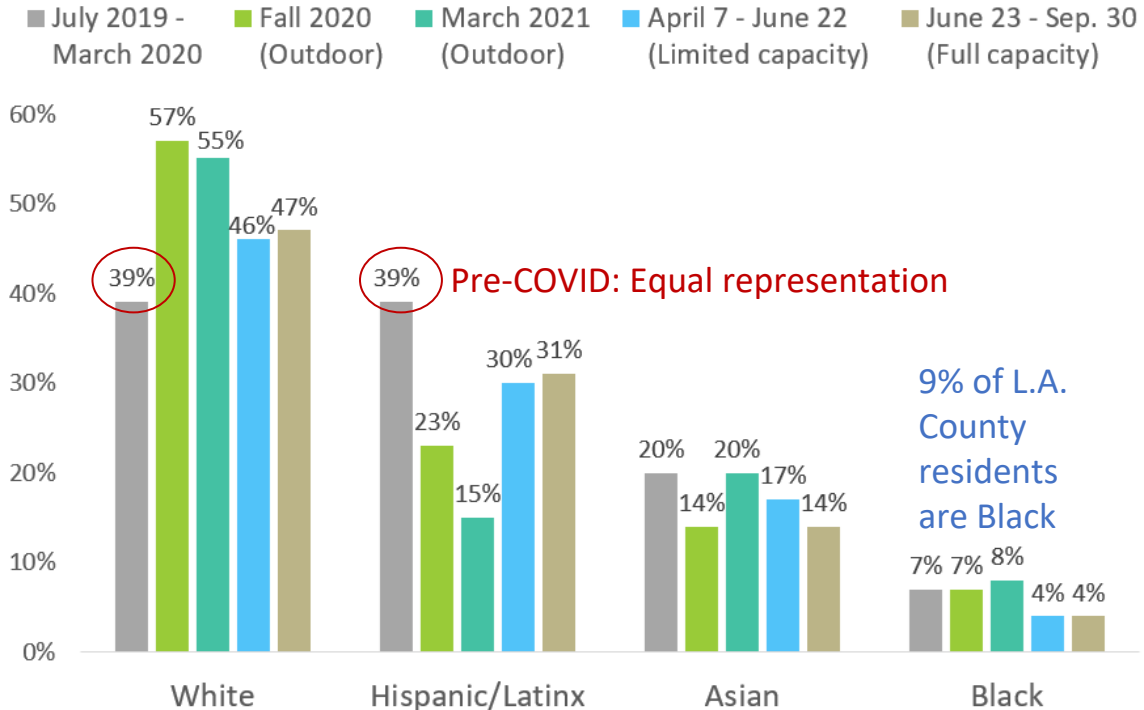


The proportion of locals-only groups skyrocketed under California COVID restrictions

72% at La Brea Tar Pits!

Out-of-towners and first-time visitors are starting to return to both sites

BIPOC Representation at NHM Has Not Returned to Pre-COVID Levels



- Pre-COVID, NHM saw equal % of Latinx and White visitors
- First visitors to return were disproportionately White and members
- Latinx representation increased when indoor areas reopened, but has not returned
- Proportion of Black visitors, which was already low, has decreased

Takeaways

Where do we go from here?

Takeaways

- Despite limitations, real-time data from email surveys proved invaluable in uncertain times
- State and local policy decisions affect visitor decision-making and their museum experience
- Even as attendance increases, health and safety concerns persist
- Visitor demographics have changed and this demands attention

Natural History Museums of Los Angeles County

NATURAL
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LA BREA
TAR
PITS

WILLIAM S.
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General Public Audience Data during COVID

Or...

The more things change, the more they stay the same?

Elisa Israel

Director of Research & Evaluation

October 2021

Context for 2020 data

- Due to the COVID-19 pandemic, the Saint Louis Science Center was closed March 14 – June 17, 2020.
- As a result of operational changes due to the pandemic, general public audience data was collected through multiple tools.
- Three versions of the COVES (Collaboration for Ongoing Visitor Experience Studies) exit survey tool were used:
 1. From January 1 – March 13, data was collected using the standard COVES exit survey.
 2. From June 20 – July 5, data was collected used a modified exit survey that incorporated some of the key demographic, visitation pattern, and satisfaction questions from COVES, but was not the full COVES survey. Therefore, for some items, no audience data was collected in June and July.
 3. Beginning August 1, 2020, data was collected using a “COVID-COVES” version of the exit COVES survey, which included all of the standard COVES questions, with modifications designed to address some of the changes as a result of the pandemic.



Questions upon reopening

- Would our audience have a larger portion of Members?
- Would there be a reduction in the portion of our audience coming from out of town?
- Would groups with children be a larger or smaller portion of our audience than before?
- Would length of stay change?
- How do guests feel about the safety precautions being taken?



Use of COVES data

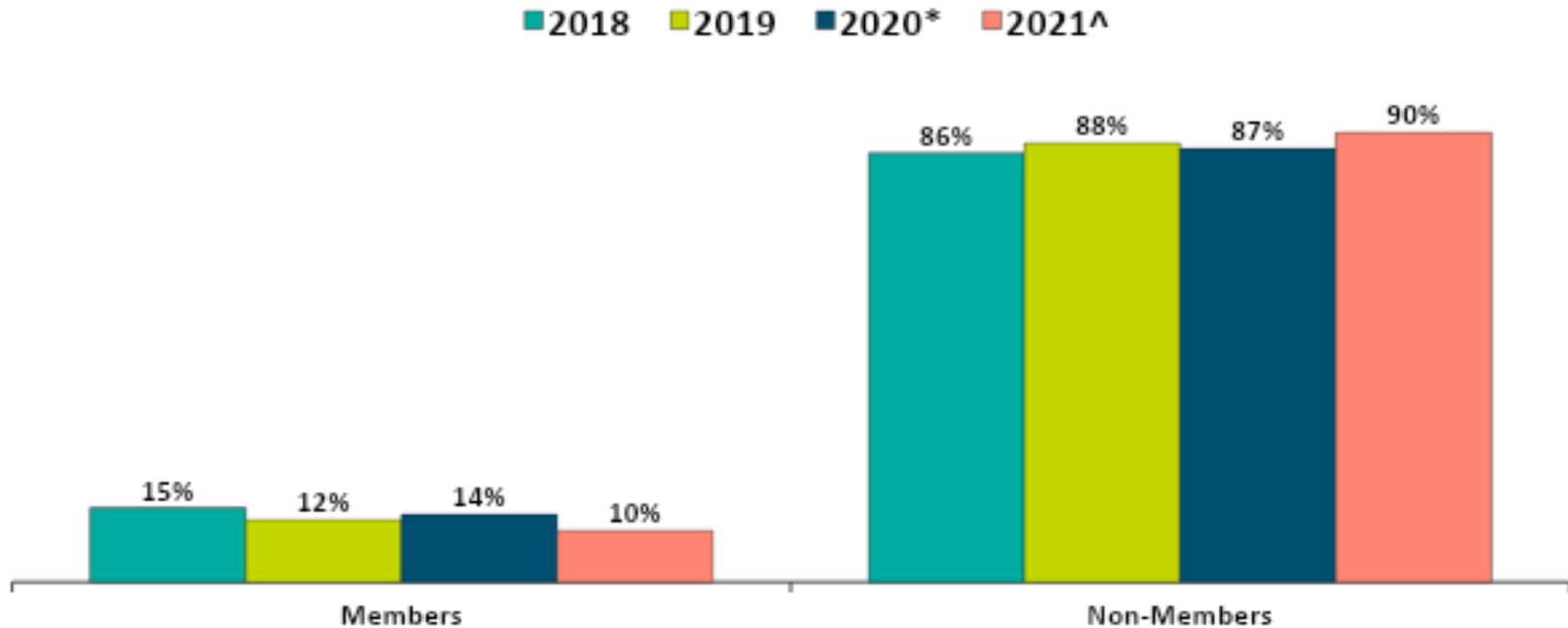
- Monthly summary reports presented to the senior management team track patterns of visitor demographics and visitation trends.
- Respondent comments and feedback from questions developed specifically related to the pandemic (from both COVES and other survey tools) were used to track reactions to modifications to the guest experience that were made (e.g. cleaning protocols, mask requirements, capacity limits).





