

2017 CULTURAL ATTRACTION TREND REPORT

CONFIDENTIAL



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BACKGROUND

The Cultural Attraction Trend Report tracks attendance, membership, and pricing trends among cultural attractions across the country and provides important information regarding marketing, social media, and membership.

Those organizations that perform optimally do so because visitor satisfaction, marketing, membership, and pricing align, and in so doing, accomplish their mission. Success does not occur with variables working independently, success occurs when different variables work together.

The 2017 Cultural Attraction Trend Survey was conducted online in March 2018; participants were invited via email. This year, 183 cultural attractions participated in the survey.

The results of this report are based on averages. Though the actual figures may not be representative of every participating institution, the percentages are likely to reflect trends across the cultural attraction industry. As with any survey, the results may be affected by participation bias. Organizations may be more or less likely to participate based upon their own attendance and/or their exhibition schedule, particularly if they have recently had or are in a year following a blockbuster exhibit.

DEFINITIONS

The terms used in this report are defined as follows:

- ***Total attendance*** is all attendance including groups, field trips, membership, general admission, discounted admission, complimentary admission, events, and entry into any free areas of the organization.
- ***General admission attendance*** is attendance including gate admission and member entry. It does not include school groups, field trips, or events.
- ***Advertising Buy*** includes in-kind sponsor coverage, but does not include production or staff costs.
- ***Membership*** is reported by number of member households.
- ***Individual membership*** is membership for one adult; ***Dual membership*** is membership for two adults or one adult and a guest; ***Family membership*** is membership for two adults plus two or more children.

PARTICIPANTS

Academy of Natural Sciences of Drexel University	COSI	Grounds For Sculpture
Adventure Aquarium	CuriOdyssey	Hammer Museum
Adventure Science Center	Dallas Zoo Management, Inc.	Harvard Art Museums
Air Zoo Aerospace & Science Museum	Delta Blues Museum	Houston Zoo
Aquarium of Niagara	Denver Botanic Garden	Hoyt Arboretum Friends
Aquarium of the Pacific	Denver Museum of Nature and Science	Huntington Library, Art Collections, and Botanical Gardens
Atlanta History Center	Denver Zoo	Independence Seaport Museum
Audubon Aquarium of the Americas	Descanso Gardens	Indianapolis Zoo
Audubon Butterfly Garden and Insectarium	Desert Botanical Garden	Infinity Science Center
Audubon Zoo	Detroit Historical Museum	International Women's Air & Space Museum
Austin Zoo	Detroit Institute of Arts	Jackson Zoo
Autry Museum	Detroit Zoological Society	Jacksonville Zoo & Gardens
Benjamin Harrison Presidential Site	Dickerson Park Zoo	John Ball Zoo
Booth Western Art Museum	Discovery Place	Long Island Children's Museum
Botanica	Discovery World	Louisville Zoo
Brevard Zoo	Eastern State Penitentiary Historic Site	Loveland Living Planet Aquarium
Bronx Children's Museum	Exploratorium	MCA Denver
Buffalo and Erie County Botanical Gardens	Fernbank Museum of Natural History	McWane Science Center
Buffalo Zoo	Fine Arts Museums of San Francisco	Memorial Art Gallery
California Academy of Sciences	Fleet Science Center	Memphis Zoo
Canadian Museum of History	Florida Museum of Photographic Arts	Mennello Museum of American Art
Cedarhurst Center for the Arts	Franklin Park Zoo	Mildred Lane Kemper Art Museum
Cheyenne Mountain Zoo	Fresno Chaffee Zoo	Milwaukee County Zoo
Chicago Botanic Garden	Friends of National Zoo	Milwaukee Public Museum
Chicago History Museum	Gates Foundation Discovery Center	Minneapolis Institute of Art
Children's Creativity Museum	Gateway to Science	Minnesota Children's Museum
Children's Discovery Museum of San Jose	George Eastman Museum	Missouri Botanical Garden
Children's Museum of Phoenix	George Washington's Mount Vernon	Monterey Bay Aquarium
Cincinnati Zoo & Botanical Garden	Georgia Aquarium	Museum of Fine Arts, Boston
Cleveland Museum of Natural History	Great Lakes Science Center	Museum of Glass
Cleveland Zoological Society	Great Plains Zoo & Delbridge Museum Natural History	Museum of Life and Science
Clyfford Still Museum	Greater Cleveland Aquarium	Museum of Photographic Arts
Columbus Museum of Art	Green Bay Botanical Garden	Museum of Science and Industry, Chicago
Columbus Zoo and Aquarium	Greensboro Science Center	Naples Zoo
Como Park Zoo & Conservatory		

PARTICIPANTS (continued)

Nasher Sculpture Center	Riverbanks Zoo & Garden	The New Children's Museum
Nashville Zoo	Saint Louis Science Center	The Rockwell Museum
National Aquarium, Inc.	Saint Louis Zoo	The Rubin Museum
National Baseball Hall of Fame	San Antonio Zoo	The San Diego Museum of Art
Natural History Family of Museums	San Diego Air & Space Museum	The Sculpture Center
Natural History Museum of Utah	San Diego Natural History Museum	Toronto Zoo
NC Aquarium at Fort Fisher	San Diego Zoo & San Diego Zoo Safari Park	Tucson Museum of Art and Historic Block
New England Aquarium	San Francisco Botanical Garden	Tulsa Zoo Management, Inc.
New Orleans Museum of Art	San Jose Museum of Art	Valley Zoological Society
New York Botanical Garden	Santa Barbara Zoo	Virginia Aquarium & Marine Science Center
Newport Aquarium	Science Museum of Minnesota	Walker Art Center
North Carolina Aquarium at Pine Knoll Shores	Seattle Aquarium	Weisman Art Museum
North Carolina Aquarium on Roanoke Island	Seattle Art Museum	Wings Over the Rockies Air and Space Museum
Norton Simon Museum	Sedgwick County Zoo	
Ogden Museum of Southern Art - University of New Orleans	Solomon R. Guggenheim Museum	
OKC Museum of Art	Space Center Houston	
Oklahoma City Zoo	Squam Lakes Natural Science Center	
Omaha Botanical Center	Stone Zoo	
Omaha's Henry Doorly Zoo and Aquarium	Tampa's Lowry Park Zoo	
Oregon Historical Society	Tennessee Aquarium	
Oregon Zoo	Texas State Aquarium	
Peabody Essex Museum	The Art Institute of Chicago	
Perot Museum of Nature and Science	The Barnes Foundation	
Philadelphia Museum of Art	The Charleston Museum	
Philadelphia Zoo	The Children's Museum in Easton	
Phipps Conservatory	The Children's Museum of Indianapolis	
Phoenix Zoo	The Field Museum	
Pittsburgh Zoo & PPG Aquarium	The Florida Aquarium	
Portland Art Museum	The Franklin Institute	
Portland Japanese Garden	The Living Desert	
Pretend City Children's Museum	The Magic House, St. Louis Children's Museum	
Pueblo Zoo	The Morton Arboretum	
Red Butte	The Museum of Contemporary Art, Los Angeles (MOCA)	

KEY FINDINGS

For the sixth consecutive year, cultural attraction total attendance and general admission attendance grew.

Admission prices continue to rise approximately 5% annually. Organizations with higher attendance tend to have higher than average admission prices.

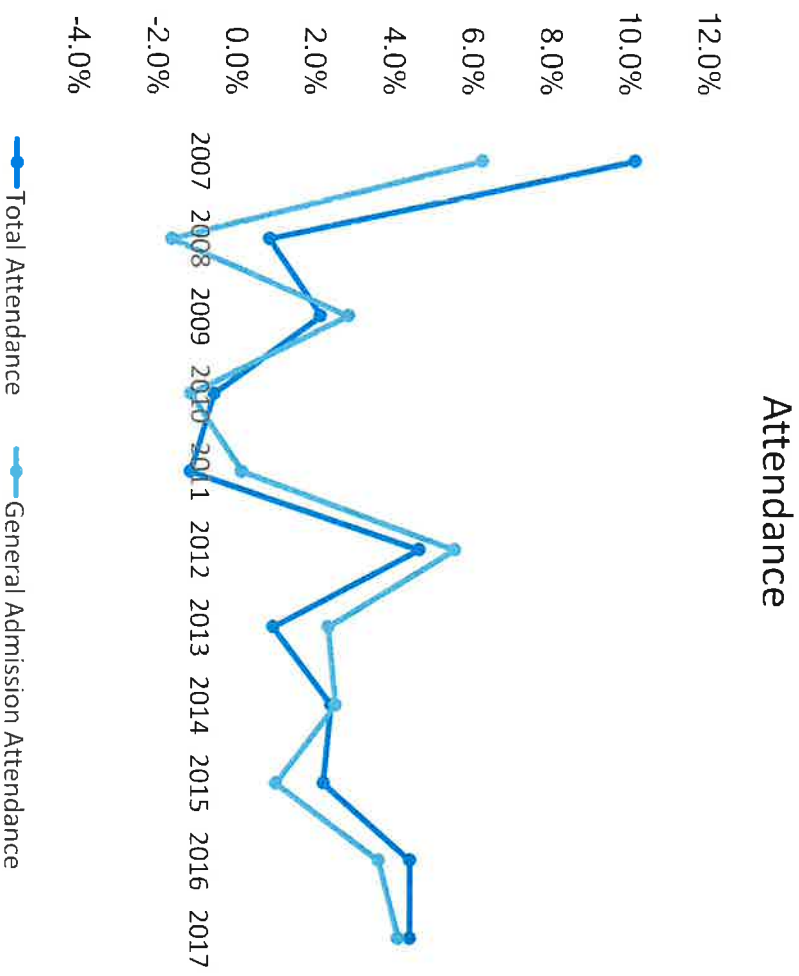
Advertising spending continued to increase. Public relations coverage has a significant impact on market capture. Digital advertising represented 31% of the advertising buy.

Membership grew at a rate higher than general admission attendance.

KEY FINDINGS - ATTENDANCE

Total attendance increased by +4.4% and general admission attendance increased by +3.6%.

Online ticket sales represented 12.6% of all ticket sales.



