

**COLD WAR MUSEUM:  
MARKET ANALYSIS**

**Prepared for:  
The Cold War Museum  
Fairfax, Virginia**

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## **EXECUTIVE SUMMARY**

The Cold War Museum is currently a collection of artifacts, documents, books, and manuscripts and traveling exhibits. It seeks a permanent home in which to display and grow its collection, conduct research activities, and develop educational materials. This study is an initial assessment of the market potential for the Cold War Museum, including an examination of the performance of competing and comparable museums and an evaluation of the impact of the specific physical location of the Museum on visitation potential.

### **Market Factors**

- The Washington Metropolitan Area has a rapidly growing resident population to support a new museum. The population in the primary and secondary market area is anticipated to grow from 4.34 million in 2000 to 5.57 million in 2020.
- Virginia, Maryland, and Washington DC already have 878,000 children in the age groups most likely to visit the Museum for educational purposes. This number will continue to increase.
- Visitors to Virginia museums tend to be well-educated, high in income, and to have an average age (51.5) that is appropriate for an interest in the Cold War as a museum visit topic.
- Visitors to the Metropolitan Washington area are primarily from east coast cities such as New York, Baltimore and Philadelphia, with relatively easy access to any location in the Washington area. Since they are most likely driving or arriving at Reagan National Airport, these visitors can visit a Cold War Museum just as easily at Lorton as in downtown Washington.
- Although the number of leisure travelers to Washington is down from 1998 highs and about even with the levels experienced in 2000, an improving economy and increased consumer confidence in the next two to three years will translate to increasing numbers of leisure visitors. The negative impact of the 2001 terrorist attacks on leisure travel to Washington will become attenuated over time.
- The top four countries sending international visitors to the Washington area are Canada, the United Kingdom, Germany, and France. These visitors would have exposure to the Cold War from their countries' participation in it, and from the existence of Cold War sites. Japan ranks fifth, and its visitors are likely to be interested in Cold War history as well. Consequently, visitors from these countries constitute an additional market, although of lesser importance than other market segments simply because many are on business travel and have little time for leisure pursuits.
- School groups are a key market segment. Area school systems have educational units on the Cold War in 10<sup>th</sup>, 11<sup>th</sup>, and 12<sup>th</sup> grades. In Virginia, compliance with Standards of Learning (SOL) guidelines means that teachers will have an interest in a Museum whose exhibits complement SOL items. However, since the Cold

War is studied late in the school year (usually May), the Museum will have to find ways to get students and teachers interested more evenly throughout the year.

### **Competitive Factors**

- The Washington area has a large number of museums offering exhibits and educational programs on almost any conceivable subject. Washington area residents benefit greatly from the richness of the offerings and tend to see a museum visit as an exciting weekend or leisure time activity.
- The Cold War is a subject that has generally not been treated in Washington area museums to date, other than in a few museums with restricted access.
- Levels of visitation at Washington area museums depend on the quality of attractions, the museum's location, its admissions price, its marketing program, and the extent of the market area population and visitor market. Annual visitation ranges from 9 million at the National Air and Space Museum down to 30,000 at the Textile Museum, Marine Corps Museum, or Anacostia Museum.
- Military museums in the Washington area attract up to 400,000 (Navy Museum and projected levels for the Marine Corps Museum). More common are military museums that treat a specialized aspect of military history, with attendance levels of 50,000 to 80,000.
- The International Spy Museum has exceeded its initial attendance projection of 500,000 and appears on track to reach 700,000 visitors in its initial year of operation. Success factors include a strong marketing program, high quality exhibits, a presence in a newly-chic part of Washington, and proximity to Metro.
- Planned suburban museums include the Air and Space Museum Annex at Dulles Airport (with forecast annual visitation of 3 million), the Marine Corps Museum at Quantico (379,000 visitation forecast); the Science Center at Belmont Bay (750,000); and the National Museum of the US Army (1 million estimated, but without a market study). These museums each aim to be state-of-the-art or even groundbreaking in exhibit design, and have fundraising programs of \$50 to \$80 million or more.
- Currently, more than 25 new museums are in various stages of planning, fundraising, or construction in the Washington area. Of these, possibly six could have some overlap in subject matter with the Cold War Museum. All could be competition for start-up funds.

### **Market Potential for the Cold War Museum**

- Based on the resident market population and the visitor market, a Cold War Museum with fully-developed exhibits, a spacious site, and complementary attractions, could achieve visitation of up to 350,000. This would be supplemented by international visitors, school groups, and Cold War buffs and researchers, for a total visitation of up to 400,000.

- A review of museums with relatively low, average, or high visitation reveals what the Cold War museum would have to do to reach each of these levels. Museums with visitation of 30 to 90,000 include the Titan Missile Museum in Arizona, the current Marine Corps Museum in Quantico and the Cryptology Museum at Ft. Meade. These have relatively difficult access, treat a very specific subject, and feature generally static displays.
- In the average category are museums with broader subjects and a greater percentage of non-static exhibits, including some complementary attractions such as films, restaurants and gift shops, and a program of special events. The National Building Museum, Harpers Ferry, and Nauticus (Norfolk) are in this group, with attendance ranging from 150,000 to 400,000 visitors annually.
- High performing museums require state of the art exhibit techniques, broad ranging collections, large hardware items for outdoor display, a large subscriber/member base, and strong marketing programs.
- The Cold War Museum in its early years would likely function at the low visitation levels (beginning at about 30,000 visitors and increasing to 75,000 as the collection increases). To reach the next level, the Museum would have to greatly increase the strength of its collection, develop a membership base, acquire corporate sponsors, and launch an extensive marketing program to include special events programming.

### **Impact of Site Location**

- A location that allows room for expansion is preferable to a more constrained location that the Museum would have to move out of in three to five years.
- The proposed site at Lorton offers the advantages of room to grow the exhibits, an existing historical association with the Cold War, room for parking lots and events, and the opportunity to offer joint programming and marketing with the emerging attractions of the Army Museum, the Marine Corps Museum, the Belmont Bay Science Museum, the Workhouse Arts Center and planned Prison Museum and Community Heritage Center at Lorton, and the existing attractions at Mount Vernon and area historic homes. It also will be an easier location for the school buses of Virginia high school students to reach.
- A Washington DC location near a Metro station would increase the number of casual visitors to the Museum. However, it would have the disadvantage of a relatively higher cost for the exhibit space, and a resulting lack of space for the research and educational functions of the Museum.
- The Lorton site can be accessed via well-traveled Route 123 and the Fairfax County Parkway using local connector roads. Route 123 also provides access to travelers on I-95. The site is also close, though not in walking distance to existing and planned commuter rail stations.
- Given the size of the resident market in Northern Virginia, the prevalence of east coast city origins for visitors and their propensity to drive to attractions, and the appeal of the high school group market in Virginia, a Virginia location would be attractive to the Museum.

## **Recommendations**

- Conduct a museum visitor survey to gauge the specific level of interest in the Cold War as a subject for museum visits and to more specifically identify the age groups, sex, and group size of museum visitors who particularly would want to visit a Cold War Museum.
- Raise initial funds to put together a brochure and fundraising materials.
- Begin an effort to identify and sign up major corporate sponsors to provide the funds for expansion of the collection, development of permanent exhibits at the museum's new home, and initiation of marketing activities.

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## **INTRODUCTION**

The Cold War Museum exists as a collection and traveling exhibits, and with a Board of Directors, but without a permanent physical location. This initial feasibility study evaluates the market potential of a physical facility located in the Washington, DC metropolitan area.

### **The Cold War Museum Concept**

The Cold War Museum is a non-profit organization founded by Francis Gary Powers, Jr. and directed by a Board of Cold War historians, legal experts, and intelligence and Cold War veterans, as well as museum management professionals.