MULTI-YEAR COMPARISONS

Membership Status



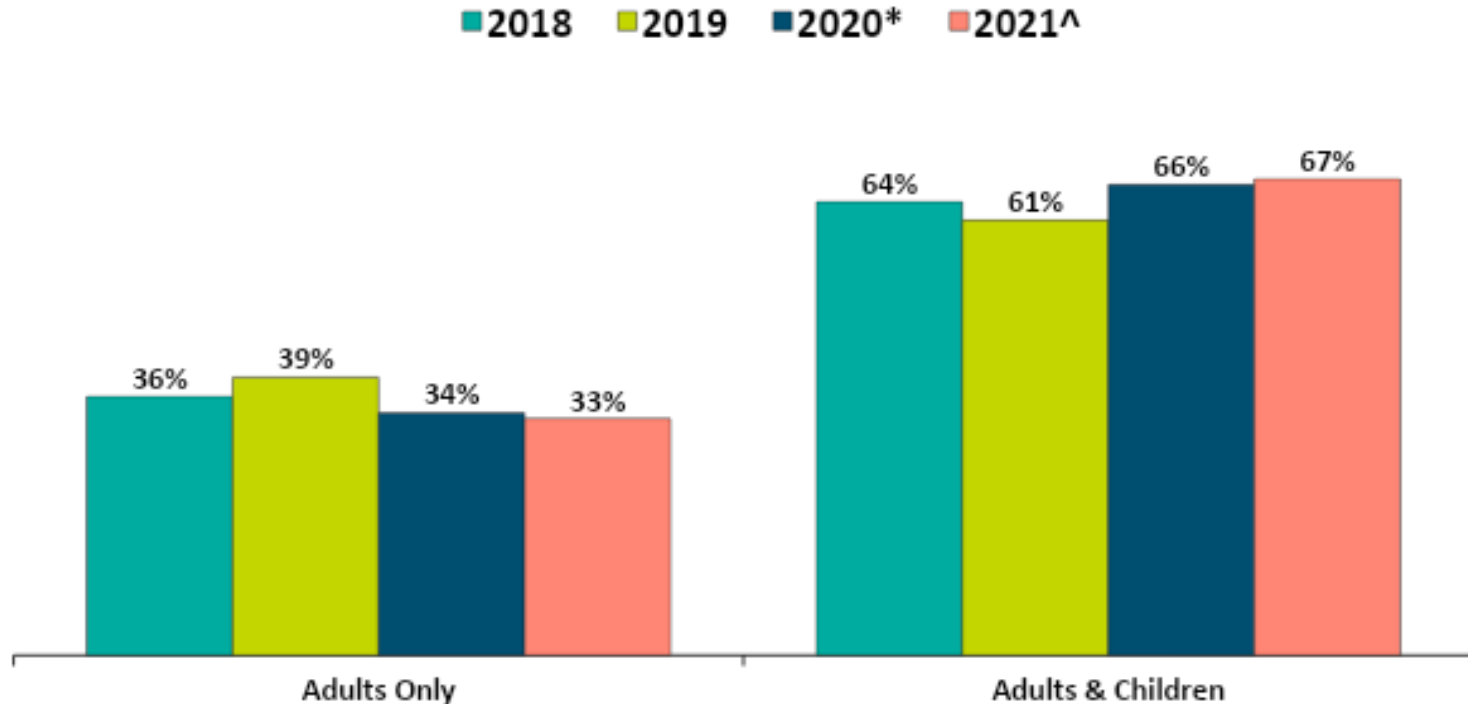
Data sources:

2018-19 - COVES exit survey

*2020 – Standard COVES (Jan-Mar), modified internal exit survey (Jun-Jul), “COVID-COVES” (Aug-Dec)

^2021 – “COVID-COVES” – data shown here are YTD through August

Group Type Comparisons



Data sources:

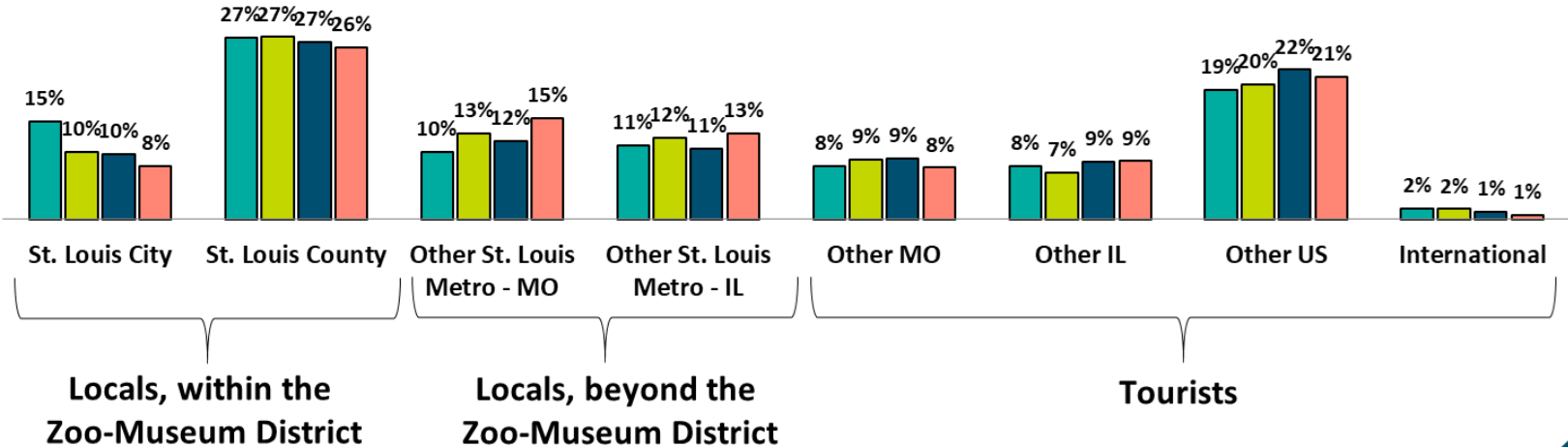
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General Public Audience Residence

