

Reopening the Cultural Sector in U.S. Cities





REOPENING CULTURE: WHAT'S AT STAKE?

CULTURE IS A SIGNIFICANT DRIVER OF ECONOMIC ACTIVITY, DIRECT AND RELATED EMPLOYMENT, TOURISM AND NEIGHBORHOOD IDENTITY IN THE U.S.

AS A SECTOR, ARTS AND CULTURE:

- Contributed \$763.6 billion to the U.S. economy, more than agriculture, transportation, or warehousing
- Employed 4.9 million workers across the country with earnings of more than \$370 billion
- Exported \$20 billion more than imported, providing a positive trade balance
- Contributed \$67.5 billion to rural community economies

REOPENING CULTURE: WHAT'S THE PROBLEM?

- There is little useful sector-specific guidance on how to reopen cultural venues in the U.S.
- Existing guidance often doesn't acknowledge differences in cultural venues, grouping indoor exhibit-based venues (museums), fixed-seating venues (theaters and concert halls) and outdoor facilities
- Overlapping layers of authority and expertise are not being coordinated around reopening including:
 - State and local regulations and related public health guidance
 - Recommendations from industry associations and advocacy groups
 - Local networks of affected venues

LIST: These Houston-area museums are open or will open later in May

Texas museums are allowed to reopen under Phase 1 of Gov. Abbott's executive order.



The Houston Holocaust Museum (Copyright 2019 ©, LYON PHOTOGRAPHY, Inc.)

Source: click2houston.com

Bars & Entertainment Venues

- Open at 1/2 Capacity
- Includes tours, museums, theaters, etc.
- Clean all surfaces after every use
- Employees screened daily and required to wear face masks

Source: Nashville Roadmap for Reopening



REOPENING CULTURE: WHAT'S THE PUBLIC DEMAND?

RESEARCH SHOWS CONSUMERS INTEND TO VISIT CULTURAL INSTITUTIONS WHEN THEY REOPEN:

- Higher demand - Outdoor attractions and venues that allow greater freedom of movement (e.g., museums, botanical gardens, zoos, outdoor performances)
- Lower demand - Indoor spaces with fixed seating (e.g., cinema, theaters, concert halls)

TO FEEL SAFE, CONSUMERS WILL EXPECT TO SEE SIGNIFICANT OPERATIONAL CHANGES. AMONG THE MOST FREQUENTLY CITED WERE:

- Ability to socially distance at the venue
- Limitation on number of visitors
- Requirement for visitors and staff to wear face masks
- Observable cleaning protocols including availability of on-site hand sanitizer



REOPENING CULTURE: INTERNATIONAL PRACTICES TO DATE

Capacity Limits

- **Entrance quotas**
- **Timed ticketing** for staggered entrance
- **Time-limited visits** (e.g., two hours)
- **Extended opening hours** to stagger visits
- **Restricted access** to small rooms/spaces
- **Distanced seating** for household groups

Visitor Requirements

- **Require face masks**
- **Require 6-ft distance** from non-household members
- **Temperature checks** / thermal scanning
- **Visitor registration** to assist with contact tracing
- **Registration of health information** via smartphone app in coordination with local health officials
- **Clear signage** prohibiting symptomatic visitors

Venue Hygiene

- **Frequent cleaning regimen**, particularly for high-touch areas/items
- **Placement of no-touch hand sanitizer dispensers** at all entrances/exits
- **Limited usage of high-touch amenities** (e.g., water fountains, coatrooms, revolving doors)

Activity Adjustments

- **Suspend or adjust group tours** and tour routes
- **Delineate one-way routes** through exhibits
- **Replace audio guides** with smartphone app
- **Close interactive program elements** with high-touch surfaces
- **Close or restrict concessions** and gift shops

Ticketing & Reception

- **Shift reception services outdoors**
- **Build plexiglass shields** for all visitor services
- **Online-only ticketing**
- **No-touch ticket scanning**
- **Designate 6-foot spacing** for queues

Special Considerations

- **Special policy or opening hours for at-risk visitors**
- **Special policy for at-risk staff** or staff who fall ill
- **Temporary quarantine areas on every floor** for visitors that fall ill



REOPENING CULTURE: VENUE CONSIDERATIONS

CONDITIONS	INDOOR EXHIBIT-BASED VENUES <i>(museums, galleries, historic sites, aquariums, etc.)</i>	INDOOR FIXED-SEAT VENUES <i>(theaters, lecture/concert halls, cinemas, etc.)</i>	OUTDOOR VENUES <i>(concerts in parks, street festivals, etc.)</i>
Ability for patrons to socially distance	HIGH	LOW	HIGH
Ability for patrons to avoid touching surfaces	HIGH	LOW	HIGH
Ability to control patron flow	HIGH	HIGH	MEDIUM
Ability to minimize patron contact with staff	HIGH	MEDIUM	HIGH
Ability for staff to clean frequently during programming	HIGH	MEDIUM	MEDIUM
Financial viability w/ conditions above	MEDIUM	LOW	MEDIUM



REOPENING CULTURE: HOW SHOULD U.S. CITIES RESPOND?

