

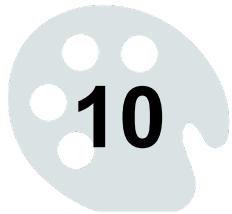
Daniller + Company COVID-19 Renewal Project

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May 15, 2020

Daniller + Company COVID-19 Renewal Project

A total of **16** visitor-based organizations participated in Daniller + Company's first round of renewal performance data request



**Art & Culture
Museums**



**Garden /
Environment**



Other
Including Science Centers /
Children's Museums

Majority mail monthly renewals, and one suspended renewals

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Overall trends across participating visitor-based organizations

	Jan – Apr 2019	Jan – Apr 2020
Total gifts received:	41,742	37,323
Total income received:	\$4,299,366	\$3,732,857
Average gift:	\$103	\$100

For the first **four months** of the calendar year:

- Gifts are down **11%**
- Income is down **13%**
- Average gift is down slightly (**3%**)

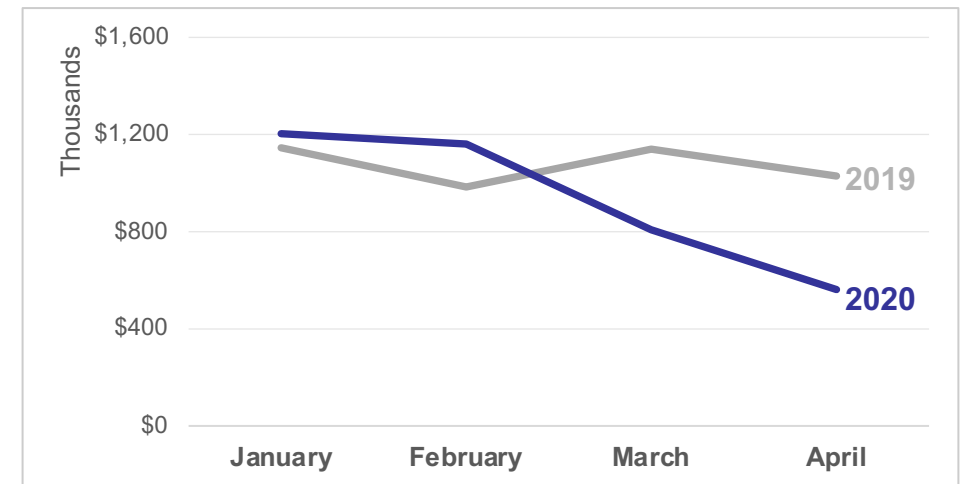
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How COVID-19 Reversed Trends:

Of note is **most organizations were performing better** in 2020 relative to 2019 until the COVID-19 outbreak in the US

	Jan – Feb 2019	Jan – Feb 2020
Total income received:	\$2,129,291	\$2,363,550
		<i>11% higher in 2020 than in 2019</i>