2018 2019 2020* 2021^



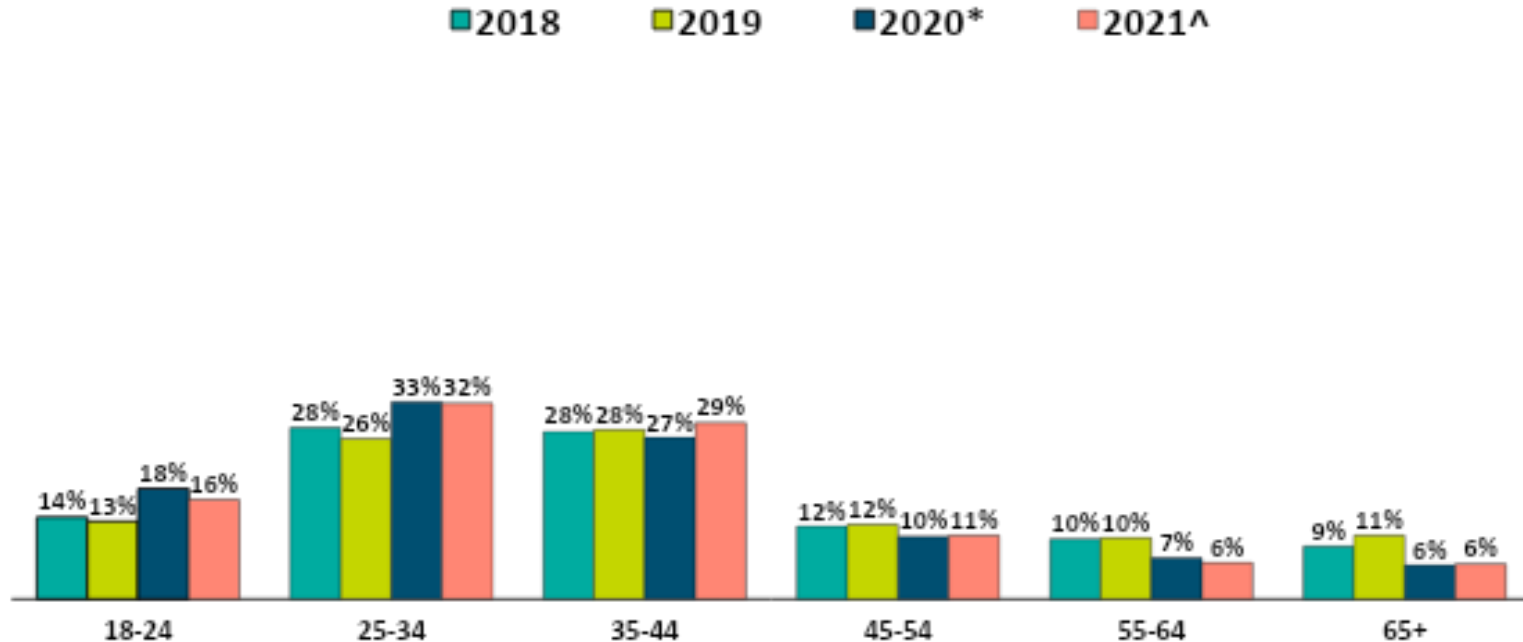
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Age Ranges of Adult Respondents



Data sources:

2018-19 - COVES exit survey

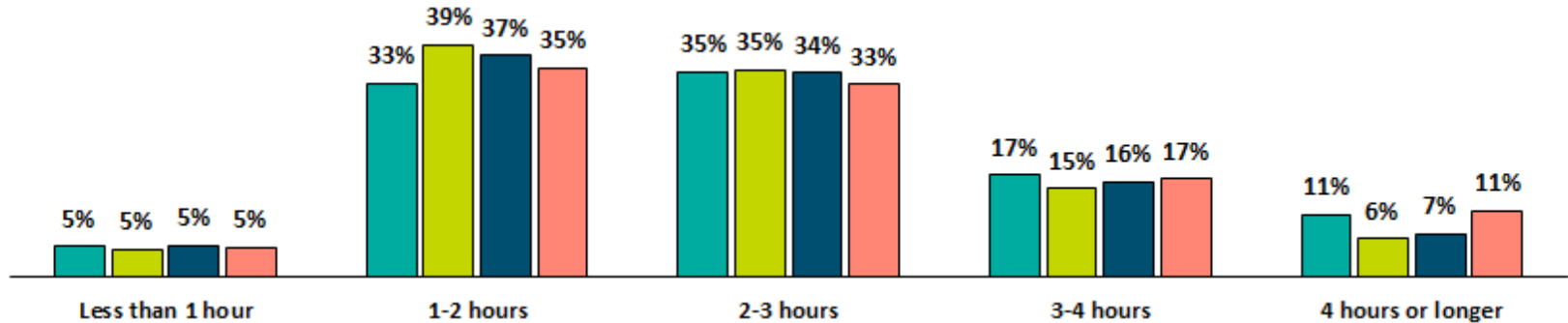
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Stay Time

■ 2018 Mean = 2 hr, 27 min ■ 2019 Mean = 2 hr, 19 min ■ 2020* Mean = 2 hr, 17 min ■ 2021^ Mean = 2 hr, 27 min



Data sources:

2018-19 - COVES exit survey

*2020 – Standard COVES (Jan-Mar), modified internal exit survey (Jun-Jul), “COVID-COVES” (Aug-Dec)

