

2019 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 2019 Cultural Attraction Trend Survey was conducted online in March 2020; participants were invited via email. This year, 200 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.
- ▶ **Market Size** is Census Metropolitan Statistical Area plus 10% of Tourist Market



PARTICIPATING ORGANIZATIONS

Academy of Natural Sciences of Drexel University
Adventure Aquarium
Akron Zoo
Aquarium of the Pacific
Arizona Science Center
Arizona-Sonora Desert Museum
Art Institute of Chicago
Asian Art Museum
Atlanta Botanical Garden
Audubon Aquarium of the Americas
Audubon Butterfly Garden and Insectarium
Audubon Zoo
Autry Museum of the American West
Barnes Foundation
Bartow History Museum
Bay Area Discovery Museum
Bell Museum, University of MN
Belle Isle Aquarium
Birch Aquarium at Scripps Institution of Oceanography
Birmingham Zoo
Boca Raton Museum of Art
Booth Western Art Museum
Boston Children's Museum
Botanica, The Wichita Gardens
Brandywine River Museum of Art
BREC's Baton Rouge Zoo
Brevard Zoo
Butterfly Pavilion
California Academy of Sciences
Carnegie Science Center
Chattanooga Zoo
Cheyenne Mountain Zoo
Chicago Botanic Garden
Children's Museum Houston

Children's Museum of Phoenix
Children's Museum of the Arts Inc.
Cincinnati Art Museum
Clyfford Still Museum
Columbus Museum of Art
Columbus Zoo
COSI
Crocker Art Museum
Crystal Bridges Museum of American Art
Cummer Museum of Art & Gardens
Dallas Museum of Art
Delaware Art Museum
Denver Art Museum
Denver Botanic Gardens
Denver Museum of Nature and Science
Denver Zoological Foundation
Detroit Historical Museum
Detroit Zoological Society
Discovery Park of America
Discovery World
Exploratorium
FDR Presidential Library and Museum
Fine Arts Museums of San Francisco
Fleet Science Center
Flint Children's Museum
Franklin Park Zoo
Frost Science
Garfield Park Conservatory Alliance
Genesee Country Village & Museum
George Eastman Museum
George Washington's Mount Vernon
Green Bay Botanical Garden
Greensboro Science Center
Grounds For Sculpture
Hammer Museum

Houston Zoo
Huntington Library
i.d.e.a. Museum
Illinois Holocaust Museum & Education center
Kemper Museum of Contemporary Art
Kentucky Science Center
Kohl Children's Museum
Long Island Children's Museum
Los Angeles Zoo
Loveland Living Planet Aquarium
Lynn Meadows Discovery Center
McWane Science Center
Memorial Art Gallery
Memphis Botanic Garden
Memphis Zoo
Michigan Science Center
Milwaukee County Zoo
Milwaukee Public Museum
Minnesota Children's Museum
Morris Arboretum of the University of Pennsylvania
MOXI, The Wolf Museum of Exploration + Innovation
Museum of Contemporary Art, LA
Museum of Photographic Arts
Museum of Science and Industry
Mystic Aquarium
Mystic Seaport Museum
Naples Botanical Garden
Nasher Sculpture Center
Nashville Zoo
National Aquarium
National Liberty Museum
Natural History Museum of Utah
Natural History Museums of Los Angeles County
New Orleans Museum of Art
New York Botanical Garden

PARTICIPATING ORGANIZATIONS

Newport Aquarium
North Carolina Aquarium Society
Ogden Museum of Southern Art
Oklahoma City Zoo & Botanical Garden
Omaha's Henry Doorly Zoo and Aquarium
Oregon Coast Aquarium
Orlando Science Center
Owls Head Transportation Museum
Peabody Essex Museum
Peoria Zoo
Perez Art Museum Miami
Perot Museum of Nature and Science
Philadelphia Museum of Art
Philadelphia Zoo
Phipps Conservatory
Phoenix Zoo
Point Defiance Zoo & Aquarium
Port Discovery Children's Museum
Portland Art Museum
Portland Japanese Garden
Pretend City Children's Museum
Revolutionary Spaces
RISD Museum
Riverbanks Zoo and Garden
Rochester Museum & Science Center
Rock & Roll Hall of Fame
Roger Williams Park Zoo
Rolling Hills Zoo
Royal Ontario Museum
Rubin Museum of Art
Sacramento Zoo
Saint Louis Science Center
San Antonio Botanical Garden
San Diego Air & Space Museum
San Diego Archaeological Center
San Diego Natural History Museum

San Diego Zoo
San Diego Zoo Safari Park
San Francisco Zoo
Science Museum of Minnesota
Science Museum of Virginia
Seattle Art Museum
Seneca Park Zoo Society
SKELETONS: Museum of Osteology
Solomon R. Guggenheim Museum
South Carolina Aquarium
South Coast Botanic Garden
Space Center Houston
Squam Lakes Natural Science Center
St. Louis Zoo
Stepping Stones Museum for Children
Stone Zoo
Tallahassee Museum
Tennessee Aquarium
Texas Ranger Hall of Fame and Museum
Texas State Aquarium
Textile Museum of Canada
The Bishop Museum of Science and Nature
The Broad
The Charleston Museum
The Children's Museum of Cleveland
The Children's Museum of Indianapolis
The Field Museum
The Florida Aquarium
The Franklin Institute
The J. Paul Getty Trust
The John and Mable Ringling Museum of Art
The Living Desert
The Magic House, St. Louis Children's Museum
The Maritime Aquarium
The Morton Arboretum
The New Children's Museum

The Queen Mary
The Rockwell Museum
The Strong National Museum of Play
The Walt Disney Family Museum
Tulsa Zoo Management, Inc.
Virginia Aquarium & Marine Science Center
Vizcaya Museum and Gardens
Woodland Park Zoo
World Forestry Center
Zoo Knoxville
ZooTampa at Lowry Park

KEY FINDINGS

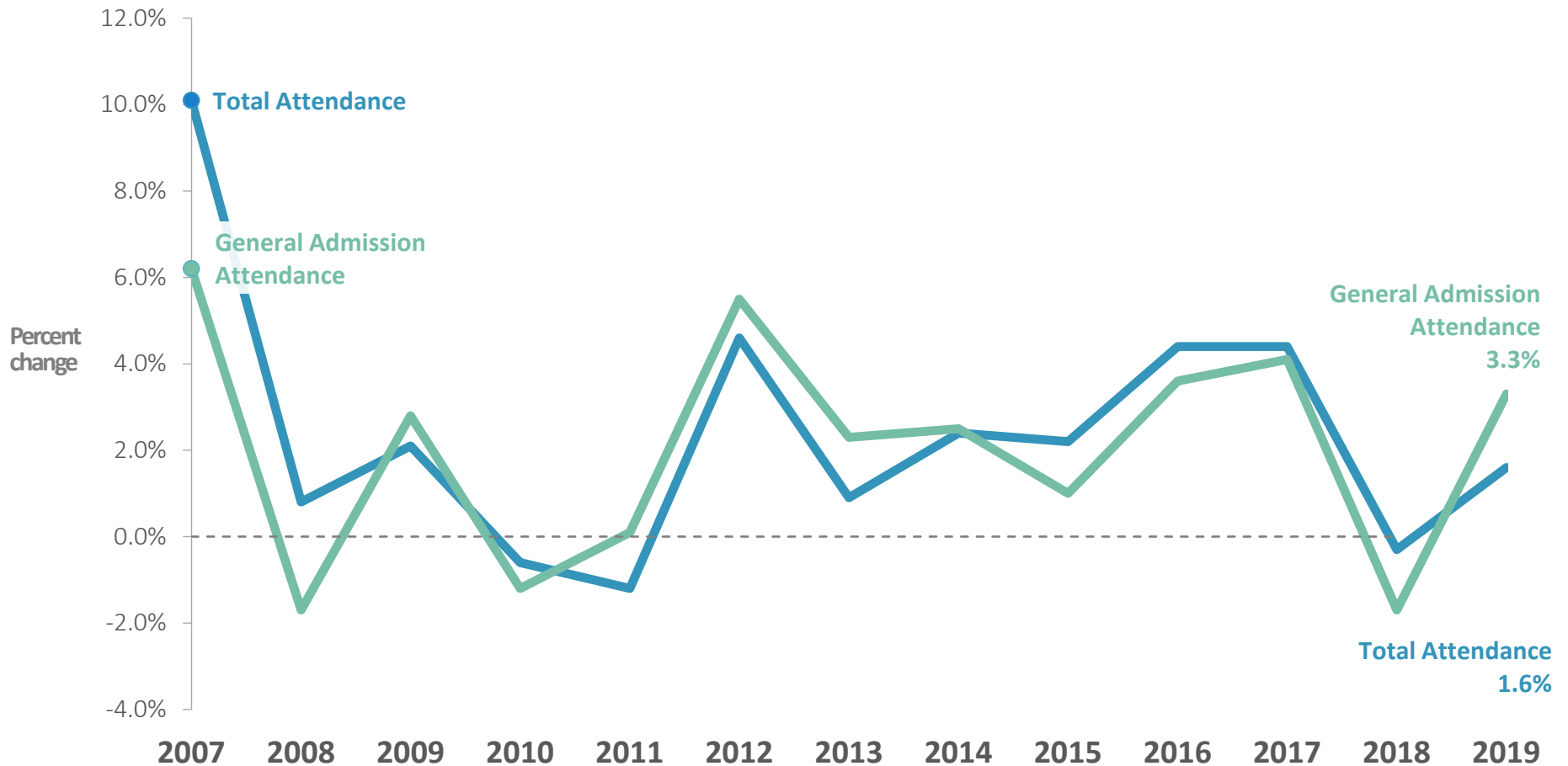
- ▶ Attendance in 2019 increased after a decrease in 2018. Total attendance grew 1.6% and general admission attendance grew 3.3%.
- ▶ Total attendance as a percentage of market size remained relatively flat at 18.1%.
- ▶ Advertising spend as a percentage of admission was 19.8%, which is an increase compared to 14% in 2018. The average spend per visitor increased to \$1.66.
- ▶ Online ticketing increased from 10% to 13%.
- ▶ Admission prices continue to rise (4.7%), but the rate at which they have increased has slowed, which is likely due to many organizations reaching their price threshold.
- ▶ Membership grew 4.9% compared to 2.4% in 2018. Retention remained flat at 54%.



