

# 2020 CULTURAL ATTRACTION TREND REPORT

CONFIDENTIAL



# TABLE OF CONTENTS

- ▶ BACKGROUND 3
- ▶ DEFINITIONS 4
- ▶ PARTICIPANTS 5
- ▶ KEY FINDINGS 6
- ▶ ATTENDANCE 7
- ▶ MARKETING 8
- ▶ PRICING 9
- ▶ MEMBERSHIP 10
- ▶ SCATTER PLOTS 12

# 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. This is the continuation of a survey initiated in 1998.
- ▶ The 2020 Cultural Attraction Trend Survey was conducted online in March 2021; participants were invited via email.
- ▶ **88 cultural attractions participated in the survey. Typically, approximately 200 organizations participate. The decrease in participation is reflective of the significant impact COVID-19 has had on cultural attractions.**
- ▶ **The decreased participation does not allow us to accurately segment results by attraction type this year.**
- ▶ 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.
- ▶ COVID-19 and each states or local municipalities reactions have impacted organizations differently.

# 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

Adventure Aquarium  
Aquarium of the Pacific  
Arizona-Sonora Desert Museum  
Audubon Aquarium of the Americas  
Audubon Zoo  
Barnes Foundation  
Belle Isle Conservancy  
Brevard Zoo  
BRONX CHILDREN'S MUSEUM  
Buffalo Museum of Science  
California Academy of Sciences  
Chattanooga Zoo  
Children's Museum of the Lowcountry  
Cincinnati Art Museum  
COSI  
Dallas Museum of Art  
Denver Museum of Nature & Science  
Discovery Center (Don Harrington)  
Discovery Park of America  
Discovery Place, Inc.  
Discovery Playhouse  
Eastern State Penitentiary Historic Site  
ECHO, Leahy Center for Lake Champlain  
Exploratorium

Filoli  
Frost Science  
Greensboro Science Center  
Hammer Museum  
Holden Forests and Gardens  
Impression 5 Science Center  
Milwaukee County Zoo  
Minneapolis Institute of Art  
Morris Arboretum  
MOXI  
Museo de Historia, Antropología y Arte  
Museum of Boulder  
Museum of Danish America  
Mystic Aquarium  
Mystic Seaport Museum  
Nashville Zoo  
National Liberty Museum  
New York Hall of Science  
North Carolina Museum of History  
Omaha's Henry Doorly Zoo & Aquarium  
Penn Museum  
Philadelphia Museum of Art  
Philadelphia Zoo  
Phoenix Zoo

Port Discovery Children's Museum  
Rochester Museum & Science Center RMSC  
Roger Williams Park Zoo  
Sacramento Zoo  
San Diego Zoo  
San Diego Zoo Safari Park  
Science Museum of Minnesota  
Sciencenter  
Seattle Art Museum  
Slater Museum  
Space Center Houston  
The Broad  
The Charleston Museum  
The J. Paul Getty Trust  
The Lawrence Hall of Science  
The Maritime Aquarium  
The Strong National Museum of Play  
Vizcaya Museum and Gardens  
WNC Nature Center

# KEY FINDINGS

- ▶ The impact of COVID-19 was significant due in part to closures, limited capacity, and public safety concerns.
- ▶ Attendance decreased 64% in 2020. Member visitation decreased 52%.
- ▶ Advertising spend decreased 40%.
- ▶ Admission prices flattened for the first time. This was due in part to some organizations decreasing their price due to closed areas within the experience. Typically admission prices increase approximately 5% annually.
- ▶ Membership decreased 19.1%, which suggests organizations did a good job of maintaining members given member visitation fell 52%.
- ▶ Member renewal fell from 59% in 2019 to 48% in 2020.



# CHANGE IN ATTENDANCE

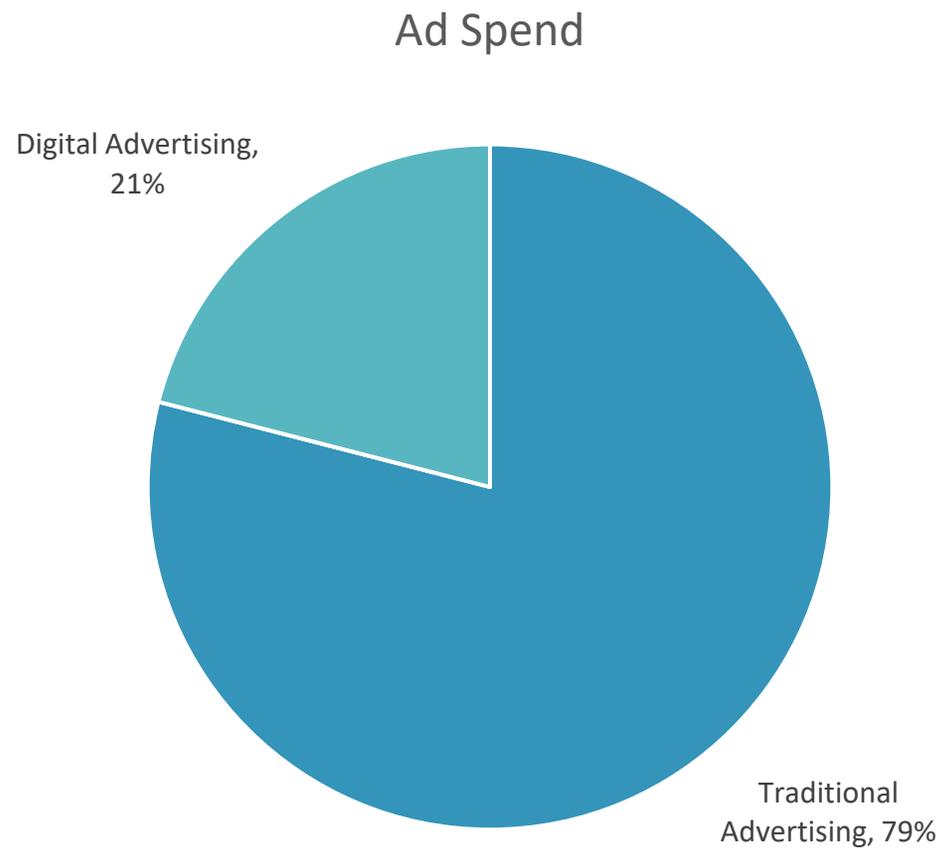
Total attendance decreased 64% and general admission attendance decreased 68%. Even among outdoor organizations like zoos attendance decreased 54% and botanical gardens decreased 26%.