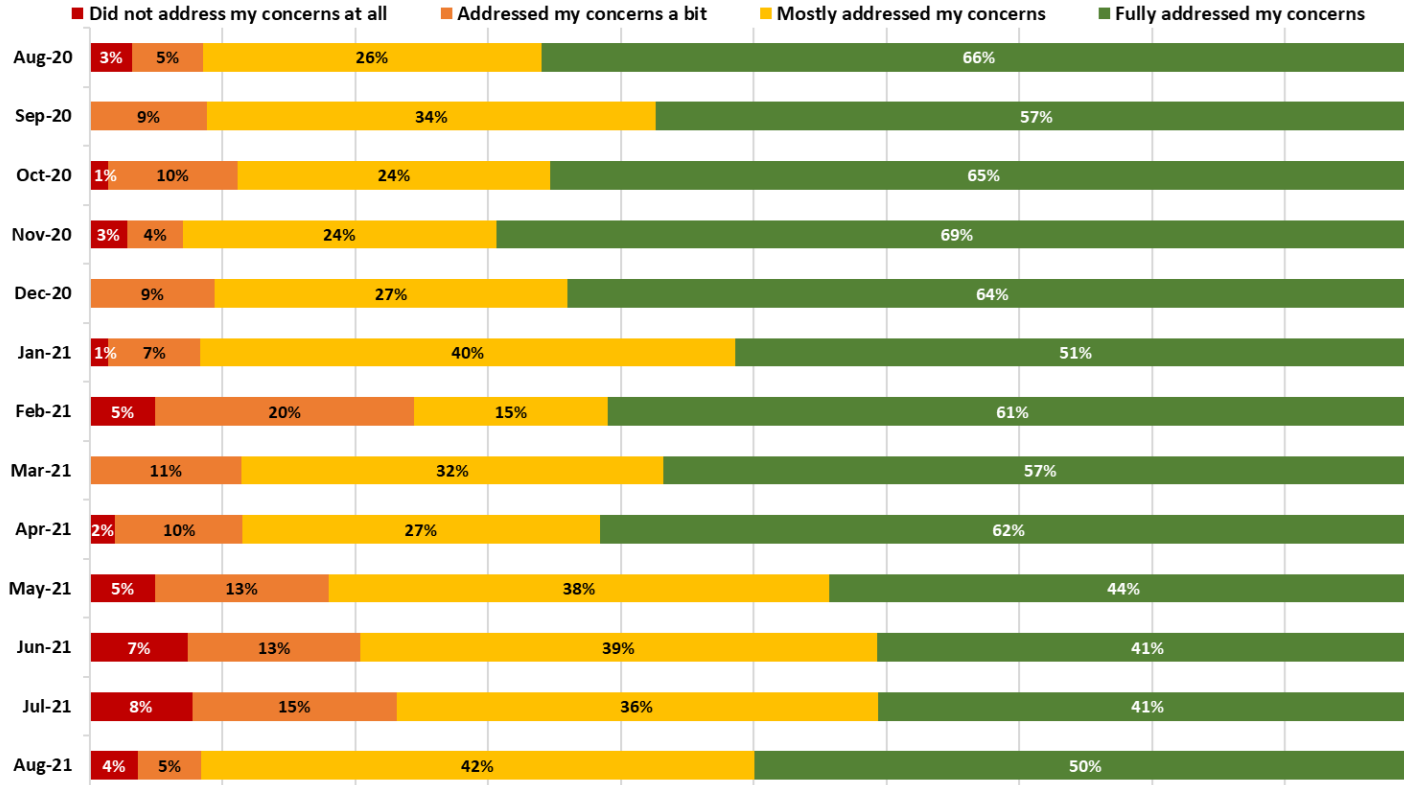
^2021 – “COVID-COVES” – data shown here are YTD through August



HEALTH CONCERNS

Health Concerns Addressed by Month

To what extent did SLSC address your health and safety concerns?



STL mask
mandate
lifted

Takeaways

- While overall visitation has been noticeably lower than pre-pandemic, the Saint Louis Science Center didn't see radical changes in the makeup of who has been visiting during the pandemic.
- Perceptions of health concerns and how well the Science Center addressed those concerns appear to mimic the ebbs and flows of case rates.



What kinds of data and when?

Keeping up with visitors during COVID

SMM COVES Team:

Gretchen Haupt

Marjorie Bequette

Sarah Robertson

And a host of dozens





**WE'VE
MISSED
YOU!**



**WE'VE
MISSED
YOU!**



**WE'VE
MISSED
YOU!**

WEEKLY UPDATES

Identifying and addressing essential visitor needs.

▶ The Museum appears to be successfully addressing most experiences that historically contributed to lower ratings as well as newer issues related to COVID-19.

WHAT HAS BEEN A POINT OF SUCCESS WITH CURRENT VISITORS:

Visible cleaning



High touch areas



Staff interactions



Timed admissions



Value of experience

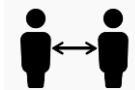


WHAT REQUIRES CONTINUOUS STAFF INVOLVEMENT TO MEET VISITOR EXPECTATIONS:

Masks



Omnitheater social distancing



Missed experiences



WHAT WE SHOULD PAY MOST ATTENTION TO:

Food and beverage

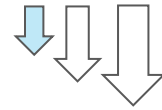
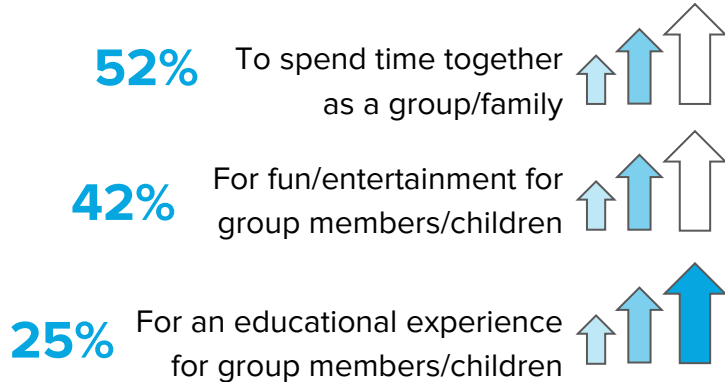


DEEPER DIVES

Examining visitor motivation and behaviors compared to non-pandemic times

Why did you decide to visit today? (Select up to two.) (n=361)

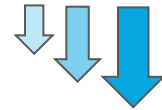
Change from
FY20 3Q



To see a specific exhibit, program, or show **16%**

No comparison To return to a normal routine **11%**

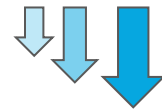
No comparison To support the Science Museum of Minnesota **11%**



For fun/entertainment for myself **7%**

No comparison To relax/relieve stress **5%**

No comparison Other **4%**



For an educational experience for myself **3%**

DEEPER DIVES

Examining visitor motivation and behaviors for unified content campaigns.

▶ Most cite social reasons as primary motivations for visiting, but theme experiences (Science is All of Us, Action For Earth) experiences were a frequently mentioned specific program or show driving attendance, and they are frequently experienced when onsite.

- SMM offered a “We’ve Missed You” marketing campaign **and** themed offerings (exhibits, programs, and events) in winter and spring/summer 2021.
- 74% went to a Science is All of Us offering; 91% to an Action for Earth offering.
- 15% said a specific Science is All of us exhibit or program was a primary motivator; 11% said so of Action for Earth