CHANGE IN ATTENDANCE

Total attendance increased 1.6% and general admission attendance increased 3.3%.

Total admission represented 18% of market size.

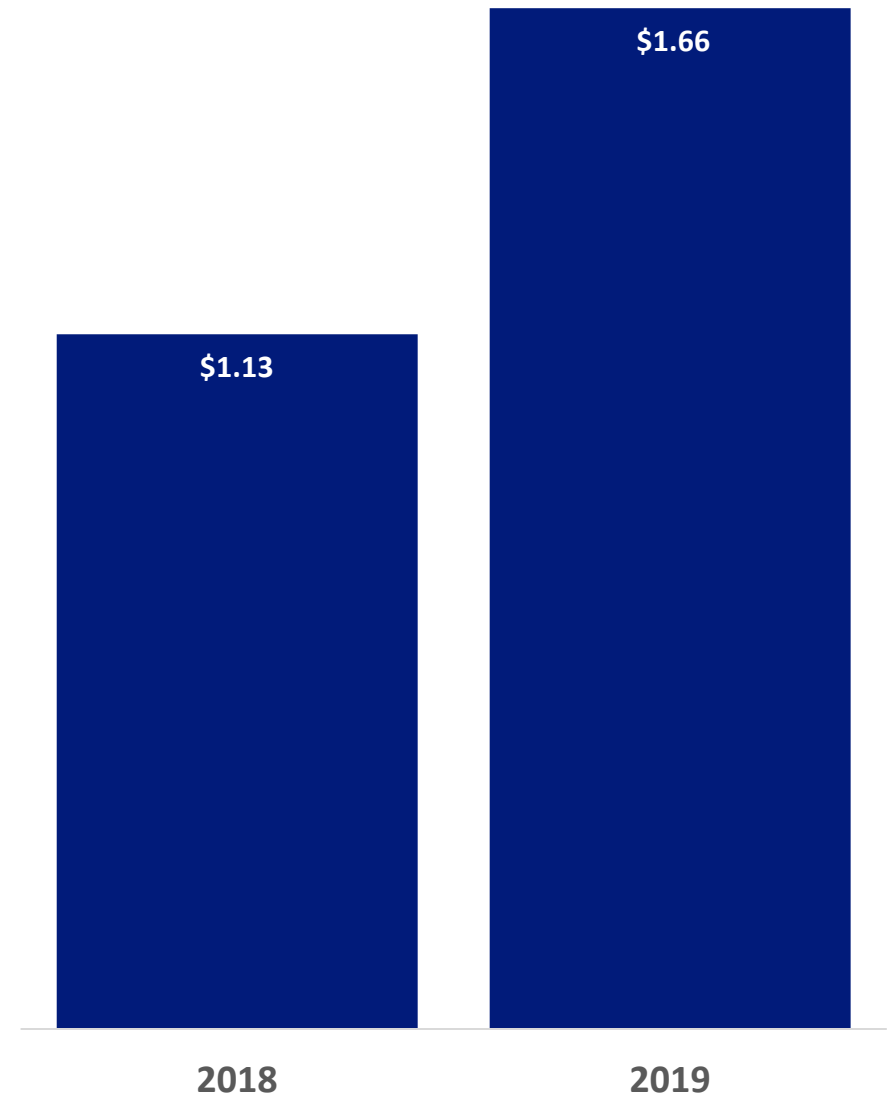


MARKETING

Advertising spend per general admission visit increased from \$1.13 in 2018 to \$1.66. Results from 2017 were unusually low.

- ▶ The average number of Facebook followers as a percentage of total attendance remained increased from 19% to 21%.
- ▶ Online ticket sales increased from 10% to 13% of ticket sales.

Advertising spend per General Admission visitor has steadily increased over time.



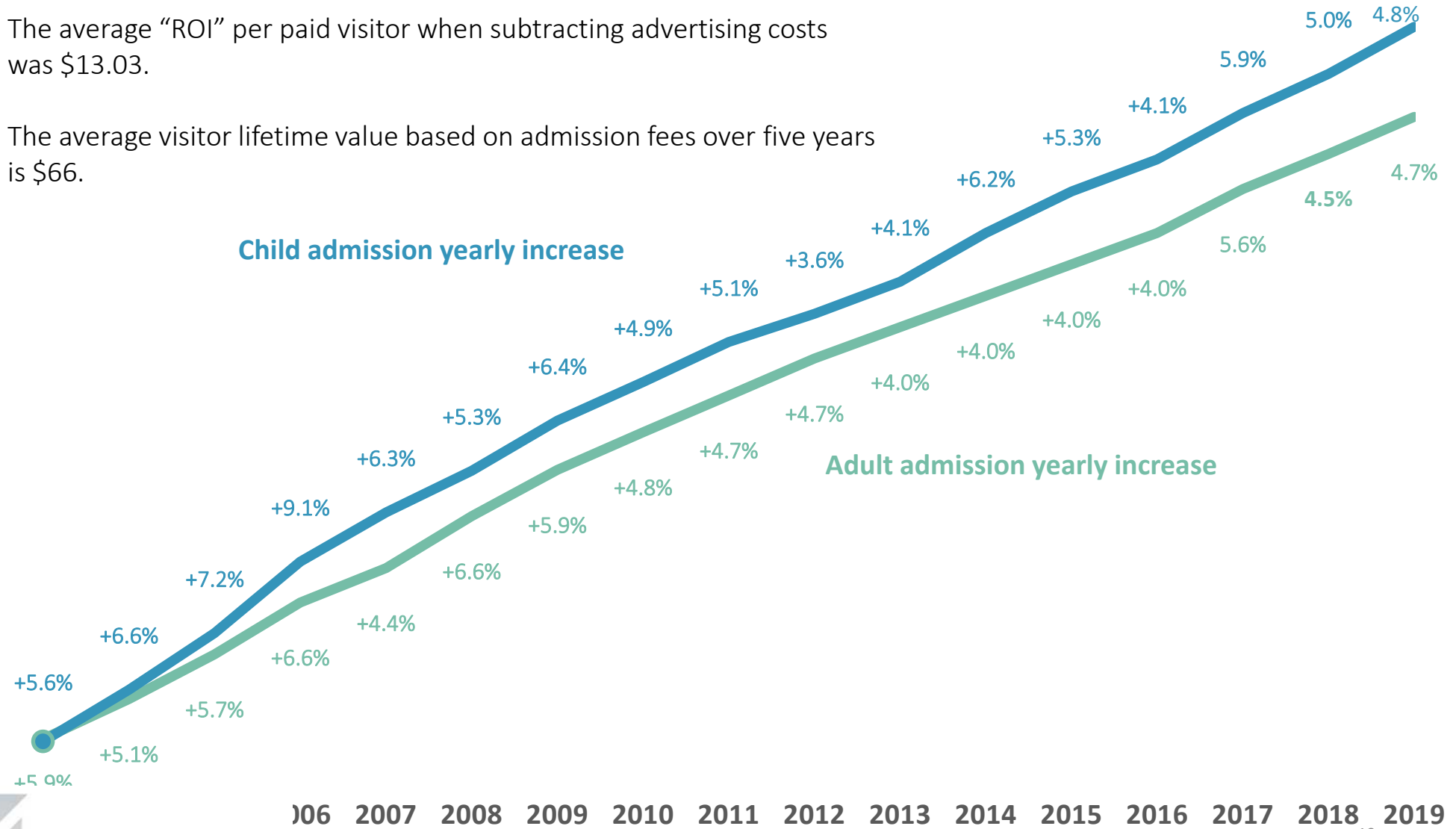
ADMISSION PRICING

Admission prices continued to increase; up 4.8% from 2018.