# MARKETING

**Advertising spend decreased 40%, digital advertising spend also decreased 40%.**

- ▶ Digital advertising represented 21% of total advertising spend. We strongly recommend increasing digital advertising spend to at least 25% and for smaller organizations to more than 50% of total ad spend.

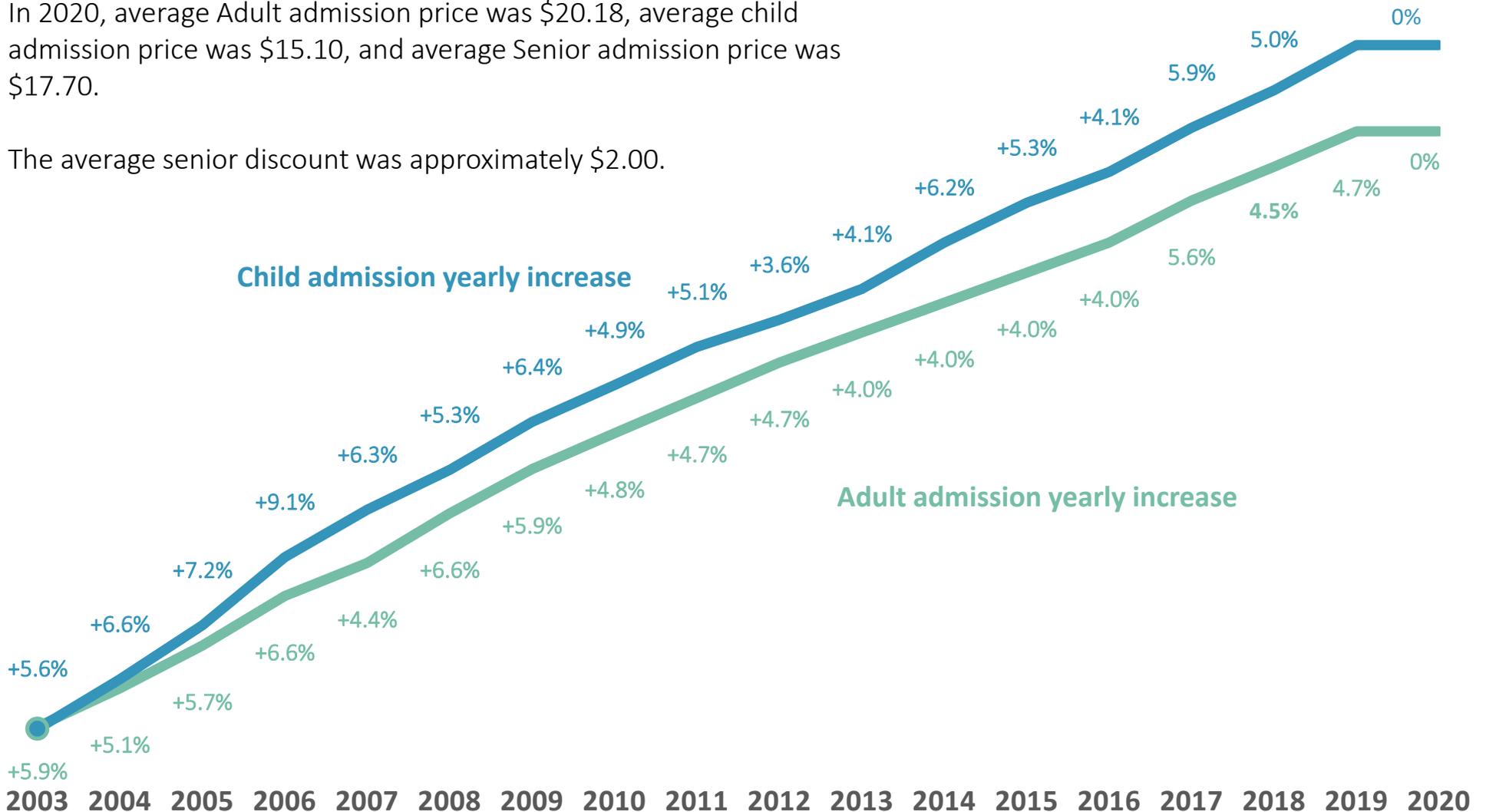


# ADMISSION PRICING

Admission prices were stable for the first time since 2003. The stability was due in part to some organizations actually decreasing their price (likely in reaction to COVID) and the average price from dynamic pricing decreasing due to less market demand.

In 2020, average Adult admission price was \$20.18, average child admission price was \$15.10, and average Senior admission price was \$17.70.

The average senior discount was approximately \$2.00.