- Adopt sector-specific guidelines on reopening that acknowledge differences in cultural venues and visitor experiences at:
 - Indoor exhibit-based venues (museums, galleries, historic sites, aquariums, etc.)
 - Indoor fixed-seat venues (theaters, lecture/concert halls, cinemas, etc.)
 - Outdoor venues (concerts in parks, street festivals, etc.)
- Support consistent, effective messaging to the public about COVID-19 measures at venues
- Develop clear protocols in the event subsequent closures are needed
- Include culture in long-term recovery planning recognizing its impact on local economies, identity and quality of life

REOPENING CULTURE

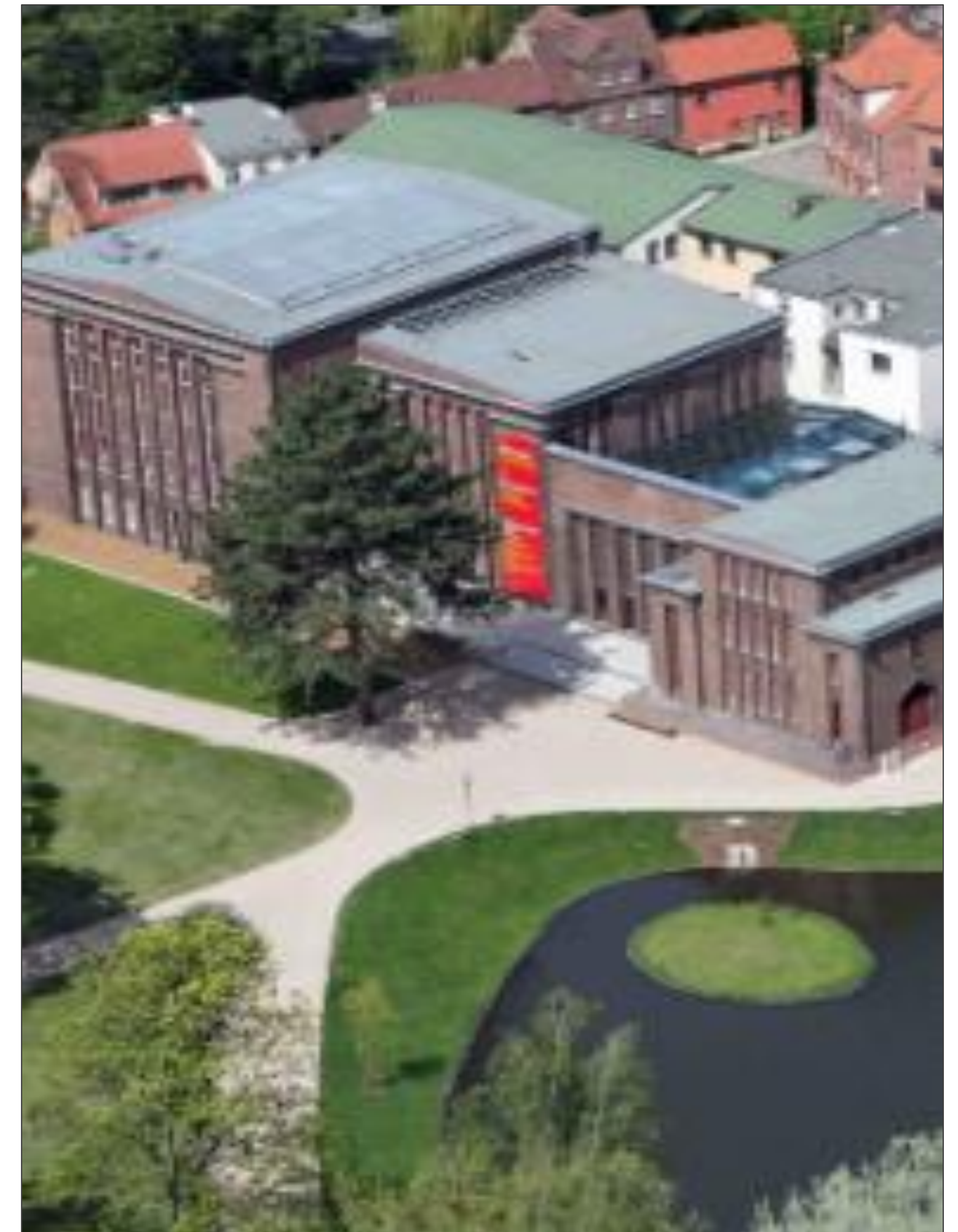
CASE STUDIES



REOPENING CULTURE CASE STUDY: BRANDENBURG, GERMANY

LOCAL CONTEXT

- The Association of Brandenburg Museums allowed its museums to reopen on April 22 with guidelines, but left decisions to the individual institution.
- Most cultural institutions reopened in German states on May 6.
- The Association Guidelines are based on local law which:
 - Prohibit queues in entry spaces
 - Limit 10 people to waiting areas
 - Require a minimum social distance of 1.5m