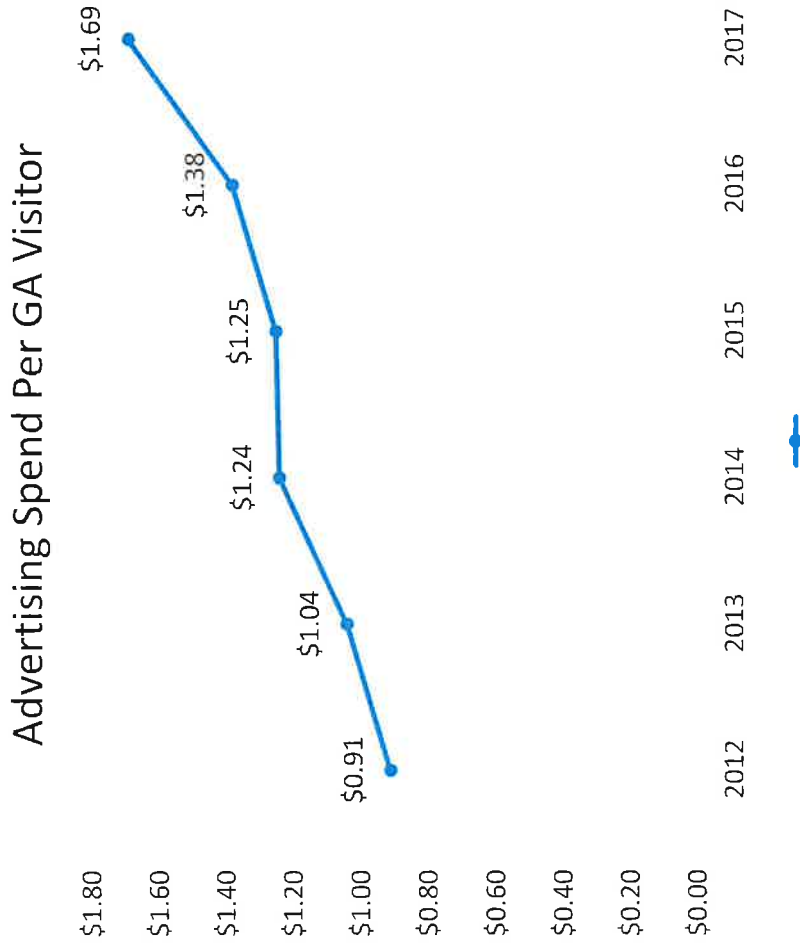
KEY FINDINGS - MARKETING

On average, cultural attractions' attendance represented 51% of the local market plus 10% of the tourist market.

The average advertising spend per general admission visit was \$1.69.

The average public relations value received per general admission visit was \$8.81.

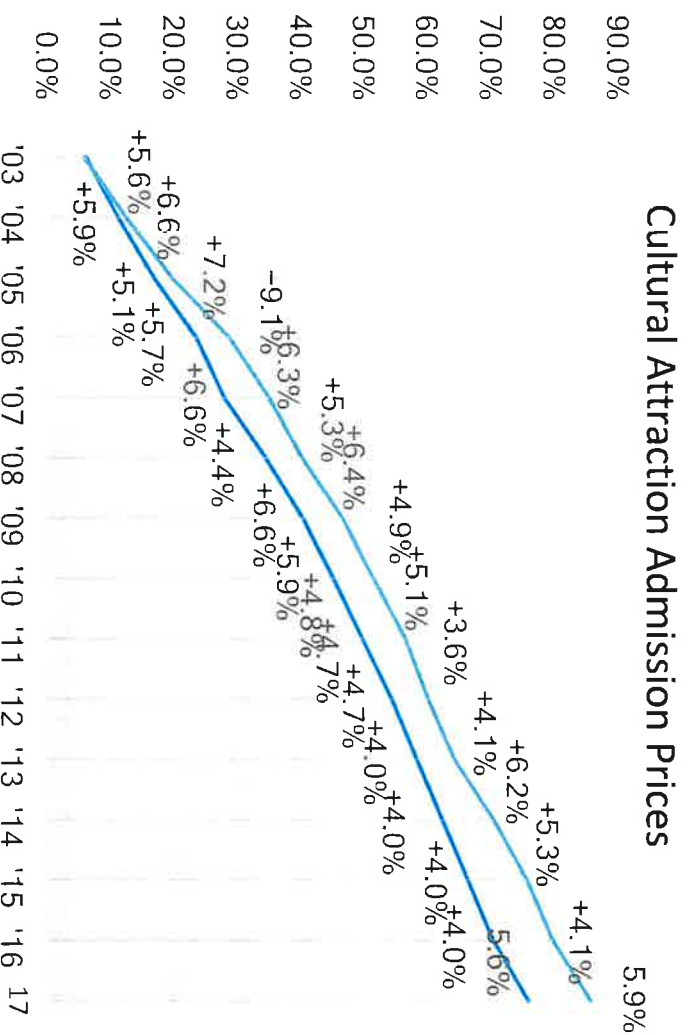
The average number of Facebook followers as a percentage of total attendance was 19%.



KEY FINDINGS – ADMISSION PRICING

Admission prices continued to increase; up 5.6% from 2016. In 2017, the average adult admission price was \$17.40, and the average child admission price was \$12.30, the average senior admission price was \$14.10.

An increase in admission prices does not necessarily correlate with a decrease in admission. Among organizations that had a price increase of 10% or more, general admission increased 3.2%.



— Adult Admission — Child Admission

KEY FINDINGS - MEMBERSHIP

Membership also continued to grow; up 5.3% from 2016.

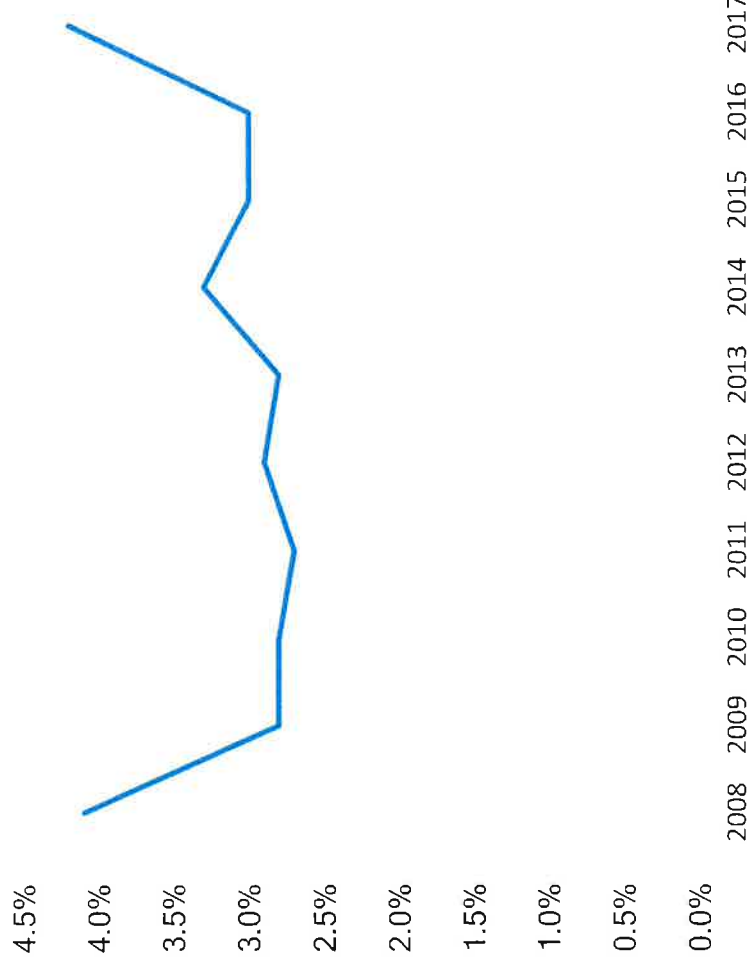
The average membership size (in terms of households) represented 5.0% of general admission attendance.

In terms of visitation, members represented 32% of attendance, and visited on average 3.1 times annually.

The average renewal rate was 56%, but varies by genre.

The average amount spent per member household was \$15.78.

Membership Households As % of GA

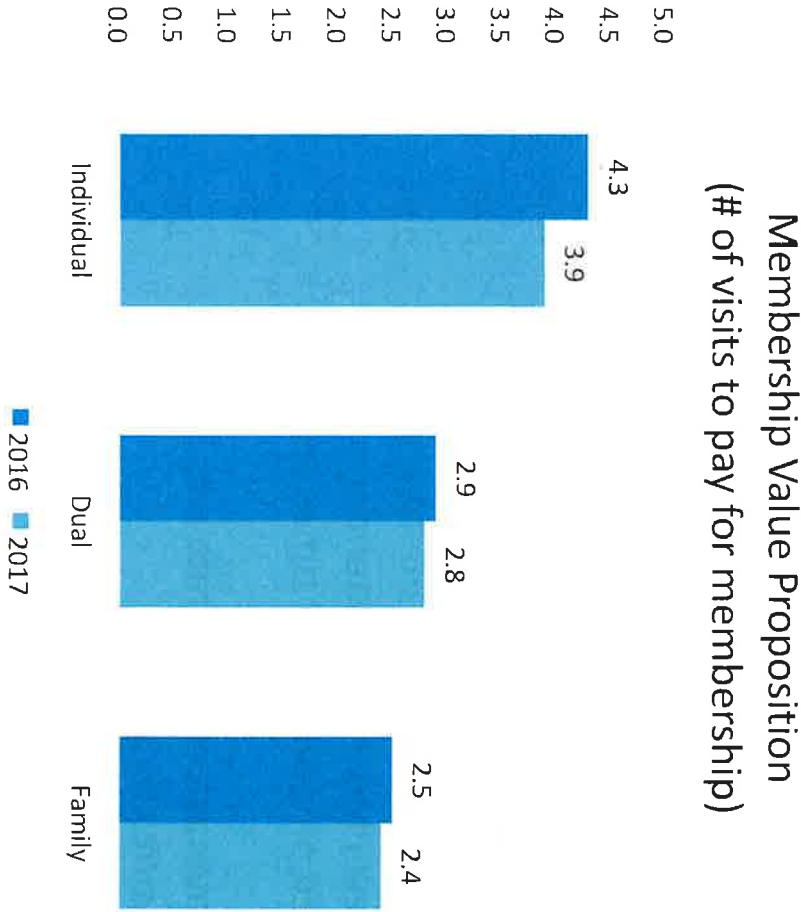


KEY FINDINGS – MEMBERSHIP PRICING

The average price of membership for 2017 was:

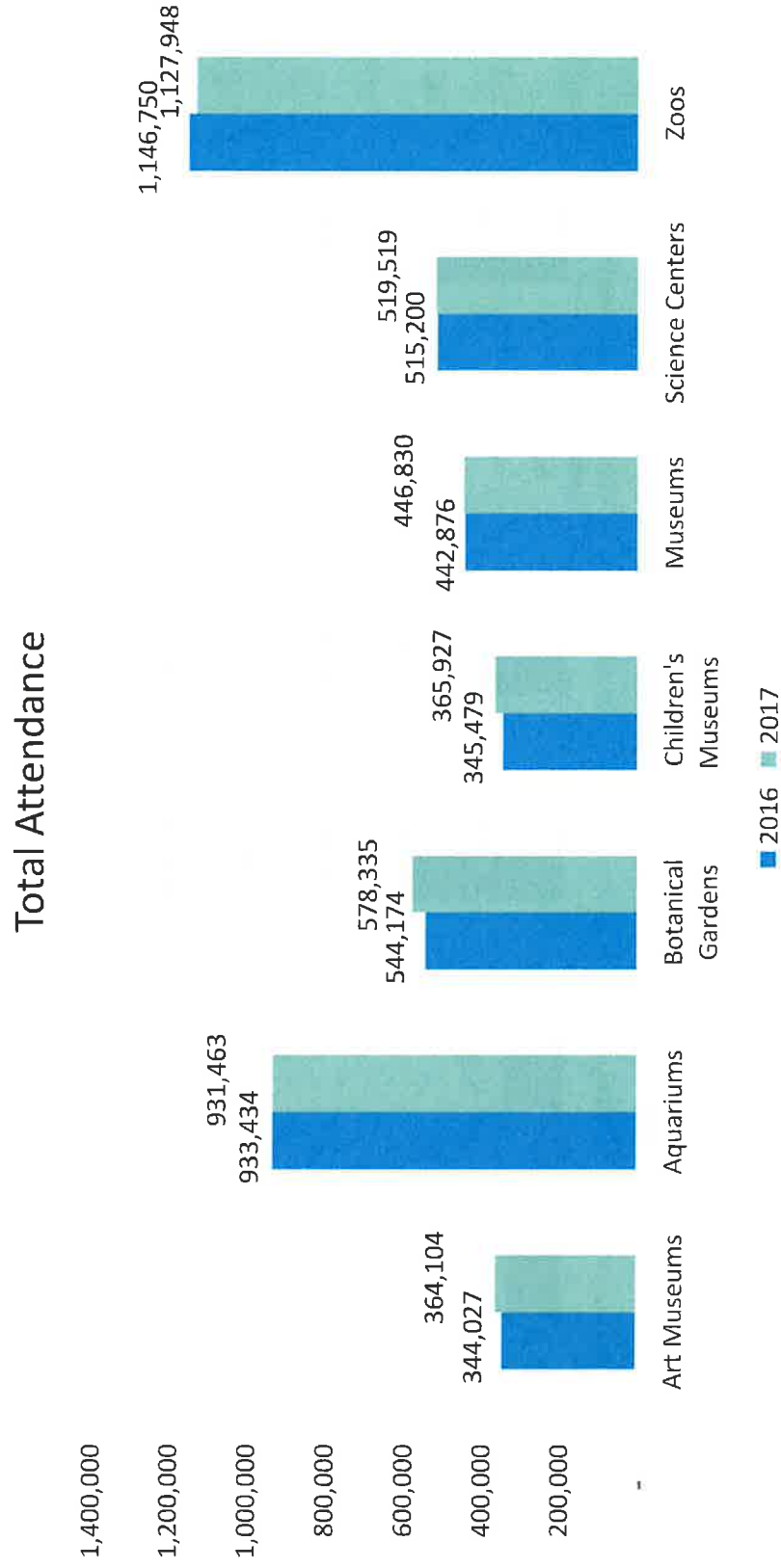
Individual.....	\$63.70
Dual.....	\$91.50
Family.....	\$119.50
Family Premium.....	\$189.20

Membership pricing varies significantly by cultural genre.



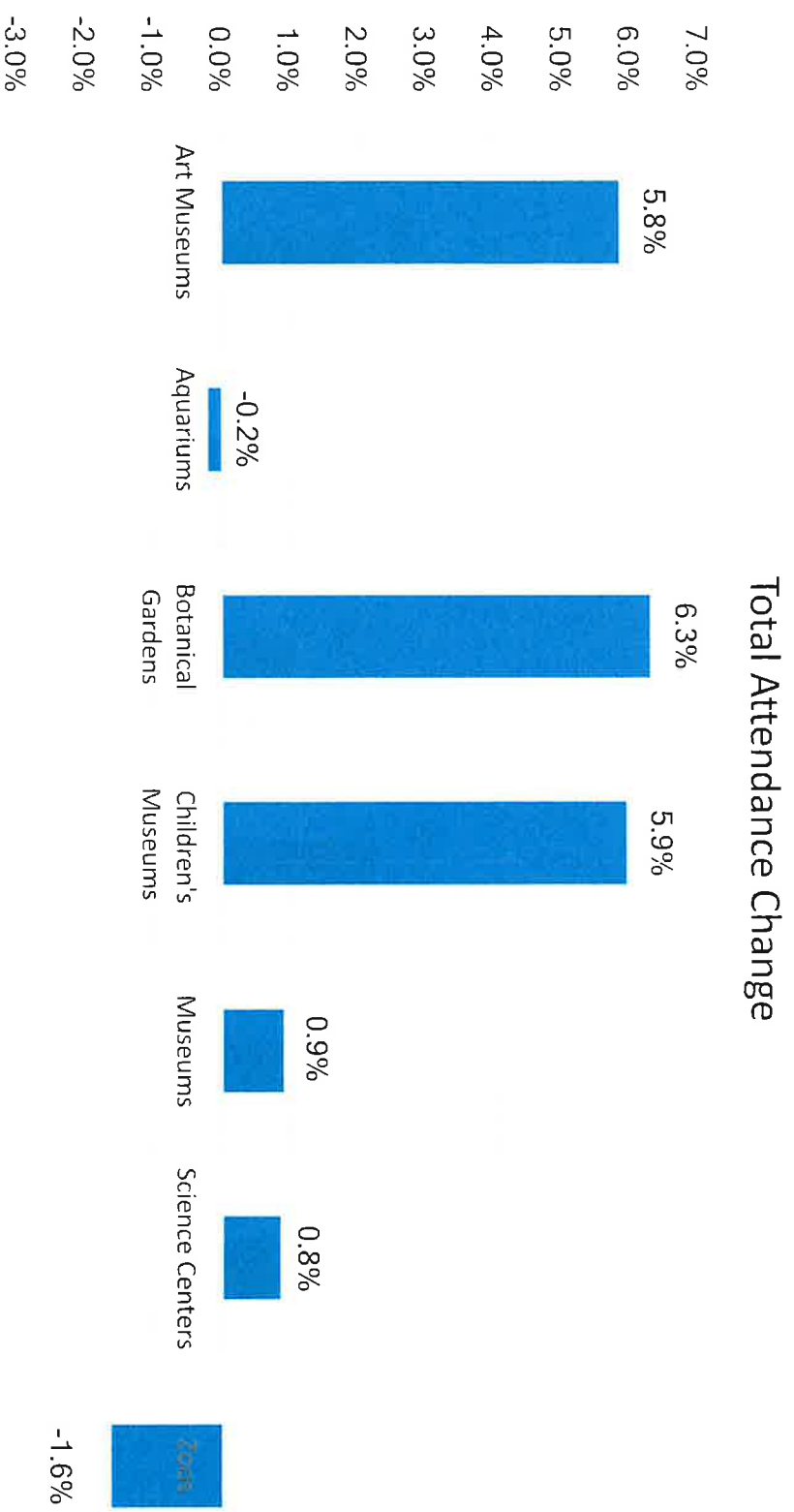
ATTENDANCE

Zoos and Aquariums remain the most visited cultural attractions.



ATTENDANCE

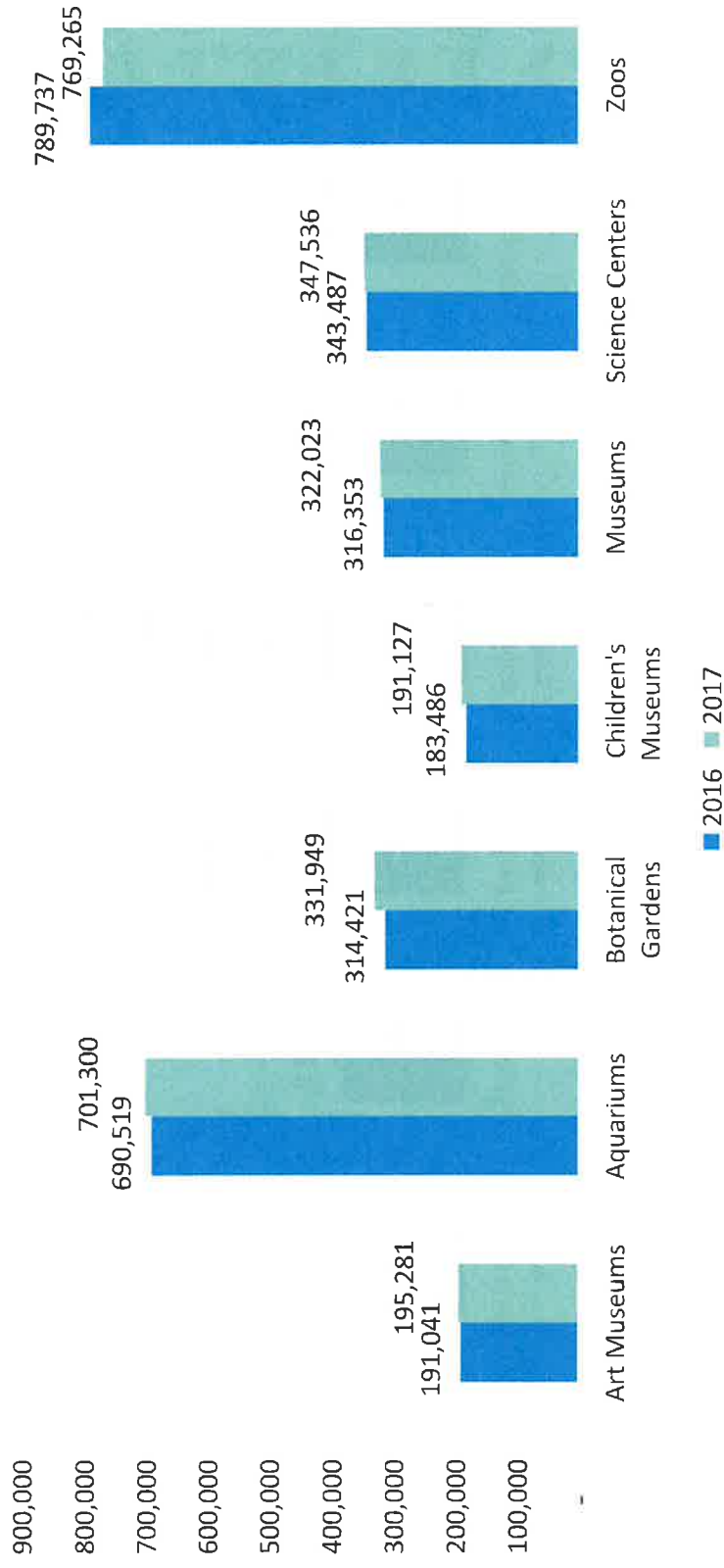
Total attendance increased for Art Museums, Botanical Gardens and Children's Museums, while attendance remained relatively flat for Aquariums, Museums, and Science Centers. Zoo attendance decreased slightly.