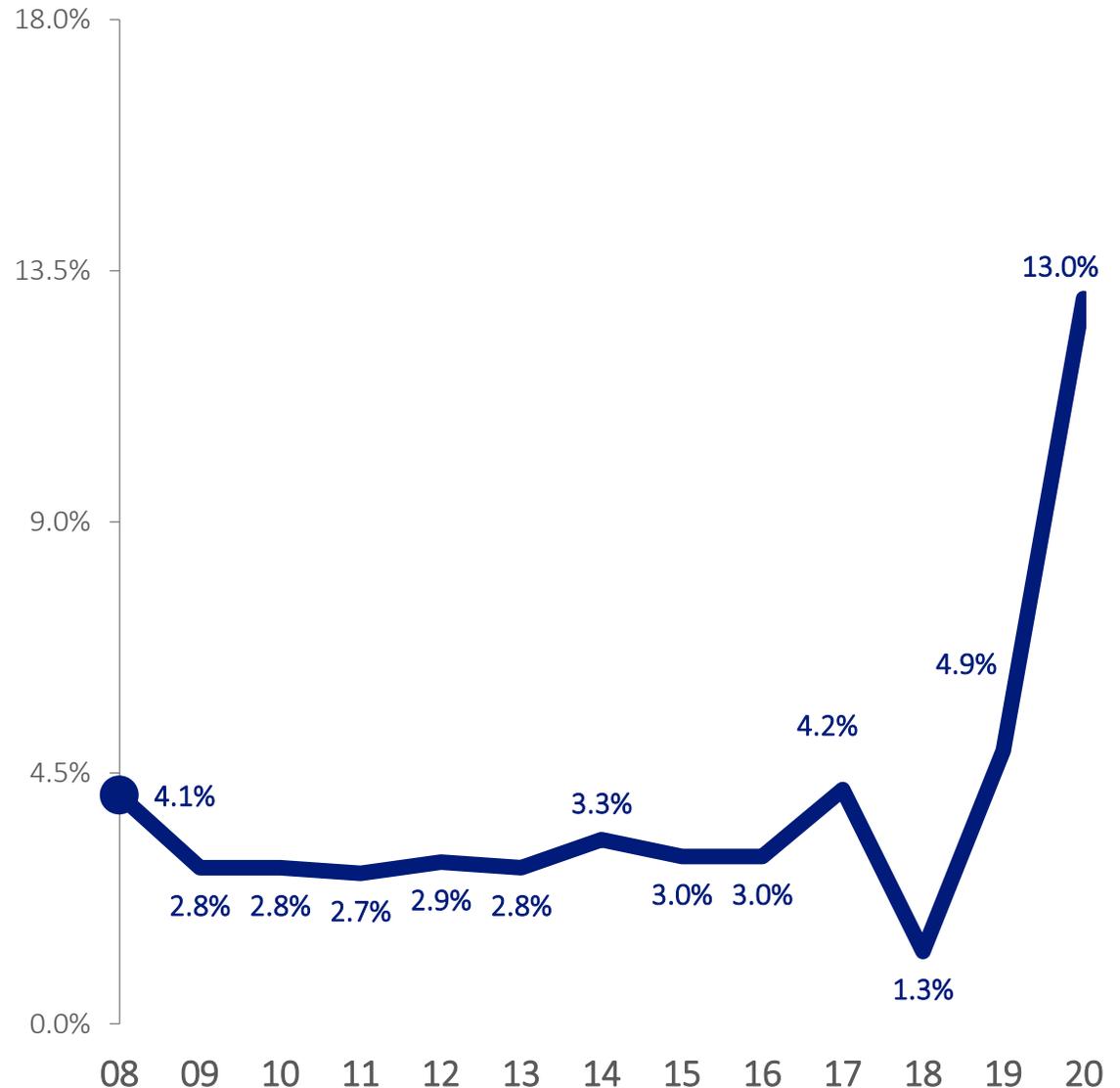


# MEMBERSHIP GROWTH

**Membership also decreased (-21%), but not as much as attendance.**

- ▶ The average membership size (in terms of households) represented 13% of general admission attendance. The increase is due to attendance decreasing at a rate greater than membership.
- ▶ In terms of visitation, members represented 35.4% of attendance, and visited on average 2.6 times annually.
- ▶ The average renewal rate decreased from 59% to 48%, which is positive given most organizations were closed for at least three months.