In 2019, average Adult admission price was \$18.99, average child admission price was \$13.37, and average Senior admission price was \$16.20.

The average "ROI" per paid visitor when subtracting advertising costs was \$13.03.

The average visitor lifetime value based on admission fees over five years is \$66.

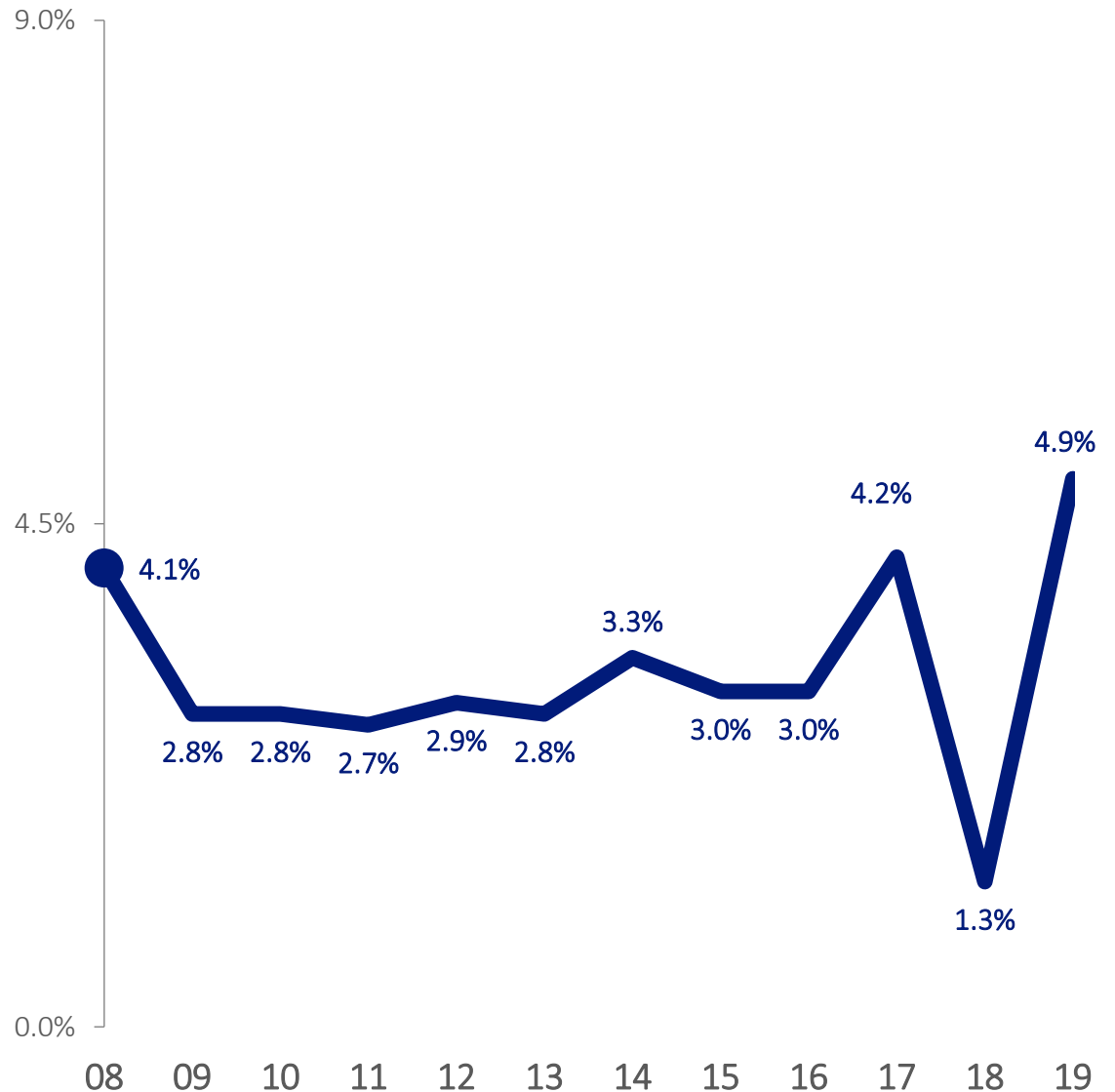


MEMBERSHIP GROWTH

Membership also continued to grow; up 4.9% from 2018, faster than general admission visitation.

- ▶ The average membership size (in terms of households) represented 4.7% of general admission attendance.
- ▶ In terms of visitation, members represented 22% of attendance, and visited on average 3.3 times annually.
- ▶ The average renewal rate remained stable at 54% but varies by genre.

Member households as a percentage of General Admission attendance.



MEMBERSHIP PRICING

Average membership pricing in 2019

- ▶ Individuals \$68
- ▶ Dual \$100
- ▶ Family \$133
- ▶ Family/Premium \$225

Membership pricing varies significantly by cultural genre.

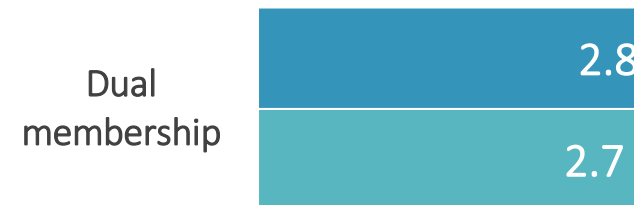
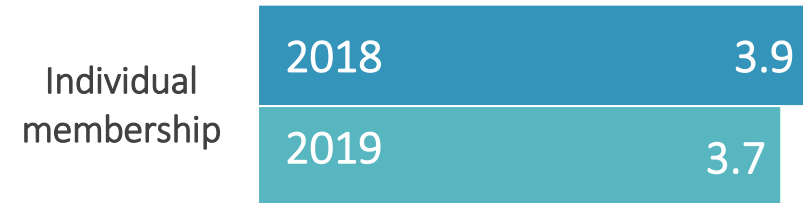
The average member expense per household was \$13.36 (not including labor).

The average gift was \$104 per household.

The average member lifetime value based on dues over five years was \$221.

Value Proposition

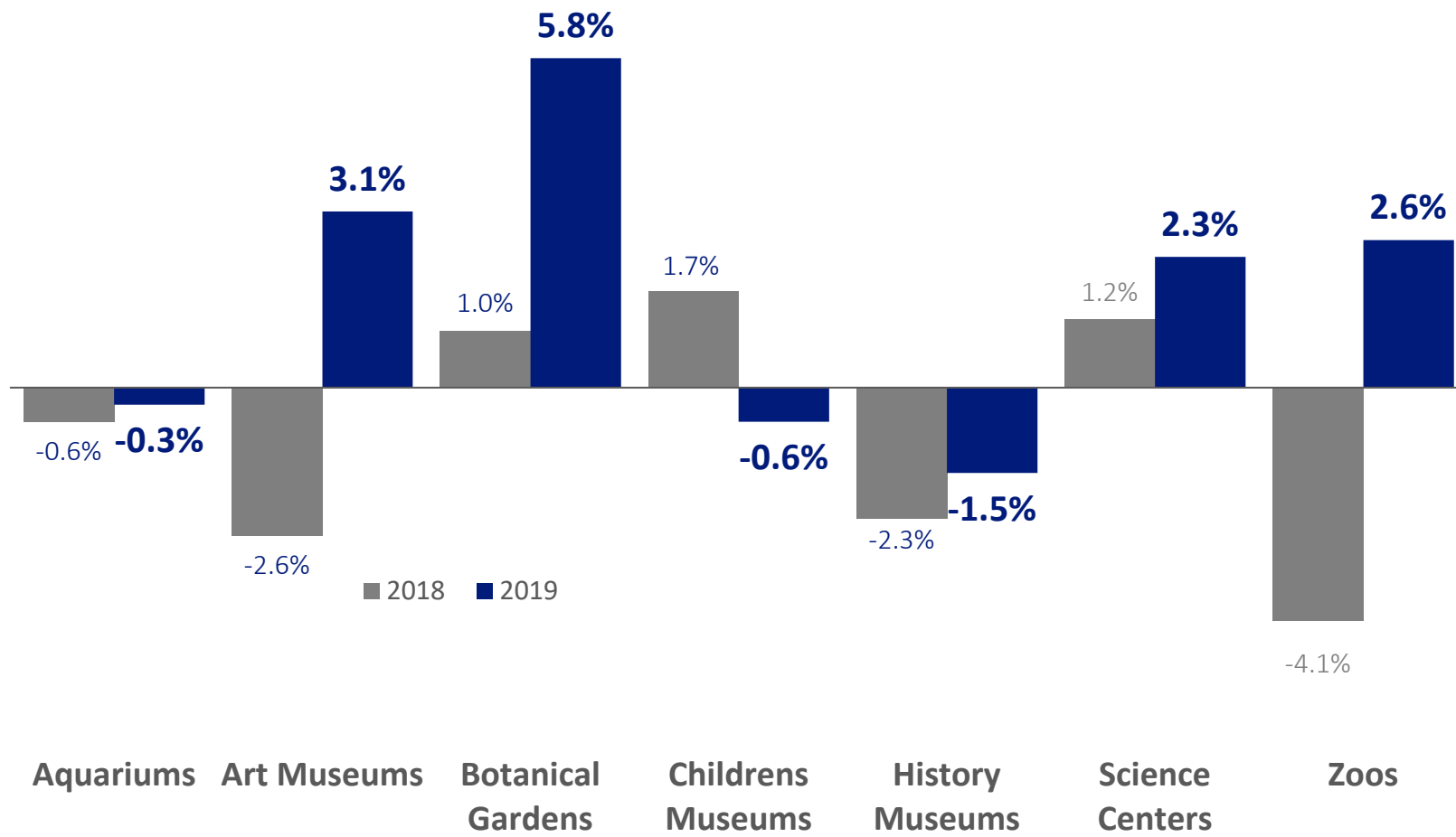
Number of visits necessary to pay for the price of membership declined slightly in 2019



