CULTURAL ATTRACTION ATTENDANCE REPORT

2006

PREPARED BY:

MOREY GROUP

Strategic Direction For Cultural Attractions

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I BACKGROUND AND APPROACH

Morey Group is a national market research and consulting firm specializing in the unique needs of non-profit cultural attractions. We conduct surveys, focus groups, audience segmentation, and branding studies of visitors, potential visitors, and members. We have worked with more than 120 non-profit cultural attractions throughout the country. As a service to the cultural attraction industry, we conduct the Annual Cultural Attraction Attendance Report. This report provides information on attendance, membership, capital expenditure, and admission price trends among cultural attractions throughout the U.S.

This year 843 surveys were mailed to museums, zoos, aquariums, and botanical gardens. Surveys were mailed to institutions that vary by geography, operating budgets, and attendance. 140 institutions participated for a 17% response rate.

Surveys were entered into SNAP Survey Tabulation Software and results were analyzed with SNAP and EXCEL.

II PARTICIPANTS

Abilene Zoological Gardens
American Visionary Art Museum
Aquarium of the Pacific
Art Institute of Chicago
Audubon Aquarium of the Americas
Audubon Zoo
Austin Children's Museum
Autry National Center
Baton Rouge Zoo
Bramble Park Zoo
Brookfield Zoo
Brookgreen Gardens
Brooklyn Botanic Garden
Buffalo Bill Historical Center
Cabrillo Marine Aquarium
Caldwell Zoo
Calvert Marine Museum
Carnegie Museum of Art & Natural History
Central Florida Zoological Park
Charles Paddock Zoo
Charleston Museum
Chattanooga Zoo
Cheyenne Frontier Days Old West Museum
Children's Museum of Denver
Children's Museum of Portsmouth
Children's Museum of South Carolina
Children's Museum of the Low Country
Chrysler Museum of Art
Cincinnati Art Museum
Cincinnati Zoo & Botanical Gardens
Clark County Historical Society
Columbus Zoo and Aquarium
Corning Museum of Glass
Crow Collection of Asian Art
David Traylor Zoo of Emporia
Dickerson Park Zoo
Discovery Museum
Entergy IMAX Theater
Fairchild Tropical Botanic Garden
Flandrau Science Center
Florida Aquarium
Fort Wayne Children's Zoo
Fresno Metropolitan Museum
Green Hill Center for North Carolina Art
Guggenheim Museum
Holden Arboretum
Hutchinson Zoo
Institute of Contemporary Art, Boston
International Center of Photography
Jack S. Blanton Museum of Art
John and Mable Ringling Museum of Art
John F. Kennedy Library & Museum
Lincoln Children's Zoo
Lincoln Park Zoo
Little Rock Zoological Gardens
Long Island Children's Museum
Louisville Zoological Garden
Maine State Museum
Meadows Museum of Art
Memphis Zoo
Miami MetroZoo
Milwaukee Art Museum
Milwaukee County Zoological Gardens
Milwaukee Public Museum
Minnesota Zoo
Minnetrista
Monterey Bay Aquarium
Museum of Arts & Design
Museum of Contemporary Art Chicago
Museum of Contemporary Art Cleveland
Museum of Contemporary Art San Diego
Museum of Modern Art
Museum of the Red River
Nashville Zoo
National Aquarium in Baltimore
National Watch and Clock Museum
Natural History Museum of Los Angeles County
New Mexico Department of Cultural Affairs
New Orleans Museum of Art
New York Hall of Science
Nicolaysen Art Museum & Discovery Center
North Carolina Aquarium at Fort Fisher
North Carolina Aquarium Pine Knoll Shores
North Carolina Maritime Museum
North Carolina Museum of Art
North Carolina Zoo
Norton Simon Museum of Art
Oregon Zoo
Parrot Jungle Island
Peabody Essex Museum
Peoria Zoo
Petersen Automotive Museum
Philadelphia Museum of Art
Pima Air & Space Museum
Please Touch Museum
Plimoth Plantation
Point Defiance Zoo & Aquarium
Port Discovery

Portland Museum of Art
Pueblo Grande Museum
Pueblo Zoo
Reid Park Zoo
Riverbanks Zoo and Garden
Rockwell Museum of Western Art
Roger Williams Park Zoo
Roosevelt Park Zoo
Sacramento Zoo
San Diego Natural History Museum
San Diego Zoo/Wild Animal Park
San Francisco Museum of Modern Art
San Francisco Zoo
Seattle Aquarium
Sedgwick County Zoo
Shark Reef
South Carolina Aquarium
South Carolina Cotton Museum
Space Center Houston
Space Needle
Spartanburg County Museum of Art
St. Louis Zoo
State Museum of Pennsylvania
Staten Island Children's Museum
Strawberry Banke Museum
Tallahassee Museum of History & Natural Science
Tennessee Aquarium
The Contemporary Jewish Museum
The Henry Ford
The Morgan Library and Museum
The Museum of Art and History at the McPherson Center
The Sandbox
The Santa Barbara Botanic Garden
The Tech Museum of Innovation
The Wilds
Tracy Aviary
US Space & Rocket Center
Virginia Aquarium & Marine Science Center
Virginia Discovery Museum
Waukesha County Historical Society & Museum
Wildlife Experience Museum
Woodland Park Zoo
ZEUM
Zoo Atlanta

III KEY RESULTS

Museum and Zoo attendance increased while Aquarium attendance decreased. The decrease in Aquarium attendance is due to the impact of Hurricane Katrina on the Audubon Aquarium of the Americas. Factoring out the Aquarium, attendance actually increased.

By facility, aquariums have the highest average visitation followed by zoos.

The average museum adult admission price has increased 74% since 1998. Museums have the lowest adult admission price.

Zoos have the lowest percentage of general admission attendance and highest percentage of member visitation. This is typically due to zoos being visited by a higher percentage of local residents.

The average zoo adult admission price has increased 73% since 2002. Zoos' adult admission price is slightly higher than museums.

Aquariums capture the highest percentage of general admission attendance and the lowest percentage of member attendance. This is due to aquariums being visited by a higher percentage of tourists.