Brandenburg State Museum for Modern Art

REOPENING CULTURE CASE STUDY: BRANDENBURG, GERMANY

LOCAL CONTEXT

Highlights from the Brandenburg Museum Association Guidelines include:

Social distancing

- Markings to define the maximum walkable floor space
- Timed electronic ticketing
- Plexi-glass at entry
- Card payment only where possible

Limiting services

- No cloakrooms, only free-standing cloak stands and lockers
- No food or drink provision

Communication

- COVID-19 regulations posted at entry points and in numerous locations inside the museum
- Personnel training on visitor management and COVID-19 measures



Minimum distance of 1.5m is marked out on the museum's foyer floor © Blmk



Visitors in pairs can each take one end of a selection of poles and ribbons exactly 1.5m long © Blmk

REOPENING CULTURE CASE STUDY: WIESBADEN, GERMANY

LOCAL CONTEXT

Wiesbaden State Theater is the first major European concert hall to reopen since the pandemic. Hygiene and safety measures include:

- **Personal data and identification**
 - Name, address and phone number of patrons recorded to enable contact tracing
 - Patrons required to have identification
- **Face covering**
 - Masks required for entry, but may be removed once seated
- **Seating**
 - 200 of 1,000 seats available in main theater
 - No fixed seats, only guarantees for particular row
 - One empty row and three empty seats between patrons
- **Facilities and services**
 - No cloakroom
 - One person at a time in the restroom
 - Limited restaurant service

The New York Times

An Audience Comes Out of
Lockdown for Schubert and Mahler

Observing social distancing, a German theater cautiously
restarted live concerts.



By Jack Ewing

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Updated May 20, 2020, 5:55 a.m. ET



REOPENING CULTURE CASE STUDY: SHANGHAI, CHINA

LOCAL CONTEXT

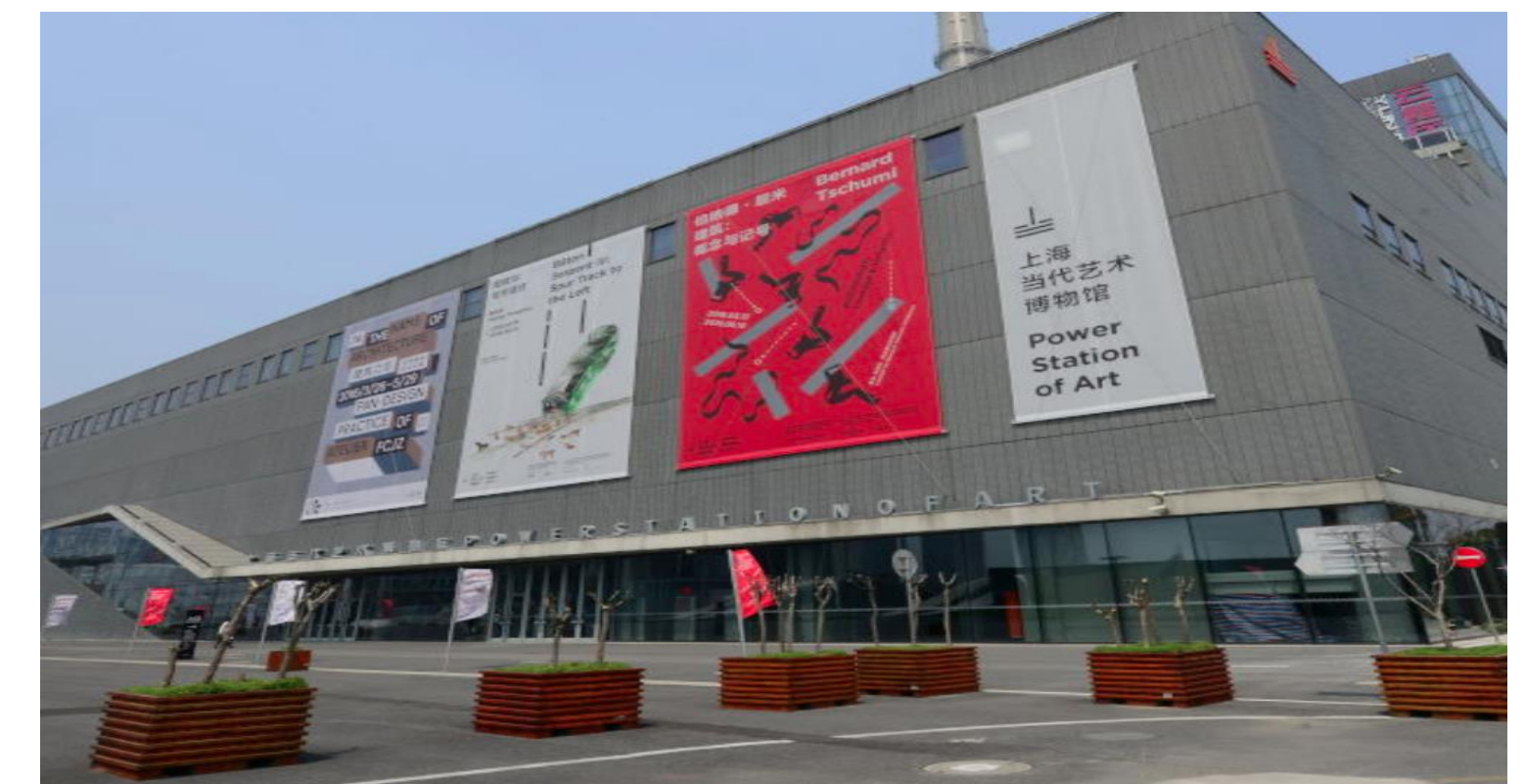
On March 13, the Shanghai Museum and Shanghai Power Station Museum reopened to the public. Both had been closed since late January, when all of mainland China was put under lockdown to contain COVID-19.

