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National Museum of Americans in Wartime

A Visitor Study

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Executive Summary

The Museum of Americans in Wartime (also known as The American Wartime Museum) is planning to locate on a large site at the intersection of I-95 and Dale Boulevard in Prince William County, Virginia. The site is along the East Coast's major north-south interstate and in a heavily-populated area. It is part of the suburbs of the Washington Metropolitan area, which contains over 6 million residents. The Washington area is home to the US Department of Defense and many other agencies involved in the military or intelligence-community activities. The area also hosts numerous contractor firms to support the Government employees.

The Museum will provide indoor and outdoor exhibits showcasing the major wars that American service members have participated in beginning with World War I. A centerpiece of the museum is its collection of operational military vehicles, displayed in the outdoor "Landscapes of War" settings. The Museum will offer reenactments and special events in addition to exhibits. A restaurant, gift shop, and visible restoration facility will also be available to visitors.

In close proximity to the museum site are Potomac Mills, a shopping center frequented by millions of shoppers each year, and the Woodbridge branch of Northern Virginia Community College, with more than 12,000 students. The residential and commercial neighborhoods nearby are developing rapidly, and in some cases redeveloping, particularly east of the site.

The National Museum of the Marine Corps opened in 2006 6 miles to the south. Its visible site, architectural excellence, and expanding number of visitor galleries have garnered it 489,000 visitors in 2009. The National Museum of the United States Army is planned for a site 13 miles to the north and will also be of a grand scale as befits a museum to the largest service in the US Department of Defense. Also nearby are a variety of Civil War battlefields that have historically appealed to history buffs and Virginia tourists. Several other museums have been planned in the area, including the SciencePort at Belmont Bay, a branch of the Virginia Science Museum, and the Cold War Museum in Lorton, but have not yet begun construction.

Visitors to the Wartime Museum will include local residents, people attracted to the museum due to special affiliations that the museum markets to, a share of the domestic visitors to the Washington area and to Northern Virginia, and a share of international visitors to the Washington area.

Visitor forecasts were prepared for a stabilized year in the museum's operation. Typically, a museum obtains very high visitation numbers in its first full opening year, and by the third year, numbers begin to decline. The initial strong visitation numbers are due to the excitement of a new museum, media coverage, and the novelty of a first-time visit. Over time, the novelty wears off, and in spite of new exhibits or special events, only the most interested visitor comes back. Visitation in the fourth or fifth year is probably typical of what the museum can expect in its normal operating mode until it carries out an expansion or makes other changes that attract repeat visitors.

The resident market draws from the over 6 million people within easy driving distance of the museum. These are people who will visit relatively spontaneously, either alone or with children, or with out of town family members, just to have something to do on a particular day. Their visitation potential is calculated

with a capture rate – the percentage of local area residents who can be expected to visit in a given year. Capture rates were developed for three tiers of visitors, based on distance traveled. The specific capture rate takes into account the relatively large numbers of local area residents who are in the military or are civilians assigned to the Department of Defense; military and DoD retirees; veterans, and others with a specific connection to the wars depicted in the museum’s exhibits. The potential local visitors are then adjusted to take into account factors such as the impact of the region’s weather on visits to outdoor exhibits, traffic congestion on I-95 during what are normally peak visitation days, difficulties in access by part of the museum’s constituency (disabled or aging veterans), and competition from a broad range of memorials and museums already in the area.

Also in the resident market area are a group of visitors whose visits result from specific programming by the museum to attract those visitors. This programming can be geared to school groups, veterans’ reunions, people wanting to attend specific holiday or event commemorations, and additional market segments that are a good fit for the museum’s site and theme.

The visitor market includes visitors from the United States, many of which come from East Coast locations – the prime sending states of New York, Pennsylvania, North Carolina, and New Jersey. It also includes international visitors, most of whom arrive in the Washington region from Canada and Mexico.

Domestic visitors are primarily attracted to museums on Washington’s Mall and nearby locations, unless they are in the area to visit friends and family. Friends and family visitors are likely to visit attractions close to where they are staying. Of those who visit Northern Virginia, 19% identify themselves as museum visitors. Others are in the area to shop or to go on scenic drives or participate in sporting events. Northern Virginia already includes top attractions such as Old Town Alexandria, Mount Vernon, Arlington Cemetery, and Civil War sites. To appeal to these visitors, the American Wartime Museum will have to create distinctive marketing tailored to those visitors’ interests.

International visitors frequently are coming to Washington DC rather than to Northern Virginia. Attracting them also requires specialized marketing. The most likely international visitors to frequent the museum are those who are visiting friends and family living in Northern Virginia, or members of the military or diplomatic circles of foreign countries.

Visitation to the museum in a stabilized year based on market segments and modeled on year 2020, is estimated at 300,500:

Local residents	156,700
Residents attracted by special programming	34,000
Domestic visitors	100,000
International visitors	9,800
Total	300,500

In an alternative approach based on an analysis of comparable museums, the museum could expect visitation of 275,000 to 350,000.

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Chapter 1: The Museum Concept and Site

The National Museum of Americans in Wartime was chartered in 2003, and has recently acquired a physical site in Prince William County, Virginia. The Museum has completed preliminary feasibility studies and initial rounds of fundraising, prepared a site layout and exhibit plan, and started work on local government zoning and land use approvals.

The Museum's objective is to tell the stories of those who served in all branches of the US military, from World War I to the present. Its centerpiece is a large collection of more than 100 fully-operational vehicles and equipment that visitors will be able to see in action.

As planned, the Museum will have 120,000 square feet under roof, including a visitor center, five outdoor exhibit areas, a gift shop, café, and vehicle restoration facility. It plans to open on Veterans Day, November 11, 2014.

Among the Museum's unique characteristics that will serve to attract visitors are:

- Coverage of all major conflicts since 1900 – World War I, World War II, Korea, Vietnam, Iraq/Afghanistan
- Breadth of exhibits across all five uniformed services of the US military
- The personal touch, exemplified by an emphasis on individual stories from the war front and back home
- Large collection of operational vehicles of land, air, and sea forces
- Replicas of actual battle scenes in the Landscapes of War section
- Unprecedented realism in depicting themes of the service experiences of Americans from 1900 to the present
- Opportunity to view active vehicle restoration activities
- Outdoor exhibits provide opportunities for touching, experiencing a battle environment, and for walking
- Special programming including demonstrations and reenactments
- Special services and activities for veterans
- Spaces that can be rented by private organizations for ceremonies, reunions, and other events.

The Site

In 2010, the Museum received confirmation that, due to the generosity of the Hylton family, it could begin operations on a 60-70 acre site at the southwest corner of the intersection of Interstate 95 and Dale Boulevard (exit 156 West). This site is both larger and more accessible than the Museum's previously announced site near Manassas Airport.

This site is 22 miles from downtown Washington DC via I-95, and 6 miles from the Marine Corps Museum at Quantico via I-95. It is also 13 miles from the planned Museum of the United States Army at Ft. Belvoir, to the north along Route 1.