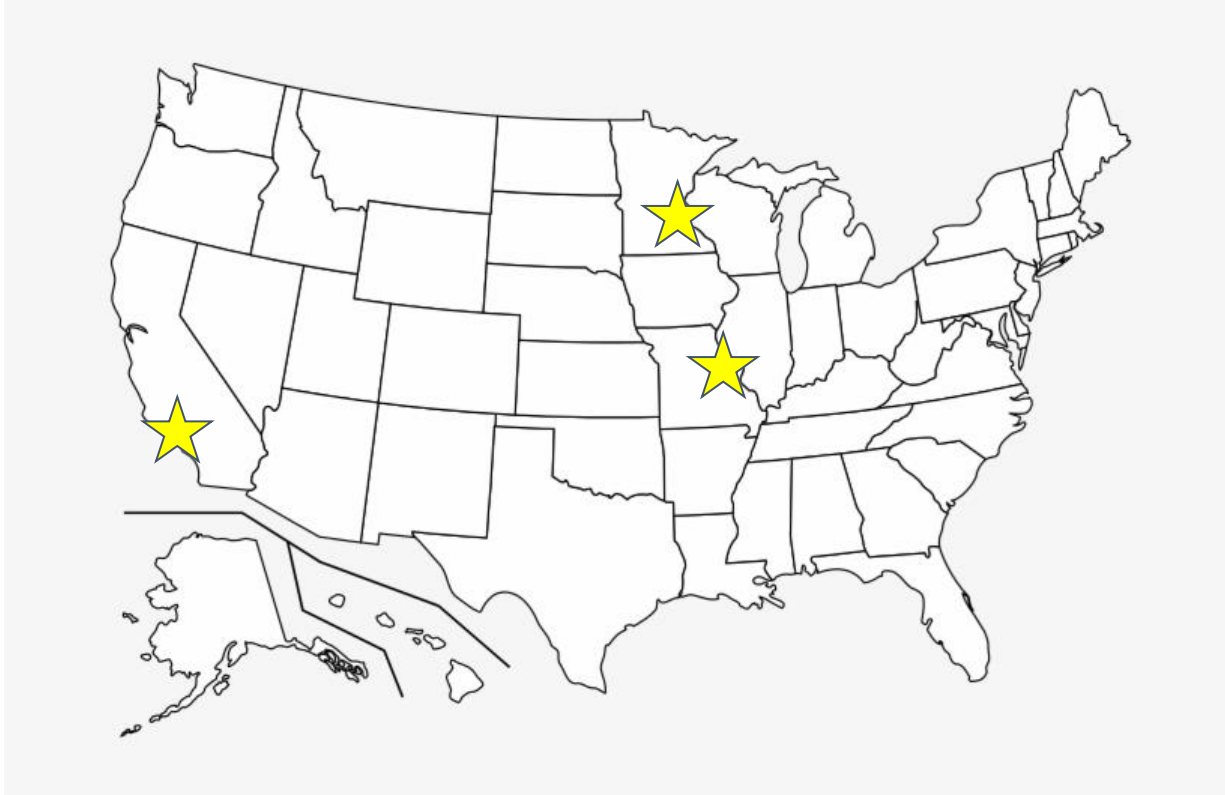


TAKEAWAYS

- Regular updates around visitor experience and health concerns helped staff to maintain a quality experience.
- This was a good time to try a mission-focused experiment. While that experiment did not drive visitation, it was compatible with visitor motivation to visit and seems to have enhanced the experience.

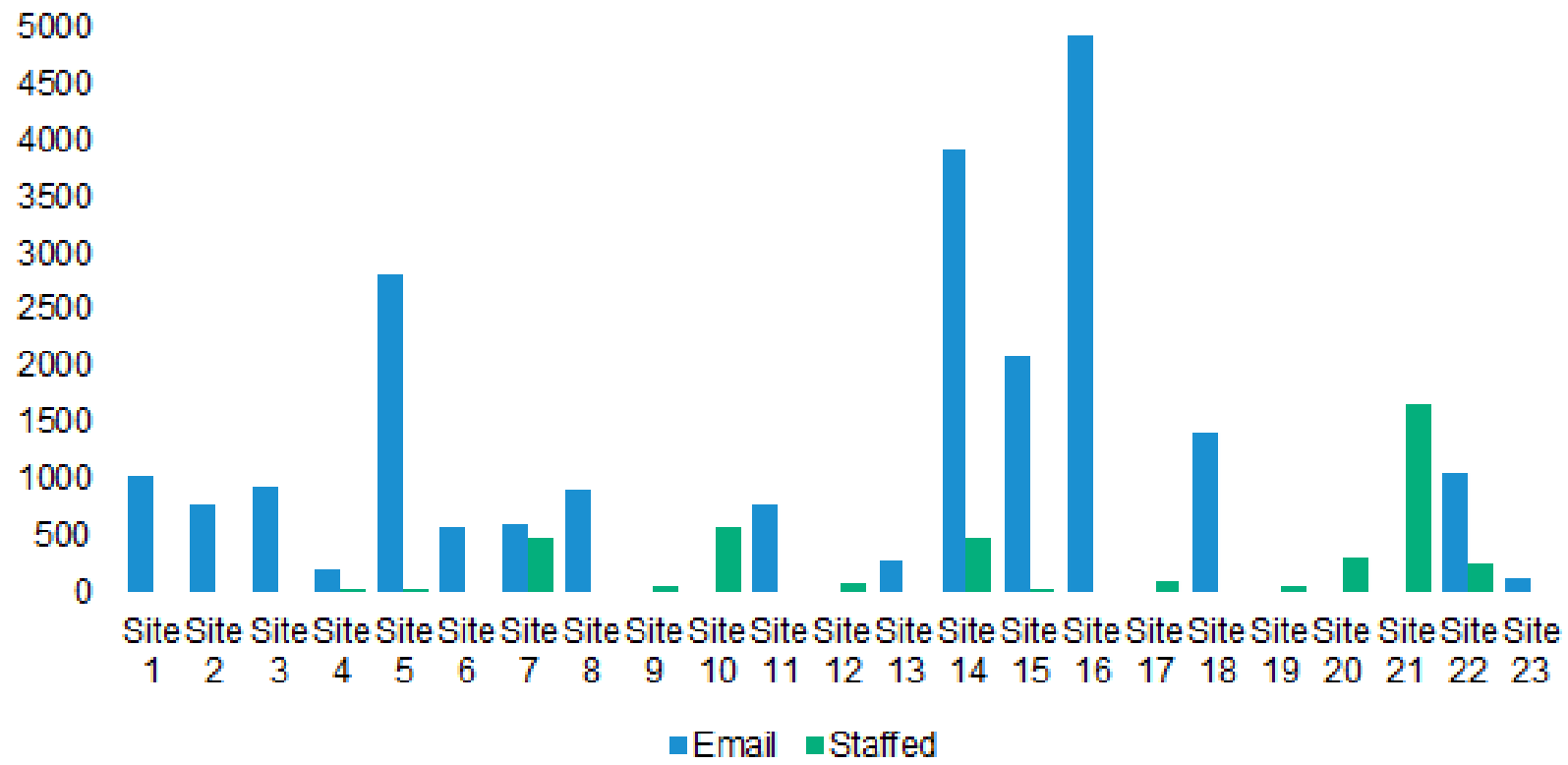


Local context matters



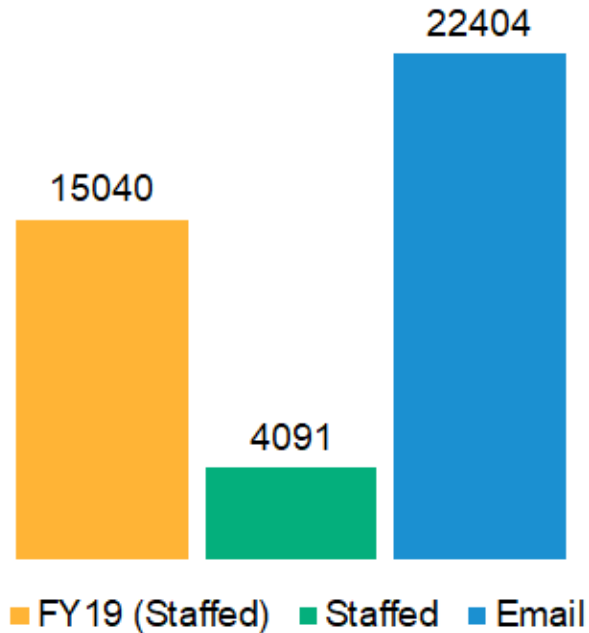


But...