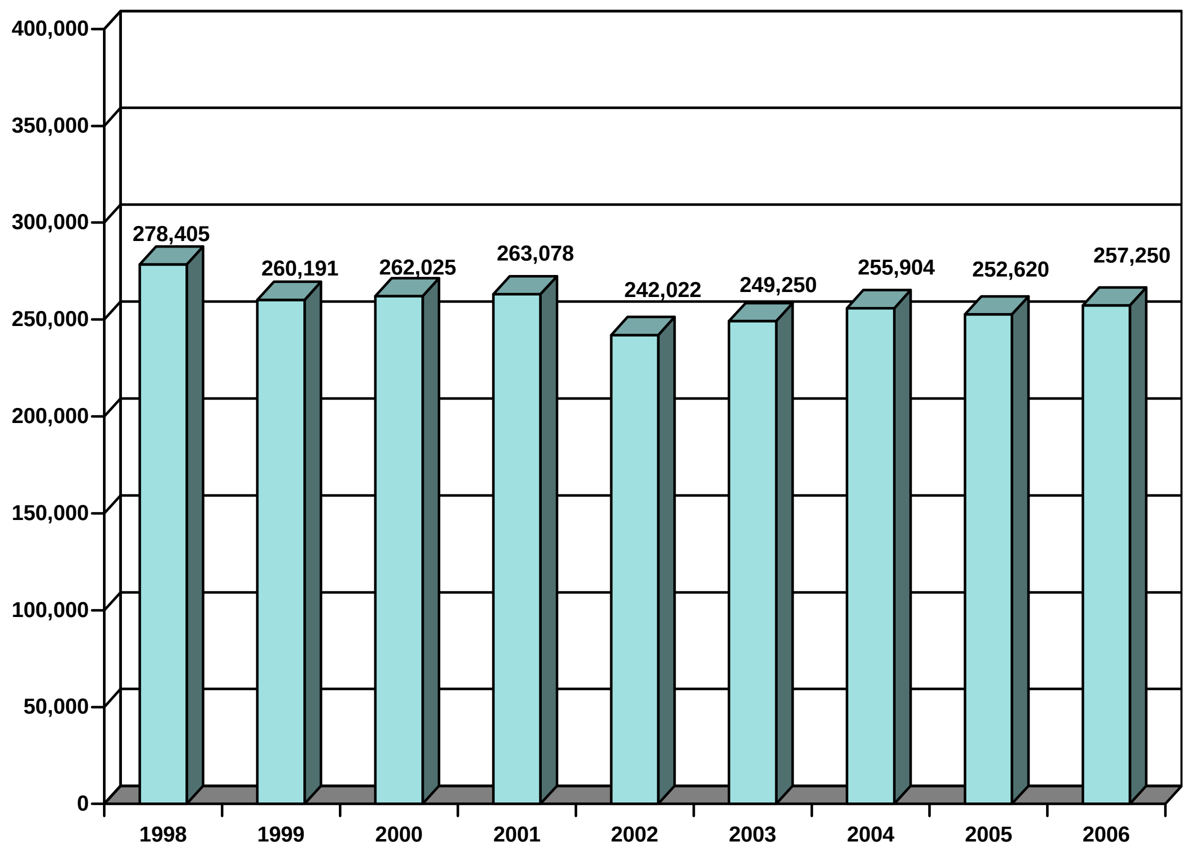
The average aquarium adult admission price has increased 9% since 2002. Aquariums have the highest average adult admission price; 64% higher than museums, and 51% higher than zoos.

MUSEUMS

Total Attendance

Figure 1

AVERAGE MUSEUM ATTENDANCE



The graph indicates average attendance increased 1.8%. Though the aggregate reflects the total of all participating museums, we saw the average increase in attendance per participating museums was higher at 4.6%.

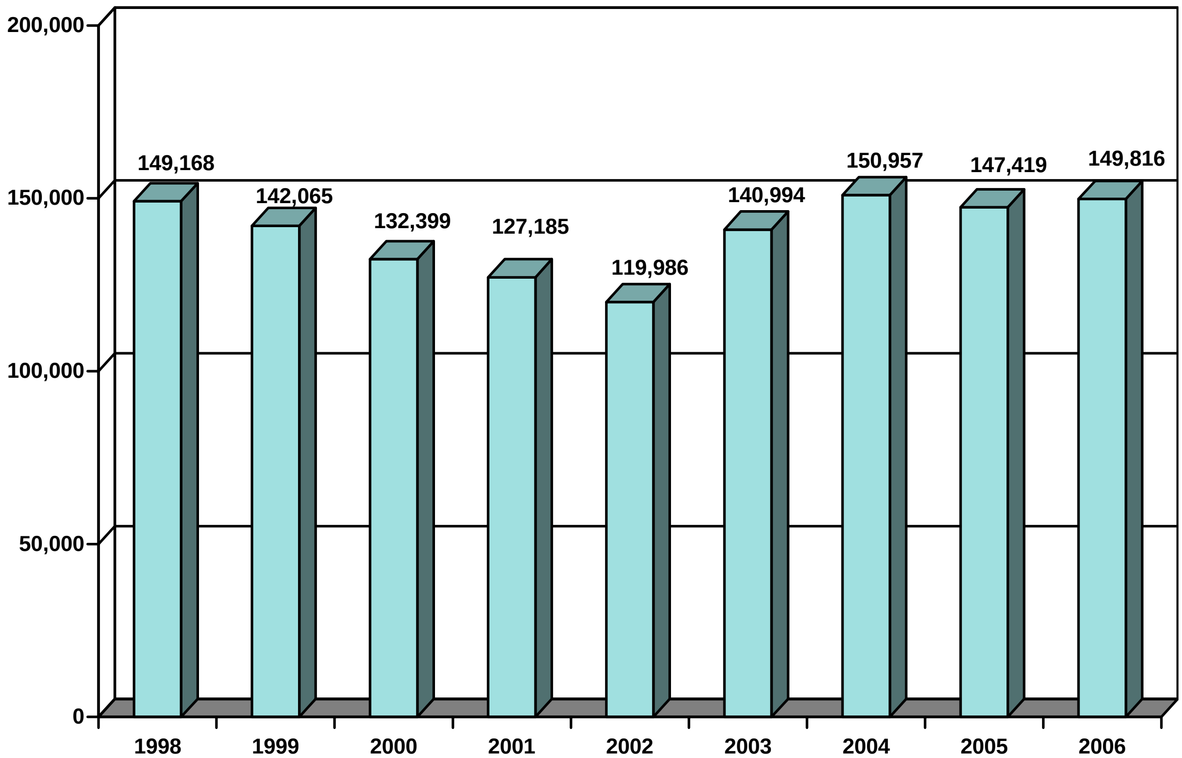
Attendance decreased by more than 1% at 27% of participating museums and attendance increased by more than 1% at 61% of participating museums. This indicates more than twice as many museums' attendance grew in 2006.

40% of surveyed museums have attendance of 100,000 or less, 28% have attendance of 100,001 to 250,000, 22% have attendance of 250,001 to 500,000 and 11% have attendance of more than 500,000.