The Museum's mission is to:

- Conduct research on the history of the Cold War
- Document and preserve the history and artifacts
- Promote an understanding of the Cold War through education

The Museum has a permanent collection that includes artifacts, historical documents, books, and manuscripts.

Main exhibit areas as currently conceptualized in a document prepared by the Cold War Museum in March 2003 include, but are not limited to:

- 1946-48, the Coming of the Cold War
- Berlin: 1948/9, 1961, 1989
- Espionage: CIA, KGB, NRO, and other intelligence organizations
- McCarthyism
- Revolt in the East: German 1953, Hungary 1956, Czechoslovakia 1968, Poland 1970
- Cold War POW and MIA stories
- Events and Activities: Nike Missiles, the Space Race, Arms Race, Bomber Gap, Missile Gap, Cuban Missile Crisis, Bay of Pigs, U-2 Incident, solidarity
- 1989-91: End of the Cold War

Features to be included in the Museum in addition to the exhibit halls are:

- film theater or auditorium
- picture gallery
- gallery for temporary or rotating exhibits
- library and study areas
- seminar rooms
- bookshop/gift shop
- café and restaurant

The physical facility in the Washington metropolitan area would be the Museum's headquarters and house the permanent exhibits, research facilities, and offices for the

development of education programs. The Museum intends to establish national and international affiliate museums to enable other states and countries to preserve their Cold War history and honor their veterans, such as the Midwest Chapter museum opened in Chicago, Illinois in 2002.

### **Potential Sites**

Currently under consideration are the former Nike Missile site in Lorton, Virginia, and a site at Dupont Circle in Washington, DC. Other sites may also be considered.

The Nike Missile site contains about 150,000 square feet of building space on about 20 acres of land. It is part of the 3000-acre former federal prison at Lorton, now in the planning stage by Fairfax County for reuse and redevelopment. In the 1950s, the site contained a series of Nike Missile bunkers, which would be upgraded and made a part of the outdoor exhibits of the Cold War Museum. Between 1953 and 1974 it was in active use by the US Department of Defense, then converted by the District of Columbia Department of Corrections to a minimum security and women's facility, with the addition of new dormitories and support buildings that can now be used by the Cold War Museum.

The site's primary advantages are its historical associations and the acreage available for development of the Museum. Among its potential disadvantages are its distance from traditional tourist attractions in the Washington area, focused on downtown Washington and the Mall, or on close-in Alexandria, Virginia and its lack of a Metrorail or convenient public transportation stop. The development of the Marine Corps Museum at Quantico and the Army Museum at Fort Belvoir, along with the success of Mt. Vernon as a tourist attraction, and the planned expansion of commuter services near Lorton could help overcome the potential isolation of the Lorton site.

The Dupont Circle site, in the vacant space under the circle previously used for trolleys and a failed retail food court development, would provide the Museum with access to a Metro station and proximity to other Washington DC tourist attractions. There would be less space available for exhibits (total of 26,000 square feet with a possibly difficult underground configuration), but could be a good starter home for the Museum, until growth of the collection drives a need for more space.

### **THE MARKET FOR A COLD WAR MUSEUM**

The Cold War Museum can expect to attract three types of visitors:

- Washington area residents who go to area museums for fun, to have a weekend destination, or as part of school field trips
- Tourists from the US and international sources, who would include the Museum as part of their travel program
- People with a specific interest in the Cold War who would view their visit to the Museum as the purpose of their trip.



Each of these groups has different characteristics and would be looking for something different in the Museum’s offerings. Each group is analyzed below.

**The Resident Market**

Local and regional residents can be an important source of visitors for the Cold War Museum. The Washington region’s educated and relatively affluent population likes to visit museums and cultural and historical attractions for entertainment. The penetration of the Cold War Museum in this market will depend to the size and quality of the museum exhibit program, competition from nearby attractions, location and ease of access of the museum, and its marketing program.

The resident market is comprised of people who live within a 45-50 minute drive (primary market) to one and a half to two hour drive (secondary market) of the museum. They tend to be repeat visitors, and some even become museum members.

The primary market for a museum located at Lorton would include nine Virginia cities and counties. These visitors live close enough to the Museum site to be able to make casual and spontaneous plans for a visit, and are likely to be familiar with the Museum’s exhibit program and the transportation routes to get to it. The secondary market also includes the District of Columbia, 3 counties in Virginia and three counties in Maryland. Visitors in the secondary market area are within day-trip distance but are more likely to make advance plans to visit the Museum, and may also visit other nearby attractions during the same trip. Table 1 shows the Year 2000 population in the primary and secondary market areas and projections for the Years 2010 and 2020. Appendix table 1 provides more detailed data on the same subject.

**Table 1. Resident Market Area Population, Actual and Projected**

	<b>2000</b>	<b>2010</b>	<b>2020</b>
Primary Market Area	1,899,500	2,279,100	2,557,000
Secondary Market Area	2,445,600	2,720,900	3,009,900
Total	4,345,100	5,000,000	5,566,900

Source: Metropolitan Washington Council of Governments Cooperative Forecasts Round 6.2 and US Census 2000; appendix table 1.

The Washington DC area has been experiencing above average population growth. The primary market area is projected to grow 34.6% from 2000 to 2020, while the secondary market area is expected to grow by 23.1% from 2000 to 2020. Most of the population growth will occur in Loudoun, Fairfax, and Montgomery Counties, outside the Capital Beltway but still within commuting distance of downtown Washington. This increasing population will provide an increased base of visitors to the Cold War Museum.

The key age groups for visitors to the Cold War Museum are school age children 5 to 19, and adults in their 40s, 50s, and 60s who either have the time and disposable income to visit museums or the education levels to be interested in historical displays.

Appendix Table 2 shows the age distribution of population in 2000 for Virginia, Maryland, and the District of Columbia. Although the area is lightly under US averages for school age population, Maryland and Virginia exceed US averages for population 35-54 years of age and for those 55-64. Again, those are key groups for having an interest in the Cold War and visiting a museum on that subject.

The school age population merits further examination. School field trips in conjunction with curriculum on the Cold War era will be a major source of visits. These visits are an additional benefit to the Museum as they occur outside weekend, summer, and vacation periods, at times when average visitation is down. In addition to trips specifically for school purposes, children are brought by parents to museums for educational and entertaining family outings. Visits by children can lead to further word-of-mouth referrals to friends who are told about the exciting displays at the museum. Finally, visits by children are in support of the educational mission of the Museum.

School group visits are likely to be strong, particularly if the Museum targets school groups as part of its marketing program, focusing on the grade levels that are studying the Cold War. In Virginia, these grades are 7<sup>th</sup>, 10<sup>th</sup> and 11<sup>th</sup>. In Maryland, grades 10, 11, and 12 have social studies courses that include the Cold War. School visits outside the curriculum driven ones are also possible as teachers seek educational field trips for their students.

Additional trips from nearby schools may also be made outside of a direct link to the curriculum. Two school sites are reserved on the Laurel Hill/Lorton property, and soon, as many as 7500 students could be located within a short driving distance of the site, many of whom are sons and daughters of active duty and retired military personnel.

**Table 2. School Age Children in Virginia, Maryland, and Washington DC**

<b>Age Range</b>	<b>Number</b>
5-9	921,787
10-14	918,108
15-19	878,051

Source: US Census 2000

Appendix Table 3 indicates in more detail the number of school age children in Virginia, Maryland, and Washington DC.

Since the Cold War Museum may want to charge admission, it will need to appeal to higher income households. In the Washington DC region, median incomes in Virginia and Maryland exceed those for the United States as a whole. The higher disposable income levels are a positive indicator for visitation to the Cold War Museum.