ATTENDANCE

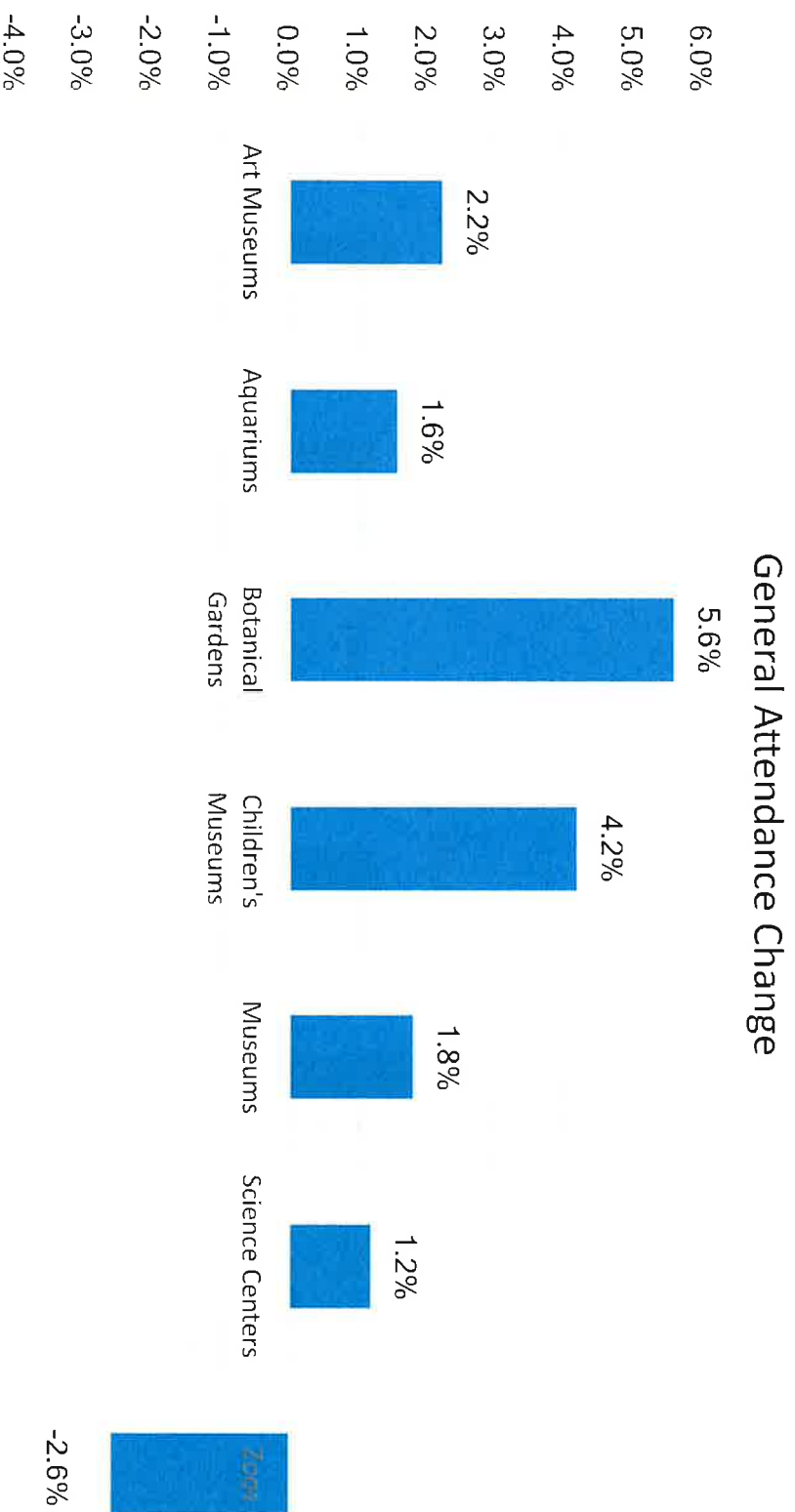
Aquarium and Zoo general admission attendance is highest.

General Attendance



ATTENDANCE

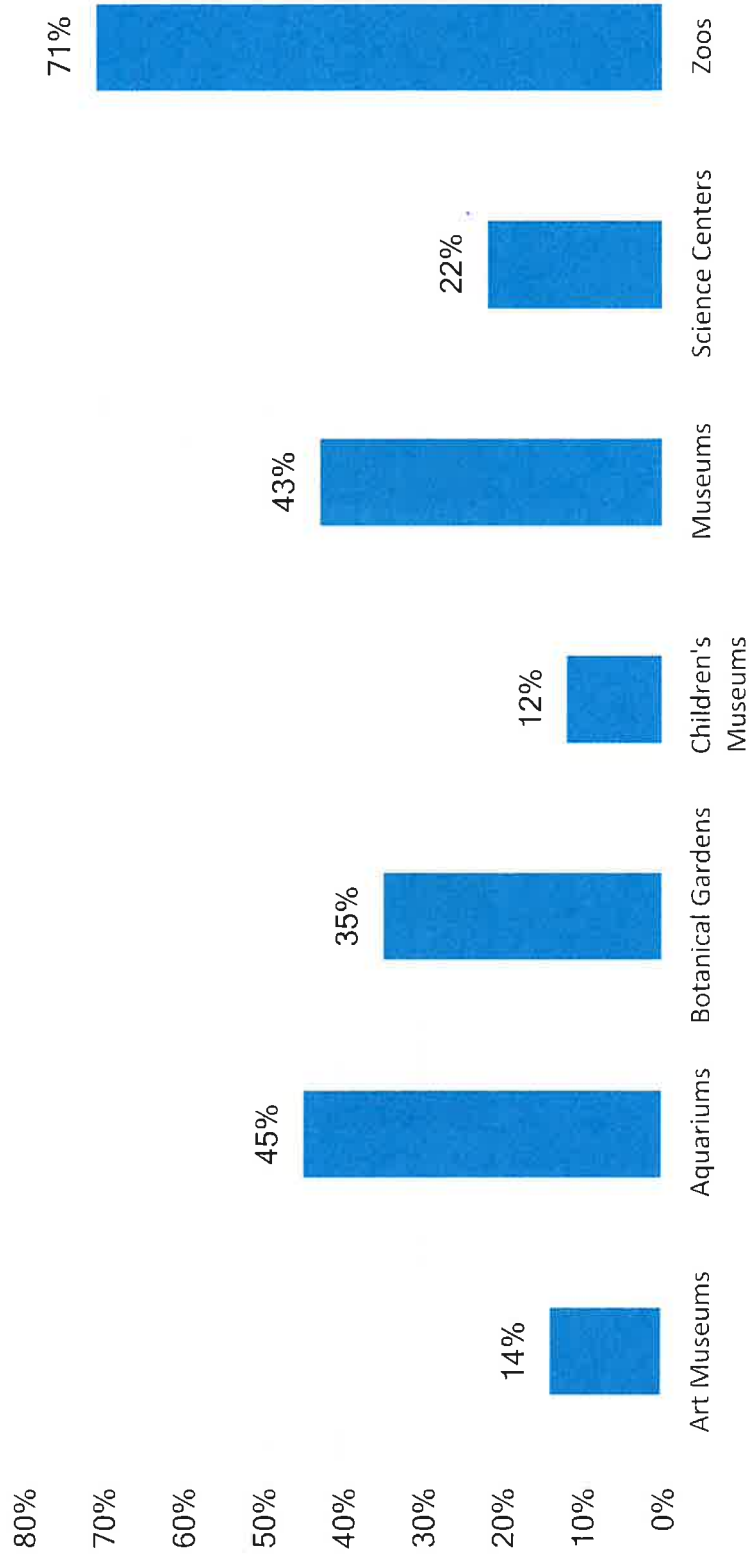
Although total attendance for Aquariums decreased, general admission attendance increased which suggests field trip visitation decreased at Aquariums. Total attendance growth was higher at Art Museums and Botanical Gardens than was general admission attendance, which suggests field trip or event attendance grew.



ATTENDANCE

Total attendance as a percentage of the local market plus 10% of the tourist market was highest for Zoos, followed by Aquariums and Museums (in general).