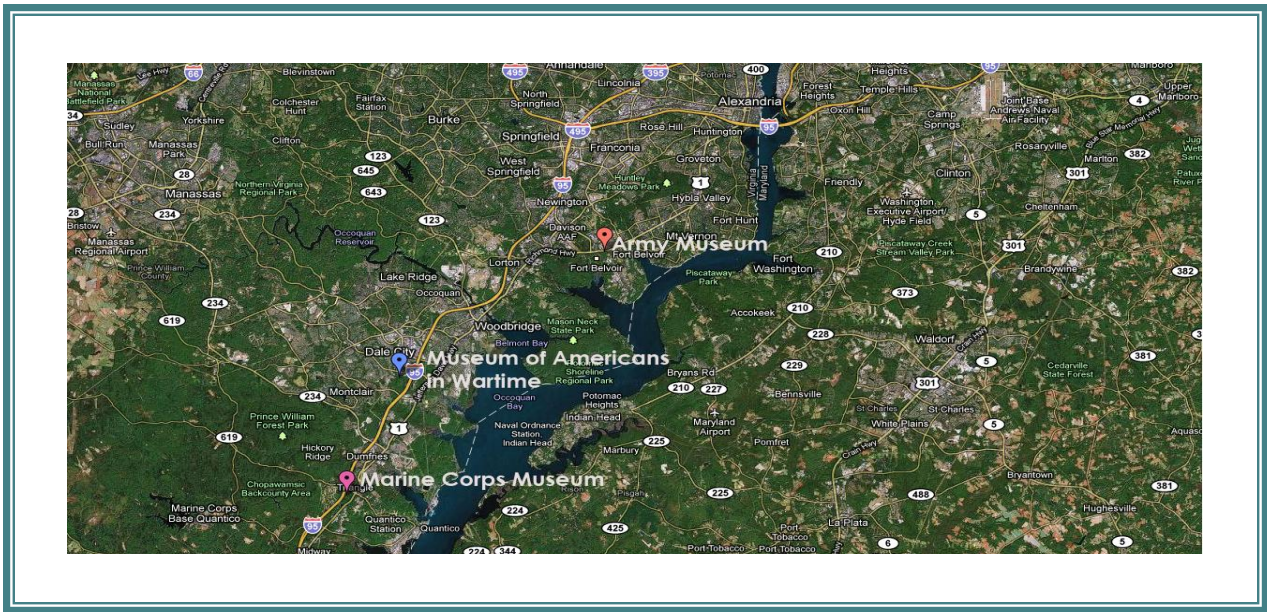


Exhibit 1. Site Location

Use of the site requires a zoning adjustment for 40.1 acres from office, residential, and parkland to commercial to allow use as a cultural arts center. The rezoning was initiated on the motion of Prince William County Supervisors Jenkins and Nohe, received staff recommendation for approval, and was heard by the Planning Commission on June 16 and July 7, 2010, then continued to September 1, 2010. Board of Supervisors consideration will follow Planning Commission approval.

To the north of the site are a K-Mart and three free-standing restaurant sites, the Ashdale Plaza commercial center, a church, and townhouses. I-95 forms the eastern boundary. Dale Service Corp property is located to the west, and vacant land to the south. A Virginia Welcome Center is also to the south with an entrance from I-95. If the Commonwealth of Virginia decides to close its Welcome Centers, this site may become available for future expansion.

The site has numerous advantages:

Ease of vehicular access: The site is located at an interchange to I-95, the region’s major north-south artery. It is also close to Route 1, another major north/south road that connects to Ft. Belvoir on the north and to the Marine Corps Museum on the south. The site entrance on Dale Boulevard connects it to east-west traffic from Dale City and the western portions of Prince William County, while directly facing the site entrance is Gideon Drive which provides access to the large retail center of Potomac Mills and adjacent strip retail centers as well as Prince William County’s population center of Woodbridge.

Proximity to regional attractors: The site is within a five minute automobile or shuttle –bus drive from Potomac Mills, one of Virginia’s top visitor attractions as well as a magnet for shoppers from throughout Northern Virginia. Directly across I-95 from the site is the Woodbridge campus of Northern Virginia Community College with an enrollment of about 12,000 students. It is also located close to existing and planned attractions with a related focus, the National Museum of the Marine Corps and the National Museum of the US Army; this will allow the Museum to plan cooperative events and programs that could increase the visitation at each of the facilities.



Exhibit 2. Site Layout

Proximity to support facilities: Given its highway-oriented location and proximity to major retail and commercial areas in the eastern part of Prince William County, the site is close to a variety of hotels, restaurants, and shopping amenities sought by visitors. A Hilton Suites is being built nearby.

Size of the site: The site's relatively large size and topographic variety allow room to stage a variety of outdoor exhibits that feature specialized and differentiated environments, house a Visitor Center, and provide sufficient parking for the museum's visitors. Current plans call for 450 parking spaces; additional parking may be provided off-site and linked by shuttle service.

One potential drawback of the site is the flip side of its excellent position along I-95. The corridor is heavily travelled, and in rush hour can be the site of major traffic delays. This could affect the hours when the museum can be expected to attract visitors, perhaps squeezing visitation into the off-rush-hour periods of 10 am to 3 pm.

An additional concern is the perception by people who live "inside the Beltway" that the site is too far away. They may not be familiar with Prince William County, or perhaps hardly ever go south of Potomac Mills, and may have a reluctance to try this museum as opposed to ones that are closer to home.

Chapter 2: The Resident Market

Visitors to the Museum of Americans in Wartime are either local-area residents living within a certain distance of the Museum (in time or mileage), or non-local visitors who made a trip specifically to see the Museum or are seeing the Museum as part of a larger activity.

Museum visitation can be described as a baseline amount of visitors for the Museum as described, supplemented by additional increments of visitors due to special programming and events.

Local Residents -- Baseline

The Museum is proposed to be located in the suburbs of a dynamic and growing region, the Washington Metropolitan area. The region's population, households, and employment are expected to continue growing for the foreseeable future. The multi-jurisdictional Metropolitan Washington Council of Governments forecasts population growing from 6.28 million in 2005 to an estimated 6.67 million in 2010, to 7.50 million in 2020 and 8.16 million in 2030 (estimates and projections from MWCOG Round 7.2A Cooperative Forecasts). The region's forecast growth of about 64,000 persons a year through 2030 is due to its strong economy and high rates of in-migration.

Of all the people in the region, a certain portion will come to the Museum for entertainment, learning, or something to do with their families. Those elements of the resident population most likely to come to the Museum in a given year are likely to have one or more of the following characteristics:

- Live within an hour's drive of the Museum
- One spouse is shopping at Potomac Mills and the other wants to do something else
- Have elementary or middle school aged children they want to do things with on weekends or during the summer
- Currently serve in the Armed Forces or are civilians assigned to the Department of Defense
- Serve in the National Guard or Reserves
- Have a past association with the Department of Defense and are retired in the Metropolitan Washington area
- Are families of deceased service members who served in one of the wars portrayed at the Museum
- Veterans of one of the wars depicted at the site
- Military history enthusiasts
- Members of reenactor groups or hobby clubs

Local Residents on a Day Trip to the Museum

The distance to be travelled to get to the Museum determines what portion of each county's population is likely to go to the Museum on a day trip – that is to leave home, drive some period of time, visit the Museum, and drive back home. The closest-in jurisdictions will have a higher percentage of people likely to go to the Museum spontaneously or without planning ahead on a day trip, while further out portions of the Washington area will have a lower percentage of their population choosing to go to this museum versus another that is closer.

Based on the daytime traffic characteristics of the Washington region, the geographic area that is most likely to attract visitors to the Museum without a specific connection consists of Prince William County and the Cities of Manassas and Manassas Park, Stafford County, and the southern portion of Fairfax County. Prince William and Stafford Counties are two of the three fastest growing counties in the Washington Metropolitan area.

The second tier jurisdictions (those that are not immediately adjacent or accessible within less than half an hour, but are likely less than an hour’s drive away) include:

- Virginia
 - Arlington County
 - City of Alexandria
 - Northern portion of Fairfax County
 - Fauquier County
 - City of Fredericksburg
- Maryland
 - Prince George’s County
- DC

A smaller number of local residents will come from third tier jurisdictions farther away in miles and travel time:

- Virginia
 - Loudoun County
 - Clarke County
 - Culpeper County
 - Spotsylvania County
- Maryland
 - Montgomery County
 - Anne Arundel County
 - Howard County
 - Frederick County
 - Charles County

The Maryland Counties are not only farther away for the most part, but reaching the Museum requires crossing the Potomac River at the Wilson Bridge or American Legion Bridge, both of which are time-consuming and not undertaken lightly. Detailed population figures are shown in Appendix A.

Table 1: Population by Tier

	2010 Population by Tier	2020 Population by Tier
Tier 1	962,015	1,117,648
Tier 2	2,665,304	2,919,111
Tier 3	2,633,838	2,999,778
Total	6,261,157	7,036,537

Source: Calculated from MWCOG Population Forecasts Round 7.2

Characteristics of Local Area Residents

Residents of the Washington area are well-educated and have incomes above the national average. Virginia is 4th in the nation in percentage of the population with advanced degrees, and 6th for percent of the population with Bachelor's degrees or higher. Northern Virginia outpaces most of the state.

At 32.8, Prince William County's median age is lower than the average of the region (36.3), indicating the County is a preferred location for families with young children. Prince William also has the highest percentage (29%) of households with children under 18, 5 points higher than the regional figure of 25%, and considerably higher than in the more urban counties of Alexandria and Arlington, in which 19% and 18% of households respectively have children under 18.

In the Washington Metropolitan area, there are 1.3 million children under 18 (2006 American Community Survey), of which slightly under 10% are in DC, and the remainder almost evenly split between the Maryland and Virginia portions of the metropolitan area. COG forecasts that the number of children in the region will increase by 30% between 2000 and 2030.

Prince William County also has relatively fewer seniors; its percentage is the lowest in the region, at 6% (compared to a regional average of 10%). Washington DC and Montgomery County are older, with 12% of their population over 65. Alexandria's population is also forecast to age over the next decade. The region's population that is 65 and over is forecast to double from 2000 to 2030 (COG forecasts).