CHANGE IN GENERAL ATTENDANCE

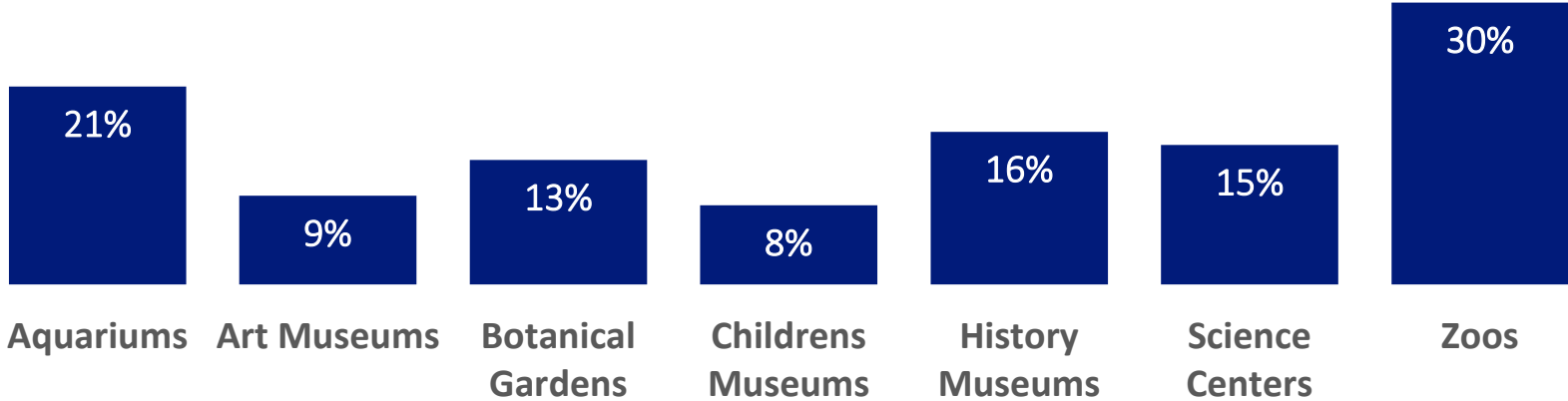
General admission attendance increased for Art Museums, Botanical Gardens, Science Centers and Zoos.

General admission attendance decreased among Aquariums, Children's Museums, and History Museums.



TOTAL ATTENDANCE MARKET CAPTURE

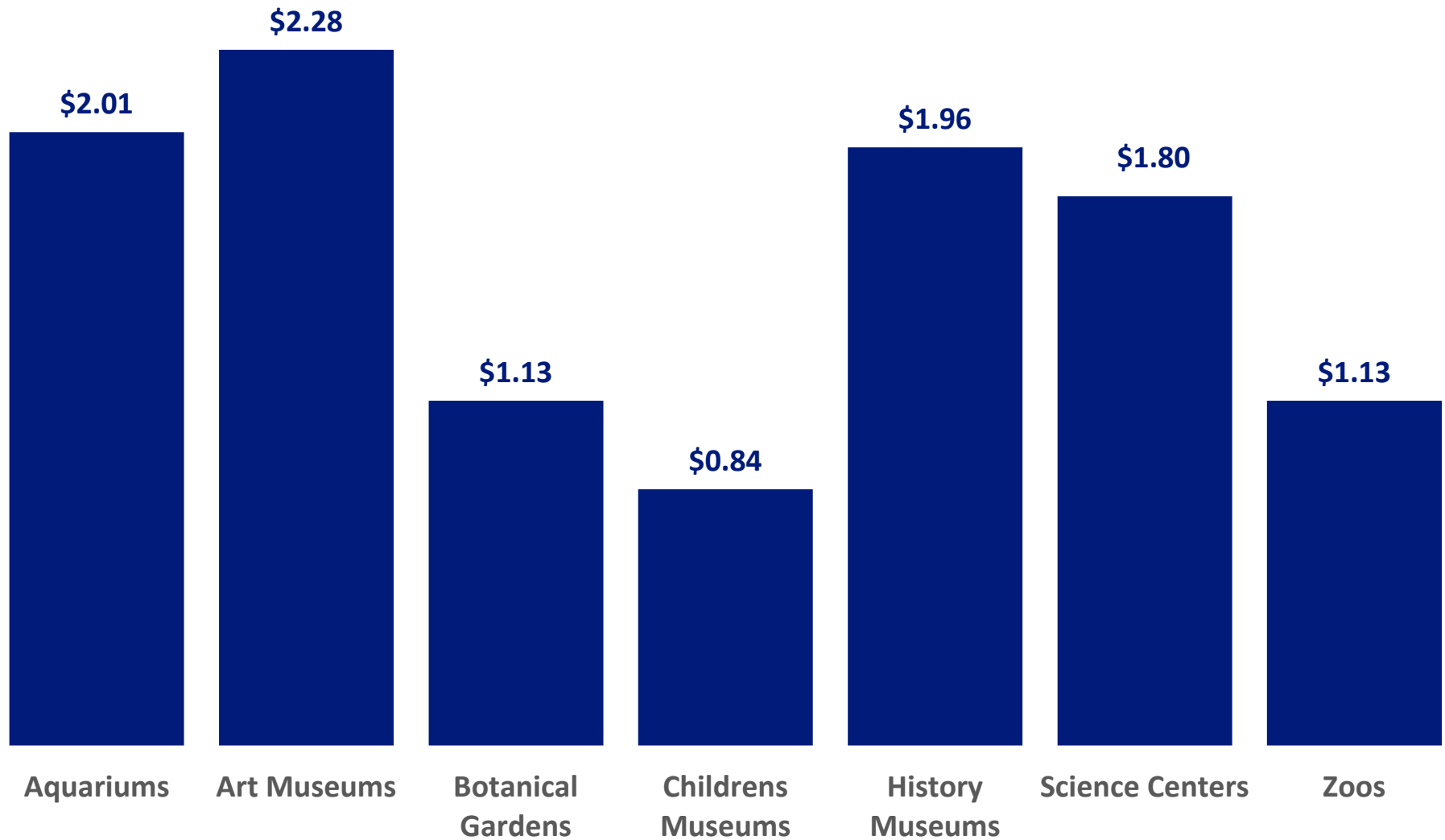
Total attendance as a percentage of the local market plus 10% of the tourist market was highest for Aquariums, Natural History Museums, and Zoos.



ADVERTISING

Advertising spend represented 19.8% of general admission ticket revenue.

31% was spent in digital media.