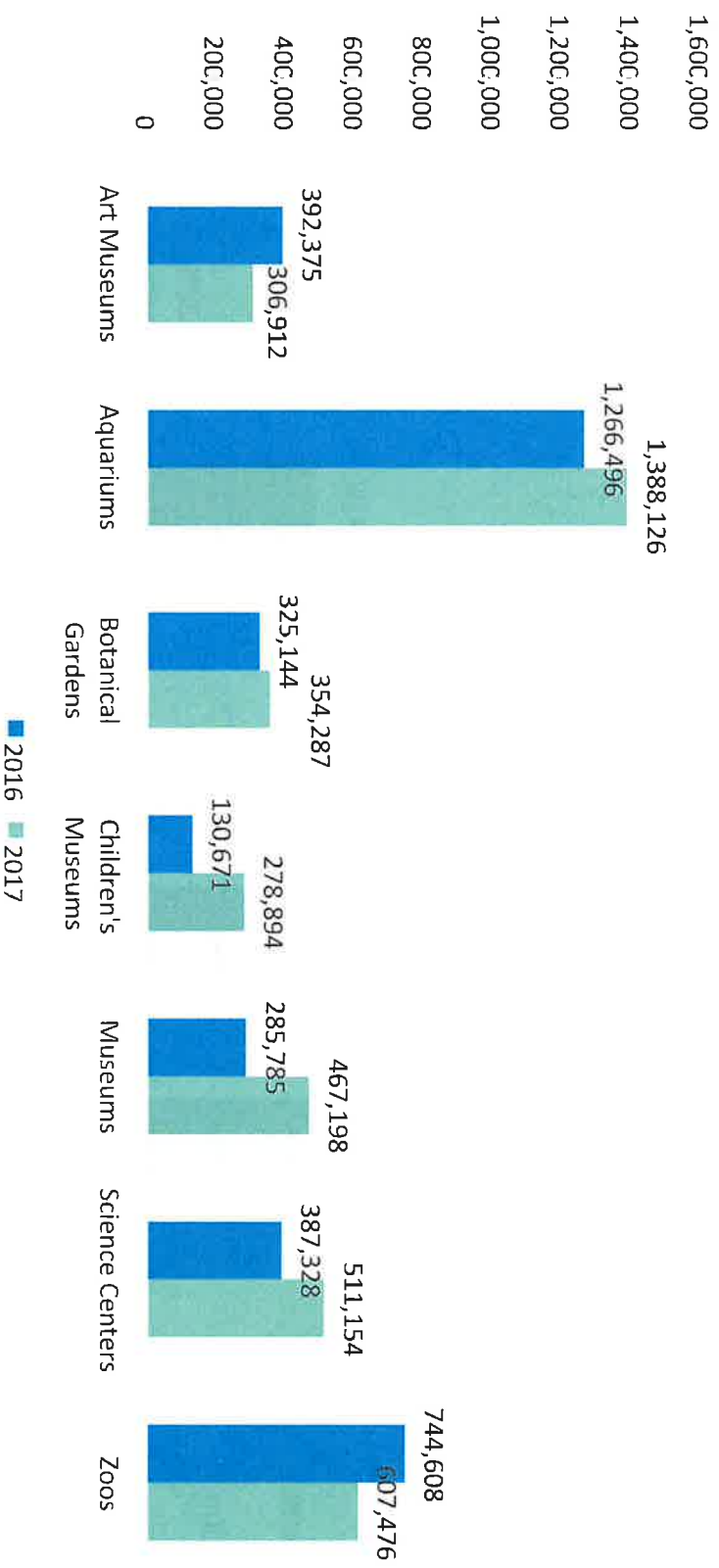
Total Attendance Market Capture



MARKETING

Advertising spend represented 16.1% of general admission ticket revenue. Aquariums have the highest advertising budgets, and also the highest admission prices.

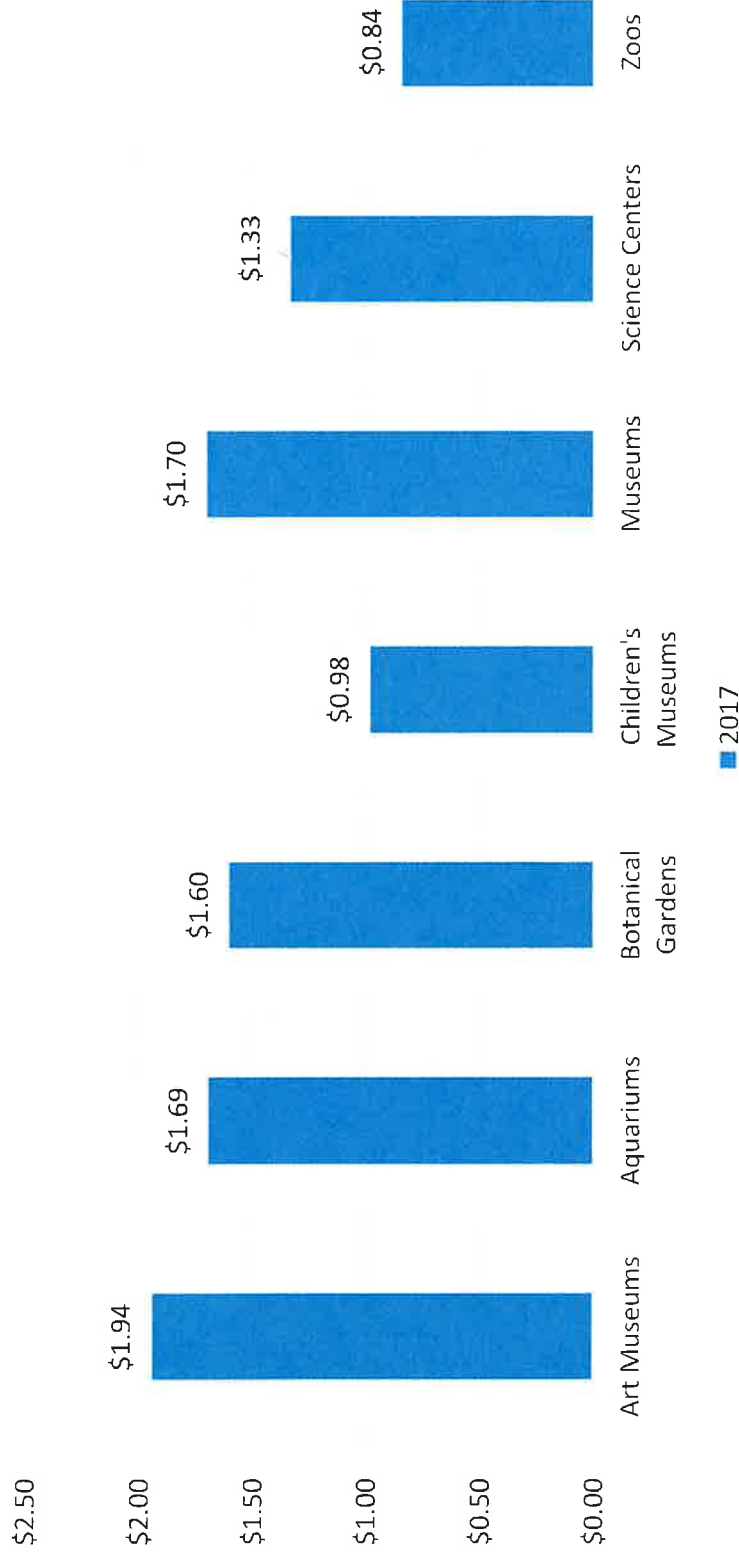
Advertising Budget



MARKETING

Zoos have the highest attendance, but lowest advertising cost per visitor. Zoos tend to receive a higher value of public relations coverage.