But...

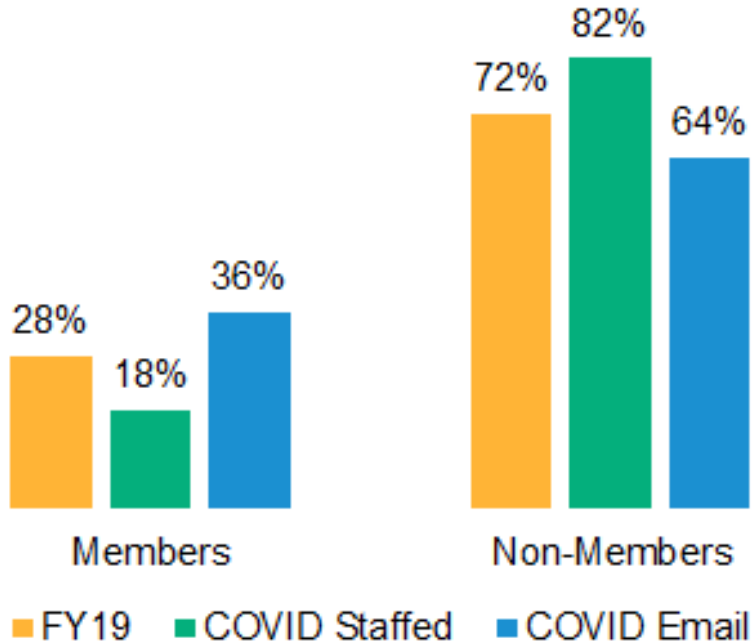


What do we see when we aggregate the data?

Compare FY19 (Jul '18-Jun'19) and Oct '20-Sep '21 (with caution)



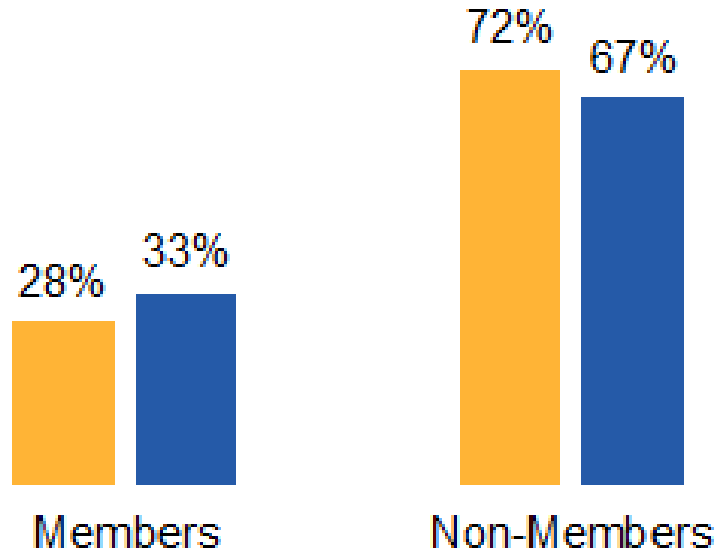
Members vs. Non-members



Net Promoter Score

Members	Non-members
83.5 FY19	67.4 FY19
78.4 Oct 20-Sep 21	57.7 Oct 20-Sep 21
68.7 Oct 20-Sep 21	54.3 Oct 20-Sep 21

Members vs. Non-members



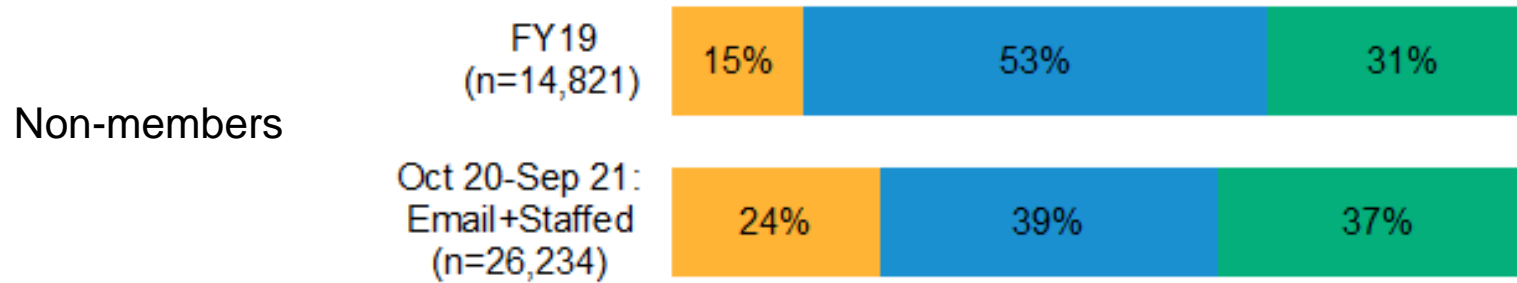
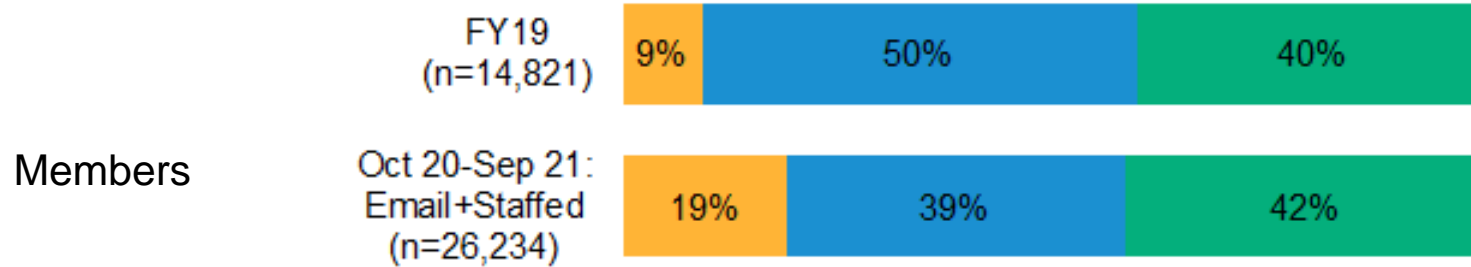
- FY19 (n=12,061)
- Oct 20-Sep 21: Email+Staffed (n=26,234)