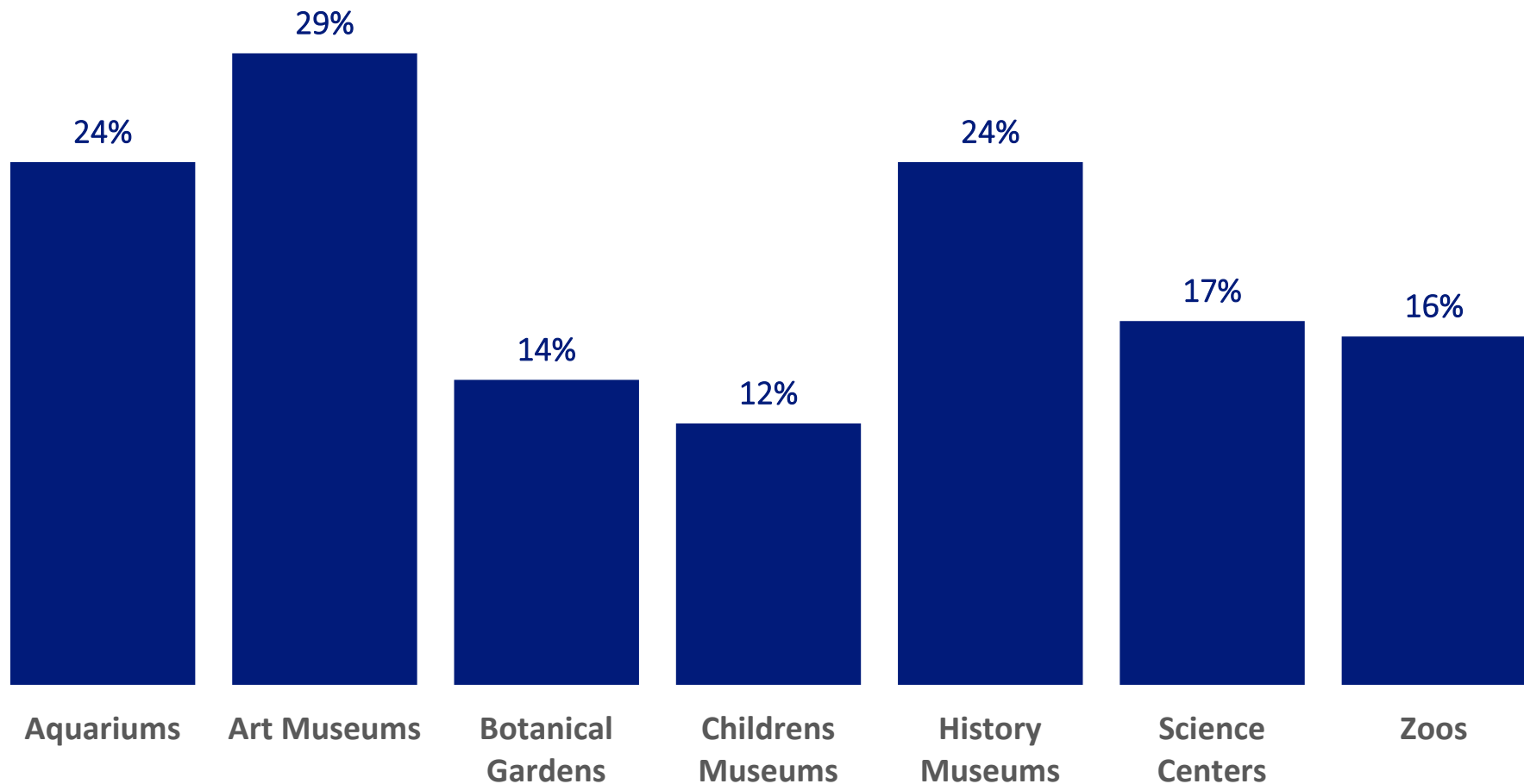


SOCIAL MEDIA

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

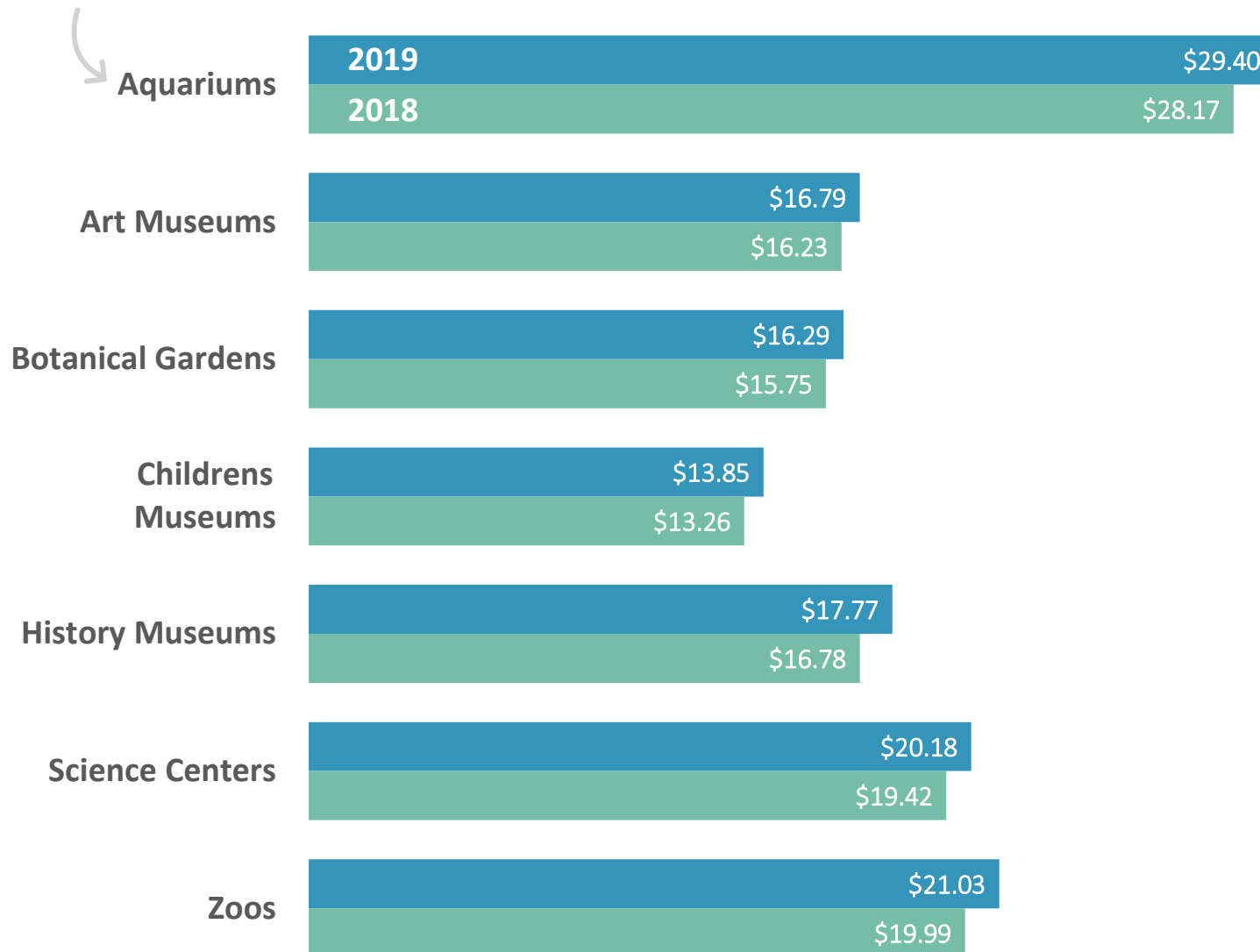


Facebook followers as percentage of total attendance.