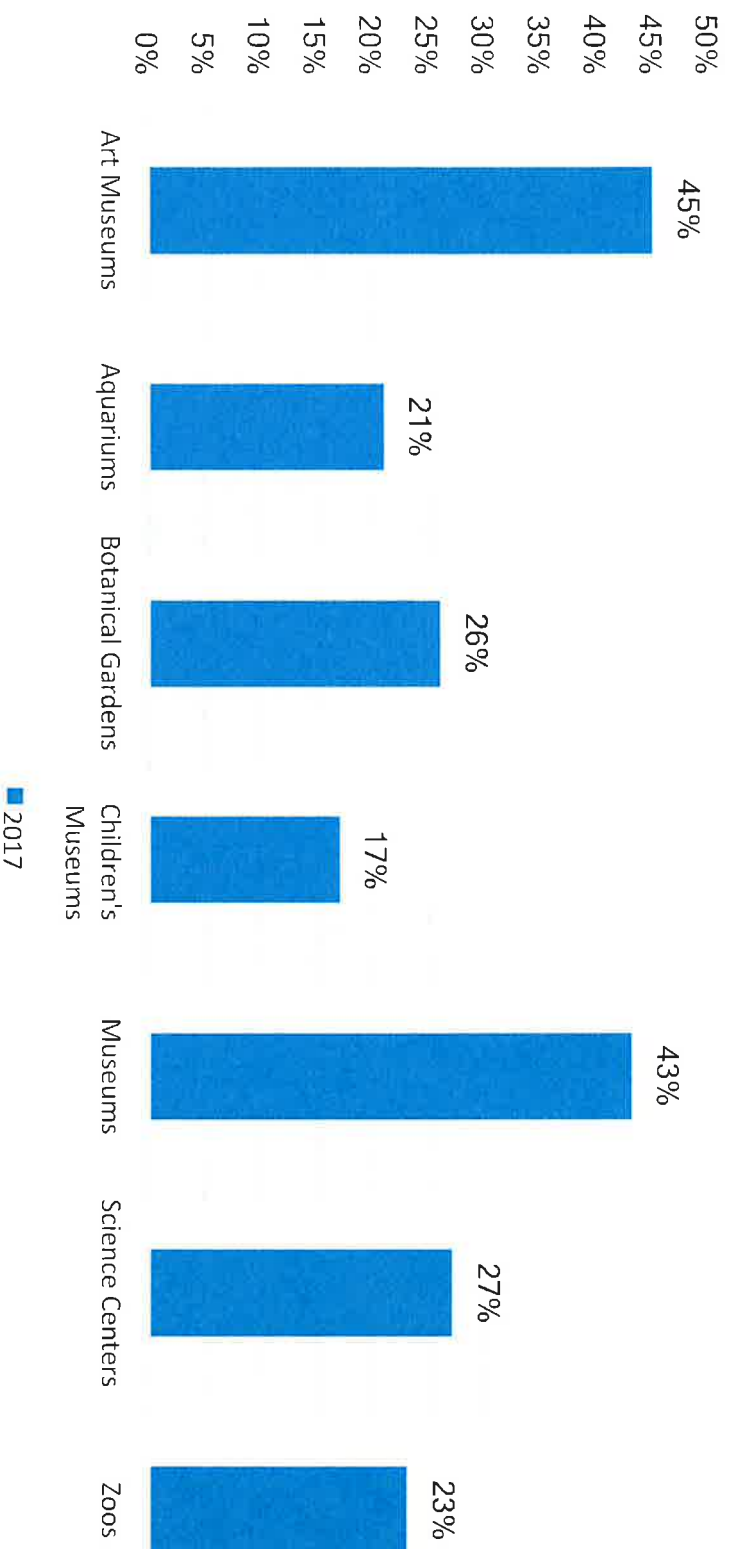
Advertising Budget Per Visitor



ATTENDANCE

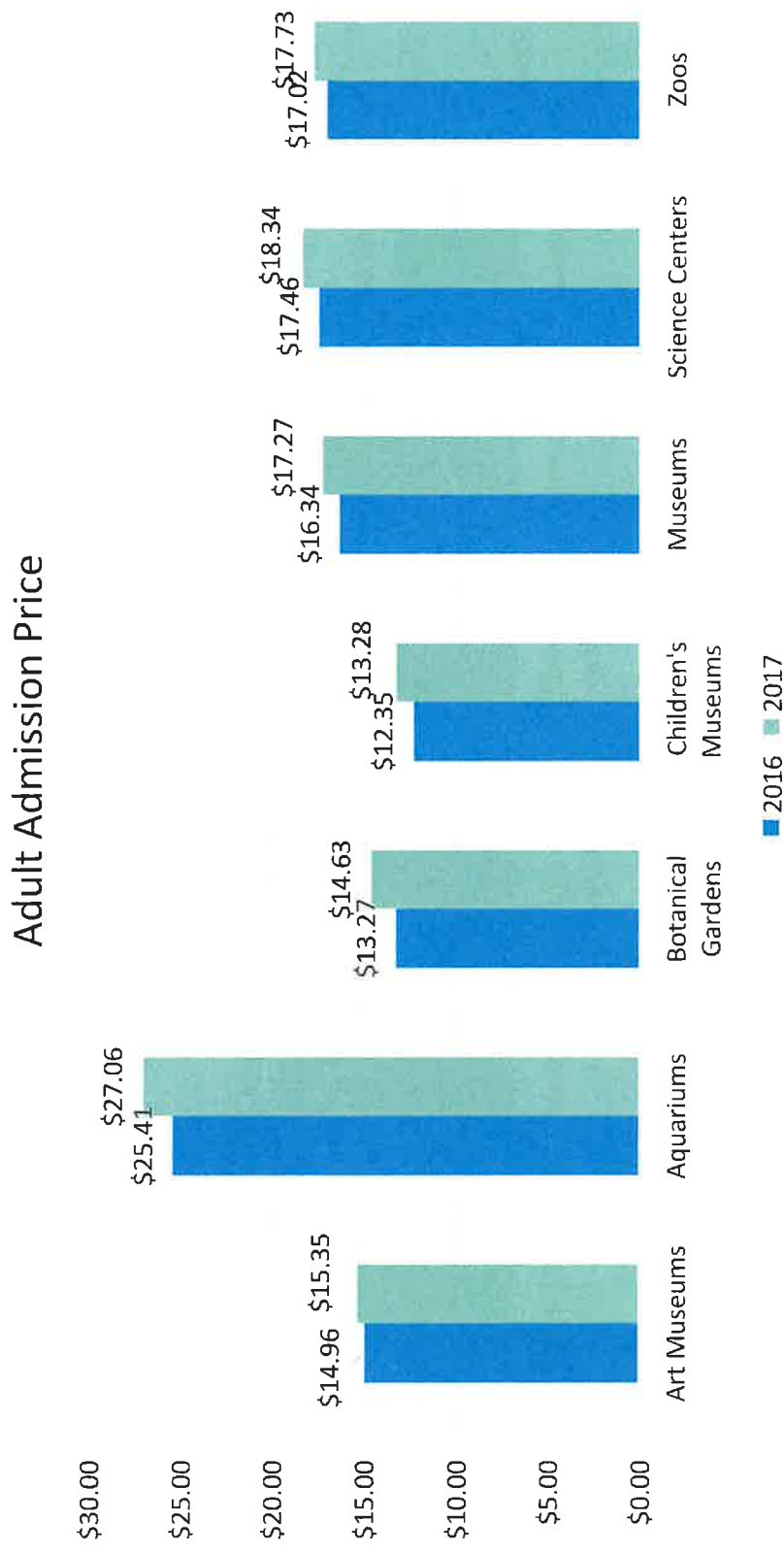
Social media continues to grow as a primary source of information for cultural attraction visitors (see Morey Group Positioning Study). Cultural attractions should try to increase followers and improve engagement.

Facebook Followers as a % of Total Attendance



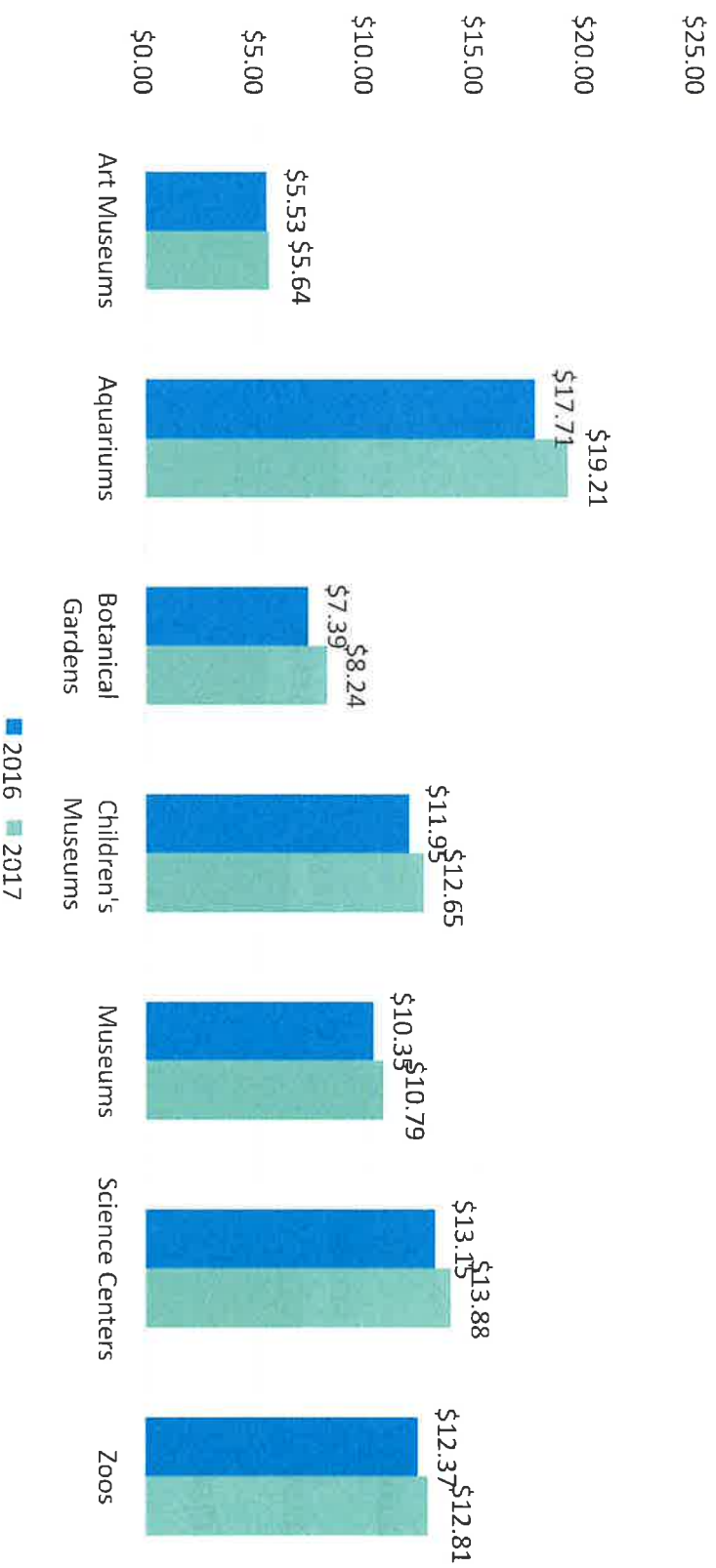
PRICING

Aquariums have the highest admission prices, which demonstrates the upper range of price potential.