Among the measures taken by Shanghai museums include:

- Advance bookings via smartphone apps
- Limits of 2,000 visitors per day and 300 at a time (Shanghai Museum)
- Visitor temperatures checks
- Two-hour limits on visits



Shanghai Museum



Shanghai Power Station Museum

REOPENING CULTURE CASE STUDY: SHANGHAI, CHINA

RELEVANT GUIDANCE

Since the reopening of cultural venues in Shanghai, Hong Kong and Singapore, the International Committee for Museums and Modern Art (CiMAM) developed guidelines based on the approaches of several Asian cultural venues.

The guidelines are based on four pillars:

- Ensuring the security of visitors
- Ensuring the security of personnel
- Management of infrastructure
- Constant communication with the public



Visitors to Shanghai museums must have their temperatures checked, wear masks and may stay no more than two hours © Power Station of Art, Shanghai

REOPENING CULTURE CASE STUDY: SHANGHAI, CHINA

FOCUS ON DOMESTIC TOURISM

- Launch of *Visit Shanghai* app with nine sectors represented including sports, healthcare, arts and transportation, with incentives and discounts aimed at getting locals to return
- Shanghai Disneyland reopened on May 11 after 107 days of closure
- Starting at 20% capacity, increasing to 5,000 per week until the park reaches 30% capacity



VISIT SHANGHAI APP available on App Store



REOPENING CULTURE CASE STUDY: HOUSTON, TEXAS

MUSEUM OF FINE ARTS, HOUSTON (MFAH)

- After a two-month closure, MFAH became the first fine arts museum in the U.S. to reopen its doors on Saturday, May 23
- Texas Governor Greg Abbott lifted the state's stay-at-home order on May 1, which allowed businesses to reopen
- Reopening protocols include:
 - Limiting museum capacity to 25%
 - Face masks for visitors older than 2, and all staff members
 - Temperature checks upon entry
 - Social distancing
 - No food or beverage service
 - Cashless payment only
 - No large bags or coat check service