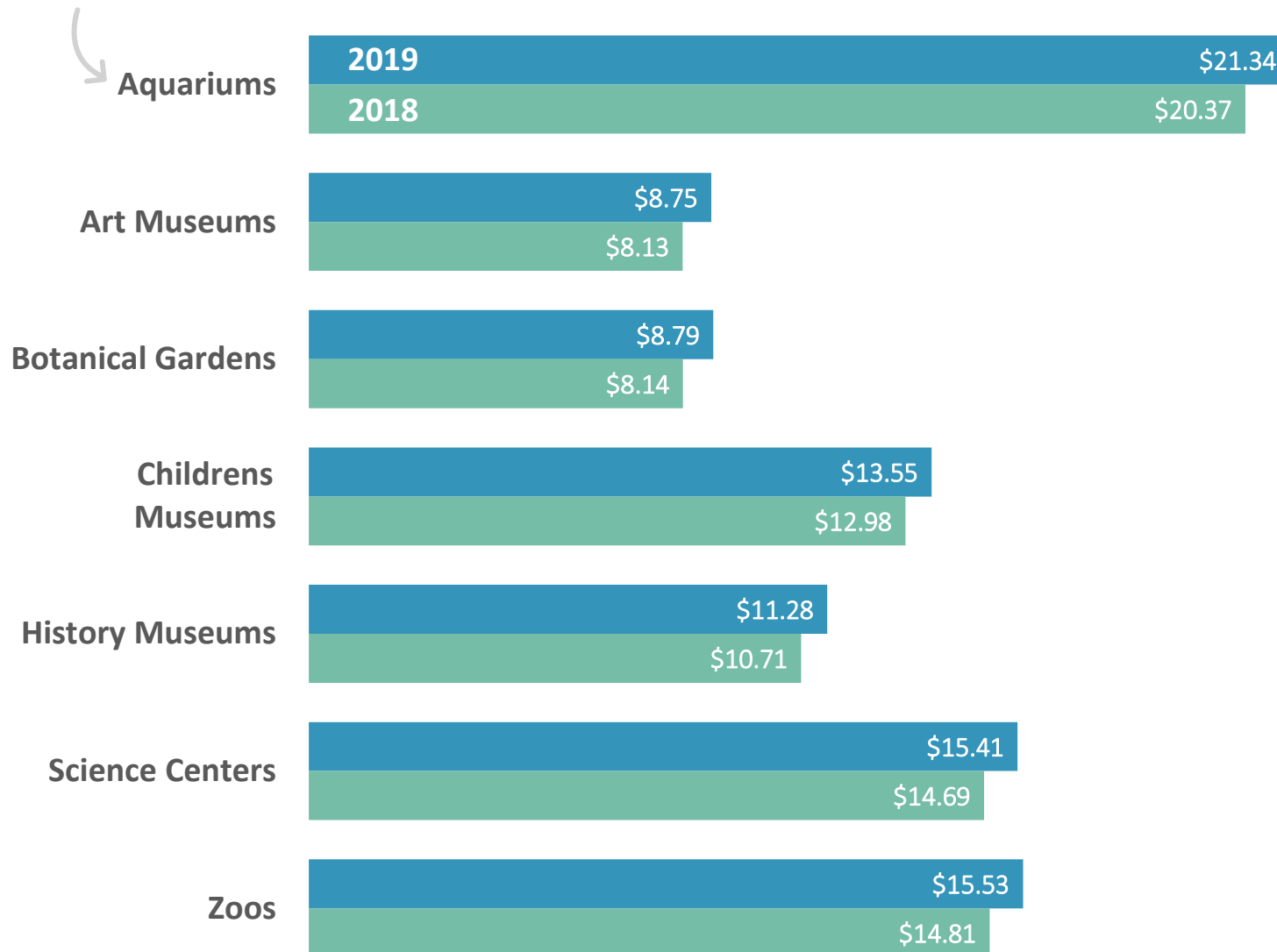
ADULT ADMISSION PRICING

Aquariums have the highest Adult admission prices, which demonstrates the upper range of price potential. The average lifetime value of a visitor over a five-year period is \$66.