General Admission Attendance

Figure 2

AVERAGE GENERAL ADMISSION MUSEUM ATTENDANCE

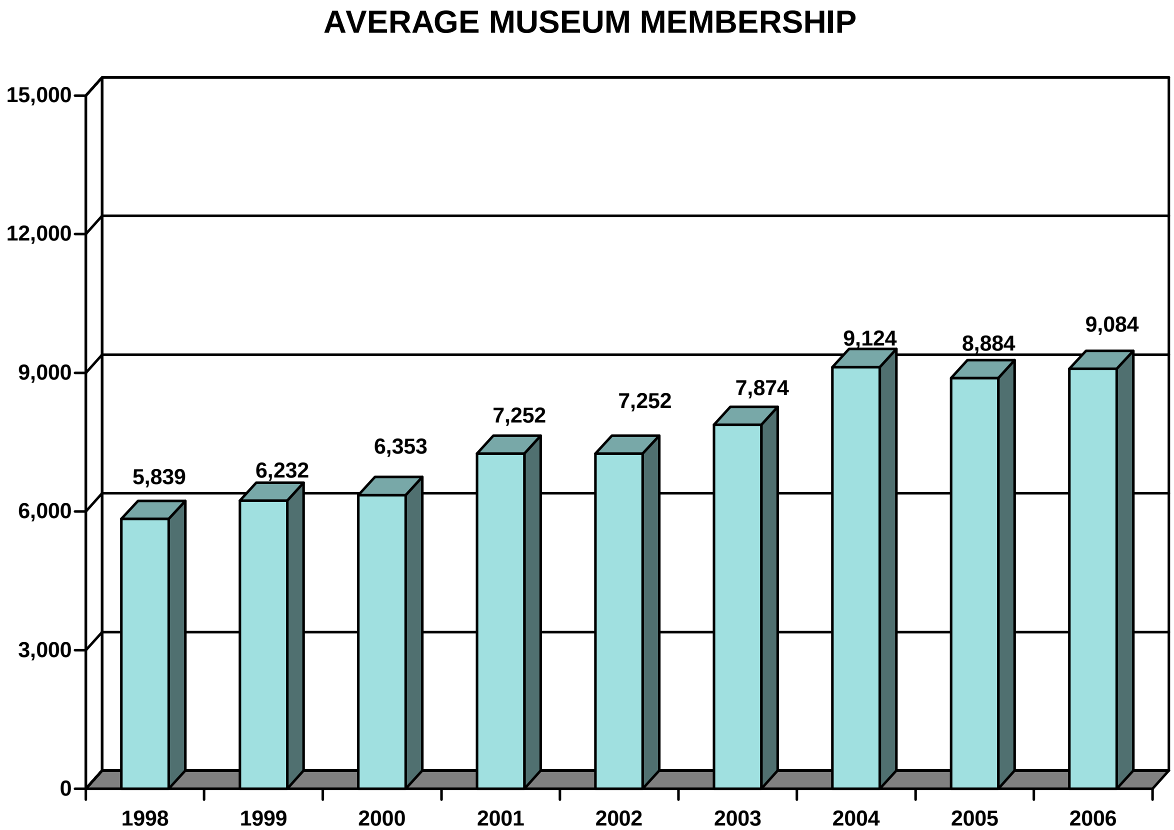


The graph indicates average general admission attendance increased 1.6%. Though the aggregate reflects the total of all participating museums, we saw the average increase in attendance per participating museums was higher at 5.6%.

These graphs indicate 58% of attendance is general admission. In the last 4 years, this percentage has fluctuated between 57% and 59%. During 2000 to 2002, this percentage ranged between 48% and 51%. These results suggest museums are capturing a greater percentage of admission revenue from visitors.

Membership

Figure 3

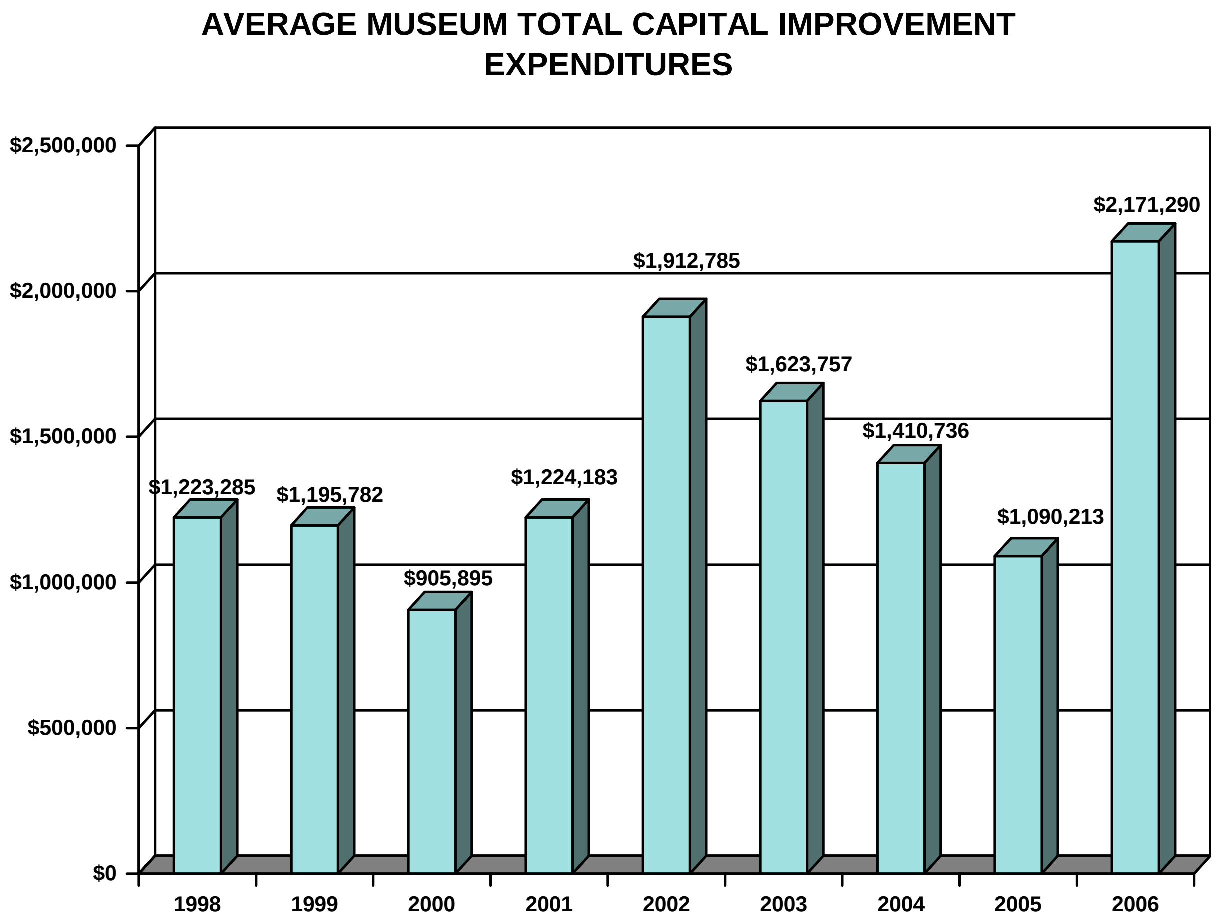


Average membership increased 2.2%. Membership appears to have stabilized after significant growth between 2000 and 2001 and between 2003 and 2004.

According to our Member Benchmark Survey Report, the average number of visits a member makes in a 12 month period is 4.5. If we multiply 4.5 by the average number of members we see that members average 40,878 visits which represents 16% of attendance. This percentage is similar to results we have seen in our clients' on-site visitor surveys.