**Table 3. Median Household Income, 1999**

Virginia	\$46,677
Maryland	\$52,868
Washington, DC	\$40,127
United States	\$41,994

Source: US Census data

### **The Visitor Market**

The Visitor Market includes all those who are not in the primary and secondary market areas, meaning that they are more than two hours distant by road from the Museum. This includes visitors to Virginia, Maryland, and Washington DC from the US and internationally. They may be in the area as part of a leisure trip or for business, or may be visiting relatives or friends in the area. In addition, a number of visitors could be pass-through visitors, driving along I-95 and making a single stop at the Museum on there way elsewhere.

### **Virginia and Northern Virginia Tourism Trends**

The Virginia Tourism Corporation last conducted a detailed visitor survey for 1997-98. The survey provided information on numerous visitor characteristics, of which several relevant to the Cold War Museum are highlighted in the appendix. The survey data are available for museum visitors separately from data for visitors to other types of Virginia attractions.

Visitors to Virginia who go to museums tend to have high disposable incomes, be well-educated, and fit in the Mature Adult market segment. 48% are college graduates, and an additional 25% have completed some college; 46% have incomes of over \$50,000 per year; and the average age is increasing, to 51.5 in 1998, consistent with the overall aging of the United States' population. One-third of visitors are 55 and over, and only 27% are under 18. Three-fourths are homeowners, 72% have no children at home, and 42% are AARP members; 23% are retired. For the Cold War Museum, this means that the visitor has flexibility on when to come for a visit, the money to spend at hotels and gift shops, and the education level necessary to appreciate a museum visit. Further, it means that physical locations away from the National Mall in Washington DC will not discourage these potential visitors. They have the time, financial resources, and interest to seek out a museum located in Lorton, Dupont Circle or other locations away from the main focal points of activity.

Visitors to Virginia museums came primarily from New York (10.5%) and from the Washington, DC metropolitan areas (10.3%) Tidewater and Richmond, Virginia contributed 9.0% of all visitors to Virginia museums, and Philadelphia 5.9%.

Most visitors planned ahead for their trip, 36% stating that they had been planning their trip for one to three months before their arrival, and 27% more than three months ahead.

Driving was the preferred way to arrive at Virginia museums: 74% arrived in their own car, and 10% in a rental car. Only 6% came by tour bus.

The median size of party was 2.0, and 58% of visitors were over the age of 35. No children were present in 72% of museum visitor households, while 12% had one child, and 10% had two children.

### **Virginia Tourism Since 2001**

The 9/11 attacks, the dot-com bust and poor economy, October 2002 sniper attacks, and bad weather in 2003 have all hurt the Washington area's tourism. Attractions such as Mount Vernon that depend on tourism and school groups anticipated a downward trend in visitation. More recently, however, there has been a noticeable increase in visitation to patriotic and historic sites.

Analysis of post 9/11 tourism trends indicates that visitors tend to stay closer to home, preferring automobile trips to airplane trips, and that day and weekend trips away from major population centers will find favor with visitors. In particular people from the mid-Atlantic states are likely to seek out local attractions away from the downtowns of major cities. The Cold War Museum's location in Lorton would be supported by this trend, where it could appeal to tourists seeking something new away from visible landmarks and population densities.

### **DC Tourism Trends**

The Washington DC Convention and Visitors Association estimates that Washington received a total of 17.6 million visitors in 2002, down from a peak of 19.8 million visitors in 1998 and about even with the level in 2000. 2001 started out as a strong year for tourism, but was severely impacted by the terrorist attacks in September, leading to a total of 18.1 million visitors for the year. In 2002, although the number of overnight visitors was up by 900,000 from 2001, day-trippers were down 1.4 million. Casual tourists were choosing to go elsewhere than downtown Washington.

Leisure travel was particularly hard hit, with a loss of 8% in Washington, compared to a national increase of 1.7% from a year earlier.

Leisure visitors arrive primarily from major east coast cities. New York contributed 11% of all visitors. Other origin cities included Philadelphia, Norfolk, Baltimore, Boston, and Atlanta.

Thirty percent of travelers claimed business as their primary purpose for a trip to Washington, while 63% claimed leisure travel drove their trip.

Preferred activities included:

- Historical or museum visits 36%
- Shopping 24%
- Visiting parks 11%
- Cultural events 10%
- Outdoor activities 17%

Leisure travel is anticipated to show some growth throughout the United States in the summer of 2003. Tourists will be showing increased interest in major cities and national monuments. However, the Washington DC area continues to suffer from declines in leisure travel in the near term. Business travel is somewhat challenged by the increasing use of technology (video or web conferencing, work by fax or cell phone rather than in person visits) and tighter travel policies by corporations.

In general, for the short term, an improving economy, acceleration in the growth of the GDP, and improved consumer confidence, should translate to increased leisure and business travel to the Washington, DC area.

### **International travelers**

In FY 2000, the Capital Region USA, consisting of Washington, DC, Virginia, and Maryland, received 2.55 million international visitors, of which about 30% were from Canada and the remainder from a variety of international origins. The United Kingdom provided the second largest group of visitors, at 13% of total international arrivals, followed by Germany at 8.3%, France and Japan at 4.4% each, and all of South America at 5.8%.

Of the total foreign arrivals, 1.35 million, or 52.7%, announced Washington DC as their primary destination. Slightly more than 29% were going to locations in Virginia. Travelers in Virginia averaged 7.2 nights in the national capital area, while those in DC averaged 5.1 nights.

Of the travelers surveyed, 32% were in the US for business, 26% for vacation, and 23% visiting relatives and friends.

Almost half the parties traveling (49%) were alone; the average size of a party was 2.5 people. The average age was 43; sixty-five percent of all international travelers were in an age group that experienced the Cold War as adults (35 and over), while 40% were in age groups that had been directly affected by the Cold War (45 and over).

The top activities named by international visitors as being important during their stay in the national capital region included:

- Shopping 86%
- Dining at restaurants 85%
- Visiting historical places 57%
- Urban sightseeing 51%
- Visiting art galleries and museums 44%
- Cultural heritage activities 33%
- Visiting amusement parks 28%

Data on the Capital Region USA were collected by the US Department of Commerce, Tourism Industries, and distributed by the Virginia Tourism Corporation.

The Travel Industry Association forecasts some recovery for international travel which had fallen since the terrorist attacks on New York and Washington in September 2001, with total foreign arrivals to the US of 41.9 million in 2002 rising to 51.1 million in 2006. Reaching pre-2001 levels is anticipated to occur in 2005 for visitors from Canada, 2006 for UK-based visitors, and after 2006 for visitors from Japan, Germany, France, Brazil, and Argentina.

### **School Group Visitors**

School groups can be an important source of visitation to the Cold War Museum. A variety of museums in Virginia, for example, have increased their visitation by marketing themselves to schools with web page exhibits showing teachers exactly how their exhibits can help students with the State's Standards of Learning exams administered in every year of high school.

In Virginia, the curriculum is based on the state's highly specific Standards of Learning. These specify that the Cold War is studied initially in the 7<sup>th</sup> grade, then more extensively in 10<sup>th</sup> grade (World History From 1600) and in 11<sup>th</sup> grade US and Virginia history. Teachers at Alexandria, Virginia's T.C. Williams High School have expressed interest in field trips to a future Cold War Museum, but caution that the subject matter is not taught until late April or early May, which may hamper teachers' ability to schedule field trips in light of multiple end of year activities which begin to take place at that time of year.