PRICING

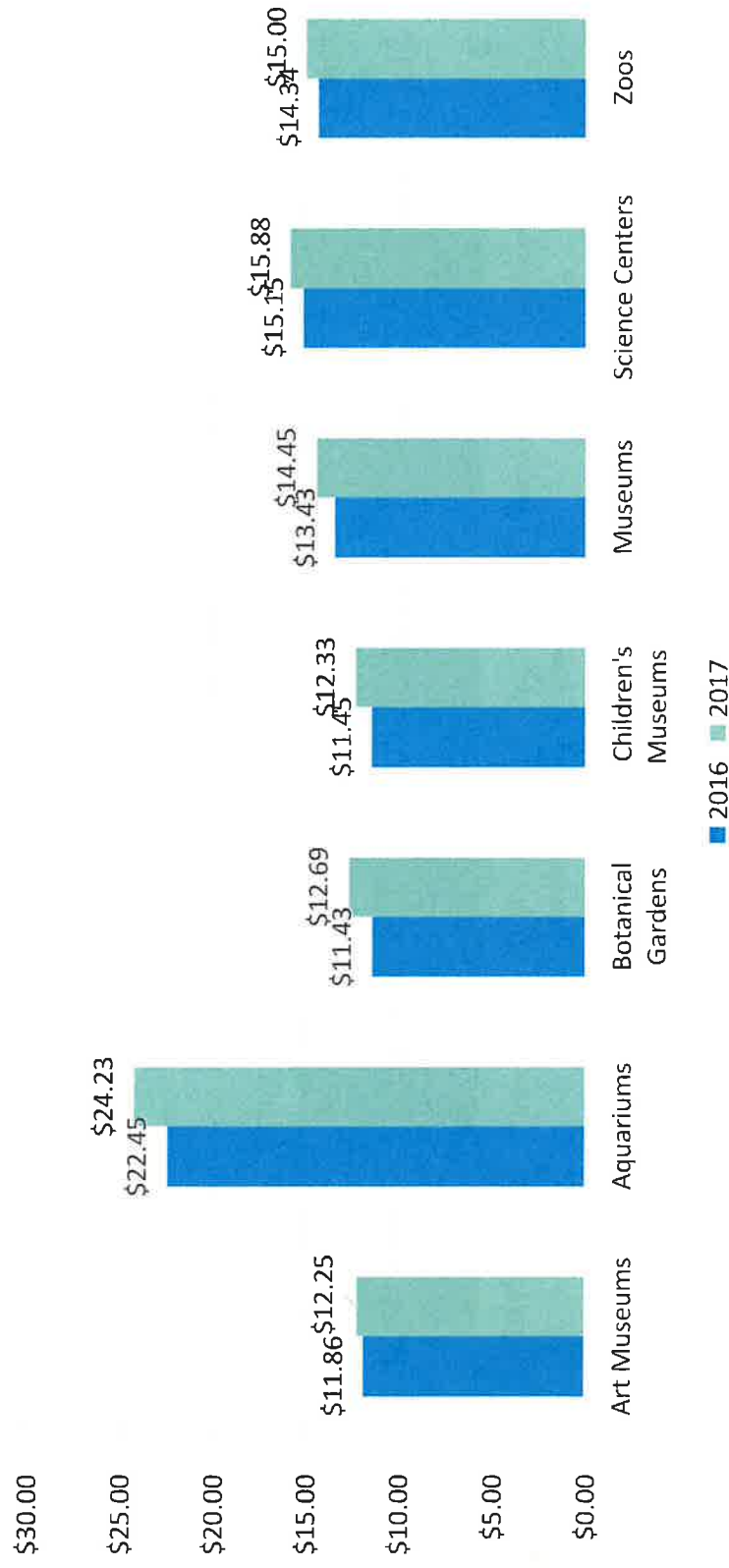
Child Admission Price



PRICING

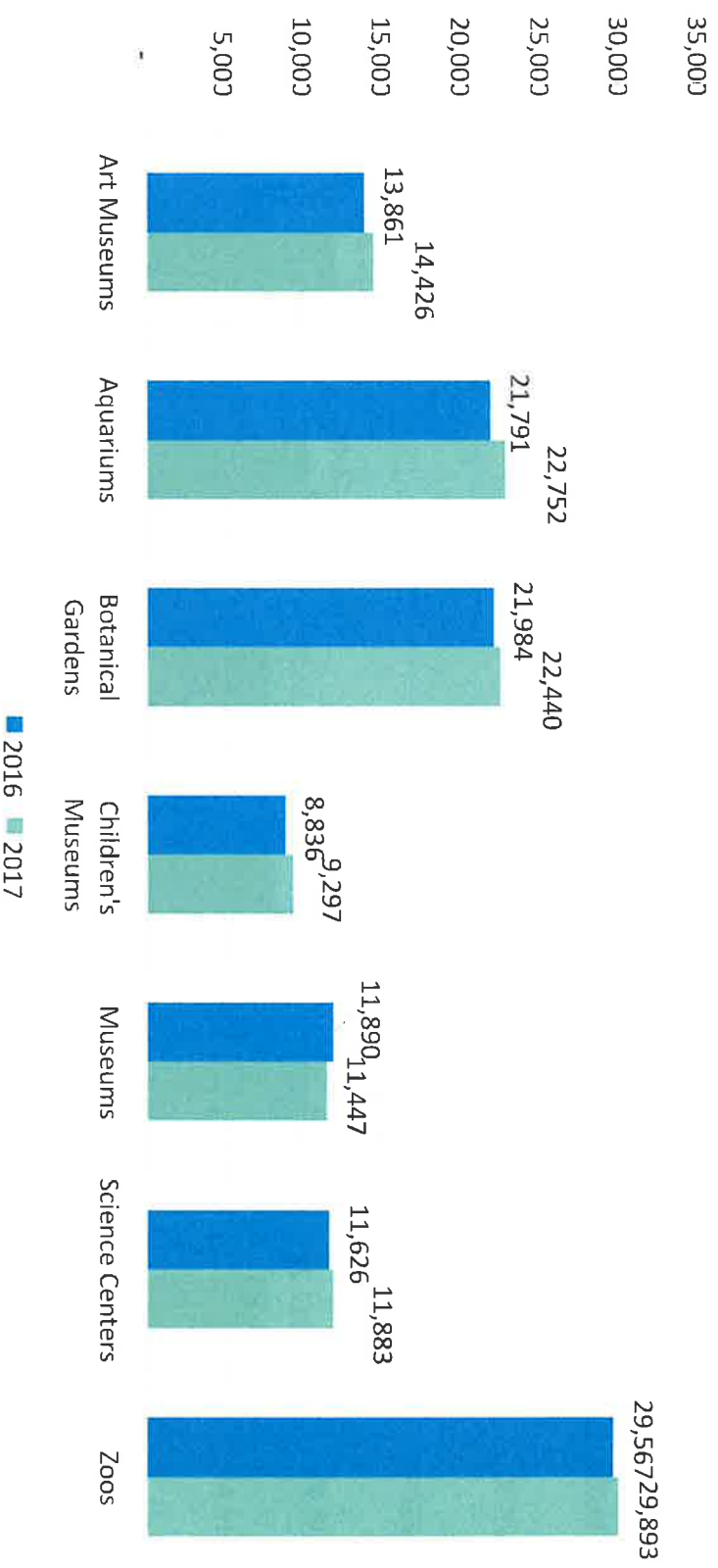
We generally recommend offering Seniors a \$1 or \$2 discount. Additionally, we do not recommend publishing a Senior rate, but offering it upon request.