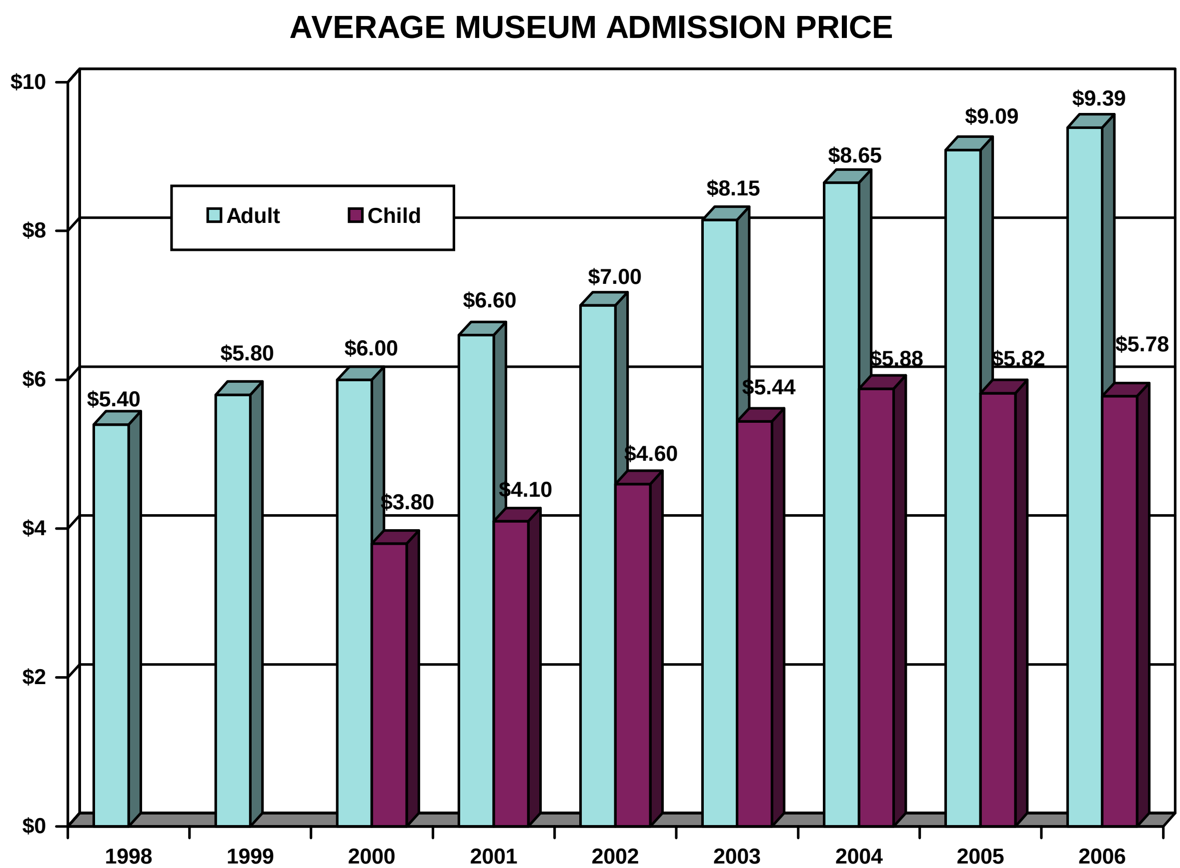
Capital Expenditures

Figure 4



Admission Price

Figure 5



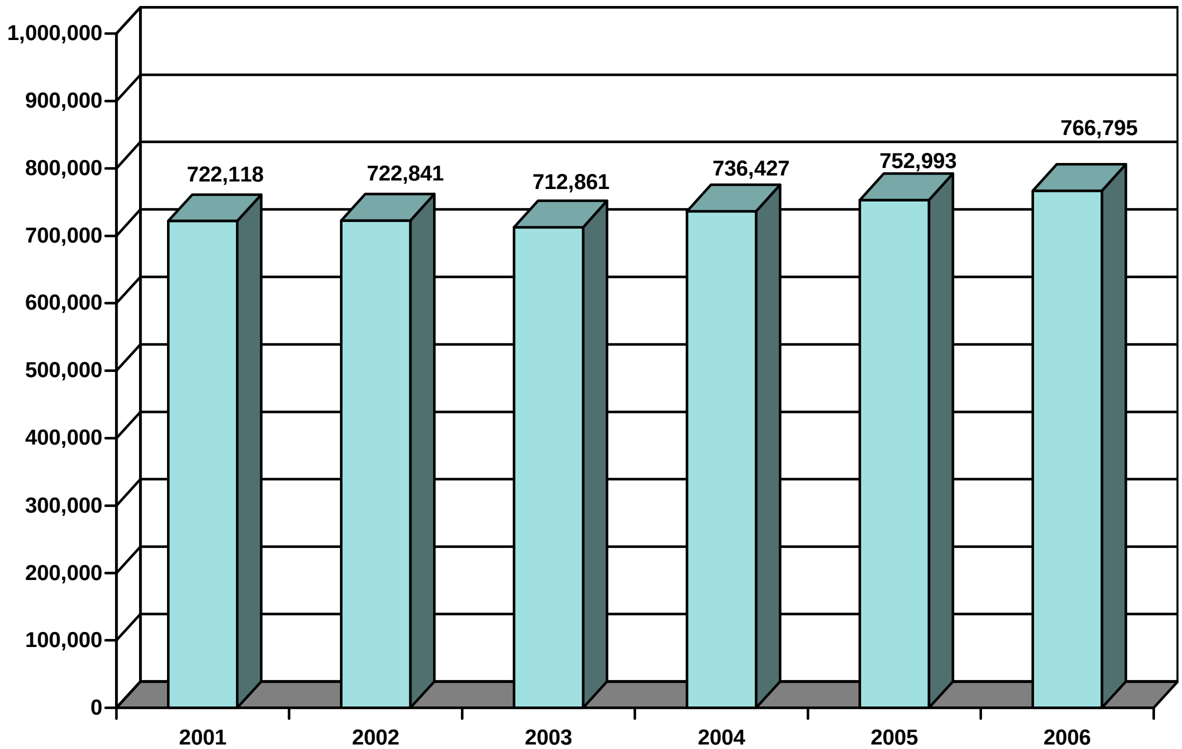
The average admission price continues to increase at a rather significant rate. Since 1998, average admission has increased 74%. Though this increase is significant and reflects a greater need for museums to increase revenue from attendance, we feel museums continue to be a great value and could bear continued price increases.

ZOOS

Total Attendance

Figure 6

AVERAGE ZOO ATTENDANCE



The graph indicates average attendance increased 1.8%. Though the aggregate reflects the total of all participating museums, we saw the average increase in attendance per participating zoos was lower at 0.8%.

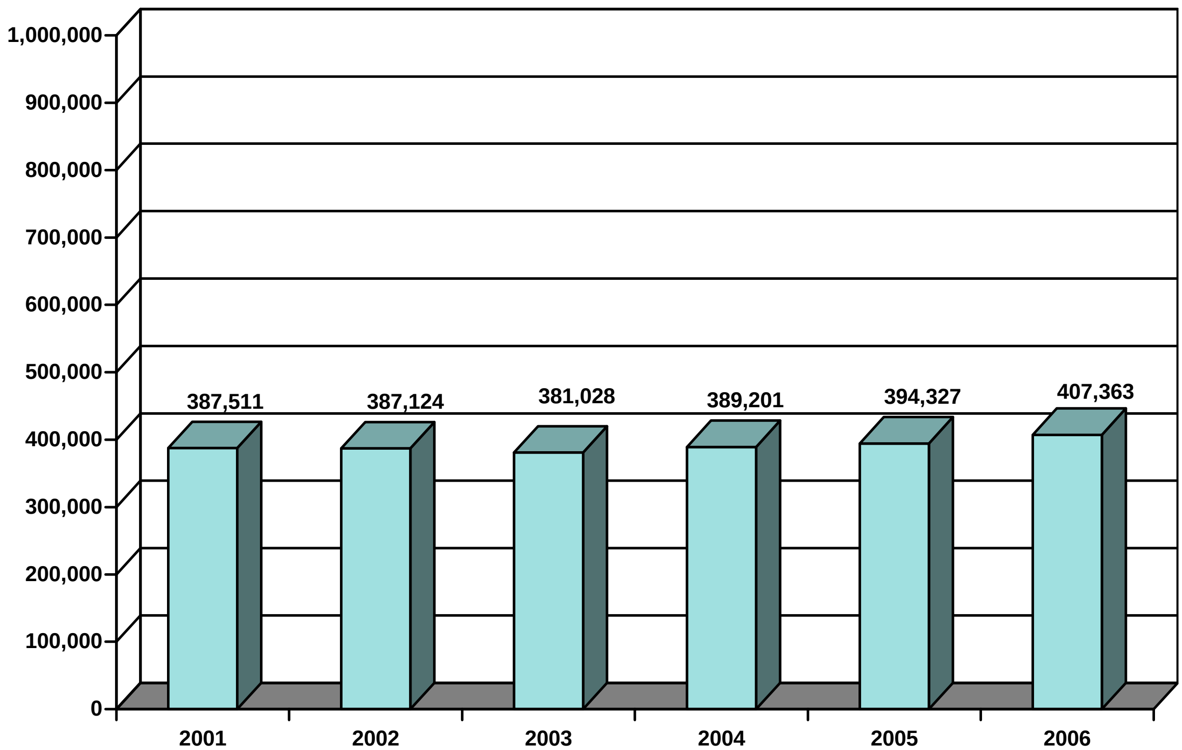
Attendance decreased by more than 1% at 24% of participating zoos and attendance increased by more than 1% at 41% of participating zoos.