The region is 51% female, but that varies by age group – males outnumber females for children under 18, but as the population ages, females become more predominant.

The Council on Virginia's Future forecasts that the state's population will continue to age as Baby Boomers enter retirement age; by 2030, one in five will be 65 or older. They also foresee racial and ethnic diversity increasing, due to immigration, higher birth rates in the immigrant population, and greater numbers of racially-mixed couples.

Residents in the Military or Assigned to DoD

Members of the Armed Forces account for 2.82% of the employed population over 16 in Virginia, far higher than the US average of 0.66%. Veterans comprise 13.1% of the civilian population 18 and over.

The US Department of Defense provides data on military and civilian jobs by jurisdiction although that is different than where those employees actually live. We believe that counting jobs will somewhat understate the number of military and civilian residents in proximity of the museum since commuting data show that DoD personnel commute from long distances, including counties in West Virginia, the Baltimore area, and the Northern Neck of Virginia. Nevertheless, the sheer number of military and civilian DoD personnel in the area is indicative of the potential level of interest in a Museum that focuses on specific wartime activities, equipment used by the Armed Forces (and designed or built by civilians and contractors), and on oral histories of those who served on active duty as well as those who supported them at home. Within Virginia, DC, and Maryland, there are close to 300,000 service-related personnel. Active duty military in the Washington portion of the three states total 57,760 and civilians 66,020. A large portion of these individuals is likely to be interested in visiting the museum.

Table 2: Military and DoD Related Personnel in Virginia, Maryland, and DC, 2009

	Active Duty Military	Civilian	Reserves and National Guard	Total
Virginia	63,160	89,713	25,109	177,982
Maryland	29,160	34,966	16,000	80,126
DC	13,424	16,088	6,378	35,890
Three State Total	105,744	140,767	47,487	293,998

Source: Statistical Information Analysis Division Atlas – US Department of Defense

DoD Retirees in the Washington Region

The Washington area is home to a large number of retirees (in addition to war veterans). These are people who were military or civilian employees of the Department of Defense and their families and probably were posted in the region at some point during their careers. They have now settled in the region and retain contacts and affiliations with other retirees and services and benefits. They are among the groups likely to have an interest in the subject matter of the museum.

Veterans

The Department of Veterans Affairs reports there are 16.96 million living war veterans, and if people who served in peacetime are included, a total of 22.8 million veterans; this count includes service prior to 2001, so does not include personnel serving in the Iraq and Afghanistan wars.

Given the Museum’s keystone element of the Landscapes of War, depicting five major wars in a realistic natural setting, veterans of specific wars will be a major component of visitation to the museum. As of mid-2009, there were at least 14.4 million living war veterans in the US:

- World War I 1
- World War II 2,079,000
- Korean War 2,507,000
- Vietnam War 7,569,000
- DesertShield/Desert Storm 2,254,000
- Global War on Terrorism not available until end of war

More than 1.3 million veterans resided in Virginia, Maryland and the District of Columbia in 2009:

- Virginia 814,000
- DC 39,000
- Maryland 480,000

An estimated 36,000 veterans live in Prince William County.

Families of Deceased Service Members

Children, parents, and spouses of veterans of World War I, World War II, Korean War, Vietnam War, and Gulf Wars collecting survivor benefits totaled 510,275 in 2009, according to the Department of Veterans Affairs. These individuals could potentially be attracted to the Museum in conjunction with ceremonies and special events honoring their loved ones or the units they served in. The Marine Corps Museum and the Army Museum nearby will also be offering events to this same market segment. In addition, several memorials in Washington (Vietnam Veterans Memorial, Navy Memorial) will draw upon the same audiences.

Spouses of Potomac Mills Shoppers

Potomac Mills Mall has 1.6 million square feet of retail under roof and 225 retailers; 22 are considered anchor stores. The most recent mall renovation was completed in September 2005. A Bloomingdales' outlet is expected to open in August 2010. The scale and variety of shopping available make the mall a major attraction both to tourists and to Washington area households.

Its proximity to the American Wartime Museum is a major advantage. There will be opportunities to attract spouses of mall shoppers to the museum for a few hours; with good marketing and an offer of round trip shuttle buses between mall and museum, this could be an ideal combination.

Capture Rates and Market Penetration of the Resident Visitor Market

A previous visitor study for the Museum at another site was conducted by ERA in 2005. That study arrived at range of capture rates (the percentage of a market segment that is likely to go visit the museum in a given forecast year) based on distance travelled. Adapting these capture rates to the Tier 1, 2, and 3 population, and using a mid-point value for each tier provides one estimate of the likely Year 2020 Local Visitor Market.

Table 3: Visitors to the museum of Americans in Wartime: Resident Market

Tier	2020 Population	Capture Rate	Resident Visitors
1	1,117,648	0.06	67,059
2	2,919,111	0.04	116,764
3	2,999,778	0.015	44,997
Total	7,036,537		228,820

Source: MWCOG Population forecasts and GMU/Artemel estimates

Note: 2020 was used as a proxy for a stabilized year

However, this gross visitor potential from local area residents must be adjusted downward by about 30% to account for special factors:

- The region is growing increasingly diverse, and soon the white population may be a minority. Yet it is traditionally a white middle class population that goes to museums
- A related aspect to this is that the wars depicted in the Landscapes of War were fought by Americans – people who for the most part were born in the US and raised to be Americans. The

large numbers of foreign born entering the Washington area are less likely to have a personal interest in wars fought by Americans on foreign lands

- The museum's most attractive feature, the Landscapes of War displays of large military equipment, is of necessity outdoors; this reduces the appeal of the Museum in the cold winter months or in inclement weather.
- The Washington region continues to plan, build, and operate ever more museums – with a great variety of subject matter, many innovative display techniques, world-class architecture, etc. The availability of many choices means that there is intense competition for the casual museum-goer looking for something entertaining to do near home.
- Finally, ever-increasing traffic along I-95 and the region's other major roads means that people hesitate to drive at certain times of day, or certain days of the week. This further restricts the ability of the region's residents to visit the museum.

The adjusted estimate of resident visitors to the museum in a stabilized year is 156,674.

Chapter 3: The Non-Resident Visitor Market

The visitor market includes all those who cannot be considered residents of the Washington Metropolitan area, including 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.

International Travelers

In 2009, there was a 5% decline in arrivals of international visitors to the US, and spending dropped 15% year over year. A 5% increase in international travel is expected in 2010, with 5 to 7% increases each year to 2014 (US Department of Commerce).

The largest increases in travel to the US will come from Brazil, China, Korea, Argentina, Australia, and India.

Canada and Mexico are the top two origin markets for tourism to the US, and are experiencing rapid growth. The US Department of Commerce is forecasting an increase of seven percent in 2010, and continued growth through 2014 of 26% in visitors from Canada, and 35% in visitors from Mexico.

Europe is showing slow growth, particularly from the traditional sending countries of UK, Germany, France, and Spain. The Department of Commerce forecasts only a 17% increase in arrivals from Europe through 2014. Countries sending more visitors than in the past include Sweden, Italy, the Netherlands, and Switzerland.

Asia/Pacific countries are forecast to increase their visitation by a total of 49% from 2009 to 2014. Particularly high growth rates are expected from China, South Korea, and India.

In 2009, the top 10 markets for international arrivals to DC generated 43.9 million visitors:

Table 4. International Arrivals to the US, 2009 from the Top 10 Sending Countries

Origin of Visitor	Rank	Number of Arrivals
Canada	1	17,960,000
Mexico	2	13,160,000
United Kingdom	3	3,900,000
Japan	4	2,920,000
Germany	5	1,690,000
France	6	1,200,000
Brazil	7	893,000
Italy	8	753,000
South Korea	9	744,000
Australia	10	724,000
Total, top 10		43,944,000

Source: US Department of Commerce

Of travelers surveyed in 2000, 32% were in the US for business, 26% for vacation and 23% visiting relatives and friends. A 2005 survey found that 36.6% of international visitors travel alone, 7.1% with business associates, and the remainder with family or friends.

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%

Domestic Travelers

In spite of recent economic difficulties, US residents still like to travel for leisure purposes, although perhaps more mindful of price than in previous years. A survey conducted by Harrison Group and the Ypartnership in 2010 of US households with annual income over \$50,000 showed that travelers took an average of four leisure trips in the past 12 months, similar to the average in previous years, and more households planned to increase rather than decrease their future leisure travel.