In Maryland, the Cold War is studied in a number of high school social studies courses beginning with 10<sup>th</sup> grade studies of National, State, and Local Government where a foreign policy unit near the end of the school year touches on international relations after World War II. Courses in the 11<sup>th</sup> and 12<sup>th</sup> grades dealing with Modern World History, Comparative Government, and Advanced Placement US History, would all have segments on the Cold War, usually in the last quarter of the school year. Montgomery County for one maintains an extensive program of field trips to a variety of locations in the metropolitan area.

Virginia, Maryland, and Washington DC combined had 878,000 children in the high school age groups that could be studying the Cold War. In any given year, about half that number could be exposed to a study unit on the Cold War.

### **The Cold War “Buff” Market**

One key segment of the market for the Cold War Museum consists of people who have a strong interest in anything to do with the Cold War, because they have either lived through it, held military assignments related to Cold War activities, or have developed an interest through the activities of family members or friends. This group will be a prime source of support to the Museum in its initial fundraising and will form the core group of early visitors as the Museum builds its collection. They will also form a constant baseline of annual visitation. Visitors from many countries will be part of this group. For instance, there are Cold War sites and museums in Canada and Great Britain, and groups of supporters of these sites; people associated with the international Cold War sites will want to visit the Cold War Museum in the US.

The Washington area already hosts large numbers of active duty and retired military personnel as well as employees of “security-oriented” companies, many of whom would likely be interested in the subject matter showcased at the Cold War Museum.

### **THE COMPETITIVE ENVIRONMENT**

Attractions that could compete with the Cold War Museum include general museums, military museums, special-interest museums, and museums in the vicinity of the Cold War Museum.

The Washington DC metropolitan area is replete with museums of all types, ranging from the Smithsonian complex to individual special-purpose museums. Visitation levels vary based on the quality of the attraction, its location, its price, and its marketing program. The Smithsonian museums are the superstar of the Washington museum scene, but even within the Smithsonian complex, attendance levels vary greatly. Specialized museums or those charging admission, as well as those away from the National Mall in Washington, DC tend to have smaller visitation numbers. Appendix Table 5 shows visitation levels attained in 2002 by museums in downtown Washington and in Virginia, distinguishing between free and paid admissions.

Three main Smithsonian museums draw large numbers of visitors: the National Air and Space Museum, National Museum of Natural History, and National Museum of American History, by virtue of their subject matter, breadth of exhibits, location on the Mall, and association with the Smithsonian. These three draw from 5 million to 9 million visitors each, down somewhat from historic highs prior to 2001. Other museums in the Smithsonian family draw far fewer visitors, including the Renwick Gallery near the White House at 135,000 and the Anacostia Museum, far from the center of tourist activity, at 39,000. Other major attractions in Washington are the Holocaust Memorial Museum at almost 2 million visitors and the White House. Other free museums draw

from a low of 33,000 for the Textile Museum to 500,000 for the FBI. These museums have collections that appeal to more specialized interests, perhaps less dazzling exhibits, are located away from the mainstream of attractions, or are simply not publicized as much.

Charging admission does not necessarily reduce visitation numbers. The recently opened International Spy Museum has exceeded its visitor projections and ranks as one of the most-visited museums in Washington. Various art galleries are able to achieve 100,000 to 400,000 visitors a year while charging admission.

Paid attractions in Virginia can also be successful. George Washington's Mount Vernon (\$9 admission) has achieved visitation of over 1 million people due to its extensive marketing program, ambitious schedule of special events, and appeal to school groups. Monticello, the Virginia Marine Science Center (\$10.95), and Manassas National Battlefield Park all had over 500,000 visitors in 2002.

### **Military and Special-Interest Museums**

People interested in the Cold War may also be interested in military museums and museums for special interests, including museums on crime, technology, or intelligence gathering. Appendix table 6 shows attendance figures for selected military and special-interest museums.

Among military museums are two in the "superstar" range of attendance: the US Air Force Museum at Wright Patterson Air Force Base in Ohio, and the Naval Aviation Museum in Pensacola, both of which have extensive displays of equipment as well as interactive exhibits. The Navy Museum in Washington and the US Naval Academy have visitation in the range of 350,000-400,000, the same range projected for the Marine Corps Museum at Quantico. Most other military museums fall in a range of 30,000 to 80,000 in annual visitation. These tend to feature exhibits in display cases, with little in the way of interactive or video attractions, and few complementary facilities.

With a little more attention to exhibit design and a more intense marketing program, a number of maritime museums have been able to achieve visitation levels in the 150,000 to 250,000 annual range. Technology museums are even more adept at enticing visitors, attracting 857,000 visitors in the case of the Space Flight Center Museum in Houston, or 600,000 for the Intrepid Sea Air Space Museum in New York City. These levels of visitation require a large number of exhibits of impressive hardware, sophisticated display techniques, video programs or movies, and extensive marketing. Less well-promoted attractions in the technology field can nevertheless attract from 80,000 to 150,000 visitors annually. Of particular interest are the National Atomic Museum in Albuquerque, New Mexico, with annual visitation of 80,000, and the Titan Missile Museum in Arizona, which attracts 57,000 visitors each year.



Unfortunately, it is difficult to obtain visitation figures for museums on espionage or intelligence; many are housed in government agencies and not accessible to the general public.

### **The National Marine Corps Heritage Center: A Case Study**

The Marine Corps Heritage Foundation plans to construct a museum in Quantico, Virginia that will consolidate and expand the exhibits currently shown at the Navy Yard in Washington, DC and a small museum in Quantico. The proposed Marine Corps Heritage Center plans an ambitious program of exhibits, along with ancillary facilities such as a parade ground and associated events program, an auditorium/lecture hall, possible IMAX theater, gift shop, and restaurant/food service facilities. From its highly visible location along I-95, the museum is projected to attract 240,000 visitors in its initial phase, and up to 359,000 visitors annually at its full development.

A 135-acre building site adjacent to Quantico was deeded to the Marine Corps in 2001, and a groundbreaking ceremony was held on September 27, 2003.

### **National Museum of the United States Army**

In October 2001, the United States Army selected Fort Belvoir, Virginia as the most appropriate site for its National Museum. The Museum's mission will be to tell the story of the Army comprehensively through the use of material objects that constitute its cultural heritage and the most effective museum educational techniques available. The archive portion of the Army museum will be located in a new United States Army Heritage and Education Center at Carlisle, Pennsylvania. A contractor was selected in January 2003 to build the Museum, develop outreach programs, funding campaigns, and relationship development plans. Initial activities, marked by a kick-off ceremony at Ft. Belvoir in September 2003, focus on developing a master capital formation and fundraising plan to galvanize public and private financial support to raise more than \$120 million to complete the Museum.

The Museum is scheduled to open in 2009, and will be a capstone to the US Army's existing 122-Museum system. Five possible sites at Fort Belvoir have been identified, although the preferred site is along Route 1 in the northern part of the Army installation. The Museum is currently planned to feature 110,000 square feet of exhibit space, a parade ground, and areas in which a hoped-for one million visitors can watch mock drills, helicopter landings, and tank maneuvers. The US Army intends to "set a new standard for museum design" according to Gen. John M. Keane, the Army's Vice Chief of Staff. The Museum is to be entertaining, exciting, and educational, according to its curator.

The US Army Museum will be in close enough proximity to the Cold War Museum at a Lorton location to offer opportunities for joint marketing of the two museums to group tours or to people who are veterans of the Cold War era, benefiting both museums with increased visitation. The Marine Corps museum at Quantico could also be part of the grouping of related museums.