REOPENING CULTURE

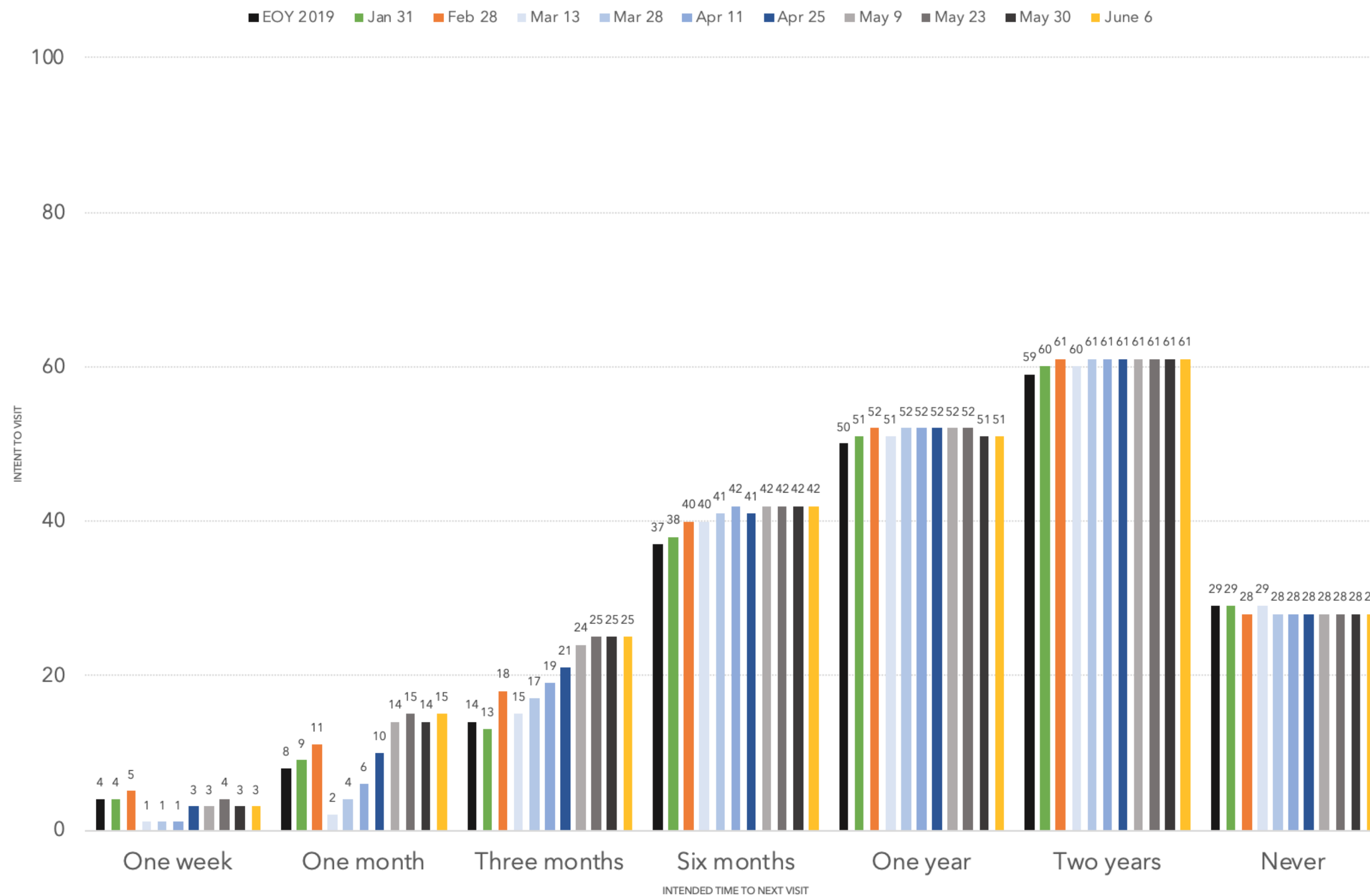
APPENDIX



REOPENING CULTURE: INTENT TO VISIT

Intent to Visit 2020

US adults as of 6 June 2020, 84 organizations



“PEOPLE INTEND TO RETURN TO ‘NORMAL’ VISITATION PATTERNS WITHIN THREE MONTHS, AND INTENTIONS TO VISIT WITHIN ONE MONTH ARE QUICKLY RECOVERING.”