The Portrait of American Travelers indicates that concerns about the economy, and about the price of gas and airfares have changed the way people travel. Fortunately for Virginia, gasoline prices have been lower than the national average for the twelve months ending May 1 2010, as reported by AAA.

The leisure traveler is now tending to spend more cautiously, look for “deals”, and stay closer to home. Vacationers are also more likely to do their own research online on destinations and places to stay. There is also a growing tendency toward booking travel closer to date of departure than in the past.

The US Travel Tracker, produced by the US Travel Association, shows the following trends:

- The travel demand indicator, which showed continued declines between 2005 and 2009, is now rebounding to positive, though modest, growth. Leisure travel indicators improved between April and July 2010, while leading business travel indicators remained flat.
- The Traveler Sentiment Index published by the US Travel Association declined sharply in February 2008 but almost recovered to pre-recession levels in early 2009. Since then it has remained flat. However, consumers do report more money available for travel than last year.
- Demand for lodging moved out of declining growth territory in December 2009 and has continued to improve since; hotel room occupancy in 2010 is expected to be up slightly, although average daily rates are down
- Airline travel was flat in the last year, although summer air travel increased in 2010; Amtrak ridership was growing faster than air travel.

The US Travel Association forecasts growth in leisure travel (domestic person-trips) of 2.3% in 2010, 2.6% in 2011, 2.3% in 2012, and 1.8% in 2013. The US Travel Outlook for summer 2010 indicates summer domestic leisure travel up 2.3% over summer 2009; vacationers spend 6.7 nights away from home on average; 42% spend \$1000 or more.

An American Express travel survey indicates that leisure travelers tend to be families, and thus would be looking for activities that are appealing to children. Fully 52% of survey respondents indicated they were on a family trip, versus 26% traveling as couples and 10% with friends.

Social media is affecting the way people learn about places to visit on vacation and select lodgings and attractions. eMarketer estimates that 127 million people will be using Facebook in 2010, and 165 million in 2014. People rely more extensively on recommendations by friends and acquaintances. Mobile phones are also becoming increasingly important as a tool to gain access to information about destinations.

All these trends will affect the Museum's ability to attract visitors, and should be monitored periodically as opening date approaches and marketing plans are firmed up.

Visitors to the Washington Area

The Washington DC Convention and Visitors Association estimates that Washington received a total of 16.4 million visitors in 2009, down slightly from 2008, but up from the low point of 15.0 million in 2004. The region still has not reached its pre- 9/11 visitor levels in spite of the addition of several major visitor attractions and the construction of new hotels; in 2000, total visitation to the region was estimated at 17.4 million visitors. The DC Convention and Visitors Association forecasts a slight annual increase in visitation, to 17.0 million in 2012.

Domestic visitors to the Washington area numbered 15 million.. International visitors (defined by the US Department of Commerce to exclude visitors from Canada and Mexico) are estimated at 1.39 million in 2009, up 5% from 2008. The depreciation of the US Dollar is a driving force in the strong international arrivals forecast, but of course the relative cost-effectiveness of the Washington area for foreign travelers could change. Washington is currently 7th among US destinations for international visitors, after several years at the #8 position. The top six destinations ahead of Washington are New York City, Miami, Los Angeles, Orlando, San Francisco, and Las Vegas.

Table 5: International Visitors to the Washington Area, 2005-2009

Year	Visitors from Overseas
2005	1.04 million
2006	1.00 million
2007	1.10 million
2008	1.32 million
2009	1.39 million

Source: Travel Industry Association of America, US Department of Commerce International Trade Administration, and Washington DC Convention and Tourism Corporation

Domestic Visitors to Virginia

Virginia is widely recognized among leisure travelers for its history and historical attractions. Most of these are focused on the Colonial period (Williamsburg, Alexandria) or on the Civil War. An Attitudinal Study commissioned by the Virginia Tourism Corporation in 2009 indicated that the top activity of travelers to Virginia was to take scenic drives (identified by 64% of all respondents), followed closely by

Colonial sites at 62% and Civil War sites at 57%. An additional 50 response categories were logged by the survey, mostly dealing with nature and attributes of hotels and restaurants, and sports.

Tourism slowed in Virginia in the last two years as it did nationally. For example, visitor inquiries at the Virginia Tourism Corporation were down to 50-60,000 in the most recent quarter of 2010 from 80-100,000 in the same quarter in 2009. Recovery in Northern Virginia has begun, as Reagan National Airport passengers were back up to their 2009 peak. In 2009, National Airport's peak passenger total was 1,595,780 (June). In the first four months of 2010, a peak of 1,592,183 was reported in April (Virginia Tourism Monitor). Dulles Airport has not yet passed its peak of 2,210,973 in summer 2009.

April and July are the two months with the highest proportion of the Washington area's annual visitation, with 11% and 12% of total visitors, respectively. The months with the lowest percentage of annual visitors are November (6%) and December (4%). Leisure travel peaks in March and April, while business travel peaks in January-February.

Leisure travelers constitute 54% of all travelers to the Washington area, while people here purely on business are 41% of total travelers. A mere 5% combine business and pleasure. Business travelers are likely to be in the area for a short period of time and doing business either in downtown Washington, Bethesda/Silver Spring/Rockville in Maryland, or in Arlington, Alexandria, Tysons Corner, or the Dulles area in Virginia. Business travelers are unlikely to have time to make a visit to the American Wartime Museum, which would be quite a distance from their business activities.

Fourteen states together send 80% of the Washington area's visitors. The top cities of origin of leisure travelers to the Washington area are:

1. New York
2. Richmond
3. Harrisburg
4. Baltimore
5. Raleigh-Durham
6. Philadelphia
7. Boston
8. Norfolk
9. Los Angeles
10. Atlanta

Source: D.K. Shifflett for the DC Convention and Tourism Corporation

The Washington area appeals primarily to visitors who are already on the East Coast, consistent with findings that people are staying closer to home for vacations, and choosing destinations they can drive to.

Visitors to Northern Virginia

The Virginia Tourism Corporation surveys visitors to Virginia every few years. Its FY 2007-2009 Tourism Survey (also excerpted in Appendix B) has provided a profile of the traveler to Northern Virginia:

- 47% are traveling to visit friends and relatives
- The peak travel months are June and July
- Most travel in groups of 1 to 2 persons (71%)
- 22% of travel parties include children under 18
- 71% come by private automobile

- Overnight stays are evenly split between staying at a hotel/motel and staying with friends or relatives in a private home
- 19% of visitors report visiting a museum while in Northern Virginia
- 12% report an activity associated with the Civil War, and 15% an activity related to Colonial times
- The top visited cities are: Alexandria, Fredericksburg, Fairfax, Arlington, Manassas
- Museum visitors and cultural/heritage tourists to Virginia report their top cities as being Richmond, Williamsburg, and Virginia Beach
- 44% of visitors to Northern Virginia decided on their visit less than two weeks before it occurred
- Museum visitors are less spontaneous: only 28% decided on their visit within two weeks; 31% made plans three months to one year ahead of time.

The Museum is located between two major draw cities, Alexandria and Fredericksburg, but is not currently in an area where visitors naturally gravitate. Its closeness to Potomac Mills is helpful, as that shopping center is one of the top attractions in Northern Virginia. Most of the museum visitors who come to Northern Virginia are looking for Civil War history, which will be further encouraged by the upcoming Sesquicentennial observations from 2011 to 2015. The Museum will have to differentiate itself through aggressive marketing to attract the attention of Northern Virginia tourists.

Table 6: Activities of Domestic Visitors to Northern Virginia (Percent)

Activity	Visitors
Shopping	30
State/National Park	22
Museums	19
Scenic Drive	19
Historic Sites	16
Visiting Old Homes	13
Beach	8
Gardens	7
Mountains	7
Theme Parks	7

Source: Virginia Tourism Corporation

Characteristics of Museum Visitors

The Virginia Tourism Corporation FY 2007-2009 survey provides a profile of museum visitors:

- Travel to see friends and family (38%) and for entertainment and sightseeing (27%)
- Have a longer peak travel period than general visitors – April through August
- Travel in larger groups (only 59% are 1 or 2 person groups) indicating more travel with children or as part of special purpose tours
- 34% travel with children under 18
- Stay more nights than Northern Virginia or Statewide travelers
- Less likely to stay in a private home with friends or relatives (36%) than Virginia travelers (49%)
- 29% do an activity associated with the Civil War, and 44% with the Colonial period

- 47% of museum visitors went to a history museum; 25% visited a military museum; 37% visited old homes and mansions
- Interest in visiting museums also translates to an interest in scenic drives, state/national parks, or in viewing wildlife

Museum visitors are more likely to shop, attend events and festivals, frequent theme parks, and go to fine restaurants than the average Northern Virginia or Statewide traveler. Shopping is the most frequently reported activity of the museum visitor – 49%.