16% of surveyed museums have attendance of less than 100,000, 21% have attendance of 100,000 to 299,999, 21% have attendance of 300,000 to 599,999, 16% have attendance of 600,000 to 999,999, and 26% have attendance of 1,000,000 or more.

General Admission Attendance

Figure 7

AVERAGE GENERAL ADMISSION ZOO ATTENDANCE



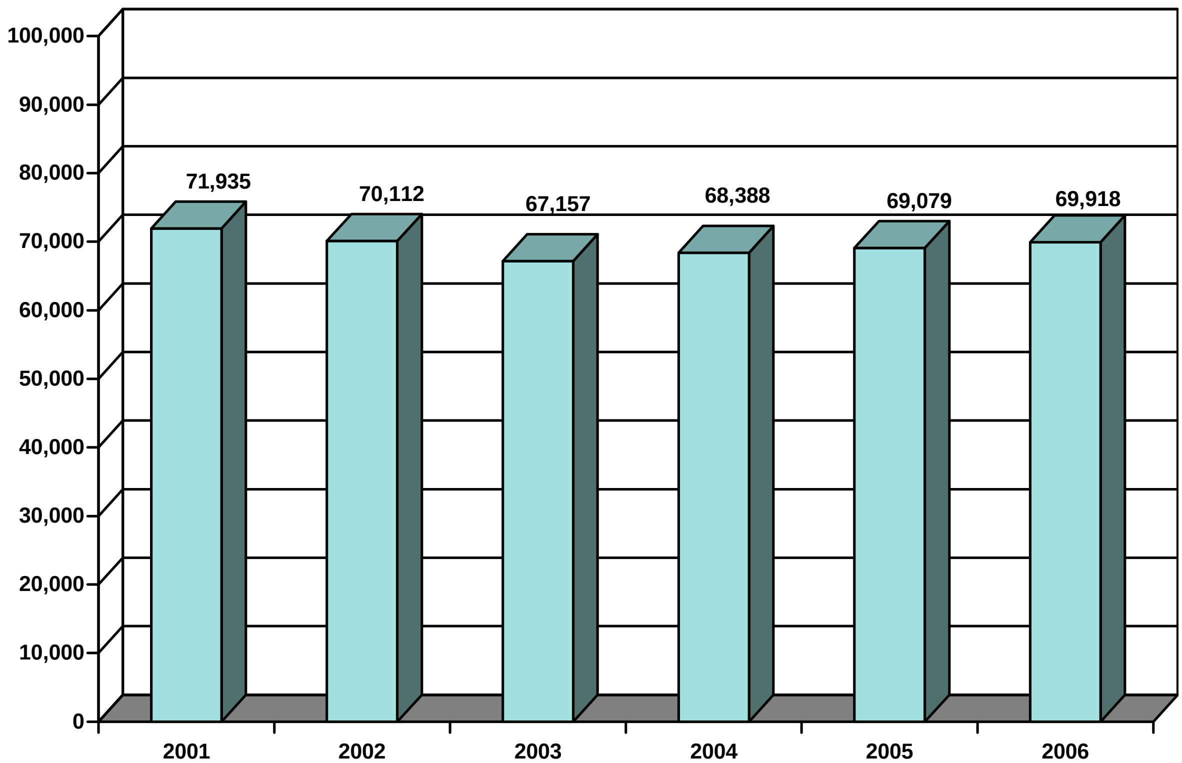
The graph indicates average general admission attendance increased 3.2%. Though the aggregate reflects the total of all participating museums, we saw the average increase in attendance per participating zoos was lower at 0.2%.

These graphs indicate 53% of attendance is general admission. In the last 4 years, this percentage has fluctuated between 52% and 54%.

Membership

Figure 8

AVERAGE NUMBER OF ZOO MEMBERS

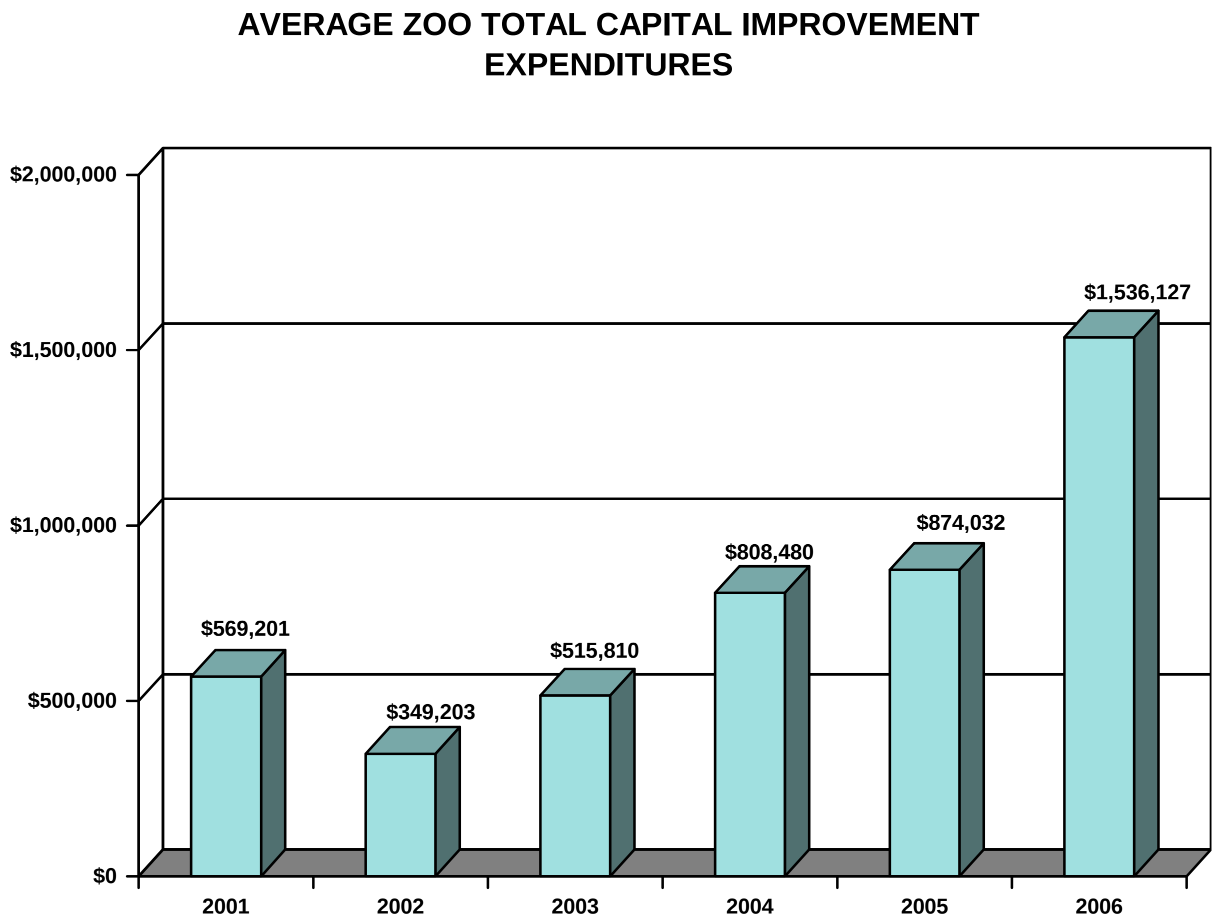


As a whole, the average membership increased 1.2%. At individual zoos, the average increase was 2.0%.