**Member households as a percentage of General Admission attendance.**



# MEMBERSHIP PRICING

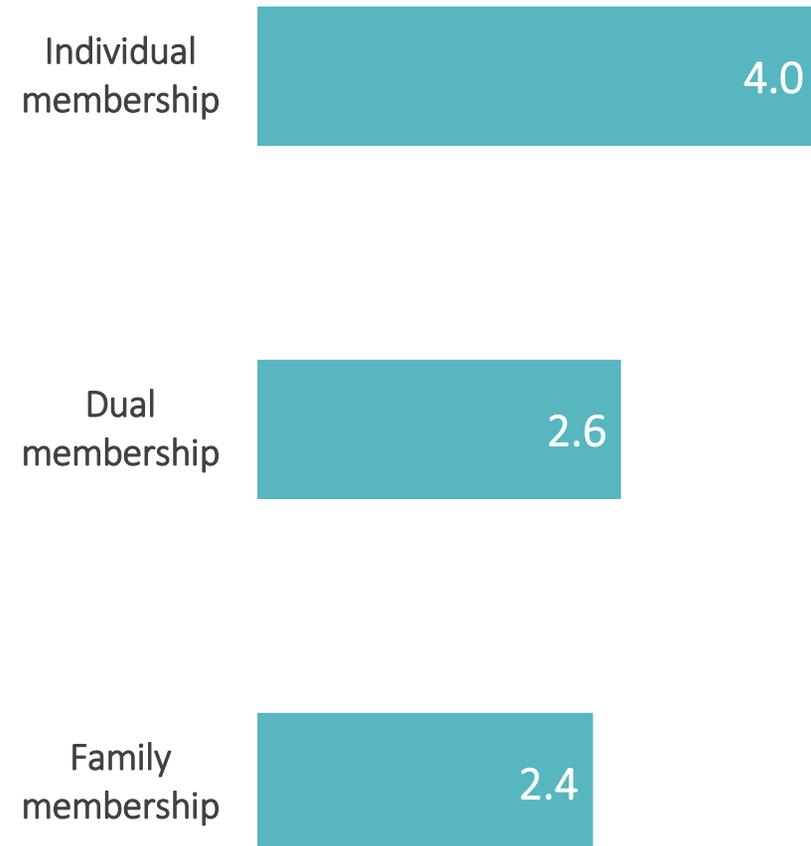
## Average membership pricing in 2020 was

- ▶ Individuals \$75
- ▶ Dual \$103
- ▶ Family \$138
- ▶ Family/Premium \$255

The average member expense per household was \$10.41 (not including labor).

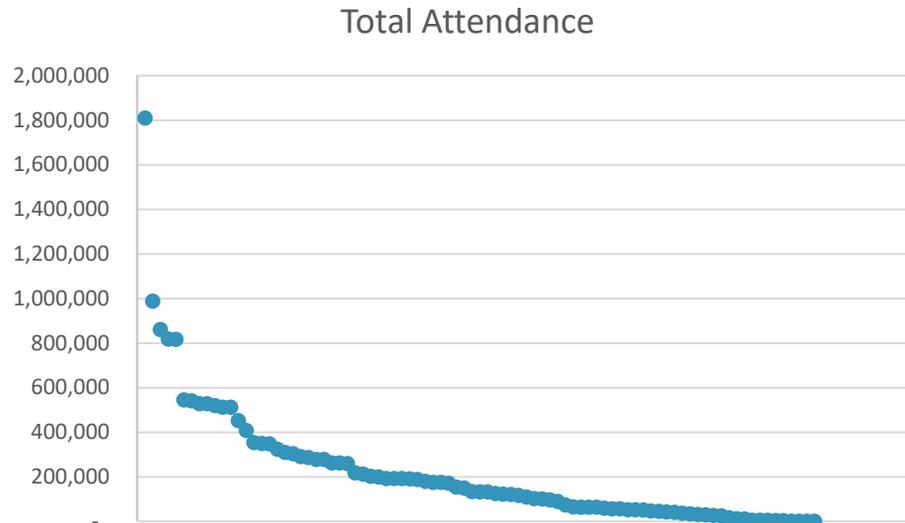
## Value Proposition

Number of visits necessary to pay for the price of membership.

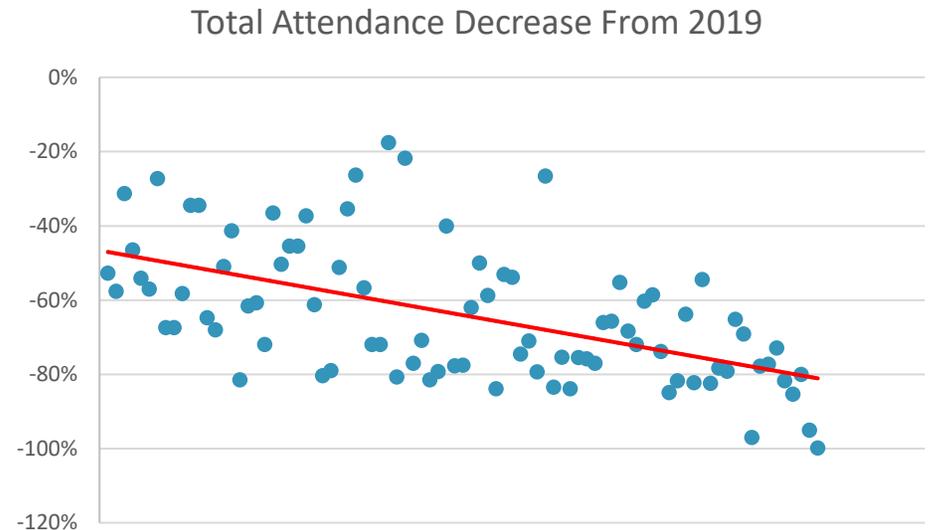


# SCATTER PLOTS

The following scatter plots are organized by highest attendance to lowest attendance (left to right). Each blue dot represents an organization.