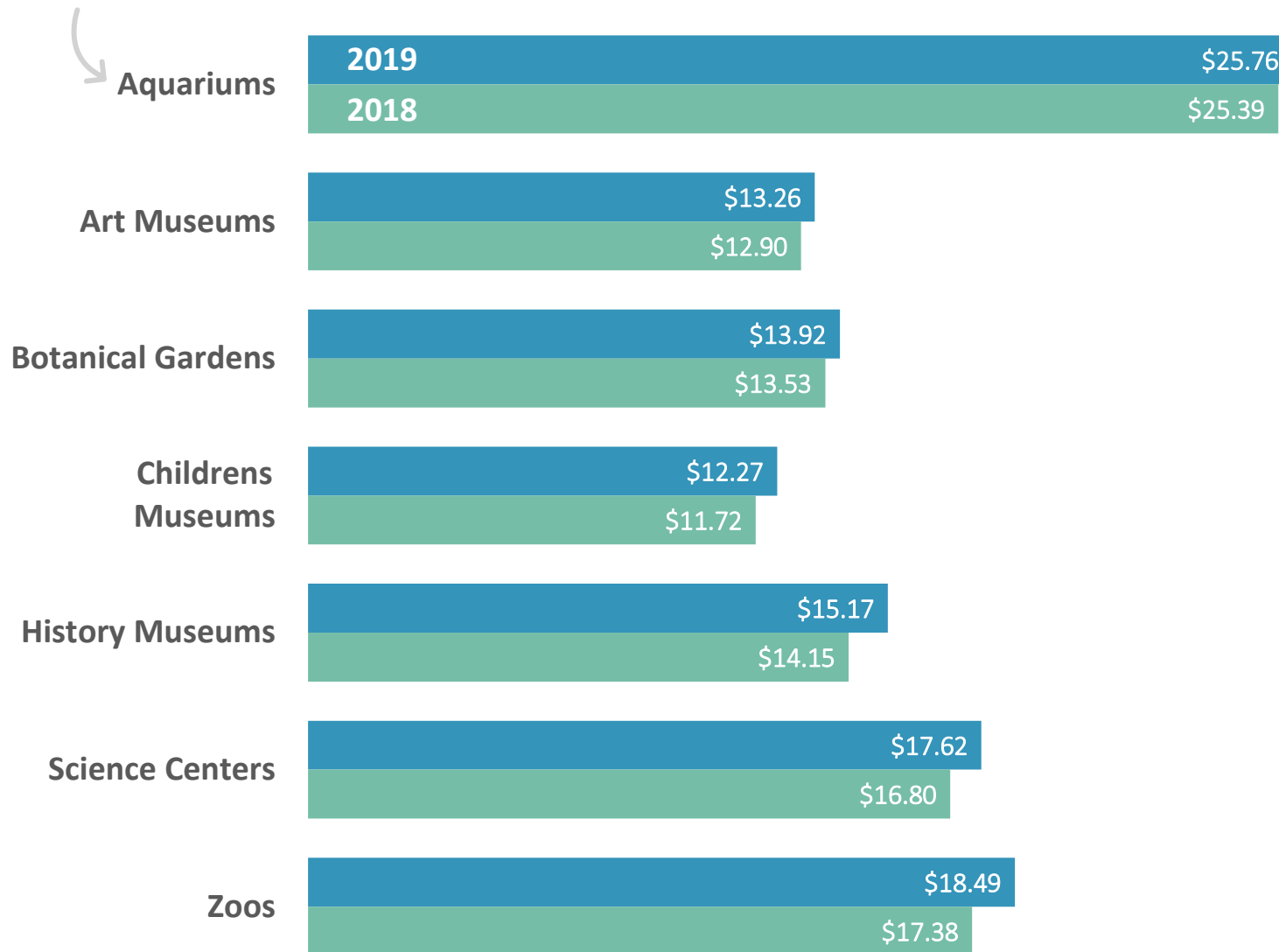
CHILD ADMISSION PRICING

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



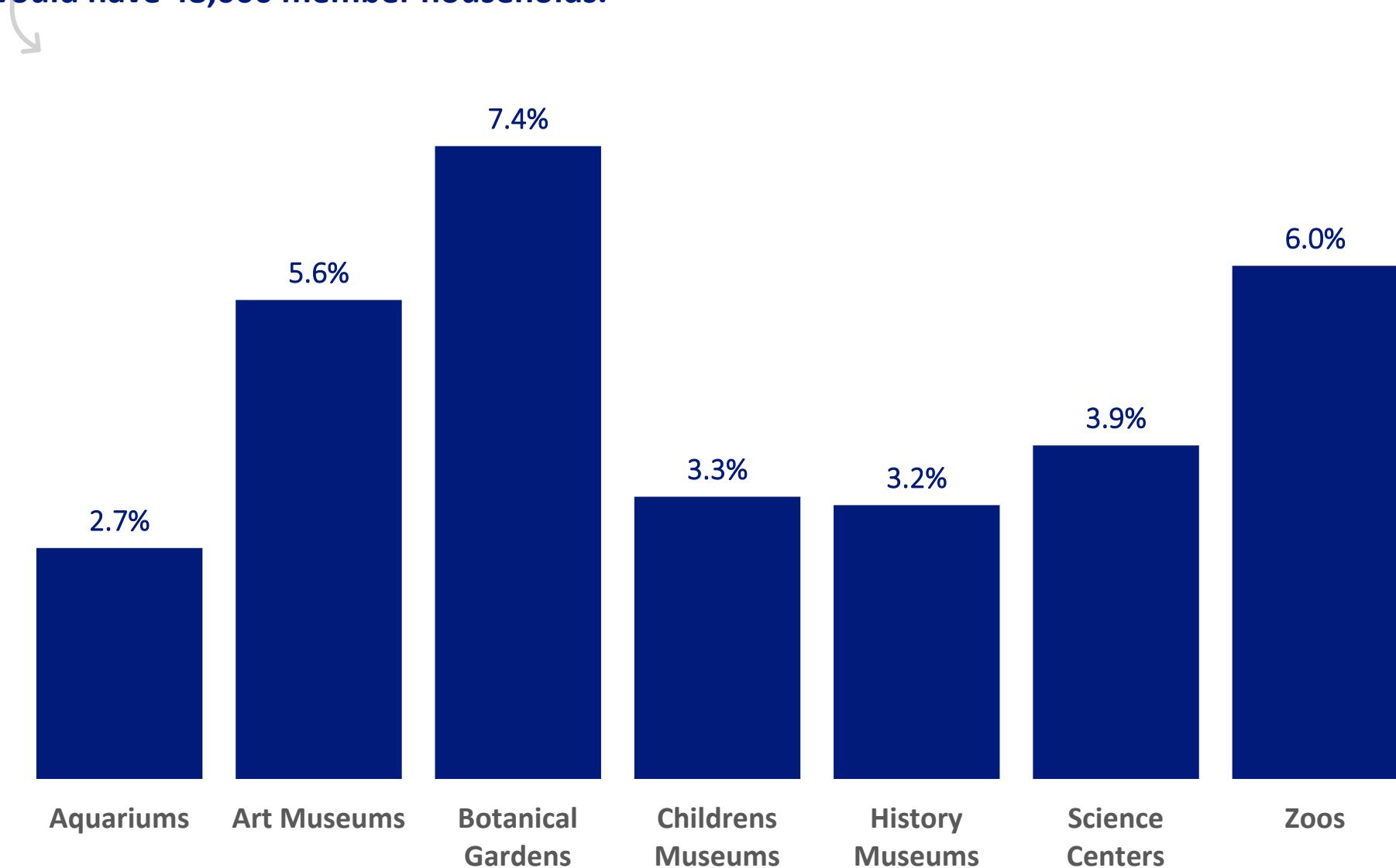
SENIOR ADMISSION PRICING

The average senior discount is \$2.77. We generally recommend offering a \$2 discount.



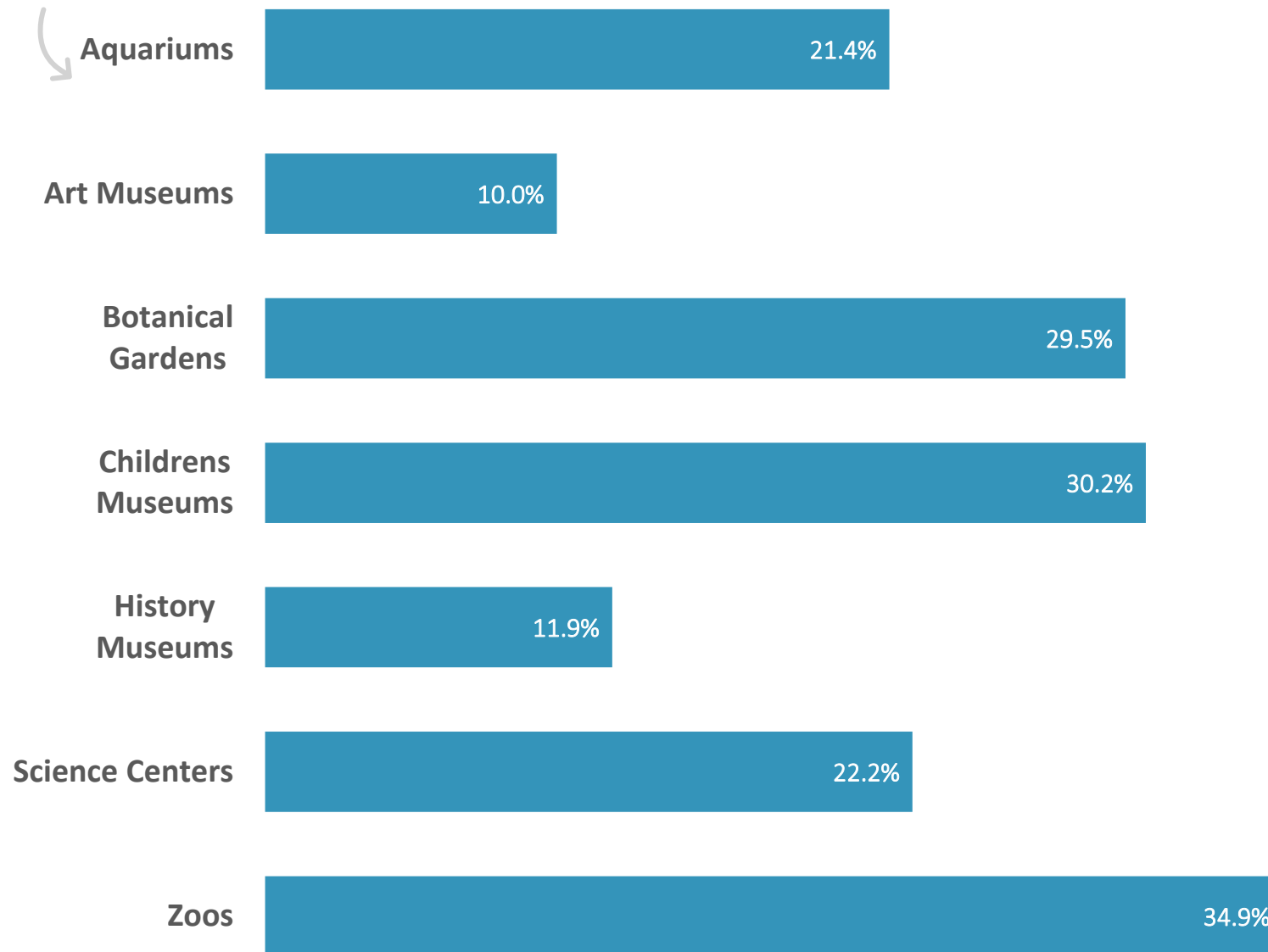
MEMBER HOUSEHOLDS (SIZE)

On average, the number of member households represented 4.8% of general admission visitation. This is represented as an organization with 1m in general admission visitation would have 48,000 member households.



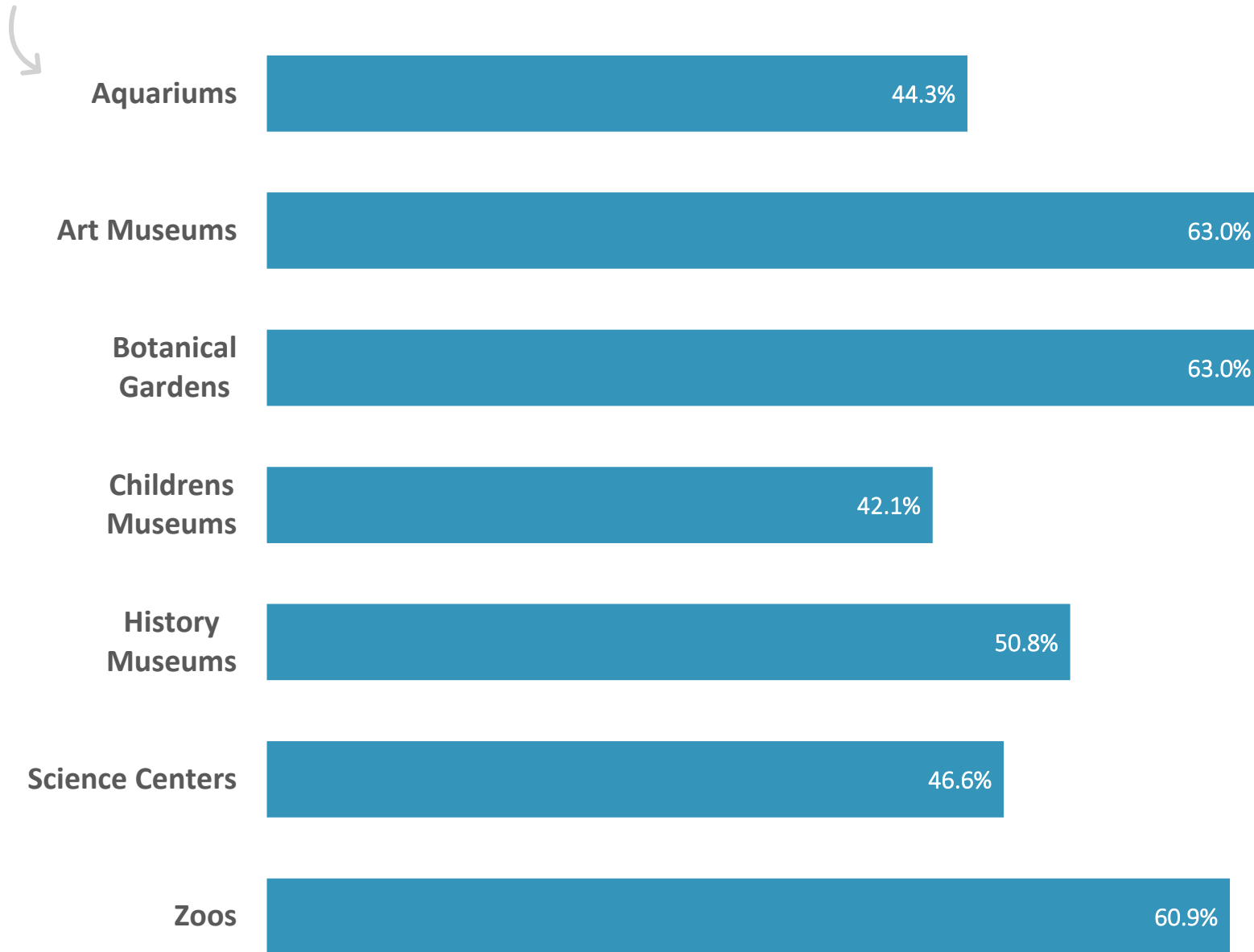
MEMBER HOUSEHOLDS (% OF VISITATION)

On average, membership represented 22.5% of visitation.