## **The International Spy Museum: A Case Study**

The International Spy Museum opened in Washington DC in 2002 in a downtown location close to a number of attractions (including the MCI Center, FBI building and National Building Museum), but not on the National Mall. It is however close to the Gallery Place Metro station and 47.1% of its visitors arrive by Metro. Despite an admission fee on the high end (\$13 for adults and \$10 for children) of what is generally charged in the Washington area, the museum has already exceeded its visitation projections. It now appears that its first year visitor total will be close to 700,000.

The Museum has commissioned a Longitudinal Visitor Survey that currently has data for the months of January through August 2003 and yields a wealth of information about visitors to the Museum. This information is summarized here and provided in greater detail in the appendix.

As is typical of visitors to Washington area attractions, the typical visitor is well-educated, has a high annual household income, and is (older). Of the visitors surveyed, 86.2 percent have attended at least some college, and 40% completed a graduate degree. One-third of all visitors have a post-graduate degree.

At least one-third have an annual household income of over \$100,000, and another 18% have incomes of between \$75,000 and \$100,000. Visitors aged 49 or older constitute more than 36% of all visitors; an additional 30.4% of visitors are aged 38 to 48.

Washington DC area residents account for 31.9% of all visitors; an additional 6.0% are from international origins, leaving 62.1% from areas of the US outside the Washington metropolitan area. Leading countries of origin are Great Britain, Canada, and Australia, similar to the pattern of international visitation reported by the Travel Industry Association. States providing the largest number of visitors, in addition to Virginia, Maryland, and Washington DC, are California and New York (similar to what was reported in the Virginia Tourism Corporation's visitor survey).

Non-local visitors to the museum tended to be familiar with the Washington area, and more than half reported having made five or more visits to the area. Most stayed in the area for three to five days and included the museum in their program. Over half were on vacation, and less than 20% were on business. The leisure visitor market is clearly a primary one for the museum. More than half of the non-local visitors decided to visit the Spy Museum before coming to the Washington area, and almost 72% had received a recommendation from friends, family, or colleagues to visit the museum. Once at the museum, 70.9% spent 2 hours or more visiting, and 23% spent three hours or more at the museum.

About 13% saw only the International Spy Museum on this trip to Washington. About 40% reported seeing at least one of the major Smithsonian Museums. Other big draws were the Jefferson, Lincoln, and Vietnam Veterans Memorials; the Washington

Monument, Arlington National Cemetery; the Capitol and the White House; and the Holocaust Museum. A major nearby Virginia attraction, Mount Vernon, only drew 6.2% of visitors to the International Spy Museum. Surprisingly, the FBI tour drew only 1.2% of visitors. Art museums also drew relatively few visitors. It appears that the complementary attractions to the International Spy Museum, besides the almost mandatory Smithsonian museums, are the major open-air memorials, rather than museums with specific themes or attractions in Virginia and Maryland.

Washington area visitors, however, appear to be avid museum-goers. More than 15% reported that they visit museums in the Washington area 13 or more times a year, and another almost 12% 10 to 12 times a year, almost monthly. Only 2.5% generally do not visit museums.

### **Museums in Fairfax and Prince William Counties**

In its early years, the Cold War Museum if established at Lorton, will compete for casual visitors with attractions in nearby Fairfax and Prince William Counties.

Prince William County currently hosts five recognized attractions, the most popular of which is Prince William Forest Park. The others are the Weems Bott Museum, a historic house, the Historic Occoquan Museum, the Freedom Museum at Manassas Airport, and the Marine Corps Museum at Quantico. Once the full Marine Corps Heritage Museum at Quantico is built, it could serve as a joint marketing partner with the Cold War Museum and both would benefit from increased visitation.

In Fairfax County, attractions span a broad range of interest levels, but most are of a historic or park nature. Mount Vernon is the biggest draw, but its nearby related historic houses, Gunston Hall, Woodlawn and the Pope Leighey house, and Pohick Church attract less than 50,000 visitors each. Other Fairfax attractions are the Firearms Museum (30,000 visitors), the Greater Reston Arts Center, the Fairfax Museum (9,960 visitors) and the US Army Engineer Museum. Once the US Army Museum at Ft. Belvoir opens, there will again be joint marketing and group visitation possibilities. A major new cultural-heritage complex, the Workhouse Arts Center, is planned at Lorton with a first phase opening possible by late 2005.

### **Other Regional Museums**

Harpers Ferry National Historic Park is an example of a museum and activity complex that appeals to visitors from the Washington area, yet relatively far from the centers of museum activity. It is about 1 to 2 hours drive for most of the market area population, is not an impulse visit but requires planning, and is not near public transportation. Its FY 2002 visitation was 310,500, down from visitation estimates of close to 500,000 in 1999. The park features a number of nature-related activities in addition to the historic town of Harpers Ferry, its historic event re-creations, and shops and restaurants. The experience of Harpers Ferry shows that the Washington area's population is willing to drive some

distance to experience unusual attractions, and that a location at Lorton would not detract from the appeal of the Cold War Museum.

A Science Center is proposed at Belmont Bay in Prince William County as a division of the Science Museum of Virginia (headquartered in Richmond), with a planned opening date of 2007. A founding Board of Directors has just been appointed to raise \$80-100 million to finance the museum's construction, fund programs, build research laboratories and classrooms and establish an endowment fund. The Science Center includes several exhibit halls, a large-format film theater, education programs, a life science education center, café, gift shop, space for private functions, and parking. Focusing on technology, physical sciences and life sciences, the Center will establish both formal and informal programs for school-aged children aligned with Virginia's Standards of Learning. A 1999 market study for the Belmont Bay Science Center estimates attendance at 629,000 to 943,000 visitors a year. Once established, this museum could become one of the complementary attractions to the Cold War Museum, and adds to the interest of Northern Virginia south of the Beltway as a new nucleus of museums and cultural facilities.

### **Museums Planned and Under Construction in the Washington Area**

At least 26 museums are currently under construction or being planned, discussed, or conceptualized, based on reports in the Washington-area press. Some are future blockbusters and others may be obscure even after they open. Some may never proceed beyond the concept stage. Appendix table 7 lists those museums that have been publicly discussed in some fashion in 2003, with announced opening dates for the ones that appear to be making progress in their plans. The Air and Space Annex at Dulles Airport, National Museum of the American Indian, and National World War II Memorial are well underway. Others are seeking sites, while still others are trying to complete fundraising before moving forward. How many of these will actually materialize is open to question.

### **Cold War Museums, Nationally and Internationally**

Very few museums identify themselves as specifically Cold War museums. The Aviation Museum at Wright Patterson Air Force Base has a large exhibit hall devoted to the Cold War. In Canada, the Diefenbunker Museum has more than 100,000 square feet of space in a bunker, but due to lack of funding has not been able to set up a major exhibit program. A few permanent exhibits deal with fallout shelters, the Canadian Army in NATO, and the Strategic Threat to North America. The Museum has an 1800 book library, and a collection of 16mm films, slides, videos and photos. It functions with two full-time paid staff and about 25 volunteers, supplements by volunteer tour guides and students. About 16,000 paying visitors came to the museum in 2002.

A number of military museums in the US have artifacts from the Cold War era, but do not emphasize the Cold War in their exhibit presentations.

Elsewhere in the world are sites and museums with associations with the Cold War. Great Britain has a number of Cold War sites that are being preserved and turned into

museums. Several RAF bases now host exhibits, and a museum is proposed at the former Bentwaters RAF base. In May 2003, work started on clearing a former command bunker and turning it into an exhibit center. Several aircraft are being acquired for static display. A number of former Soviet bloc countries have Cold War artifacts in their national museums, but these are difficult to access or visit.