Museum visitors’ favorite locations to visit in Virginia are

- Williamsburg 40%
- Richmond 26%
- Virginia Beach 25%
- Norfolk 21%
- Alexandria 21%

Museum visitors and cultural/heritage visitors prefer activities that are either historic or scenic, while the general visitor to Northern Virginia shows a market preference for shopping and scenic attractions. For the Northern Virginia visitor, but not the museum or cultural visitor, Tysons Corner Mall and Potomac Mills are in the top four attractions.

Capturing the Visitor Market

As noted previously, out of town visitors are here to visit friends and family as well as to see the attractions of the Washington area. If visiting friends and family, they will tend to visit attractions that their hosts have previously enjoyed, or that are close to where they are staying. If they are on a vacation tour of the area, they will almost certainly go to the National Mall first and enjoy those attractions, focusing only secondarily on any attractions that are located in Northern Virginia or Maryland suburbs.

An examination of any of the popular tour guide books to the Washington area reveals that more than 80 percent of their pages devoted to attractions in the area talk about things to do that are located in DC. Virginia attractions are generally limited to Old Town Alexandria, Arlington Cemetery, and Mount Vernon.

For a non-local resident to go to any other Virginia attraction will require that person to have a special interest in the subject matter and have spent time researching what there might be in the environs of interest.

Washington DC had 16.4 million visitors in 2009, according to the Washington Convention and Tourism Corporation. Alexandria claimed 3 million visitors in the same period. Currently most of the tourism “product” in Northern Virginia is in Alexandria, or consists of Mount Vernon and Arlington Cemetery. Civil War buffs also may be interested in sites such as Manassas National Battlefield Park, although that site is less frequently mentioned in guidebooks aimed at US and international visitors.

Total visitation to Northern Virginia is estimated at 8 million. The Virginia Tourism Corporation’s survey of visitors to Northern Virginia indicates that 19% of those visitors visit a museum while in Northern Virginia. They may visit only one museum, or perhaps two. Museum visitors will go to Mount Vernon, the Marine Corps Museum, the Army Museum after it opens, and potentially others. It will benefit the American Wartime Museum to have cooperative programs with these already-visible museums so that it can effectively attract the visitor’s limited time and attention.

Chapter 4: Specialty and Add-on Market

The baseline estimates of visitors from the Resident Market and the Visitor Market are adjusted upwards by marketing efforts to special segments of the population. These are people who come to the museum for a specific purpose rather than for general entertainment or as part of a larger trip. Targeted marketing efforts and special programming by the Museum can potentially add 70,000 or more visitors per year. The Museum can also spread visitation away from peak hours by creating programs on days or in time slots that are less popular with the general visitor.

School Field Trips

School trips have always been part of the special markets for museums. In recent years, school trips originating in Virginia have decreased, due in part to security concerns since 9/11, but also to the need to tie trips in with Virginia's Standards of Learning curriculum units, and the strain on school budgets. The Marine Corps Museum reports 67,000 school related trips since it opened in November 2006.

The American Wartime Museum's success in attracting school groups will depend on the extent to which it can tailor exhibits to meet the requirements of Virginia's Standards of Learning and whether it can match or compete with the Army and Marine Corps museums which do not charge admission in this age of tight school budgets.

Scouting and Clubs

The museum's interesting terrain and large outdoor spaces present opportunities to attract Scout troops and people interested in wilderness and camping adventures. The Boy Scouts of America hold an annual Jamboree at Ft. A. P. Hill, not too far from the American Wartime Museum. It may be possible to create tie-ins resulting in additional visitation; special camping and war games areas could be designated that would attract additional visitors year-round.

Special Events (holidays, etc)

Holiday such as Veterans Day or Memorial Day can be opportunities to create and host special events that will boost visitor totals. Commemorations of service tied to anniversaries of particular battles can also attract people who served at the times being observed. On the other hand, several area museums already have competing programs on these holidays. The American Wartime Museum can develop commemorative programs focused on specific battles or events of the wars it portrays, on unique days where it will be the only museum with an event.

Special Focus Programming

Mount Vernon has been very skilled at creating special programming to increase visitation at the mansion. For example, it has a two-day harvest festival in the fall, winemaking days, events built around George Washington's distillery, etc.

The American Wartime Museum could focus on special events that tie in to aspects of the battles being recreated, for example, reenactments, which are quite popular among Civil War buffs but presumably also for later wars. The Museum's Annual Open House already attracts reenactors portraying members of the Russian, German, British, and Vietnamese armed forces.

Facility Rentals for Weddings, Promotions, and other Ceremonies

Much as military families use the Officers' Club for weddings, receptions, graduations, and other major life events, the American Wartime Museum could offer its Visitor Center for a variety of ceremonial occasions. Renting the facilities to private groups would boost the museum's finances as well as increasing visitor numbers.

Shows and Expos

The Museum has received expressions of interest from gun shows, vendors of collectors' items and memorabilia, enthusiasts' clubs, and others to provide exhibit and meeting space. If space is available on site, their events could also add to museum visitation.

Veterans Reunions

Veterans groups should find the museum ideal for reunions by unit or wars or areas served in. The Museum could also provide meeting rooms for regular meetings of organizations such as the VFW, American Legion, and others.

Military and Special Schools and Universities

The museum could provide special lecture rooms and activities tied to exhibits that would be of interest to military prep schools, universities with a military focus, and special training academies.

Seminars and Films, Lectures

The Cold War Museum had planned to host film series using films depicting events of the Cold War; have annual seminars on aspects of the Cold War; and invite guest speakers to talk about specific events and their role in those events. This type of programming is varied and appeals to a variety of people depending on the topic. It could increase visitation by local residents once they have exhausted the appeal of seeing the primary exhibits at the museum.

Parades, Demonstrations

Everyone loves a parade! Demonstrations of equipment (the Marine Corps Museum planned airplane flyovers), mock drill exercises, and special performances could all attract additional visitors to the museum.

Cooperative Programs with Nearby Museums with Similar Themes and Interest Groups

Given that two major military-themed museums are in close proximity (future Army Museum, Marine Corps Museum), there may be much to gain by designing cooperative programs with those museums; for example a visitor to the Marine Corps Museum could be offered reduced-price admission to the American Wartime Museum on the same day. There could be jointly-provided free shuttle bus service between the two museums. All three museums could reach out to tour operators and tour bus drivers to bring passengers to the American Wartime Museum as well as one of the other nearby museums. A good marketing strategy will consider these options to increase visitation.

Table 7: Potential Annual Add-on Visitation Due to Special Events and Programming

Type of Event	Potential Add-on Visitation
School field trips	3,500
Scouting and clubs	400
Special events around holidays	6,000
Special focus programming	6,000
Facility rentals	750
Shows and expos	5,000
Veterans Reunions	3,000
Military Academies or Training Schools	1,500
Seminars and films or lectures	600
Parades and demonstrations	2,400
Cooperative programs with other	5,000
Total additions to visitations	34,150

Source: GMU/Artemel estimates

The actual add-on visitation achieved will depend on the marketing strategies adopted by the museum and which areas it chooses to focus on in attracting visitors.

Chapter 5: The Competitive Environment

The Washington DC metropolitan area is replete with museums of all types, ranging from the popular 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, as well as to the size of the population or special-interest group it ties into.

The Smithsonian museums are the superstar of the Washington area museum scene, but even within the Smithsonian complex, attendance levels vary greatly. The 19 museums tracked as part of the Smithsonian complex reaped 30 million visitors in 2009, a 19.4% jump since 2008. Specialized museums or those charging admission, as well as those away from the National Mall in Washington DC tend to have smaller visitation numbers.

Washington Area Museums

Major Attractions

Three main Smithsonian museums on the Mall draw large numbers of visitors: the National Air and Space Museum, National Museum of Natural History, and National Museum of American History. The Air and Space Museum on the Mall drew 10 million visitors in 2003, but that number is down to about 7 million since the construction of the Udvar Hazy branch at Dulles Airport, which averages 1.2 million visitors a year. The Museum of Natural History draws about 7 million visitors annually; in 2009, it was the most-visited museum. The American History Museum averaged around 5 million visitors, closed for two years for renovations and reopened in November 2008; in 2009, visits totaled 4.4 million for the new museum.

