

COVID-19 RELATED GARDEN CLOSURE MARCH 2020 SURVEY RESULTS



The impact of the coronavirus (COVID-19) pandemic is being felt across the globe and acutely so in the public horticulture industry where gardens and arboreta across the country were abruptly closed during Spring, the busiest time of year for public gardens.

In late March 2020, 324 Association member gardens responded to a survey. Survey results indicated sweeping closures that occurred suddenly and caused profound earned revenue-related losses and other economic impacts to garden business operations.

As of March 30th, only 4% (13) of responding member gardens remained "fully open" to the public. Partially closed gardens accounted for 36% (117) and totally closed gardens made up the majority at 60% (194).

Greater than 90% of the reported closures (n=198) occurred between March 12 and March 24. This was an abrupt change as gardens had been experiencing increases in visitation prior to this time as people sought respite in them. On Friday March 13th, a COVID-19 national emergency was announced/declared and within 48 hours, 17% (34) gardens closed their gates. On Monday March 16, immediately following release of national social distancing guidelines discouraging gatherings of >10 people and encouraging 6-ft. (~2m) distances between individuals, 26% (52) of gardens closed followed by 15% (29) the next day.

Affected gardens and arboreta reported immediate and drastic earned revenue losses from shutdowns, forcing harsh, largely unanticipated choices upon them:

- 91% cancelled education classes, programs, and activities
- 83% cancelled external events (e.g. weddings and externally booked meetings)
- 69% cancelled ticketed events (e.g. concerts)
- 64% cancelled their own fundraising events

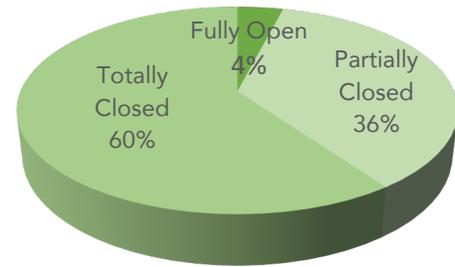
Membership sales reductions were 39%, mainly reported by gardens fully closed, as opposed to partially closed gardens which reported membership sales increases and increased visitation.

Estimates from Association Benchmarking show that collectively, our member institutions are possibly losing over \$3M USD per day in earned revenue, which is about 63% of total revenue per year. For example, a median-sized garden is losing more than \$6K per day or almost \$190K per month.

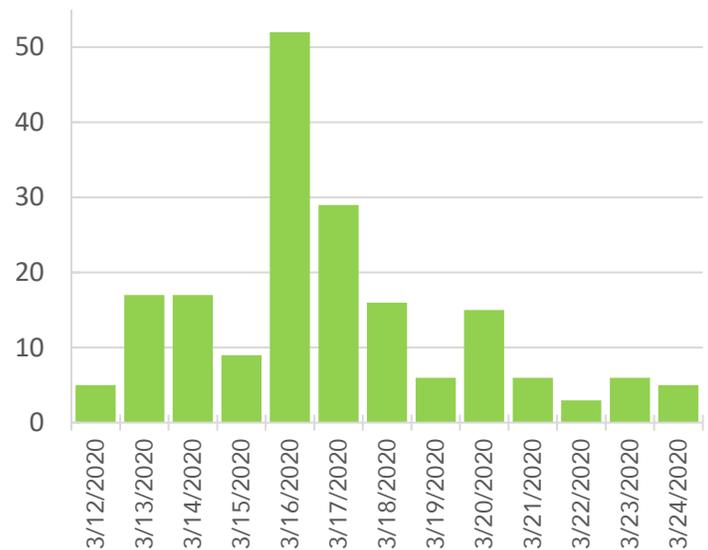
Staffing impacts were also immediate. While our survey found that 51% had transitioned to some form of remote work, just 45% retained horticultural staff working on site. Sadly, 30% of gardens were already reporting layoffs and furloughs, a number expected to rise sharply going forward as gardens remain closed. This staffing reduction potentially threatening plant collections, public gardens' most valuable assets.

The Association plans a second survey in April 2020 to further document industry impacts due to COVID-19.

Gardens Closed/Open Status as of March 30

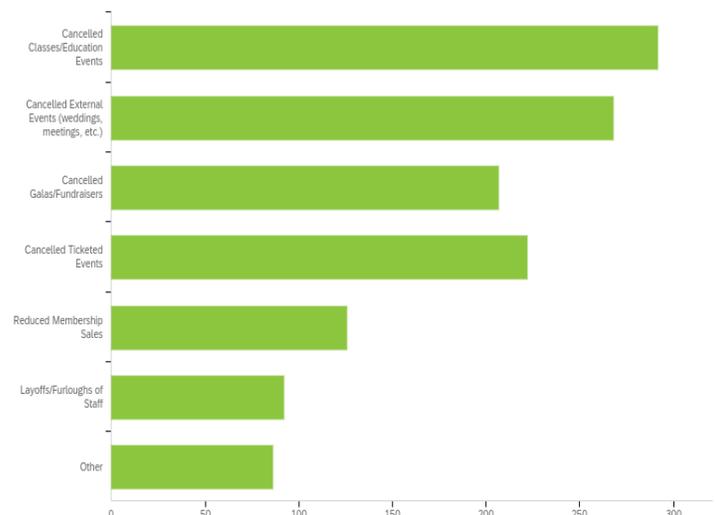


Garden Closures Observed by Day, March 12-24



Garden closures observed by day from March 12-24, 2020 reported as of March 30, 2020. Only 5% (9) closed before March 12 and only 2% (3) closed after March 24.

Garden Closure Revenue and Staffing Impacts



Types of revenue and staffing impacts reported by gardens as a result of closures experienced through March 30, 2020