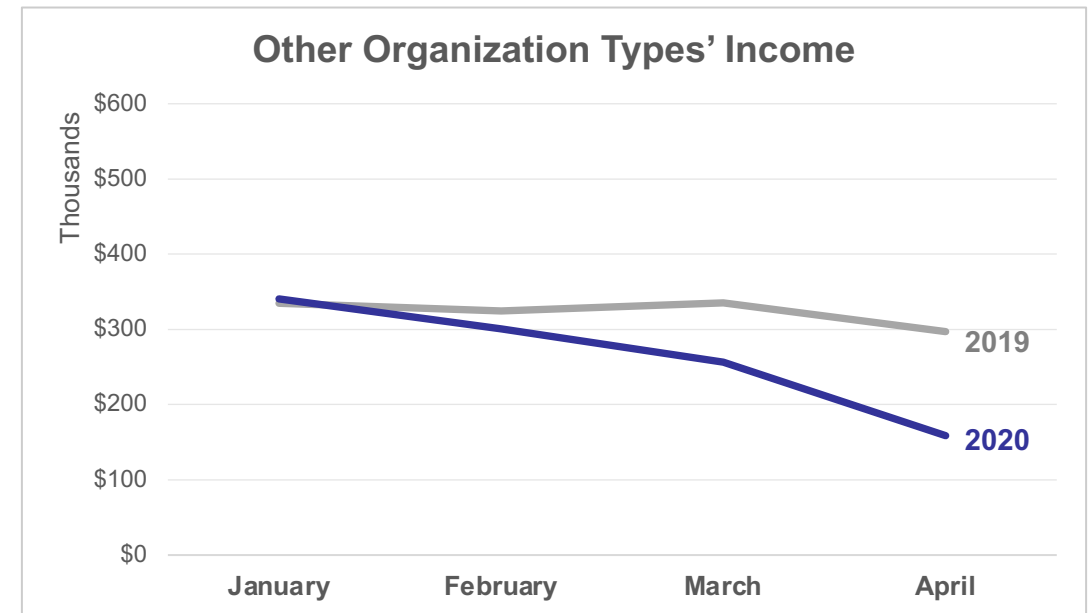
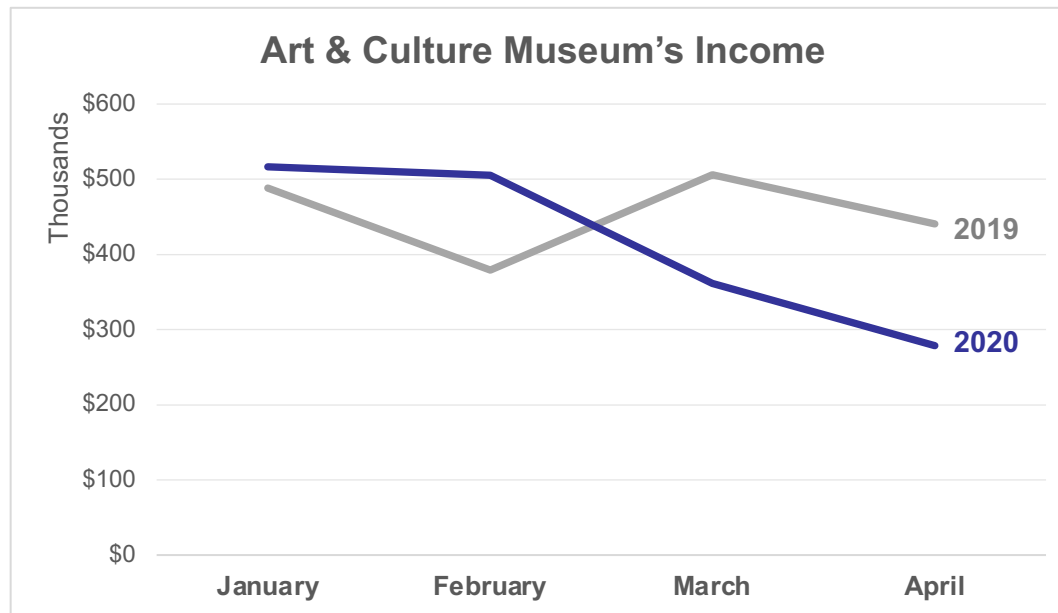
	Mar – Apr 2019	Mar – Apr 2020
Total income received:	\$2,170,075	\$1,369,307
		<i>37% lower in 2020 than in 2019</i>



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How COVID-19 Impacted Different Organization Types:

Total March-April 2020 income for Art & Culture Museums and Other organization types* was **~33% lower** than 2019. **Art & Culture Museums' losses were partially offset by gains earlier in 2020**; to date, their total income is 9% below 2019, while Other organization types are 22% lower



*The Other organization type consists mostly of Science Centers and Children's Museums. Garden / Environmental organizations are not included in the figures above to protect data privacy.

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Key Takeaways:

- Impact on Arts & Culture Museums to date appears to be alleviated by earlier gains in 2020. Many Daniller clients in this category also had existing successful digital engagement strategies to deploy
- Science Centers and Children's Museums have had weaker performance, though they also have a unique opportunity to complement families' at-home education
- These results reflect the early days of the COVID-19 outbreak when much was still unknown. While a lot of uncertainty remains, some museums and gardens are preparing to re-open in the summer, which may lead to improvements in performance
- Caution should be exercised in interpreting these results as we saw wide variation in impact across organizations, and 2019 renewal performance may not be representative of some organizations' typical renewal performance. We will continue to partner with interested visitor-based organizations to report results so the picture of overall impact will become clearer