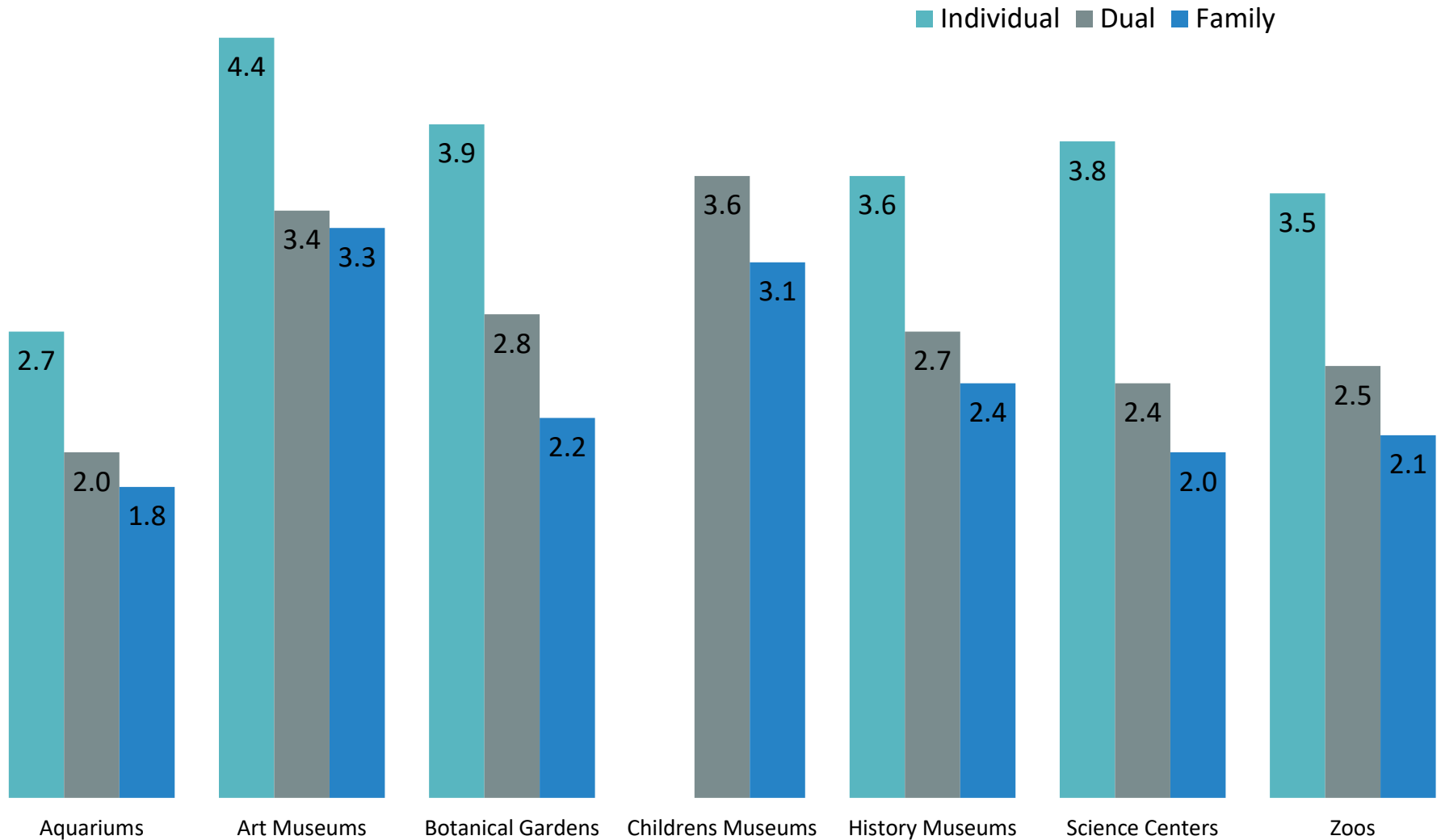
MEMBERSHIP RENEWAL

Art museums and botanical gardens have the highest renewal rates.



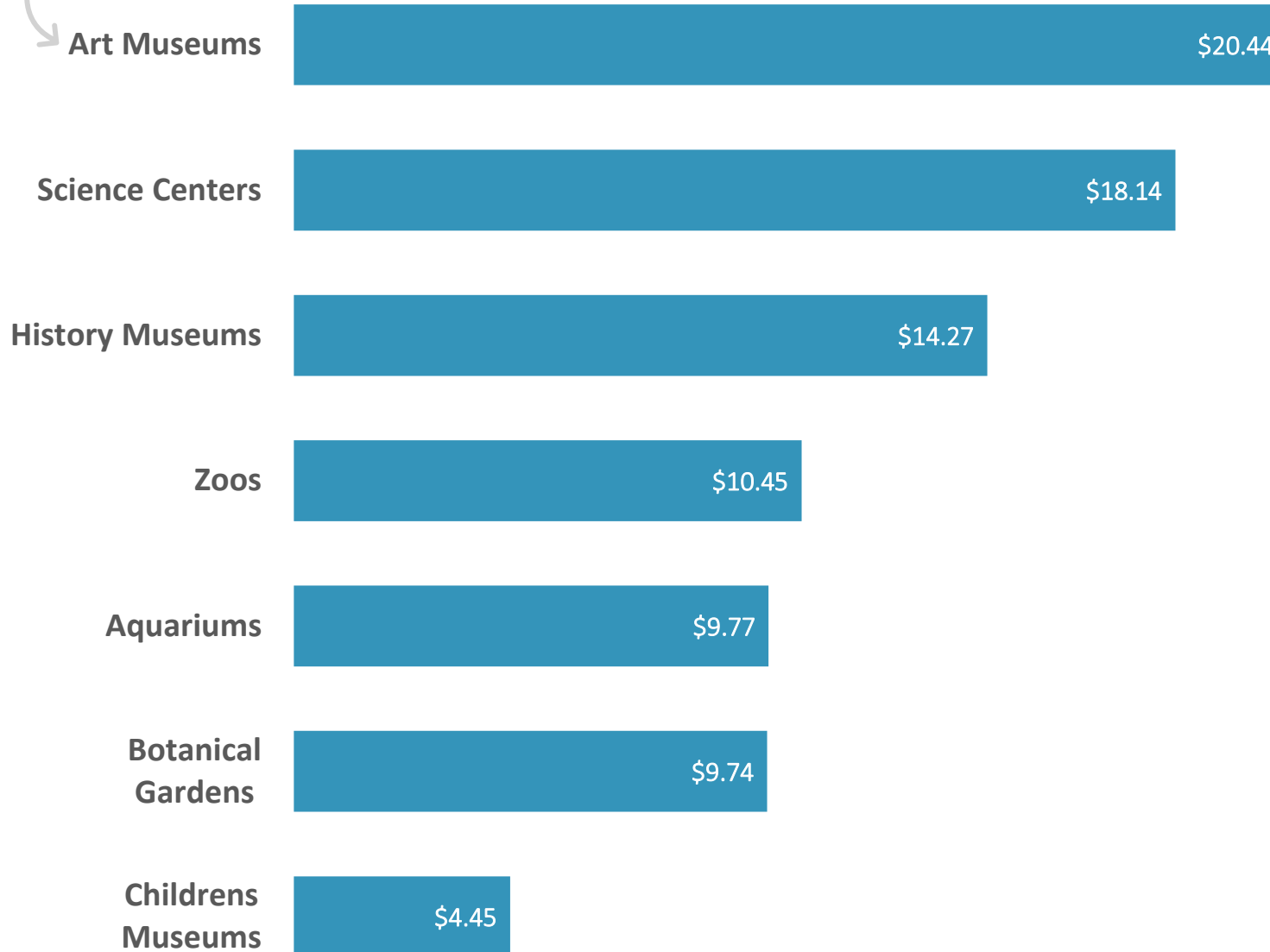
MEMBERSHIP PRICING RATIO (MEMBER PRICE/ADMISSION PRICE)

The average lifetime value of a member over a five-year period is \$221. Members are 4.4 times more valuable than visitors from a financial perspective.



MEMBERSHIP EXPENSE PER HOUSEHOLD

Art museums had the highest membership expense per household (not including labor).
Some membership programs actually lose money.





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