The Native American Museum’s distinctive architecture and unique subject matter have garnered it 1.4 million visitors in recent years, down from 1.8 million in 2007 after its third year of operation. Other museums in the Smithsonian family draw fewer visitors, as shown on Table 8.

Table 8: Smithsonian Museum Annual Attendance (selected years 1999 – 2009)

Museum	1999	2003	2008	2009
Air and Space (Mall)	9.1 mil.	10.0 mil.	7.0 mil.	7.0 mil.
Air and Space/Udvar-Hazy (Dulles)			1.2 mil.	1.2 mil.
Natural History	7.4 mil.	6.3 mil.	7.4 mil.	7.0 mil.
American History ¹	5.5 mil.	5.0 mil.	4.4 mil.	480,000
Castle	1.8 mil.		1.9 mil.	1.7 mil.
Hirshhorn	784,000	690,000	670,000	668,000
Sackler/Freer	600,000	599,000	892,000	983,000
Postal Museum	463,000	500,000	334,000	349,000
Renwick (off Mall)	136,000	134,000	137,000	161,000
Native American	NY 560,000	NY 250,000	DC 1.5 mil.	DC 1.4 mil.
National Zoo			2.2 mil.	2.1 mil

Note 1: Reopened November 2009.
Source: Smithsonian Institution visitor counts

Total visits were up around 20% from 25.2 million in 2008 to 30.0 million in 2009.

General Interest Museums and Attractions

General interest museums attract visitors from a broad range of interests, backgrounds, education, and income levels. Their attendance varies according to location, marketing, and the strength of the collection.

Visitation totals vary widely. Arlington Cemetery is the top attraction, with 4 million visitors a year, but is not necessarily a comparable to museums with indoor space. The National Gallery benefits from its location on the Mall and proximity to the highly popular Smithsonian museums as well as the excellence of its collection and its use of blockbuster exhibits. The International Spy Museum considerably exceeded its original attendance projections and was even able to increase its ticket prices, in spite of its location off the usual tourist paths; intriguing exhibits and smart marketing have contributed to its success. Mount Vernon in Virginia has been able to increase its visitation due to its attractiveness to local residents in Virginia, strong promotion to tour groups, and extensive use of special events programming throughout the year. Its recent addition of a Visitors Center, expanded gift shop, and theater increased its visitation even further. The Newseum relocated to DC from a site in Rosslyn recently and has been successful at its new location. National Geographic Explorers Hall, while dealing with interesting subject matter, is constrained by its rather small exhibit space and location in the office district away from other tourist attractions.

Table 9: Visitation at General Interest Museums in the Washington Area

Name	Location	Visitation
Arlington Cemetery	VA	4,000,000
Air & Space	DC	3,300,000
US Senate*	DC	1,500,000
Udvar Hazy	VA	1,200,000
National Archives	DC	1,000,000
Mt. Vernon	VA	918,328
Newseum	DC	714,000
International Spy Museum	DC	700,000
Manassas National Battlefield Park	VA	700,000
American Indian Museum	DC	526,000
Marine Corps Museum	VA	489,000
Monticello	VA	447,514
National Building Museum	DC	375,000
Ft. Washington	MD	297,000
US Navy Museum -- Navy Yard	DC	250,000
National Geographic	DC	207,627
Naval Heritage Center	DC	70,000
National Firearms Museum	VA	35,000
Weems-Botts Museum	VA	3,000

*US Senate is now Capitol Visitors Center, opened in 2008. It is forecast to attract 2 million visitors a year.
Source: American Association of Museums and individual museums

Special Interest Museums

These museums have collections that appeal to more specialized interests, have perhaps less dazzling exhibits, are located away from the mainstream of attractions, or are simply not publicized as much. Visitation totals are generally under 400,000 although the visitors they do have tend to be loyal, make repeat visits, and contribute financially either through memberships or donations. Military-themed museums fall in this category.

The National Building Museum, which has a magnificent building, location near Metro, and introduces several new exhibits each year, boosted its attendance from 220,000 in 1999 to 375,000 in 2005.

The Navy Museum, although out of the way for tourists at the Navy Yard, boosts its visitation totals through visits by military personnel. Since security measures were enacted in the early 2000s, visitation fell from about 400,000 annually to 250,000 in 2009.

The Textile Museum's audience is highly specialized, and its location is far from other museums or tourist attractions. Its visitation averages around 30,000 annually.

Fort Washington, in Maryland across the river from Mount Vernon benefits from its close in location to attract 297,000 in 2005.

The Patent and Trademark Office Museum at its new location in Alexandria draws 8,000 visitors.

Museums and Cultural Attractions Close to the Wartime Museum

Northern Virginia's inventory of museums historically has consisted of museums showcasing historic homes or civil war forts; most of these are quite small and have consequently small visitation numbers. Mount Vernon is the exception, with its large grounds, extensive programming, and series of visitor amenities.

With the 2004 opening of the Udvar Hazy annex to the National Air and Space museum, and in 2006 the National Museum of the Marine Corps, Northern Virginia has acquired significant tourist attractions. The Marine Corps Museum's attendance was at a high of 548,875 in 2007, its first full year of operation, and has declined slightly to 489,000 in 2009.

Northern Virginia has numerous remnants of the Civil War including large battlefields. These are the site of visits by Civil War buffs and general history fans. Among them is Manassas Battlefield Park, which attracted 700,000 visitors in 2009. As Virginia prepares to commemorate the Sesquicentennial of the Civil War, 2011-2015, the marketing buzz and special events will result in increased visitation at Civil War sites throughout the state.

The National Museum of the US Army has been planned for a site at Ft. Belvoir for a number of years. The Environmental Assessment has been completed, but a final site decision has not yet been announced. When this museum opens, potentially in 2015, there is an opportunity for joint programming and cooperative marketing. The Army Museum, Marine Corps Museum, and American Wartime Museum would occupy a unique axis south of the Capital Beltway of museums with a military theme, and by clustering in general proximity to each other, could become a significant draw for people who want to see more than one of them.

Table 10: Key Characteristics of selected museums in Prince William and Fairfax Counties, Virginia plus military museums in Washington, D.C.

Museum & Location	Museum Type	Admission fee (adult)	Total Attendance	Floor Area (sf)	Historic Site	Comments
The Manassas Museum, Manassas, VA	Local History	\$5	19,362	7,000	no	City owned and managed
Manassas Nat'l Battlefield Park, Manassas, VA	Military	\$3	700,000		yes	
Fairfax Museum, Fairfax, VA	Local history	Free	10,000	2,000	yes	Housed with city visitor center
National Firearms Museum, Fairfax, VA	Firearms	Free	35,000	20,000	no	Opened 1998, no room to expand
NASM Udvar-Hazy Center, Chantilly, VA	Aircraft	Free	1.18 million	346,774	no	Will be 760,000 sf when completed
National Museum of the Marine Corps, Triangle, VA	Military	Free	489,000	240,000	no	
Mount Vernon, Fairfax County, VA	Historic estate	\$15	1 million	dna	yes	500 acre site
Naval Heritage Center, Washington, DC	Military	Free	70,000		no	Located next to the Navy Memorial has a theater, rotating exhibits about the sea services, and Navy Log kiosks; daily screenings of films
U.S. Navy Museum, Washington, DC	Military	Free	250,000			Located at Washington Navy Yard; interactive exhibits and displays; naval artifacts, models, documents and fine art. Exhibits include model ships, undersea vehicles, periscopes, & destroyer

Source: Individual museums

Several additional museums have been in the planning stage:

- A SciencePort extension of the Richmond-based Virginia Science Museum was to open at Belmont Bay in Prince William County; as of 2008, the Virginia Science Museum's financial difficulties in light of state budget cuts, declines in earned revenue, and insufficient private fundraising have put this museum on hold. Its mid-range attendance forecast had been estimated at 789,000. The museum was planning to review the project after the fall 2009 completion of its strategic plan effort. The original Virginia Science Museum reported attendance of 410,848 in 2005.
- The Museum of American Diplomacy conducted visitation studies and focus groups in 2004 for a location within the State Department on 21st Street NW in Washington DC. The Museum planned to have 17,000 square feet of exhibit space with ancillary theater, seminar room, and gift shop. Its forecast annual visitation ranged from 80,000 to 130,000, with an additional 80,000 possible with additional programming, optional expansions, and extensive marketing.
- The Cold War Museum was in negotiations with the Fairfax County Park Authority for a 25 acre site in Lorton until recently; due to difficulties in fundraising, that site is on hold and the museum has opened a "starter" branch at Vint Hill in Fauquier County. Its potential attendance at the Lorton site had been estimated at 350-400,000.
- The National Museum of the United States Army is well underway in fundraising, site design, and exhibit development for a site at Ft. Belvoir in Fairfax County. Currently, it is planned to break ground in 2011 and open in 2015. Visitation is forecast to be in the range of 750,000 to 1 million.
- Fredericksburg extension of the Museum of the Confederacy based in Richmond in time for commemorations of the 150th anniversary of the Civil War. ;
- National Children's Museum at National Harbor, MD
- In DC, museums in various stages of development include the Martin Luther King Jr National Memorial, the African-American Museum, and the Dwight D. Eisenhower National Memorial. Most recently, a Museum of American Latinos has been announced for the Mall area in Washington.
- At one point, the Korean War Museum looked at sites in Northern Virginia, but has since focused on Springfield, Illinois where a groundbreaking ceremony was to take place in summer 2010. It has recently announced that it is "short of financial and operational goals to break ground".