Net Promoter Score

Members	Non-members
83.5 FY19	67.4 FY19
69.4 Oct 20-Sep 21	57.7 Oct 20-Sep 21



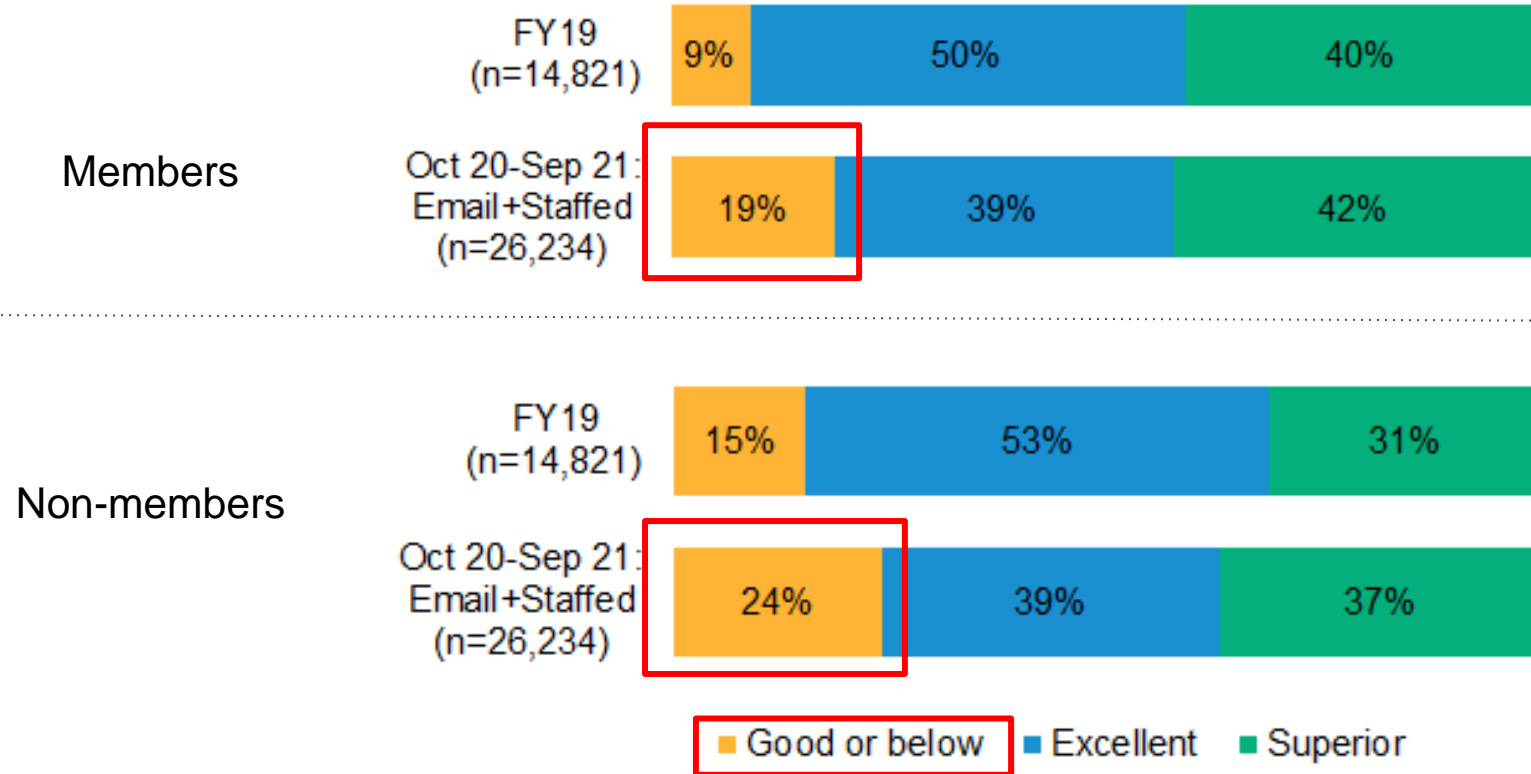
Overall Experience Rating



■ Good or below ■ Excellent ■ Superior

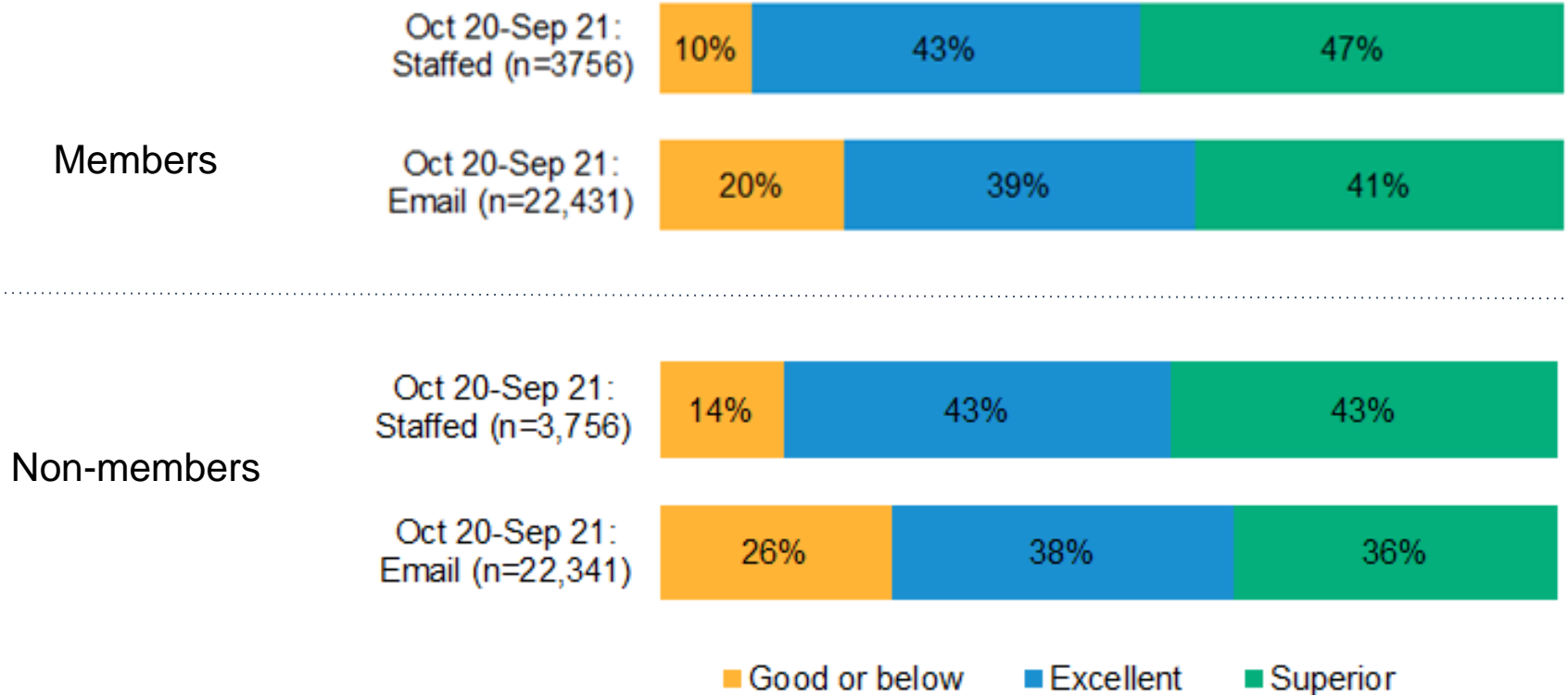


Overall Experience Rating

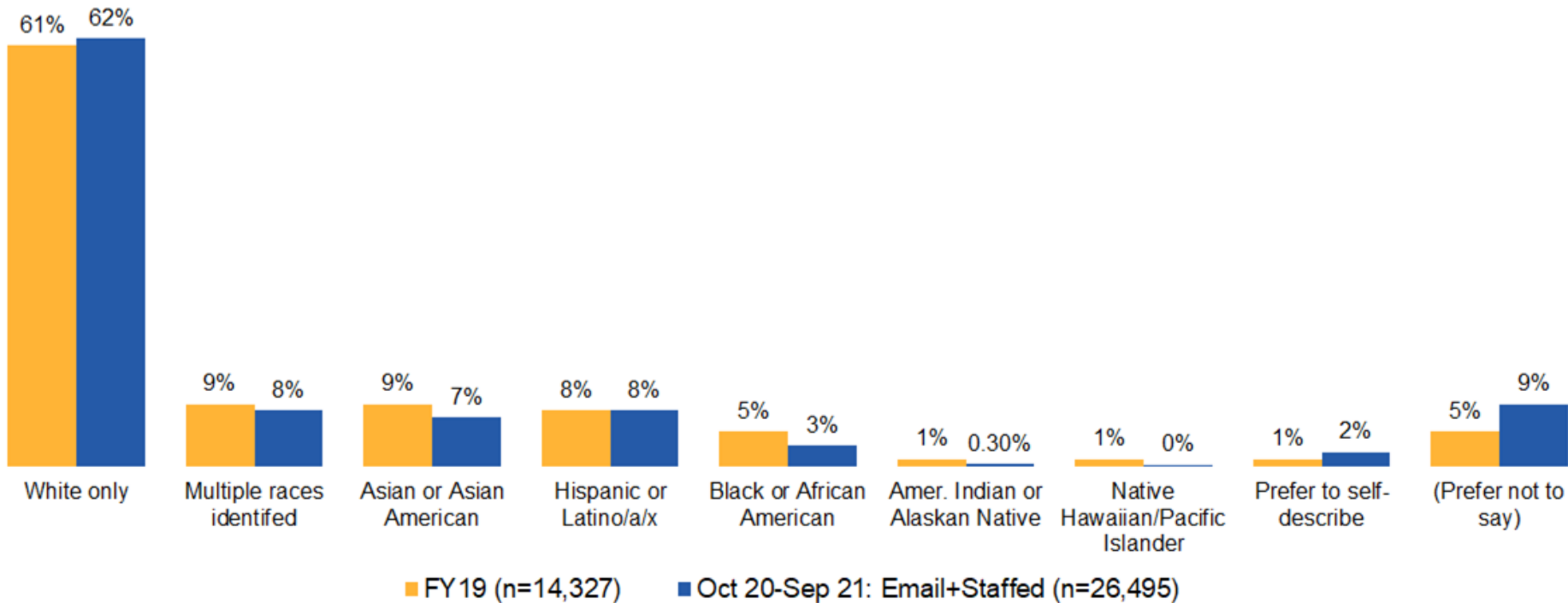




Overall Experience Rating (COVID era only)

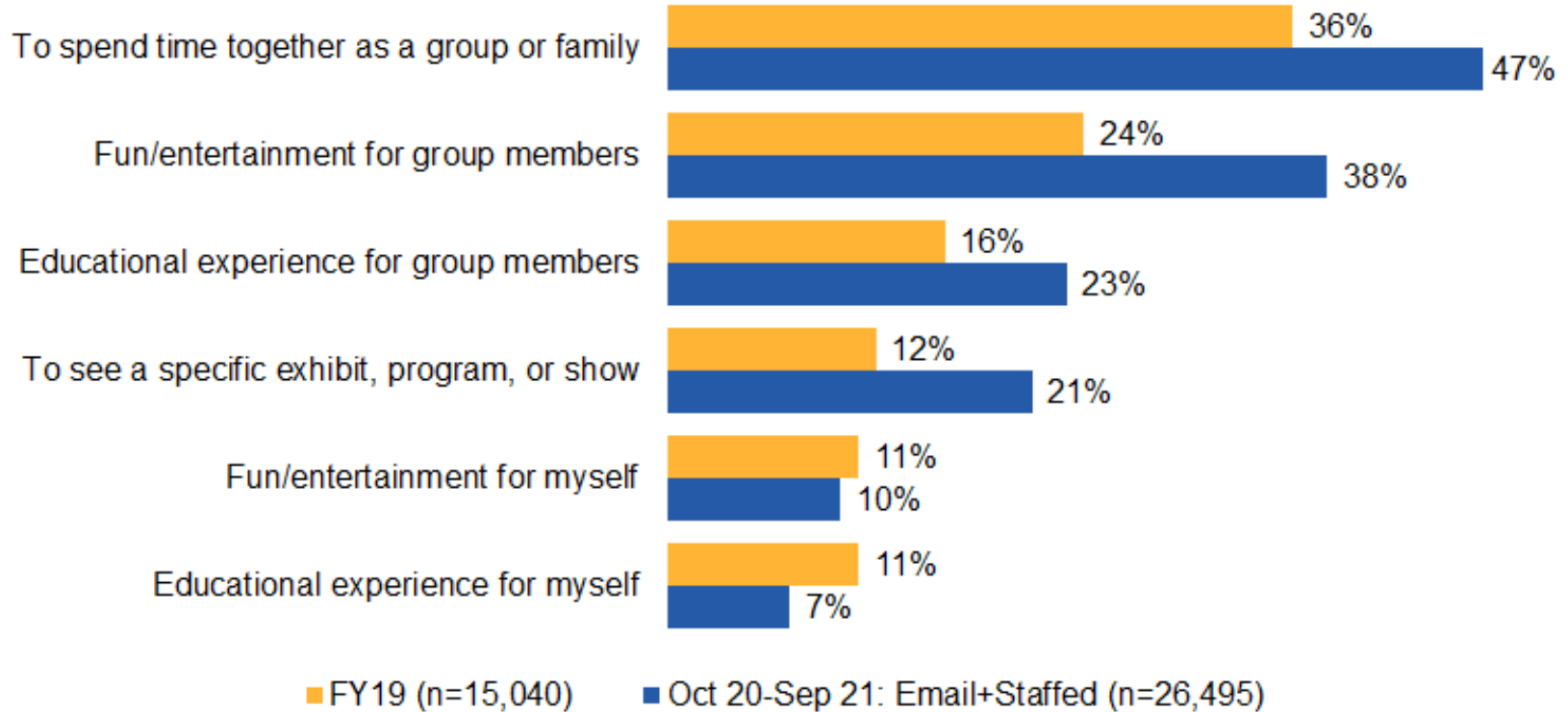


Race and Ethnicity





Motivation for Visiting





Takeaways

- Interpreting data across methods is *hard*
- More people may have had worse visitor experiences in the COVID era, or be less likely to recommend visiting the museum
- More people than ever visit science museums as a way to simply spend time together

Thank you!

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More info about COVES at understandingvisitors.org