## **MARKET POTENTIAL FOR THE COLD WAR MUSEUM**

The Cold War Museum's market potential depends on a number of factors:

- **Location and site:** The Lorton site offers a number of advantages, including sufficient space for indoor and outdoor exhibits, a historical association with the Museum's subject matter, the presence of a Nike Missile silo, and possible marketing synergies with the US Army Museum at Ft. Belvoir and the Marine Corps Museum at Quantico. Potential disadvantages include distance from the Washington area's key attractions downtown and on the National Mall and lack of visibility of the site from major travel routes, although the planned widening of Route 123 may improve accessibility, with its connections to I-95, Route 1, and the Fairfax County Parkway.  
The Dupont Circle site has the advantage of offering access via Metro, but its 26,000 square feet underground in a former food court space may be less than optimal for exhibit display and for housing research facilities. Other Dupont Circle area sites are now obtaining premium retail rents of \$50 to \$100 per square foot, too high for a museum use.
- **Program:** The Museum is only at the beginning of building its collection of artifacts, documents, and video items. It is also only beginning its fundraising. As such it will have neither the display items nor the financial ability to build state-of-the-art exhibits for some time. Therefore, the initial program is likely to appeal more to the group of people with a keen interest in the Cold War than to the visitor market, for whom several hundred attractions are available to visit in the Washington area. The resident market may be attracted to some extent, but visitation is likely to remain low until the program becomes more substantial. The research and archival elements of the Museum's program are important and valuable to high school and college students, and to serious researchers on the Cold War era.
- **Pricing:** Admissions fees do not appear to deter Washington area visitors. Most attractions outside the Smithsonian complex and federal agency museums charge admission, and that does not seem to deter from their appeal to visitors. At the high end, the Spy Museum with interactive exhibits and a strong marketing program can charge \$13 for adults. A more likely range of supportable admissions pricing is \$5 to \$7 for adults.
- **Market area population:** The base of support for the Cold War Museum is the local resident population. The Washington area is a high growth area, and is expected to continue that way. The population tends to be well-educated and have high incomes as well as leisure time and an interest in visiting museums. Thus there can be substantial support for a Cold War Museum.

- **Visitor market:** The Washington area is one of the strongest tourism markets in the country. In spite of some shifts in visitation patterns in the past two years, the market will remain strong due to the appeal of the region's numerous and varied attractions, its good inventory of hotel rooms in diverse price ranges, and marketing efforts by a number of local and regional tourism authorities.
- **Comparable attractions:** Museums on almost any subject and almost any magnitude from local interest to national interest can be found in the Washington area. Yet few offer exhibits covering the historical period of the Cold War. The International Spy Museum will probably attract those who are primarily interested in the espionage techniques used during the Cold War, but little is available to those who want to see artifacts in a historical context. The Cold War Museum as presently defined should be a unique attraction in the Washington Metropolitan area.

### **Attendance Projections Based on Market Factors**

Two approaches were used to estimate the potential visitation to the Cold War Museum. The first is based on the size of the resident and visitor markets to Washington-area attractions. The second is based on an analysis of comparable and competitive museums, and the actual levels of visitation they experience based on the extent of their collections, their display methods, and their marketing techniques.

### **Resident Market Capture Rates**

In its first few years, as the Museum becomes established, grows its collection, and begins its marketing efforts, attendance will remain low due to extensive competition from other attractions. Once it reaches its full development, with several galleries of exhibits and complementary facilities such as gift shop, restaurant, lecture hall/auditorium spaces, the Museum can expect to capture a percentage of the resident market each year to form the base of its attendance.

The primary market, consisting of people who are in close (within 45 to 50 minutes) driving distance of the Museum, could provide as high as 6 to 10% of its population as museum visitors in any given year, depending on the level of sophistication of the displays at the Cold War Museum. For the year 2010, for example, that could translate to 137,000 to 228,000 visitors. The secondary market would provide a far smaller percentage of its population as visitors due to greater distances (1 ½ to 2 hours) and more planning required in order to go to the Museum. Percentages of from 1 up to 5% could possibly be achieved, yielding 25,000 to 125,000 visitors in 2010. Additional visitors who are within a driving distance permitting a day-trip (say from between Richmond, Virginia to Wilmington, Delaware) would add to these numbers.

A 1995 study for the National Air and Space Museum Annex found overall market penetration rates of 1.2 to 14.4% of the gross market for air and space attractions in the US. These are major museums with attendance over 500,000. General science museums with attendance over 1 million had market capture rates of 5.7% to 14.2% in 1994.

## **Visitor Market**

The study completed for the Belmont Bay Life Sciences Center in 1999 estimated the visitor market as a percentage markup of the total resident market, in that case 20 to 25%. Using a figure of 20% would yield a figure of 71,000 visitors annually who are not residents of the immediate area.

The visitors most likely to go to a Cold War Museum located outside of downtown Washington are those who are on multi-day visits to the area, probably on a leisure trip or visiting friends or relatives living in the Fairfax County area. Visitors on trips shorter than four days are likely to visit more well-known attractions in downtown Washington, as will those staying in Washington or Maryland hotels.

School groups were identified as a key element in total visitation. However, because the Cold War is studied primarily in the May timeframe, there is a limit to the number of students who could physically see the exhibit in correspondence with their studies. With the school year ending in Mid-June, and a heavy schedule of activities in that period, there is probably only a total of about 18 eligible school days for a museum visit. With visiting hours running from about 9:30 to 3:00 based on school schedules, it appears that only four to five busloads of children could be accommodated by the museum each day. This translates to a maximum of 3,600 school children who could see the Cold War Museum exhibits in conjunction with their studies.

## **Attendance Projections Based on Performance Data**

The comprehensiveness of a museum's collection, the sophistication of the display techniques, and a museum's skill at marketing itself determine the level of visitation it receives. Currently, the Cold War Museum is only in its formative stages and the collection is still small. The Museum is without a physical location, display techniques have not been defined, and marketing is not yet taking place. Yet the Museum has the potential in several years to reach differing levels of appeal. To determine its prospective visitation level under differing conditions of collection, exhibits, and marketing, the performance of a variety of museums in terms of visitation was examined (see Appendix Tables 5 and 6). These allow the Cold War Museum to be compared to museums with low (30,000-90,000) visitation, average visitation (150,000-400,000) and high visitation (500,000-700,000) to determine what it would take to reach these levels.

## **Museums with Relatively Low Visitation**

These museums tend to focus on a single specific subject and be located away from city downtowns. Examples include the Titan Missile Museum in Arizona, the National Atomic Museum in Albuquerque, New Mexico, the Quartermaster Museum at Ft. Lee, Virginia, and the US Army Transportation Museum at Ft. Eustis, Virginia. Displays are generally static, featuring heavy equipment outdoors, and smaller items in display cases

in a museum building. The location may appear restricted or difficult to access, as in the case of the Marine Corps Museum in Quantico, the Cryptology Museum at Ft. Meade, and the Visitor Center at NASA Goddard.

In its initial years, with a relative small collection, a limited budget, and a location remote from downtown Washington, the Cold War Museum could have a similar performance to these museums with relatively low visitation.

### **Museums with Average Visitation**

Most museums, including several very well-known ones, never achieve visitation levels over 400,000. This is still a substantial number, equaling over 1,100 people a day (assuming 362 days open a year), or 138 people an hour in an 8-hour museum day. These museums can cover broad topics (modern art, maritime history, stamps, geography), have extensive collections, varied display techniques, prime or not so prime locations, low or medium admissions fees, and varying levels of marketing. Examples include:

- Navy Museum
- National Building Museum
- Corcoran Gallery
- Harpers Ferry Historical Park
- Science Museum of Virginia
- Nauticus (Norfolk, Virginia)
- Ft. Washington, Maryland
- Mariners Museum, (Newport News)
- Corning Glass Center (New York)

The proposed Marine Corps Heritage Center at Quantico is forecast to receive visitation at the upper end of this range.