The richness of Washington's existing museum offerings and ambitious development programs for new museums mean that there is substantial competition for the attention of visitors and residents. Since the onset of the economic downturn, many have had difficulty meeting their fundraising goals and have been delayed.

Military, War, Commemorative, and Large Equipment Museums in the US and Internationally

Military museums, which focus on a specific unit of the military, a particular war or battle, or a specific historic site, tend to have lower levels of attendance. The exceptions are a handful of larger museums that portend to depict an entire branch of the Armed Forces or a broad range of historical periods. Table 11 provides visitation estimates for a number of military themed museums in the US and one in Canada. The table in Appendix D provides additional details for museums that are Army, Navy, Air Force, and Marine themed or relate to a specific historic period.

Table 11: Military, War, and Equipment Museums

Name	Location	Visitation
Vietnam Veterans Memorial	DC	4,000,000
Holocaust Memorial	DC	1,910,200
US Air Force Museum	Ohio	1,300,000
Udvar-Hazy Air & Space	VA	1,200,000
Navy Memorial	DC	1,000,000
Pensacola Naval Air Museum	FL	717,649
Hampton Roads Naval Museum	VA	552,975
Canadian War Museum	Canada	500,000
Marine Corps Museum	VA	489,000
Infantry Museum, Ft. Benning	Georgia	400,000
Nauticus	VA	320,000
National WWII Museum	Louisiana	316,000
Pima Air and Space Museum	AZ	250,000
US Navy Museum -- Navy Yard	DC	250,000
Patton Museum	NY	150,000
Ist Division -- Cantigny	IL	106,000
101st Airborne		90,000
Ordnance Museum Aberdeen	MD	85,000
Naval Heritage Center	DC	70,000
Army Transportation Ft. Eustis	VA	52,737

Source: American Association of Museums and individual museums

Typical of the smaller service-branch specific museums are the US Army Ordnance Museum at Aberdeen, and the Army Transportation Museum at Ft. Eustis Virginia which had 92,000 visitors in 2002 and now 53,000. At the other end of the spectrum are the US Air Force Museum at Wright-Patterson Air Force Base near Dayton Ohio (1.3 million visitors in 2009) and the National Museum of Naval Aviation in Pensacola, Florida (717,649 reported visitors in 2009). Both have gone beyond being specialized military museums and offer extensive exhibits designed to appeal to general audiences.

Internationally, Canada, the UK, and Australia have war museums that cover at least World War II. The Canadian War Museum has 450,000 annual visitors in a 9,300 square meter exhibit space.

Maritime museums have slightly broader appeal to general audiences but are still of greatest interest to people who love the sea. The Mariners Museum in Newport News gets 267,000 visitors. The Hampton Roads Naval Museum (USS Wisconsin) attracts 553,000 and the Chesapeake Bay Museum attracted 70,000, down from 90,000 in 2002.

The USS Intrepid in New York recently came back from dry dock repairs. It now receives 915,000 visitors; admission is \$22 for adults, although active duty and retired military personnel are free. The museum features a range of interactive exhibits and events providing a snapshot of heroism, education, and excitement. Children and adults view historical recreations such as Day of Darkness/ Day of Light. Visitors can also ride in an A-6 Cockpit Simulator, visit the Virtual Fly Zone, and tour the interior of the world's fastest commercial airplane, the Concorde.

Technology museums, which include railroad museums, space centers, and missile history museums, typically reach 50,000 to 300,000 visitors a year. The National Railroad museum in Green Bay Wisconsin claims 75,000 visitors per year. The Titan Missile Museum in Saharita, Arizona charges \$7 basic admission and reports attendance of 51,000 visitors per year. It is run by the Pima Air and Space Museum in Tucson. The Pima museum showcases 300 aircraft on 80 acres, attracting 250,000 visitors.

The National Construction Equipment Museum in Bowling Green, Ohio operates to preserve the history of the construction, dredging and surface mining equipment industries. Historically significant machines are restored, exhibited and interpreted for the education and enjoyment of the general public. Sales and service literature, photographs, and other documentation of these industries are preserved and made available for research.

Memorials can attract many visitors who have a personal connection to the subject. In Washington DC, the Vietnam Veterans Memorial attracted 2.8 million visitors in 2003 (down from 3.8 million in 2001) and currently claims 4 million visitors. An underground Education Center was approved in November 2003 to honor the memory of Vietnam Veterans and celebrate values exhibited by America’s service members. It is still in the fundraising stages but will certainly attract additional visitors when built.

The Navy Memorial, also in DC, claims close to 1 million visitors. The National World War II Memorial was built in May 2004 after a \$197 million fundraising campaign. The US Air Force Memorial opened in Arlington Virginia, not far from the Pentagon, in October 2006. The Pentagon Memorial opened on September 11, 2008.

Museums That Charge Admission

Since the Washington area offers numerous museums that can be visited without an admissions charge, it is useful to examine visitation patterns at those museums that are paid attractions. Admission prices for museums with significant in door exhibits (as distinguished from historic sites with ancillary exhibits) tend to be in the \$12 - \$15 range. This price range does not appear to deter visitors. Among local museums charging admission and their most recent number of visitors are:

Table 12: Visitation at Museums that Charge Admission

Name	Location	Amount	Visitation
International Spy Museum	DC	\$18	700,000
Canadian War Museum	Canada	\$12	500,000
Nauticus	VA	\$12	320,000
National WWII Museum	LA	\$14	316,000
Mariners Museum	VA	\$12	267,165
Civil War Museum Harrisburg	PA	\$9	NA
Pamplin -- Petersburg	VA	\$10	NA
Pennsylvania Military Museum	PA	\$6	150,000
Manassas Museum	VA	\$5	19,362
Manassas National Battlefield Park	VA	\$3	700,000
Mount Vernon	VA	\$15	1,000,000

Note: Quoted price is full adult admission ticket
 Source: American Association of Museums and individual museums

Theme Parks

In a sense, a theme park could be considered a comparable to the Landscapes of War portion of the American Wartime Museum. Theme parks have a wider variety of amusements, including water features, rides, and booths allowing visitors to win items. Their visitation is usually in the millions. Theme parks reachable from Washington and their visitation totals include:

- King's Dominion: the park has 15 roller coasters and 60 rides on a 400 acre site, attracting 2 million visitors a year
- Six Flags: has 7 roller coasters, 100 rides on 200 acres in Upper Marlboro MD
- Busch Gardens: on a European village theme, has 50 rides and other amusements 50 miles from Washington. It receives 3.9 million visitors during a 10 month season.

The roller coasters and water slides give a sense of family fun different from a museum or commemorative experience. Yet, with the shorter attention spans of today's young audiences and the trend toward interactive and computer – assisted experiences, theme parks can provide valuable clues to enhancing the visitor experience.

Chapter 6: Visitation Potential and Recommendations for Maximizing Visitation

This section summarizes the visitation potential for the Wartime Museum based on the analysis presented in the preceding chapters. It also provides information on the patterns of visitation.

Visitation by Local Residents and According to Market Segments

The largest portion of visitors to the Museum will come from local area residents. These include two categories:

- 1) People who reside in the area and are looking for an activity during their leisure time
- 2) People attracted to special events and programs at the museum, or who fit very specific targeted categories.

The Museum's ability to attract local area residents during their leisure time depends on several factors of which proximity and appeal of the exhibits are the two primary ones.

Proximity means that those who live closest to the Museum have the greatest likelihood of deciding to visit the museum on any given day. Those within a half-hour drive are more likely to visit the Museum than those living more than one hour away. Accordingly, the area population has been divided into tiers of attraction, with different capture rates for each tier. These capture rates assume that the exhibits offered are compelling and attractive to different age groups and socio-economic classes, and that they are renewed often enough that multiple visits by the same individual or family are possible.