Senior Admission Price



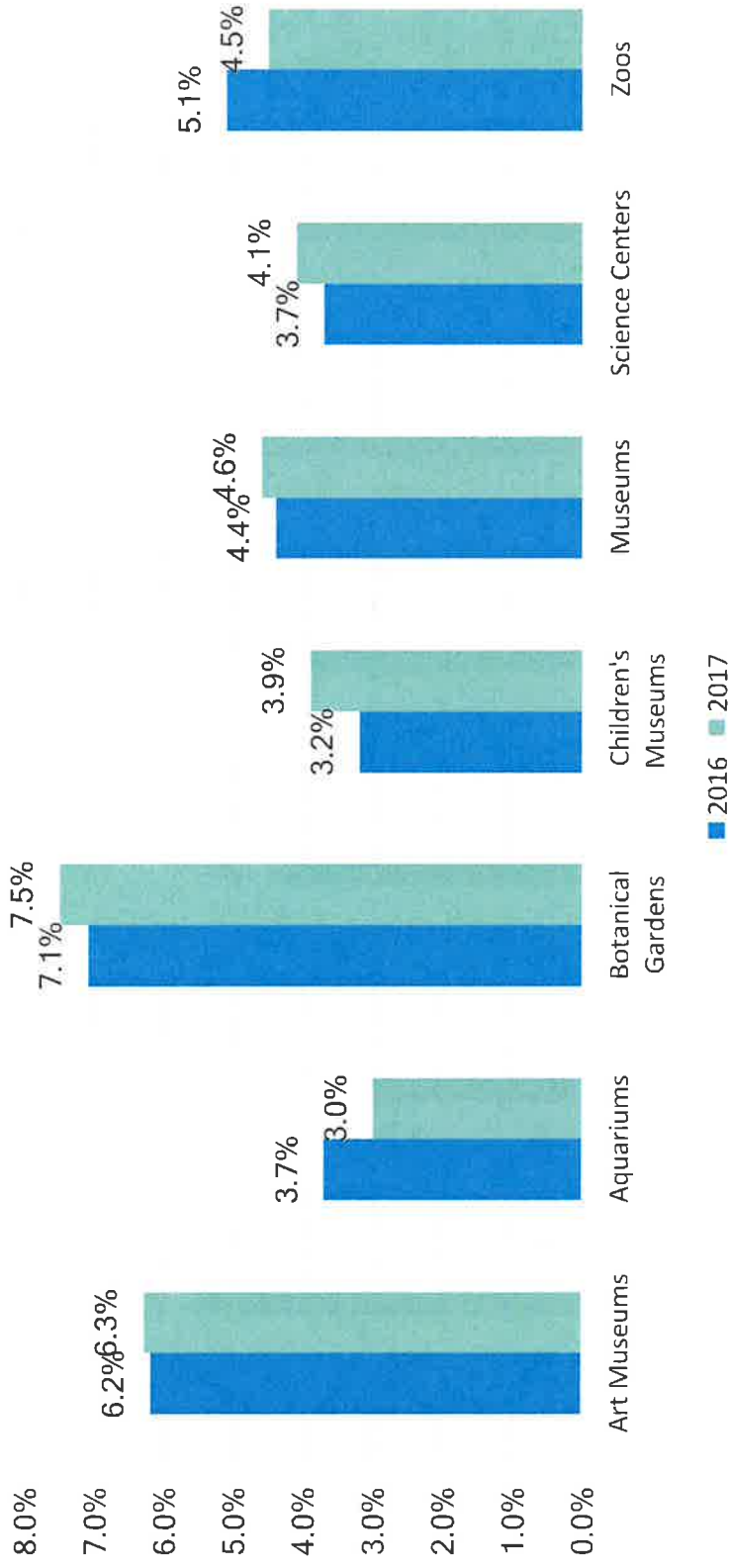
MEMBERSHIP

Member Households



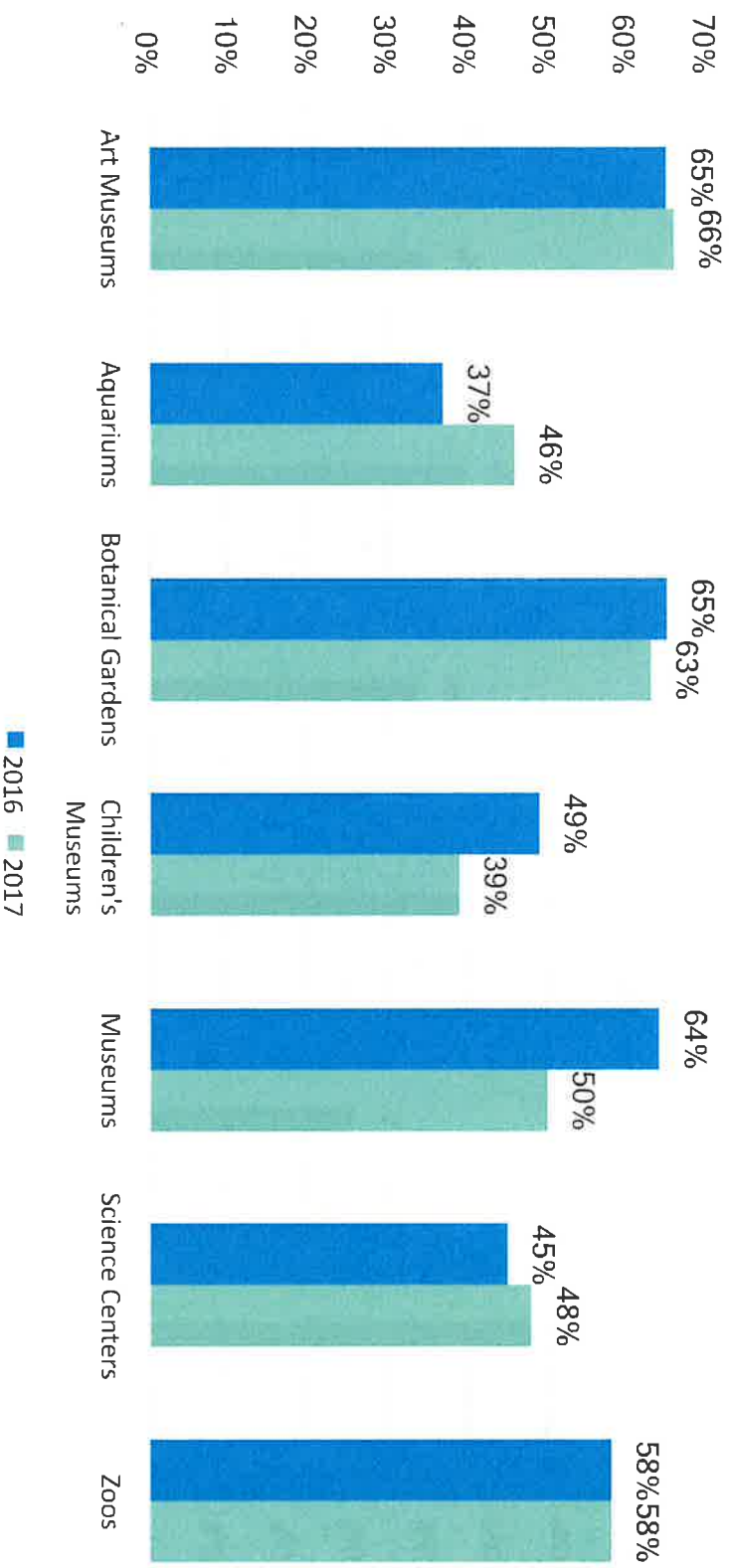
MEMBERSHIP

Member Households as a Percentage of Visitation



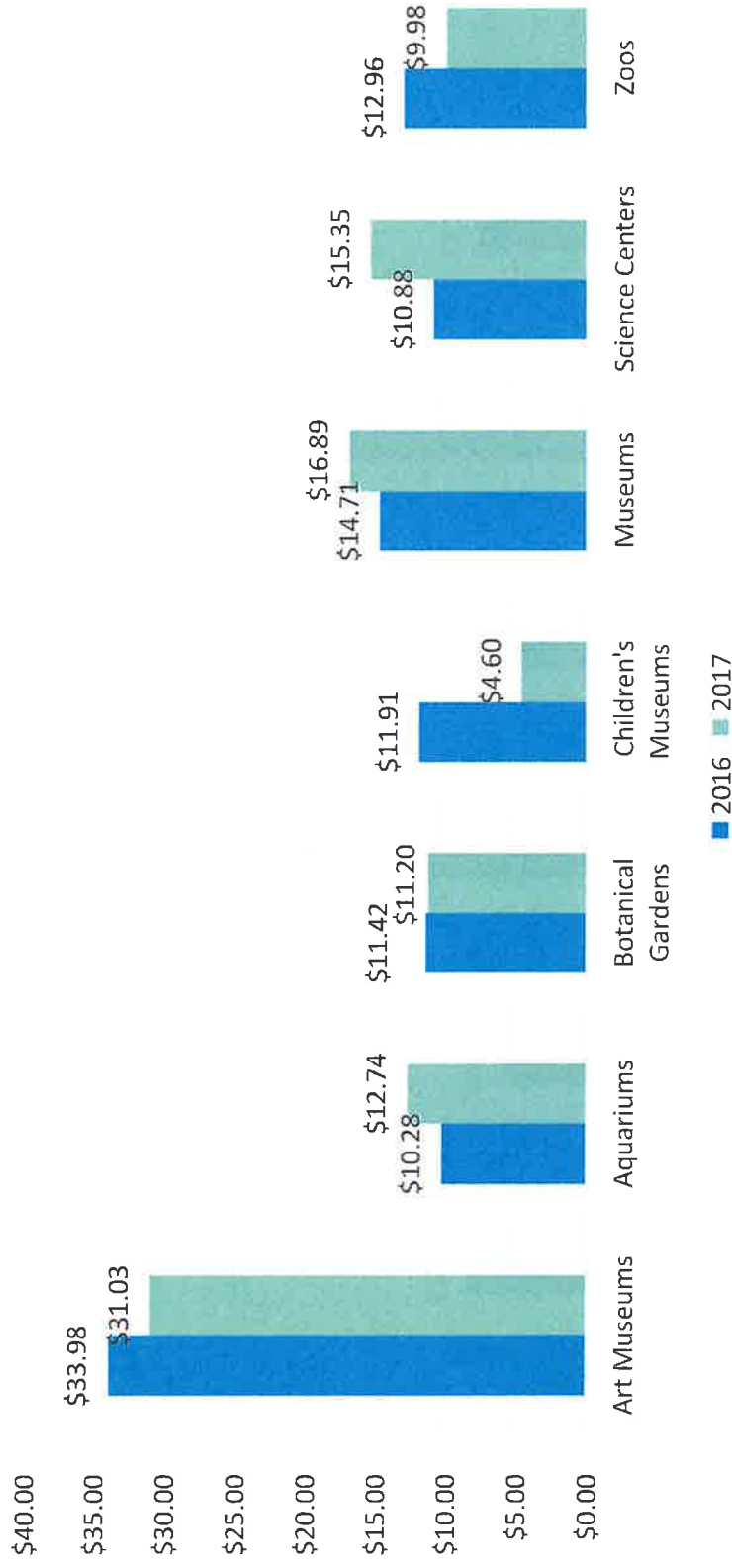
MEMBERSHIP

Member Renewal



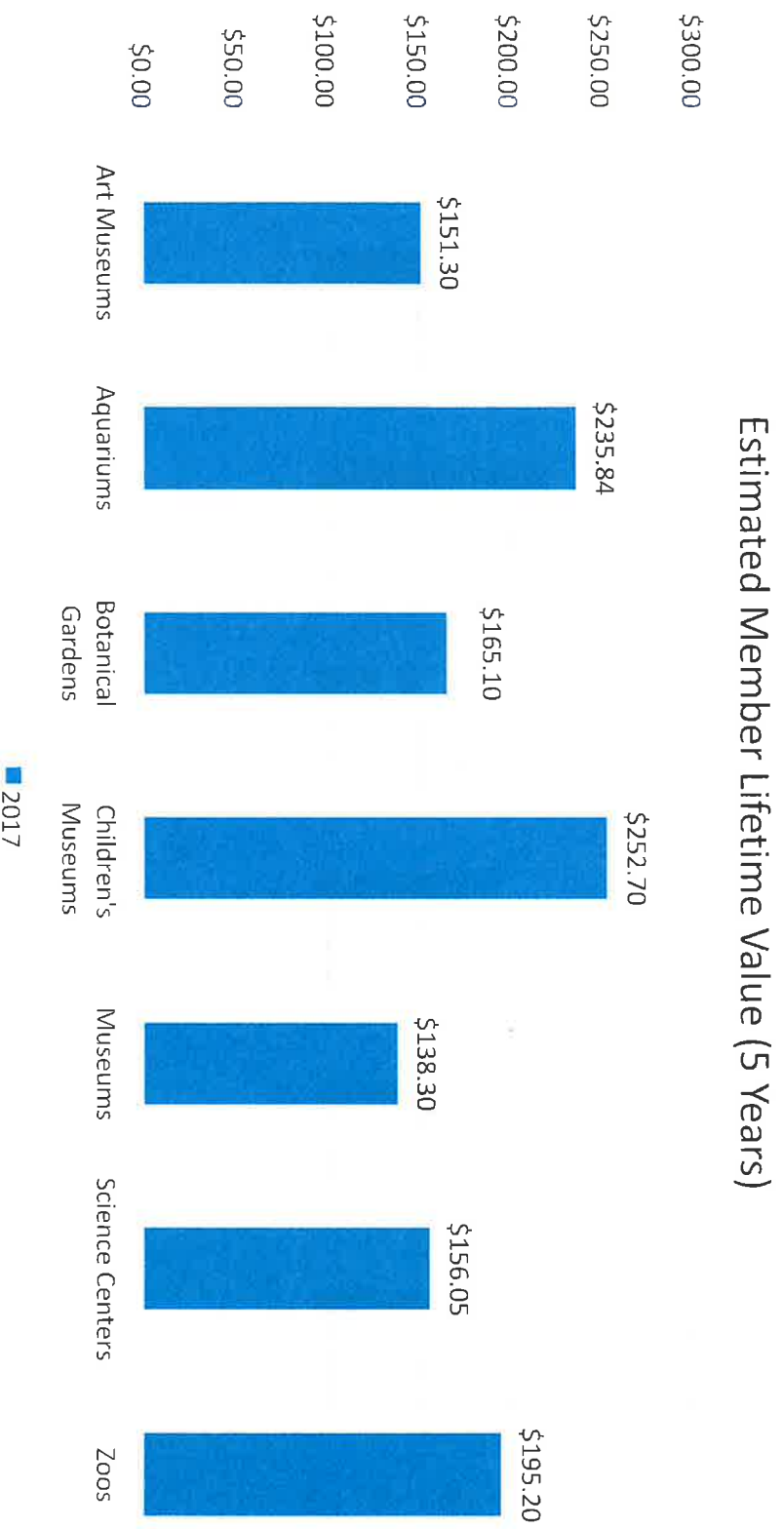
MEMBERSHIP

Member Expense Per Household (not including labor)



REVENUE - MEMBERSHIP

Estimated Lifetime Value is calculated using dues, renewal, and membership service costs. It does not include revenue from ancillary sources like food and gift purchases or donations.



REVENUE - ADMISSIONS

Estimated Visitor Lifetime Value (5 Years)