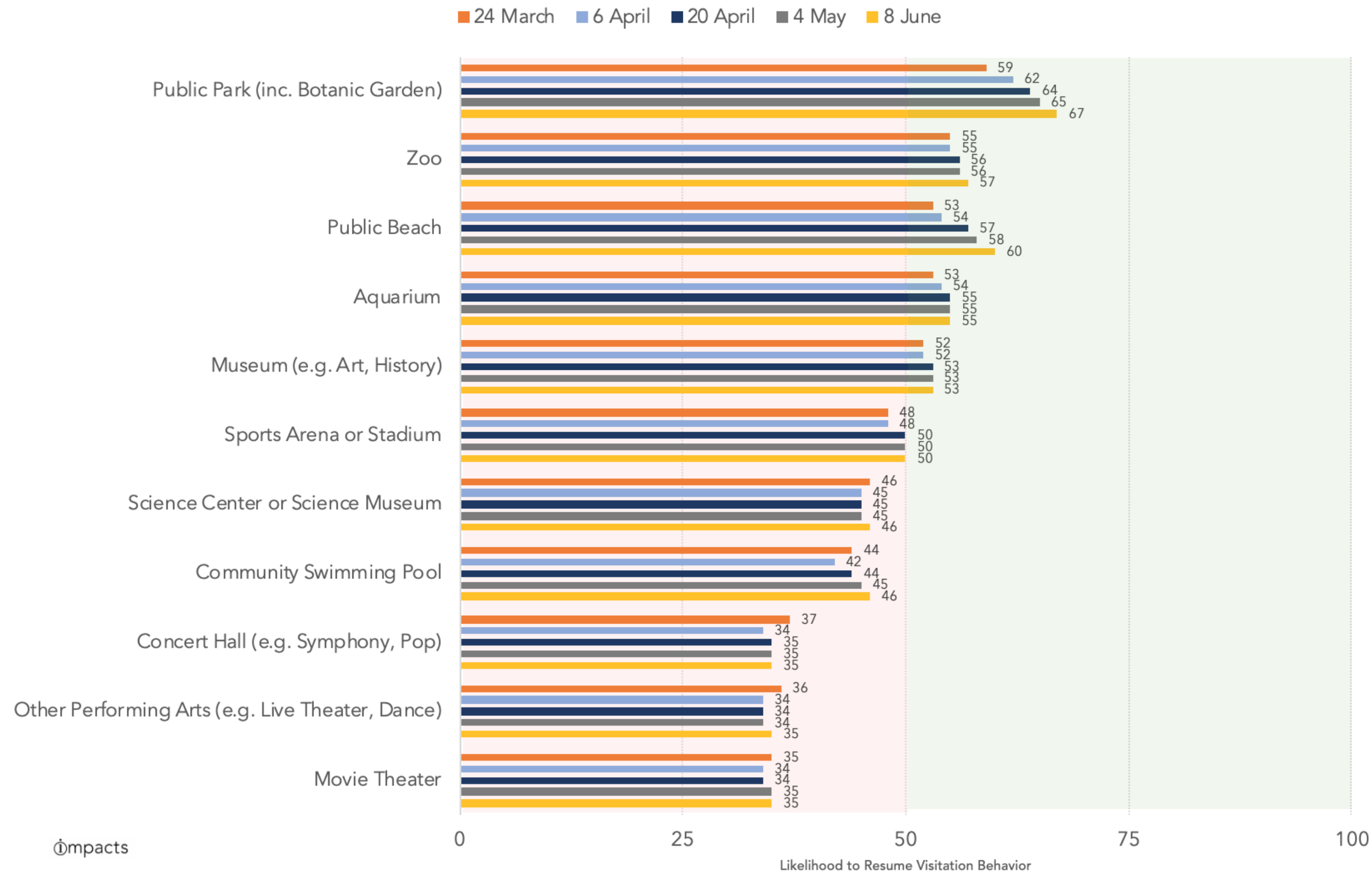
- 8 weeks of monitoring adult public’s intention to visit 84 unique cultural institutions in the U.S. including museums, theaters, aquariums, and symphonies
- Starting sample size of 5,892, has grown over the 8-week period to 8,000+ participants
- Values on the Y axis represent the certainty of their intent to visit, with “1” representing no intent to visit and “100” suggesting that they cannot wait for the doors to open