According to our Member Benchmark Survey Report, the average number of visits a member makes in a 12 month period is 4.5. If we multiply 4.5 by the average number of members we see that members average 314,631 visits which represents 41% of attendance.

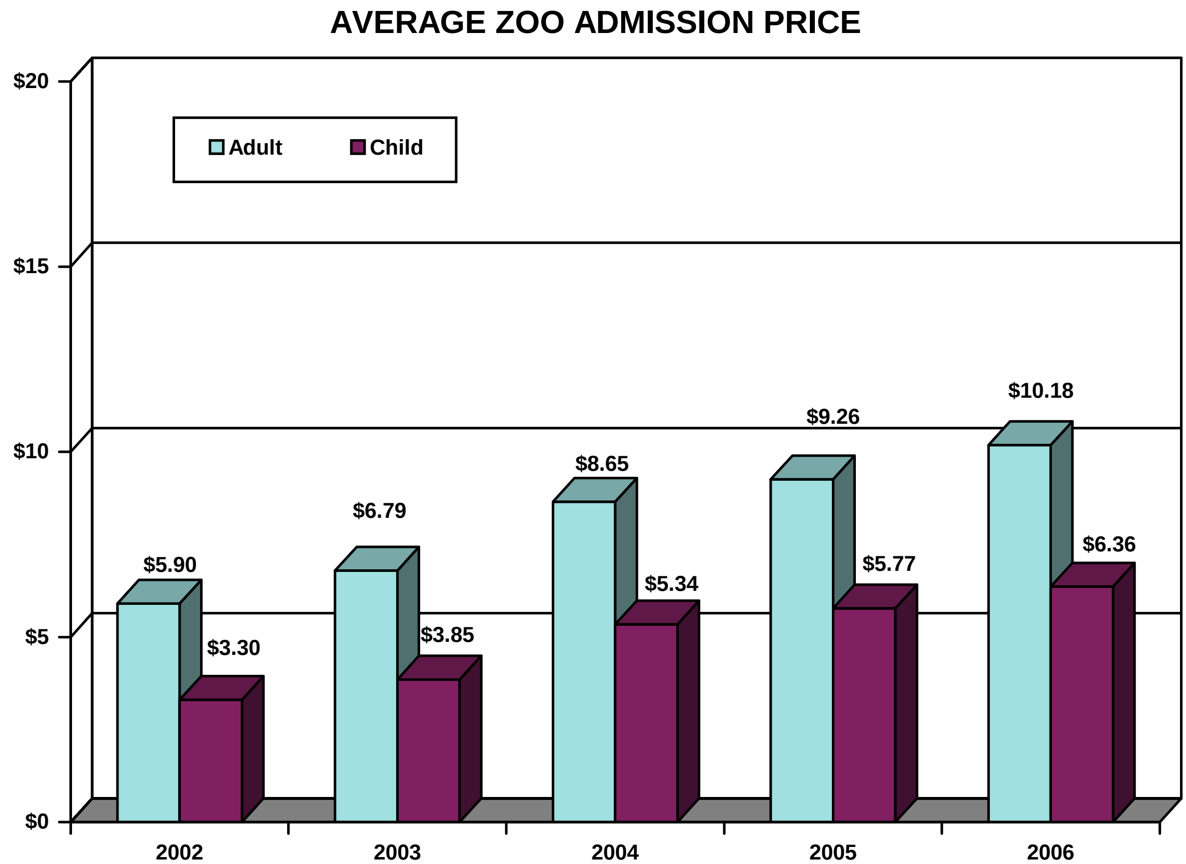
Capital Expenditures

Figure 9



Admission

Figure 10



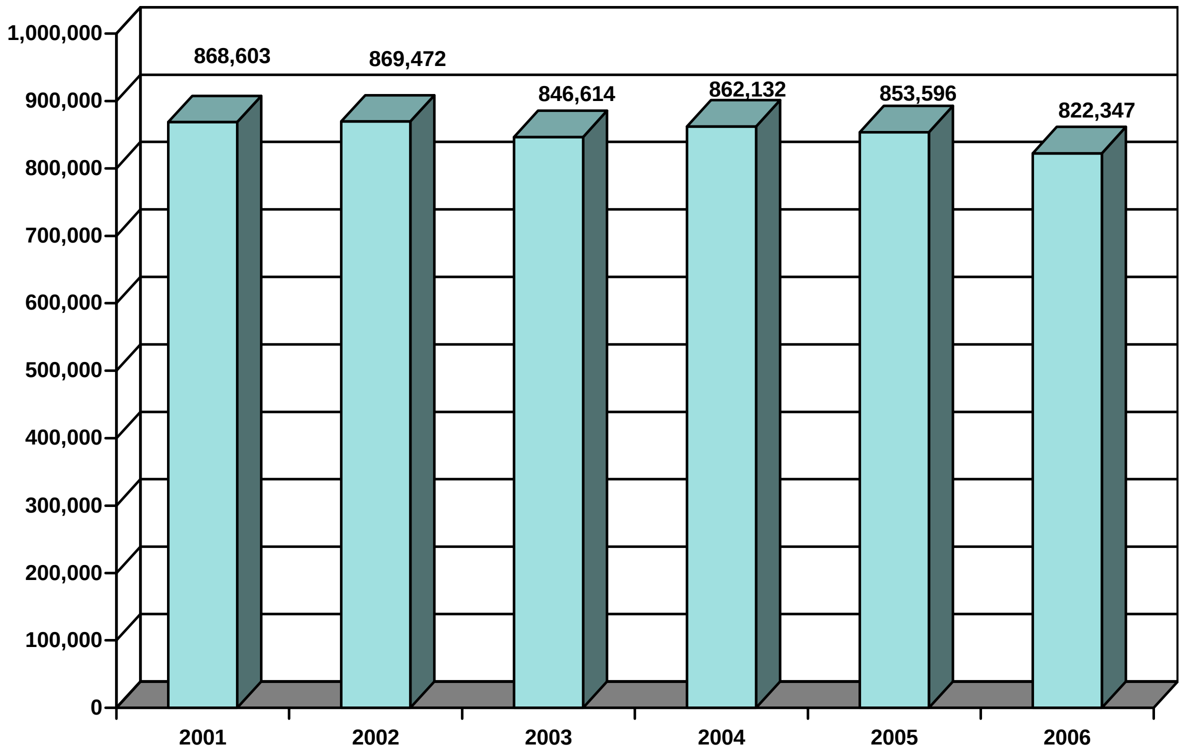
The average admission price has increased significantly. Our Benchmark Survey Report indicates the average length of stay at a zoo is 3.5 hours, which is nearly twice the average length of stay at a museum. Both are similarly priced.

AQUARIA

Total Attendance

Figure 11

AVERAGE AQUARIUM ATTENDANCE



The graph indicates average attendance decreased 3.7%. The decrease was due in part to the impact of Hurricane Katrina on the Audubon Aquarium of the Americas. Due to the fact there are significantly fewer aquariums than museums or zoos, the impact of one aquarium on an average is much greater. Factoring out the Audubon Aquarium of the Americas, overall attendance actually increased 1.9%.