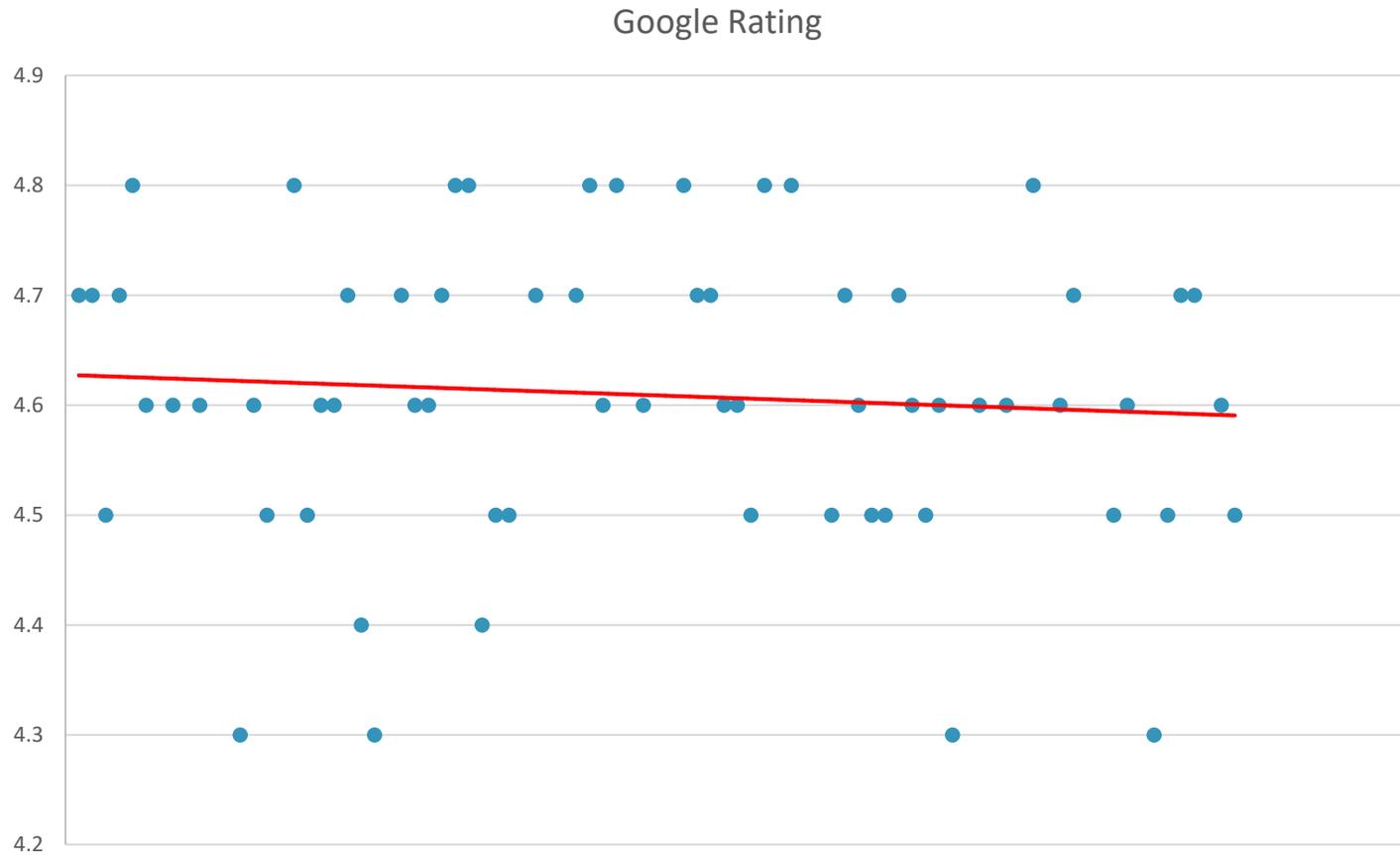


Attendance decreased more among smaller organizations and those closed longer.



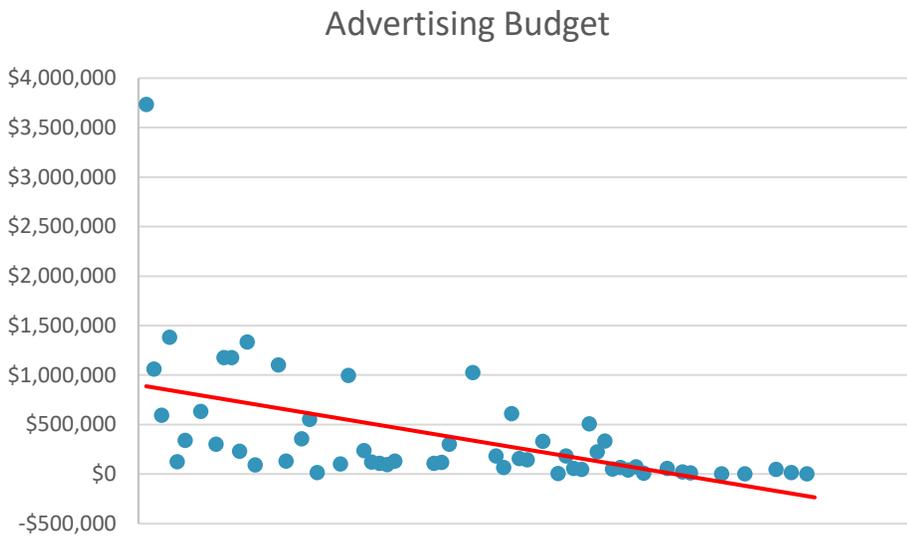
# SCATTER PLOTS

Organizations with higher visitor satisfaction have higher attendance.