Impacts

Source: colleendilen.com

REOPENING CULTURE: INTENT TO RETURN

Return to Normal Activities Shown by category of visitor-serving organization



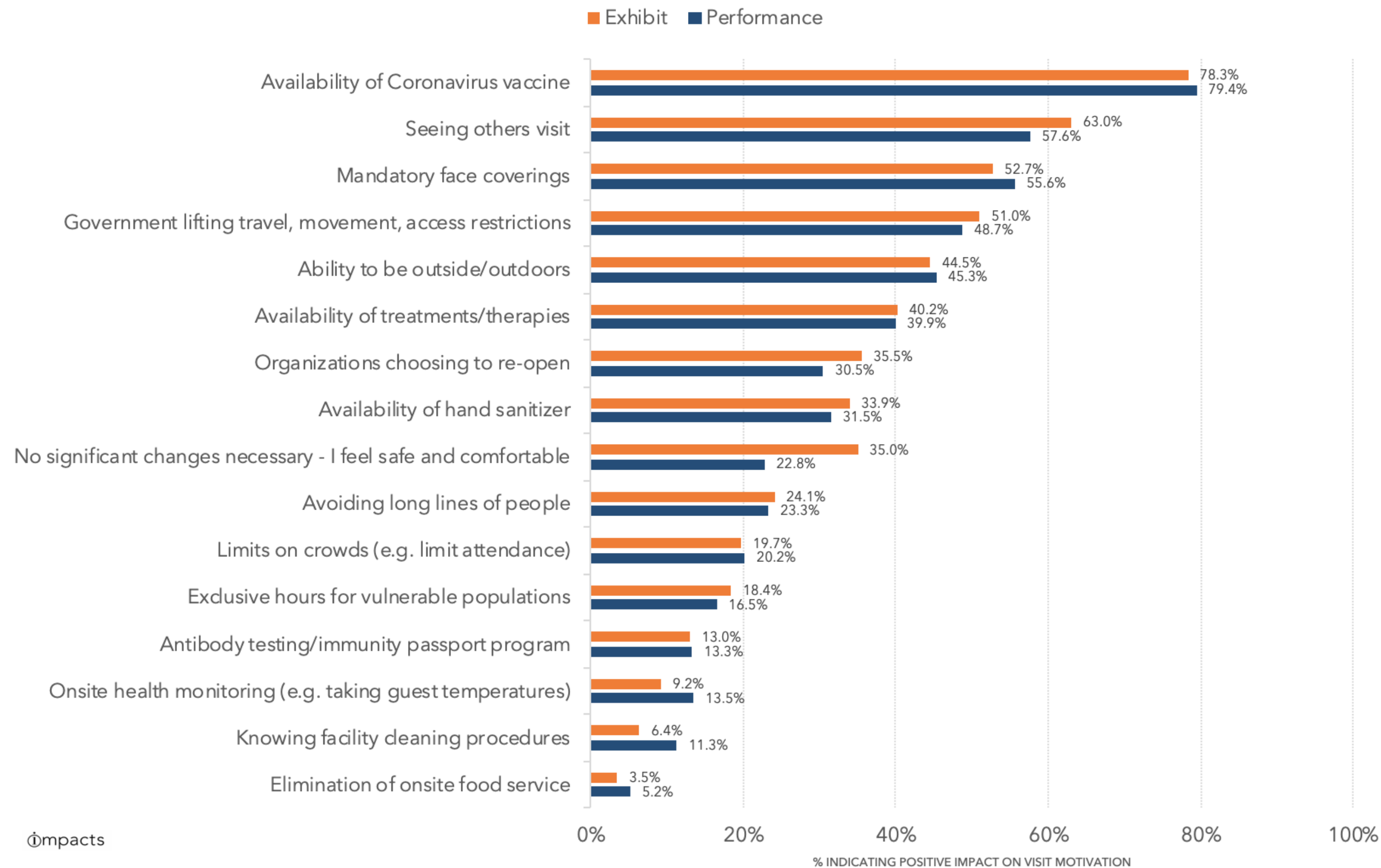
“PEOPLE INTEND TO VISIT CULTURAL ORGANIZATIONS AGAIN ... BUT DEMAND FOR ORGANIZATION TYPES IS BEING REDISTRIBUTED.”

- Outdoor attractions and institutions that allow greater freedom of movement will be in high demand
- Closed spaces with minimal visitor movement - concert halls and theaters - will have far less demand
- Values on the X axis represent likelihood to resume visitation with "50" representing no change – i.e., intent as if COVID-19 never happened

REOPENING CULTURE: AUDIENCE PERCEPTIONS

“What would make you feel safe and comfortable going to a [organization type] again?”

As of 8 June 2020, multiple choice, select all that apply, choices populated by lexical analysis



Source: colleendilen.com

“PEOPLE INTEND TO VISIT CULTURAL ORGANIZATIONS AGAIN IN THE RELATIVE NEAR TERM, [BUT] WE ALSO OBSERVE THAT A SIZABLE PERCENTAGE OF VISITORS DO NOT FEEL COMFORTABLE DOING SO WITHOUT FIRST OBSERVING SIGNIFICANT OPERATIONAL CHANGES.”