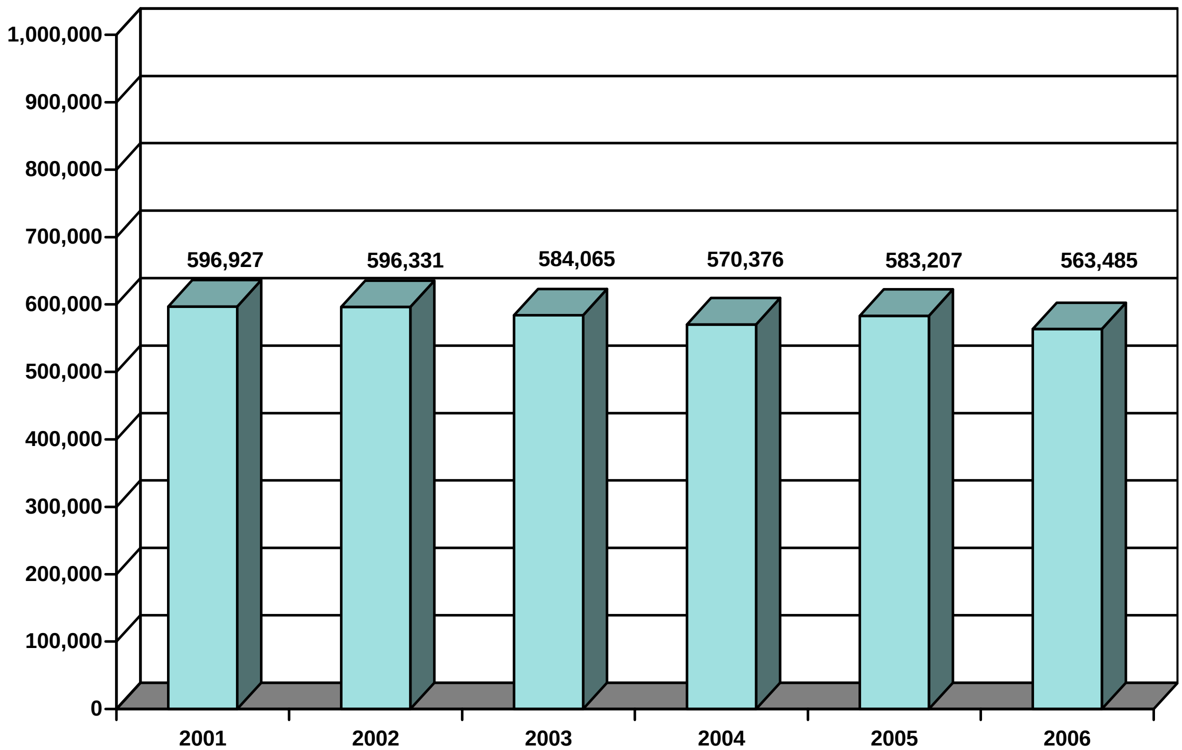
Attendance decreased by more than 1% at 43% of participating aquariums and attendance increased by more than 1% at 29% of participating museums.

33% of surveyed aquariums have attendance of less than 500,000, 33% have attendance of 500,000 to 999,999, and 33% have attendance of more than 500,000.

General Admission Attendance

Figure 12

AVERAGE GENERAL ADMISSION AQUARIUM ATTENDANCE

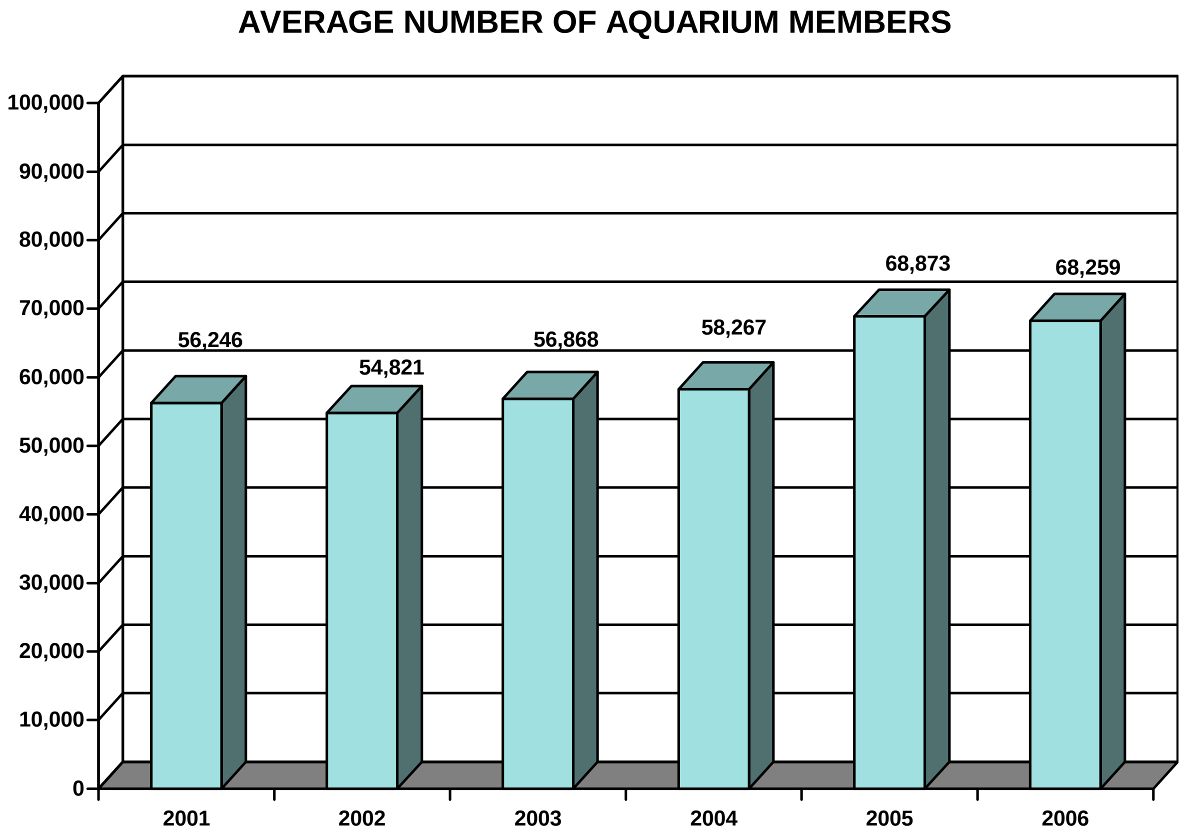


The graph indicates average general admission attendance decreased 3.5%. Factoring out the Audubon Aquarium of the Americas, overall attendance actually increased 3.7%.

These graphs indicate 69% of attendance is general admission. In the last 4 years, this percentage has fluctuated between 66% and 69%.