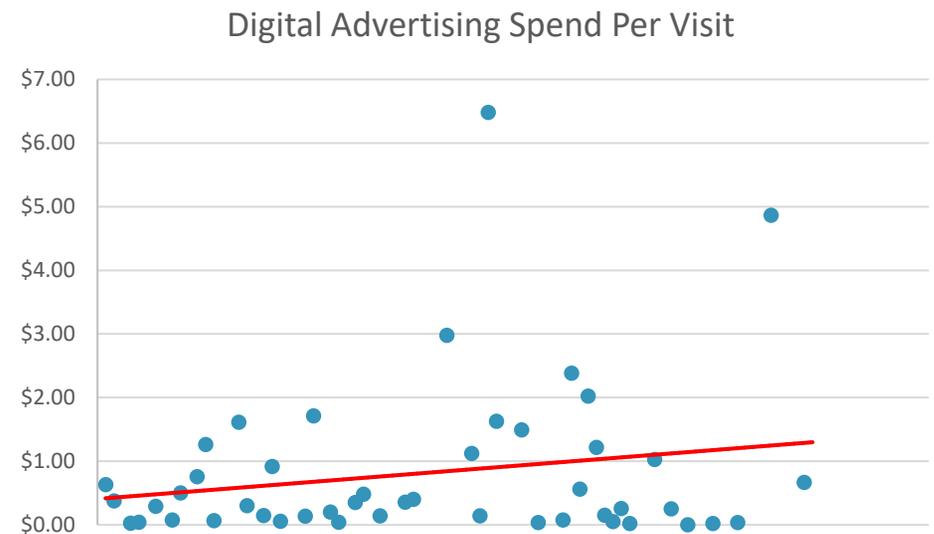
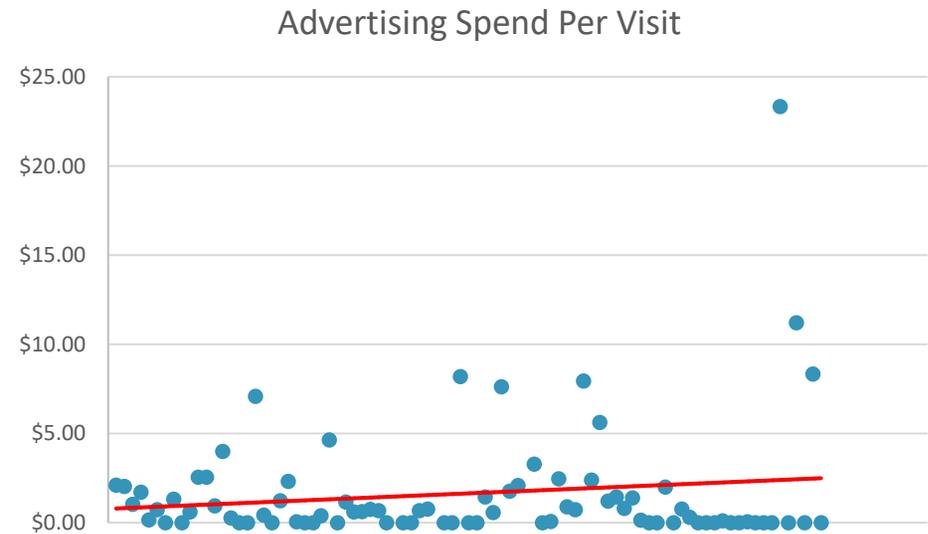


# SCATTER PLOTS

Higher advertising budgets correlate with higher attendance. Organizations that have lower attendance should increase their advertising spend.



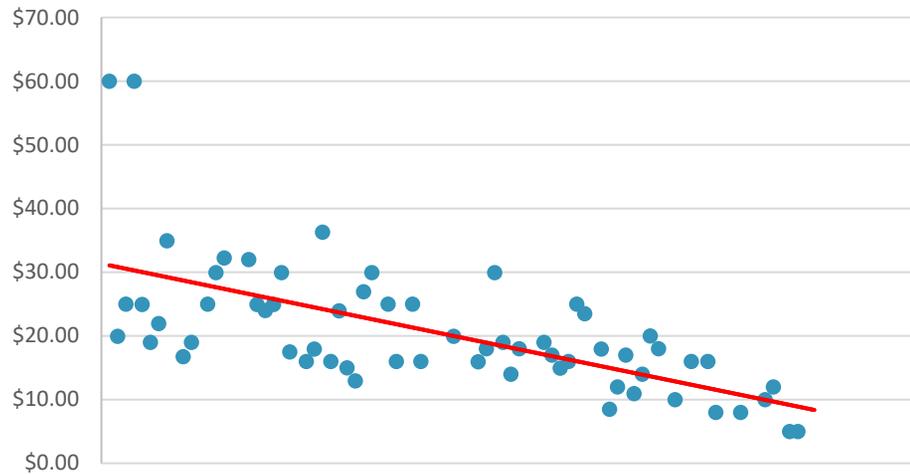
Advertising efficiency improves as organizations spend more on advertising.



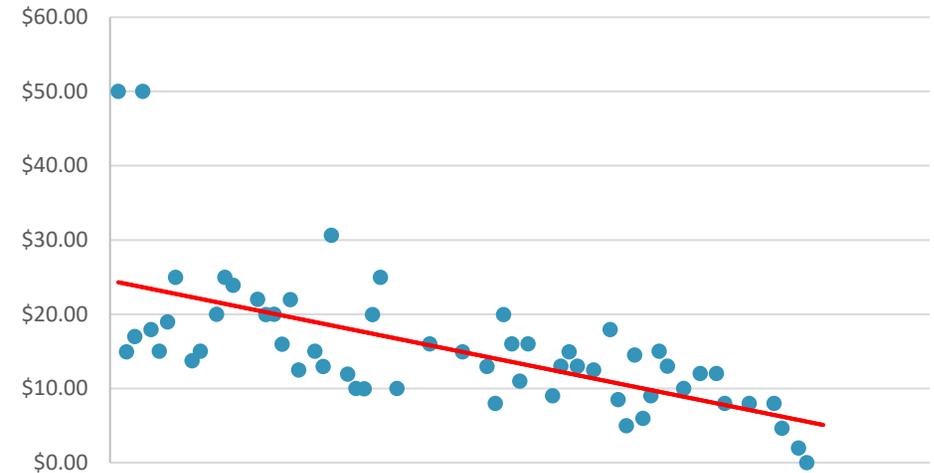
# SCATTER PLOTS

Organizations with higher attendance also charge more which suggests admission price does not impact visitation (within reason).