The Cold War Museum at full development would likely be in this range when its collection reaches the levels required to sustain all the exhibits listed as planned in the introduction to this report.

### **Museums with High Levels of Visitation**

Achieving visitation over 500,000 requires superior displays including interactive exhibits and extensive marketing. Leaving aside the “big Three” of the Smithsonian Institution (Air and Space, Natural History, American History), only the Hirschhorn art museum and the Arts and Industries building out of the 15 Smithsonian museums in the Washington area reach over 500,000 visitors. The International Spy Museum was forecast to host 500,000 visitors and has surprised everyone by exceeding the forecast with a possible 700,000 visitors in its first year.



The Intrepid Sea Air Space Museum in New York, the Space Center in Houston, the Naval Aviation Museum in Pensacola, and US Air Force Museum in Ohio are in the high to stratospheric visitation numbers. All have a large number of large vehicle displays (ships, spaceships, airplanes), interactive exhibits, a large number of interior display galleries, and cover a wide variety of topics and experiences.

It is not anticipated that the Cold War Museum would reach the “high” levels of visitation.

### **Impact of Site Location on Visitation Projections**

While a downtown Washington location poses several advantages, it is not necessarily the best place to start for a new and lightly capitalized museum. The availability of Metrorail service, while bringing a certain number of patrons that would not otherwise come to the Museum, does not outweigh the relatively high cost of getting started in Washington and the lack of space in which to showcase hardware exhibits.

We believe that total visitation numbers could be higher at a downtown Metro-oriented location than at a suburban location because of the number of “casual” rather than purposeful visitors that could be attracted. However, these visitors might not be as interested in the Museum and its subject matter and be less likely to become members or supporters.

At a suburban location, there will be more opportunity to build the collection and display it, and a better ability to provide parking and complementary facilities for visitors. The Lorton location in particular provides a historic context for the museum and offers ample space for both outdoor and indoor exhibits. In addition, it provides the opportunity to offer joint programs with other nearby museums under development including the Marine Corps Heritage Center, the National Museum of the United States Army, and the Life Sciences Center at Belmont Bay, in addition to the existing historic attractions of Mt. Vernon and nearby colonial-era residences and churches, and the Freedom Museum at Manassas Airport.

### **Financial Potential**

The Museum’s revenue sources include admissions, memberships, earnings from restaurants and a gift shop, and fees for special events. The level at which these are attained will depend on the level of offerings. For the museum exhibits, an admission fee of \$6 to \$7 is sustainable. Membership dues can range from \$25 (individual) to \$40 (family), but members will expect a newsletter and some discount programs in exchange. Food service is often provided by an outside vendor who pays the owner 15 to 25% of gross revenues as rent. A fast food operation of 1,400 square feet with sales of \$400 per square foot could provide more than \$100,000 per year in revenue to the museum. Retail sales can average \$2 per museum visitor depending on the size of the shop and the mix of merchandise it offers. Finally, the museum can rent out certain spaces for meetings or special commemorative events, and charge for events it organizes (seminars, symposia).

However, before getting to that point, the Museum must organize a major fundraising effort to expand its collection, design and build exhibit spaces and complementary facilities, hire a staff, research and design its educational programs, and market its offerings. The museums currently in the conceptual and planning stages in the Washington area have fundraising goals of \$30 to \$80 million for the above purposes.

## **RECOMMENDED NEXT STEPS**

The Cold War Museum certainly has the potential to be a significant visitor attraction and to provide tourism development benefits to its host jurisdiction. Once it has a location, builds its collection, and begins to be known locally and regionally, the Museum will have a springboard from which to raise addition funds for expansion and furtherance of its broader mission.

However, from this point on, the Museum will need start-up capital in order to take the first steps in that direction. Our immediate recommendation is that the Museum raise and spend \$150,000 in the next year for the following:

- Conduct a visitor survey to determine the level of interest in the Cold War as a Museum subject in Virginia
- Prepare a fundraising brochure that will outline the Museum's missions and programs, its concept, its visitation projections, and sample exhibit listings to raise awareness, gather funds, and make an impression on major sponsors
- Identify and solicit major sponsors for significant financial contributions
- Organize an effort to locate and obtain a specific site and begin installing the current collection.

As a result of this effort, more significant will likely have been raised. The Museum can then embark on the following:

- Marketing campaign featuring the Museum's new home, its plans for development and expansion
- Increased acquisition program
- Increased publications program (which will also raise the level of interest among the general public)
- Work on the Museum's objectives, including educational programs, traveling exhibits, reciprocal programs with other museums and other countries
- Contacts with other compatible museums currently under development to discuss joint marketing.

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### **Appendix B: Cold War Exhibit Profiles**

- RAF Bentwaters and sites in Great Britain
- CIA Museum
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- International Spy Museum

### **Appendix D: Excerpts from Museum Studies**

- Attendance Planning Update for the NASM Extension
- Attendance at Smithsonian Museums, 1997-1999
- Museum Visitor Survey Done for Marine Corps Heritage Center
- Smithsonian Museum Visitor Profiles
- Mount Vernon Visitor Profiles
- International Spy Museum Longitudinal Visitor Survey, 2003 (excerpts)
- Belmont Bay Life Science Center Market Study (excerpts)

### **Appendix E: Additional Resources**

- Tourism Data and Trends, Metropolitan Washington

## **Appendix A: TEXT TABLES**

Appendix Table 1. **Resident Market Area Population**  
(thousands)

	2000	2010	2020
<b>Primary Market Area</b>			
Arlington County	192.0	201.4	212.9
Alexandria City	127.1	135.3	140.9
Fairfax County	968.2	1112.9	1184.1
Fairfax City	21.7	22.7	22.8
Falls Church City	10.4	10.7	10.9
Loudoun County	172.2	304.2	439.0
Prince William County	286.1	350.5	387.1
Manassas/Manassas Park	43.2	45.4	46.0
Stafford County	78.6	96.0	113.3
Subtotal, Primary Market Area	1899.5	2279.1	2557.0
<b>Secondary Market Area</b>			
District of Columbia	518.1	554.7	618.6
Montgomery County	855.0	945.0	1000.0
Prince George's County	784.6	852.4	916.6
Fauquier County, VA	55.1	58.8	63.6
Spotsylvania County, VA	90.3	135.2	201.1
Fredericksburg City, VA	19.3	24.7	27.1
Charles County, MD	123.2	150.1	182.9
Subtotal, Secondary Market Area	2445.6	2720.9	3009.9
Total Market Area	4345.1	5000.0	5566.9

Source: Metropolitan Washington Council of Governments  
Round 6.2 Cooperative Forecasts, Rappahannock Rapidan Regional  
Commission, Spotsylvania County Planning Department, and  
Fredericksburg Regional Alliance.