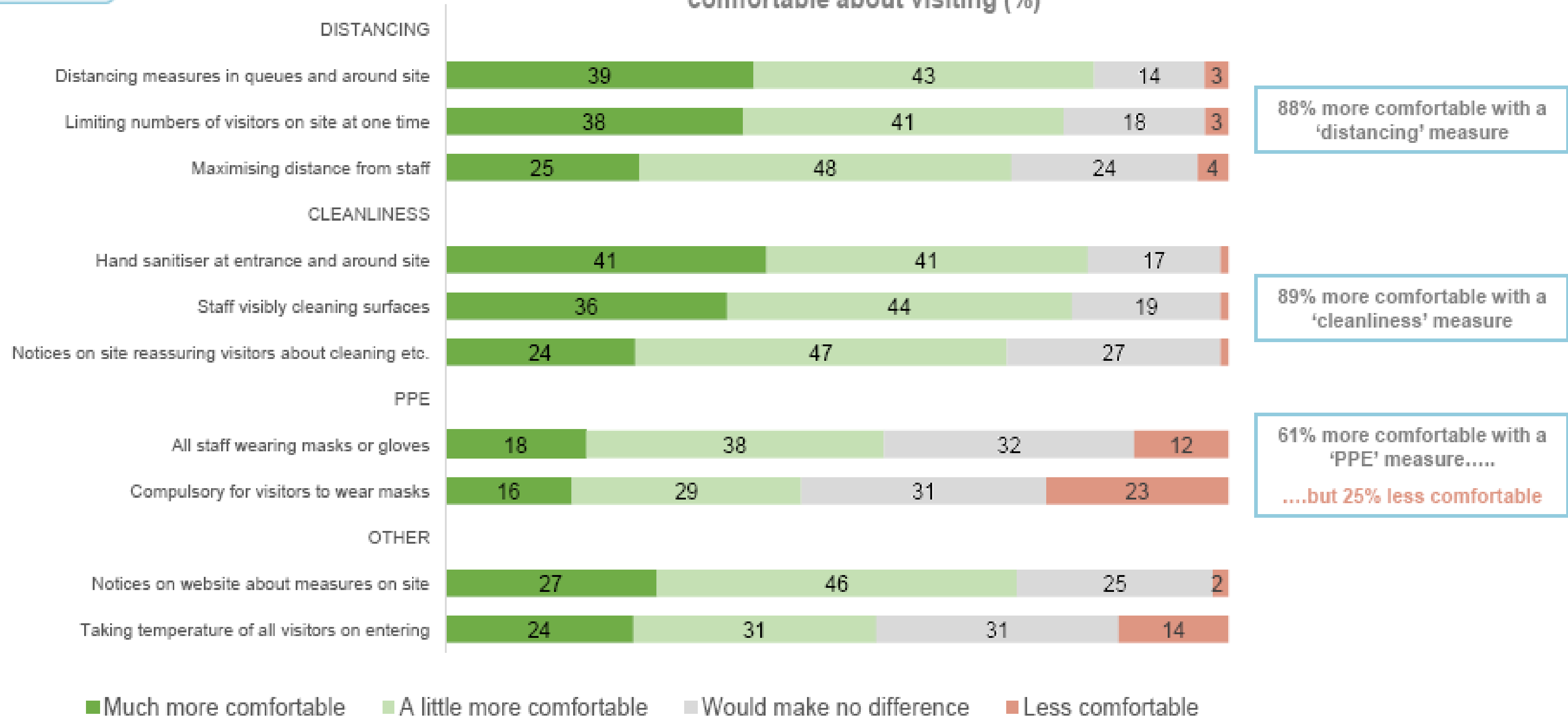
- Many will take a “wait and see” approach
- Cultural institutions will have to prioritize safety measures and communicate about them effectively

CULTURE REOPENING: VISITOR PERCEPTIONS

Distancing and cleanliness measures strongly welcomed by the market, but attractions must be seen to be delivering and policing these effectively – notices alone are not enough. A quarter will feel less comfortable with introducing PPE, especially if compulsory for visitors



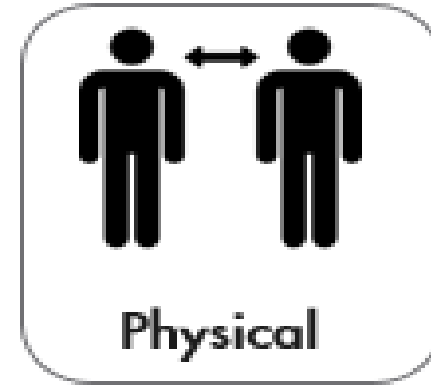
Which of these measures would make you feel more comfortable about visiting (%)



Source: Association of Leading Visitor Attractions (ALVA), UK

REOPENING CULTURE: WHAT'S HAPPENING ELSEWHERE?

Reopening measures



- Face masks and / or gloves (**Abu Dhabi, Brussels, Montreal**)
- Temperature checks
- Mass testing (**Seoul**)
- 1.5m society / social distancing measures in public (**Amsterdam, Taipei**)
- Reopening differentiated across geographic location (**France, Chengdu**)



- Health apps, with codes that are scanned (**Chengdu, Guangzhou, Nanjing, Shanghai, Shenzhen**)
- Contact tracing apps (**Melbourne, Sydney**)



- Staggered opening hours to reduce congestion
- Extension of opening hours to meet capacity restrictions
- Specific opening hours for at risk population
- Reduced seating and capacity
 - Based on social distancing guidance
 - Based on size of space (e.g sqm calculation)
- Increased cleaning & disinfecting requirements (up to 8x day)
- Self scan tickets
- Plexi glass shields at ticket desks to separate staff from public
- Provision of masks

* Indicative, not all cities listed

Status as of April 30



REOPENING CULTURE: QUESTIONS?



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