Membership

Figure 13

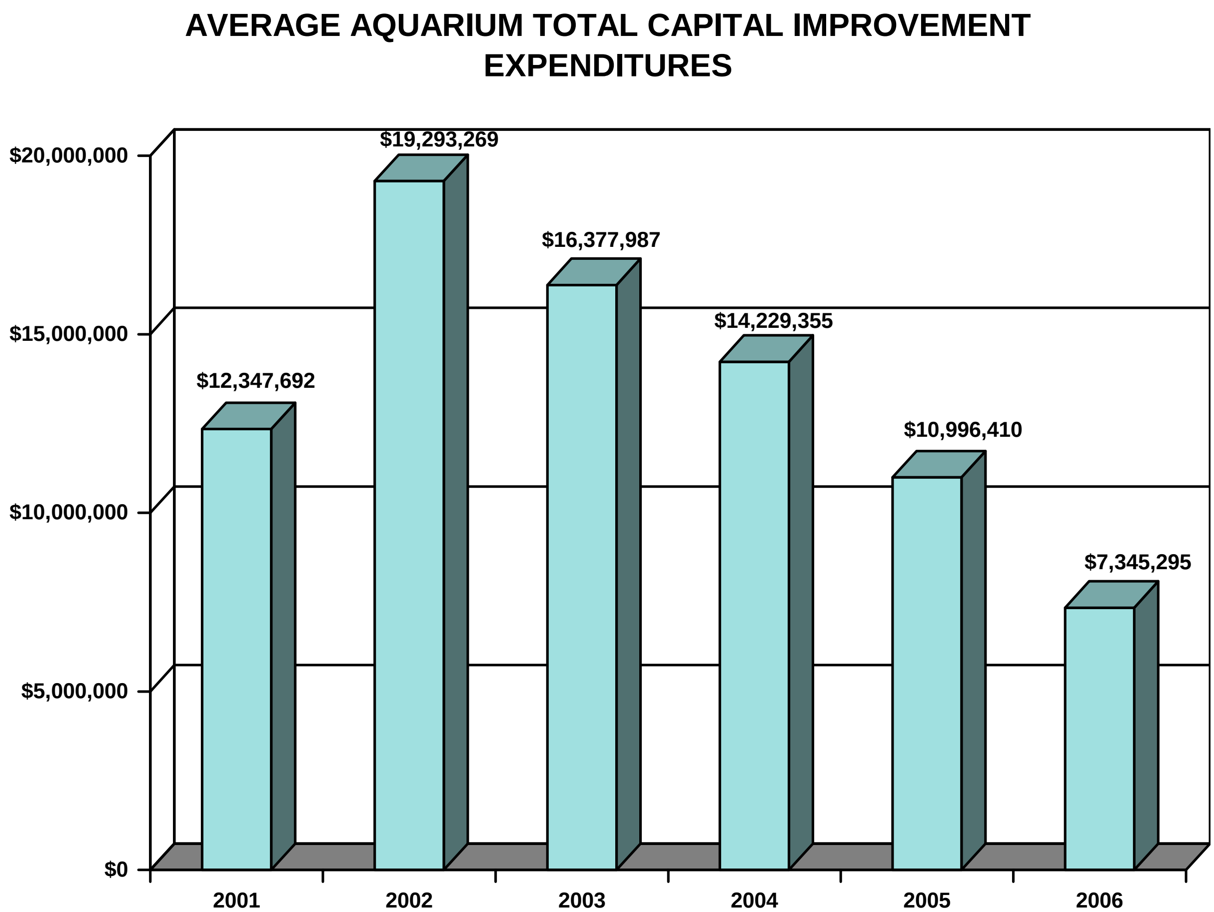


Even though there was a decrease in attendance, membership remained virtually the same.

According to our Member Benchmark Survey Report, the average number of visits a member makes in a 12 month period is 3.0. If we multiply 3.0 by the average number of members we see that members average 204,777 visits which represents 25% of attendance. This percentage is higher than normal due to a decrease in attendance and no change in membership.

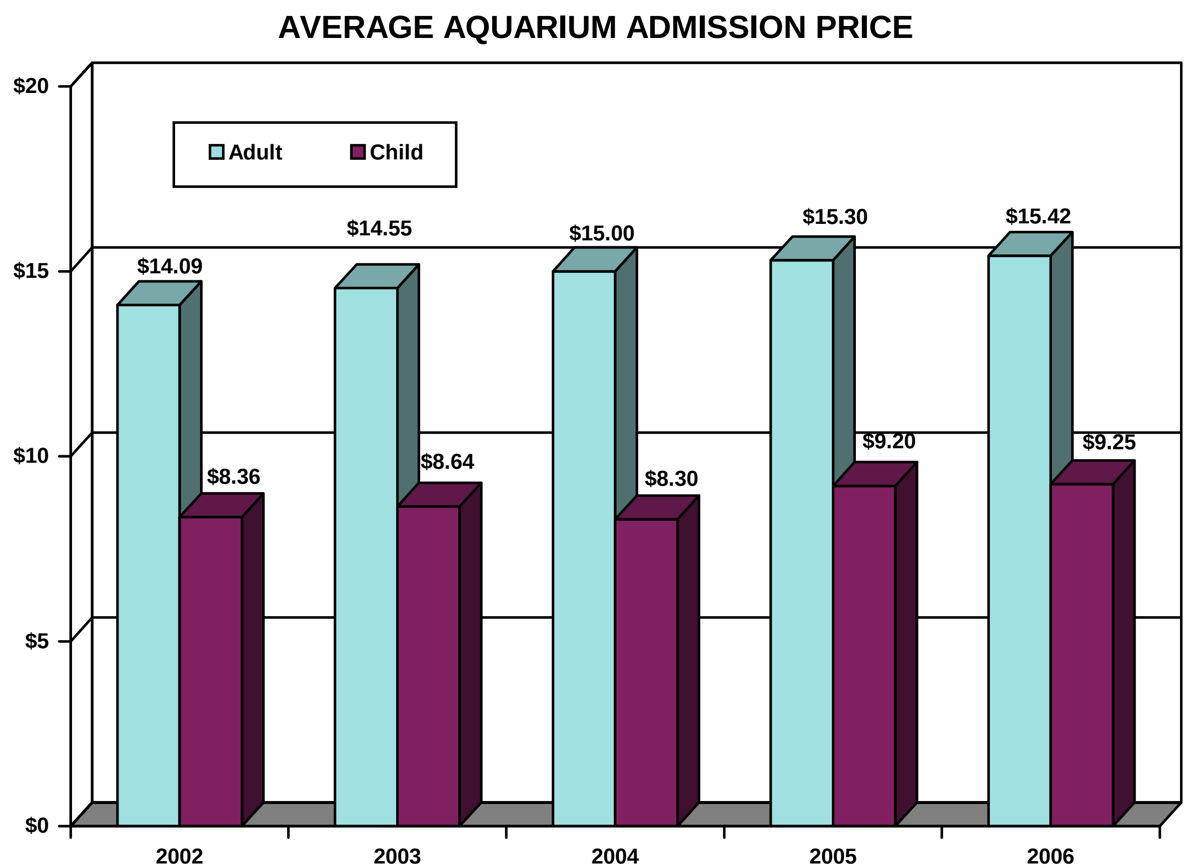
Capital Expenditures

Figure 14



Admission Price

Figure 15



Aquaria continue to be the most expensive cultural attractions. Concurrently, our Benchmark Survey Report indicates they receive the lowest admission value ratings but overall satisfaction ratings are similar to museums and zoos. This suggests aquaria are maximizing their gate revenue without sacrificing overall satisfaction ratings.

2006 CULTURAL ATTRACTION ATTENDANCE REPORT

REGISTRATION FORM

Name:

Title:

Organization:

Address:

Email:

Telephone:

	2005	2006
TOTAL ATTENDANCE	__________	___________
GENERAL ADMISSION ATTENDANCE	_________	_________
TOTAL NUMBER OF MEMBERSHIPS* *(MEMBERS, NOT HOUSEHOLDS)*	_________	_________
TOTAL CAPITAL IMPROVEMENT EXPENDITURES *(INDICATE N/A IF INFORMATION NOT AVAILABLE)*	$________	$________
ADULT ADMISSION PRICE	$________	$________
CHILD ADMISSION PRICE	$________	$________

Please fax to Morey Group at 843.723.7299 by March 2, 2007. Feel free to contact us at 800.824.4795 or kari@moreygroup.com with any questions.

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