**Appendix Table 2. Age Distribution of Population**  
Year 2000

	<u>Virginia</u>	<u>Maryland</u>	<u>DC</u>	<u>US</u>
Under 5	6.81%	6.67%	5.69%	6.81%
5-19	20.84%	21.52%	18.05%	21.78%
20-34	21.44%	20.06%	26.85%	20.91%
35-54	31.08%	31.55%	28.49%	29.43%
55-64	8.92%	8.88%	8.70%	8.63%
65 and over	11.19%	11.32%	12.22%	12.43%
Total	7,078,595	5,296,486	572,059	
Median Age	35.7	36.0	34.6	35.3

Source: US Census 2000

**Appendix Table 3. Number of School Age Children**

Year 2000

<b>Age Range</b>	<b>5-9</b>	<b>10-14</b>	<b>15-19</b>	<b>Total</b>
Virginia	495,084	495,955	484,065	1,475,104
Maryland	391,318	392,135	356,119	1,139,572
DC	35,385	30,018	37,867	103,270
Total	921,787	918,108	878,051	

Source: US Census 2000

**Appendix Table 4.** Selected Characteristics of Virginia Museum Visitors, 1998

a. Month of Travel

January	7%	July	13%
February	5%	August	12%
March	6%	September	10%
April	9%	October	7%
May	8%	November	7%
June	7%	December	8%

b. Travel Party Size

1	22%	Mean	4.3
2	38%	Median	2.0
3	11%		
4	15%		
5	6%		
6+	9%		

c. Visitors by Age

Under 18	27%
18-34	15%
35-54	25%
55-64	12%
65+	21%

d. Age of Household Head

18-24	2%
25-34	14%
35-44	21%
45-54	21%
55-64	19%
65+	24%

e. Children in Household

0 children	72%
1 child	12%
2 children	10%
3 or more children	5%



f. Mode of Travel

Own car	74%
Rental car	10%
Train	4%
Group tour bus	6%
Other bus	2%
Plane	14%
Other	11%

g. Advance Planning Time

Same day	3%
2-6 days	9%
1-3 weeks	25%
1-3 months	36%
4-6 months	15%
more than 6 months	12%

h. Top metropolitan areas of origin

New York	10.5%
Washington DC	10.3%
Philadelphia	5.9%
Tidewater Virginia	5.2%
Richmond	3.8%
Boston	2.8%
Pittsburgh	2.7%
Baltimore	2.6%

Source: Virginia Tourism Corporation, 1997-1998 Visitor Study

**Appendix Table 5. Visitation to Attractions in the Washington  
DC Metropolitan Area and Virginia**

<b>Type of Museum</b>	<b>Year 1999</b>	<b>Year 2002</b>
<u>Smithsonian</u>		
National Air and Space Museum	9,196,000	9,000,000
National Museum of Natural History	6,334,000	6,300,000
National Museum of American History	5,455,000	5,000,000
Hirschhorn Museum	809,000	731,453
National Postal Museum	468,000	500,000
National Museum of American Art	431,000	closed
Sackler Gallery	551,400	599,696
Renwick Gallery	135,000	134,650
Anacostia Museum	39,000	
<u>Other Free Admission Attractions</u>		
US Holocaust Memorial Museum	2,000,000	1,824,978
The White House	1,200,000	1,200,000
Library of Congress	831,000	200,000
FBI	500,000	500,000
National Geographic Explorers Hall	450,000	179,807
Newseum	413,000	482,777
Navy Museum	377,000	362,000
National Building Museum	220,000	400,000
Textile Museum	33,000	30,000
NASA Goddard Visitors Center		
<u>Paid Attractions, Washington DC</u>		
International Spy Museum	not open	700,000 projected
Corcoran Gallery	350,000	350,000
Phillips Collection	151,000	180,289
National Museum of Women in the Arts	115,000	120,000
<u>Paid Attractions, Virginia and W. VA</u>		
Mount Vernon	1,045,000	1,038,778
Manassas National Battlefield Park	973,229	692,486
Virginia Marine Science Center	692,000	600,000
Monticello	551,000	501,000
Harpers Ferry National Historical Park	500,000	310,500
Science Museum of Virginia	297,800	
Virginia Air and Space Museum	234,000	430,000
Nauticus	240,000	450,000
Prince William Forest Park	162,656	

**Appendix Table 6. Visitation to Special Interest Museums**

	1999	2002
<u>Military Museums</u>		
US Air Force Museum, Wright Patterson AFB	1,000,000	1,200,000
Naval Aviation Museum, Pensacola	941,000	907,872
Navy Museum, Washington DC	377,000	362,000
Fort Washington, MD	297,000	297,000
Fredericksburg & Spotsylvania National Military Museum	230,000	230,000
US Army Transportation Museum, Ft. Eustis, VA	98,000	92,000
Aberdeen Proving Ground, MD	75,000	85,000
US Navy Memorial, Washington DC	70,000	70,000
War Museum of Virginia	62,500	63,000
Casemate Museum, Fort Monroe, VA	61,570	43,690
Quartermaster Museum, Ft. Lee	55,000	68,000
Marine Corps Museum, Quantico, VA	30,000	30,000
Marine Corps Museum, Washington DC	25,000	
UDT Seal Museum, Ft. Pierce, FL	24,000	25,784
Fort Meade, VA	21,793	21,793
Old Guard Museum, Ft. Myer, VA	8,000	8,000
Army Heritage Center, Carlisle, PA		6,000
<u>Maritime Museums</u>		
US Naval Academy, MD	350,000	350,000
Nauticus, VA	240,000	450,000
Mariners Museum, VA	225,000	229,884
Baltimore Maritime Museum, MD	150,000	150,000
Chesapeake Bay Maritime Museum	101,537	90,120
Hampton Roads Naval Museum	97,707	555,080
<u>Crime Museums</u>		
FBI	500,000	500,000
American Police Center and Museum, Chicago	50,000	50,000
New York City Police Museum	12,500	68,000
Cleveland Police History Museum	11,468	11,468
<u>Technology Museums</u>		
Space Center, Houston	857,000	850,000
Intrepid Sea Air Space Museum, NYC	600,000	600,000
Corning Glass Center, New York	266,039	294,017
New Mexico Museum of Space History, Alamogordo	152,180	128,690
Baltimore Museum of Industry, MD	120,000	168,339
NASA Glenn Research Ctr, Cleveland	100,000	100,000
National Atomic Museum, Albuquerque, NM	80,000	80,000

Titan Missile Museum, AZ	57,000	55,000
National Cryptologic Museum, Ft. Meade MD		50,000

Source: American Association of Museums  
Official Museum Guide, 2000 and 2003

**Appendix Table 7. Museums Planned or Under Construction  
Washington Metropolitan Area**

<b>Name</b>	<b>Location</b>	<b>Status</b>	<b>Notes</b>
City Museum, Washington, DC	DC	opened May 03	proj. visitation 300,000
Air and Space Annex	Dulles, VA	to open Dec 03	
National Academy of Sciences Museum	500 5th St NW, DC	to open April 2004	6000 sf, \$30 million; project 100,000 visitors
National Museum of the American Indian	Mall, Washington DC	to open Sept 04	
National World War II Memorial	DC	to open May 2004	
Workhouse Arts Center	Lorton, VA	possible open late 2004	full build out 2008
US Capitol Visitor Center	DC	to open 2005	
National Portrait Gallery/American Art Museum	DC	to reopen 2006	
US Air Force Memorial	Arlington	Sep-06	
Corcoran Museum Gehry Addition	DC	projected opening 2006	
Newseum Relocation	DC	projected opening late 2006	projected visitation 500,000
Martin Luther King Memorial	DC	2008?	
National Music Center and Museum	DC/convention Center	2008?	concept; in fundraising mode
National Museum of the US Army	Fairfax Co. VA	2009	
Marine Corps Museum	Quantico, VA	ground broken	in fundraising
Belmont Bay Life Science Center	Prince William Co VA	in fundraising	proj visitation 500,000 to 1 million
African American History Museum	Mall, Washington DC	2011	
National Health Museum	DC		looking for site
National Childrens Museum	DC		looking for site
Museum of the Americas	??		looking for site
National Museum of the American Latino	DC/Mall		looking for Congressional support
America's Heroes of Freedom	DC or Arlington		concept
National Law Enforcement Museum	DC		concept, 500,000 visitation proj.
Museum of Bags	??		concept
National Pet Museum	??		concept
Changing Planet	Arlington		concept

Source: consultant team research