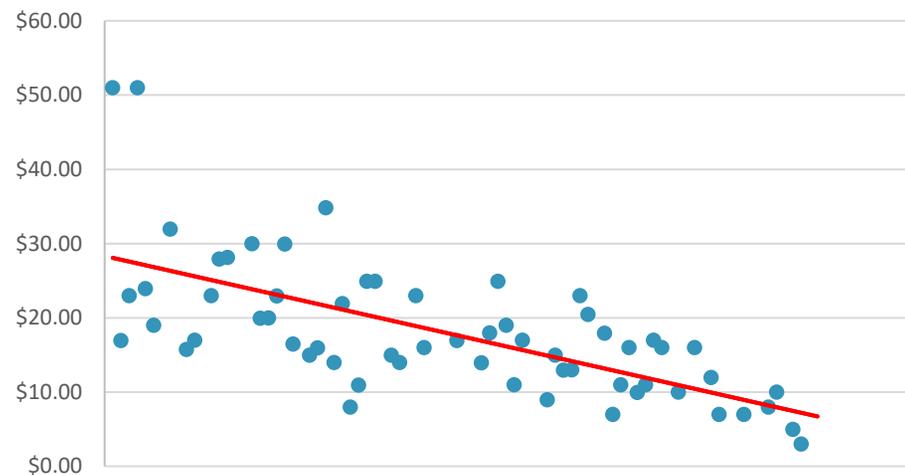
Adult Admission Price



Child Admission Price



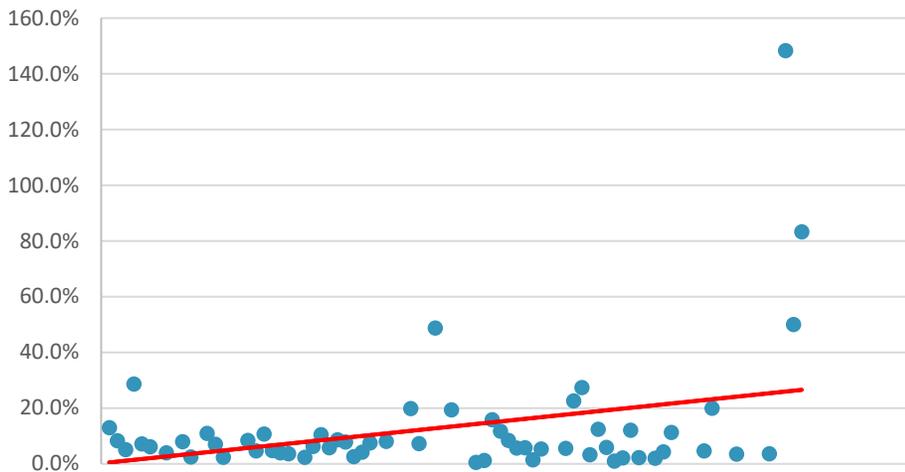
Senior Admission Price



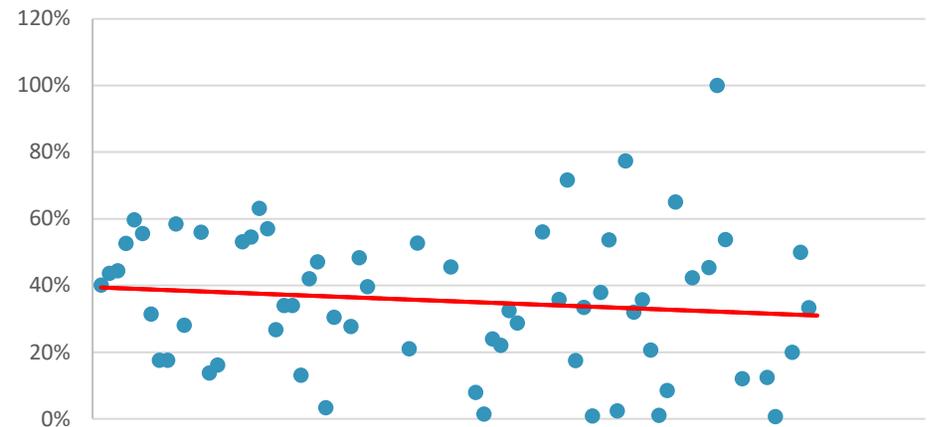
# SCATTER PLOTS

**Member conversion is lower among higher attendance organizations, which suggests high attendance organizations increase their attendance by expanding their audience (less likely to be a member). Member visitation as a percentage of attendance is higher among higher attendance organizations.**

Member Conversion (HH as % of Attendance)



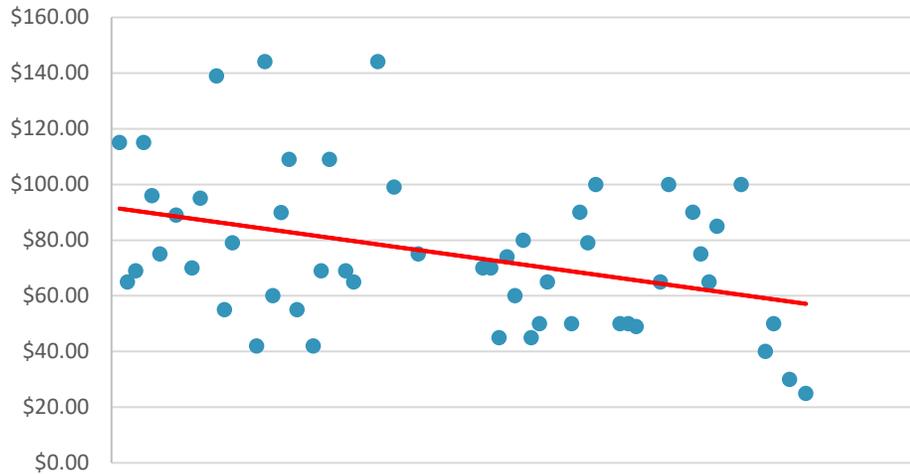
Member Visitation (Members as % of Attendance)



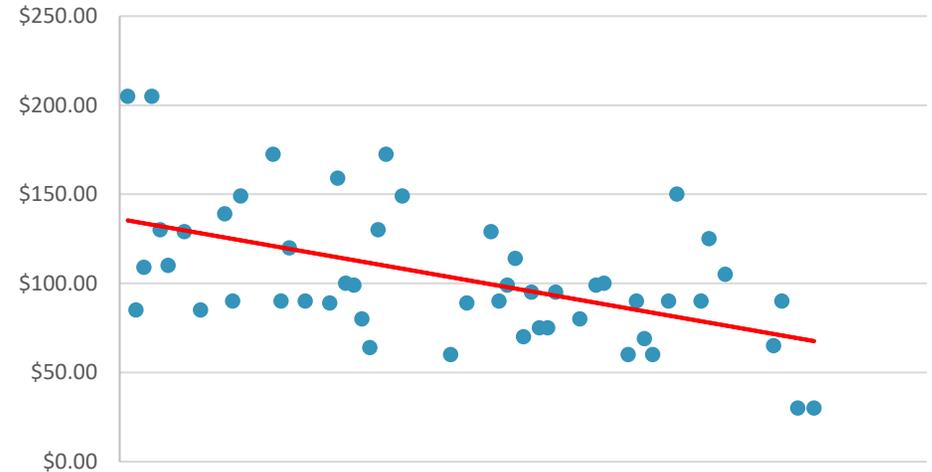
# SCATTER PLOTS

Organizations with higher attendance also charge more for membership, which correlates with higher admission fees.

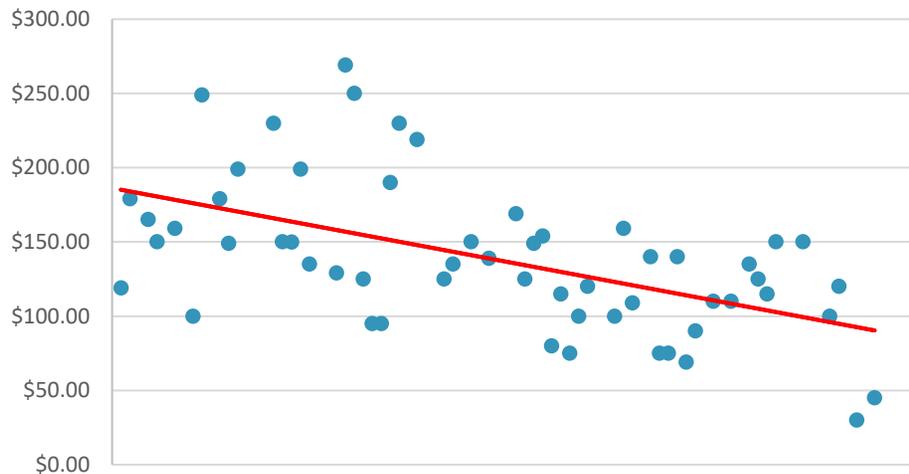
### Individual Membership Price



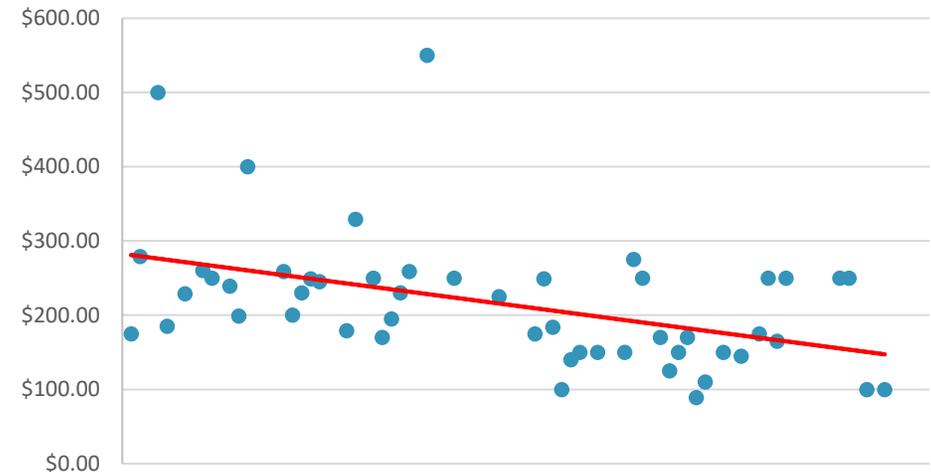
### Dual Membership Price



### Family Membership Price



### Premium Membership Price



# SCATTER PLOTS

Organizations with higher attendance have lower renewal rates (which suggests their members are less loyal) and spend less per household.





MOREYCONSULTING

DO BETTER. DIG DEEPER.

PUBLISHED BY  
MOREYCONSULTING  
©2020