As described in Chapter 2, local area residents can be expected to contribute 156,674 visitors in a stabilized year.

Special market segments, including school groups, Veterans reunions, holiday programming, and the like are forecast to generate an additional 34,000 visitors for the local area.

The resident market in a stabilized year is estimated at 190,674.

Visitation by Out-of-Town Visitors

Domestic Travelers

DC attracts about 15 million travelers per year. These travelers could be in the area to visit friends and family, go to museums, shop, partake in scenic or recreational activities, and more. While no visitor totals are available for Northern Virginia alone, Alexandria claims 3.3 million visitors and has most of the tourism product in the region.

Of the visitors to Northern Virginia, 19% of the respondents to the Virginia Tourism Corporation survey identified that one of their activities while in the region was going to a museum. Northern Virginia's primary attractions are Old Town Alexandria, Arlington Cemetery, Mount Vernon, the Marine Corps Museum, Civil War battlefields, and an assortment of historic mansions. Arlington Cemetery counts 4 million total visitors (resident and out of town), Mount Vernon 1 million, the Marine Corps Museum one-half million. A visitor may visit more than one attraction. The American Wartime Museum can be expected to capture 100,000 out of town domestic travelers who are arriving from nearby states that provide tourists to the Washington region. This capture will of course depend on the quality of the

marketing done by the Museum and its ability to reach people who live in other states with compelling descriptions of the exciting times they and their family can have at the museum.

International Travelers

Of the 1.4 million international travelers to the Washington region, about 70% are leisure travelers, and 20% of those will spend some time in Northern Virginia while on their trip. A capture rate of 5% of those international travelers visiting Northern Virginia would be excellent and add 9,800 visitors to the museum.

Total Visitation Based on Resident and Visitor Patterns

Based on the above analysis, the American Wartime Museum's visitation in a stabilized year, approximately 5 years after opening, is estimated at:

Resident Market	190,674
Visitor Market	109,800
Total	305,474

Visitation Based on Comparable Museums

Another approach to estimating visitation is to compare the Museum's offerings to other museums currently in operation. In Chapter 5, museums were compared based on their location (Washington-area museums), theme (military, equipment, and outdoor museums), and pricing (museums that charge admission).

Washington Area Museums

Washington-area museums range from the very large (Smithsonian museums with visitation in the several millions) to the very small (specialized museums with visitation under 100,000). Many museums are transitioning from past static displays to new interactive display techniques. They are constantly renewing their exhibits, developing special programs targeted to specific audiences, and ramping up their marketing through social networking techniques. Meanwhile, new museums are constantly appearing on the drawing boards, both big and small. Washington being the city that it is, Memorials to various wars, branches of the armed forces, and events are constantly being planned and built. This means there is enormous competition for the attention of residents and visitors.

In comparison to other Washington area museums, the Museum of Americans in Wartime fits in the range of museums having 297,000 to 375,000 visitors.

Military/Equipment/Outdoor Museums

Theme parks, memorials, museums focused on one of the services, museums addressing a specific war or military topic, and museums showcasing one type of hardware fall in this category. Theme parks claim admissions in the 1 to 2 million visitor range and are not true comparables due to the extent of their offerings. Service museums like the Marine Corps Museum or proposed Army Museum are probably at the high end of the range of possibilities; the Marine Corps Museum averages 500,000 visitors per year over its first three full years of operation. Equipment museums (Army Transportation Museum, Titan Missile Museum) usually capture fewer than 100,000 visitors per year. The Battleship Wisconsin attracts more than 500,000, probably in part due to its role as the centerpiece of Norfolk's waterfront tourism.

The American Wartime Museum's visitation, in comparison to these museums, could be expected in the range of 300,000 to 500,000.

Museums that Charge Admission

Comparable museums charge \$12 to \$14 for adult admission. They attract 275,000 to 500,000 people. An admission fee does not appear to be a deterrent to visitation as long as the museum has appealing and interesting exhibits, special programming, targeted marketing, interesting architecture, visitor services such as a café or restaurant, and convenient access and parking.

Patterns of Visitation According to Time

Seasonal Variation

Throughout the 1990s, the Smithsonian Institution kept detailed records of visitation patterns at its museum and released these findings in a number of studies. A study for the National Air and Space Museum discussed visitor patterns in three seasons: winter (January through March), summer (July through early September) and fall (mid-September through October). The winter months only had one quarter the number of visitors as the summer months, a variation attributed to vacation schedules and temperature. Attendance is depressed during cold weather, and shoots up as soon as the weather tempers. This will be particularly true of the American Wartime Museum, as its outdoor Landscapes of War exhibits will be less attractive to visitors during the cold months. In addition, after Labor Day, school resumes and families end their vacations, leading to plummeting monthly attendance. At the National Air and Space Museum, visits reported ranged from a high of about 1,200,000 per month in the summer months to a low of about 200,000 per month in the winter months.

Children under age 12 constituted 16 percent of summer month visitors, but only 9 percent of winter month visitors, due to school schedules. The proportion of visitors 45 and older was highest in the fall. This also translated to a higher proportion of visitors arriving alone or in pairs in the fall.

Local residents accounted for 33 percent of winter month visitors, but only 18 percent of visitors in the summer, when families from all over the US and internationally are more free to travel.

Monthly Variation

The Smithsonian Institution's visitor counts by month identify April through July as the months with the largest number of visitors for the Smithsonian group of museums as a whole. For the largest museums in the system, April through August are the highest visitation months. For smaller, more specialized museums, there is less of a pattern, probably because these museums have more of a special-interest constituency that is less affected by tourism or school patterns. Numbers may also be influenced by special exhibits, which tend to take place in the fall and spring, boosting visitation in otherwise slower months. The specialized museums rely more heavily on patronage from local residents while the general interest museums reflect leisure traveler visitor patterns.

The Marine Corps Museum achieved peak visitation levels in June, July, and August in 2007, 2008, and 2009, with more than 50,000 visitors in each of those months. January and February are the months with the fewest visitors, averaging about 30,000.

Weekly Patterns

Not surprisingly, the Smithsonian Institution found that Saturday was the busiest day for its museums, even in the summer. Sundays came second, followed by Tuesdays. Mondays and Fridays were the slowest days.

The Marine Corps Museum follows a different, and perhaps unexpected pattern. Its peak days of the week are Saturday and Friday, both considerably higher than the other five days of the week.

Its daily average by day of the week for the entire year 2009 is as follows:

1. Saturday	1,959
2. Friday	1,738
3. Thursday	1,258
4. Sunday	1,202
5. Wednesday	1,183
6. Monday	1,032
7. Tuesday	1,015

Source: National Museum of the Marine Corps Daily Visitor Counts, 2009

Daily Patterns

Even though a museum may be open from 9:30 am to 6 pm every day, the visitors will be unevenly distributed throughout the day. The hours with the highest number of visitors are generally 1 to 3 pm, with still substantial numbers of visitors an hour before and an hour after this period.

At the National Air and Space Museum, arrival peak times were from 11 through 3, as follows:

• 11am-12pm	14%
• 12-1 pm	17%
• 1-2 pm	22 %
• 2-3 pm	16%

Departures started peaking in the 1-2 pm slot, with the greatest number of departures between 3 to 4 pm. The American Wartime Museum is likely to exhibit a similar pattern, as these arrival and departure times enable visitors to miss the worst of the morning and afternoon rush hours on I-95.

Recommendations

Marketing as much as the strength of the collection drives visitation. Exhibits must constantly be renewed, and designed to appeal to young visitors as well as the expected constituencies of active duty and retired people with connections to one branch of the armed services. Special programming to fill non-peak visitation days should be actively pursued.

Marketing should be addressed to specific market segments such as those identified in this study. Periodic surveys of visitors to comparable museums as well as this museum when it opens would be advisable. Tracking visitor patterns in Northern Virginia as well as general trends in museum operations would also be of value.

If it appears that the outdoor nature of much of the museum detracts from visitation, adjustments may have to be made to place some of the outdoor equipment under roof or provide covered vehicles to carry visitors from place to place.

The word “museum” may place unnecessary hardship on what is actually an experience – museum still implies passive seeing, while the Wartime Museum is more about feeling the power of tanks and other large vehicles and understanding their role in battle, and about hearing the experiences of those who fought and those who kept the home fires burning while their loved ones were fighting for freedom, told through the oral history collection.

Marketing and Programming Suggestions

A number of ideas for components of the museum, marketing initiatives and partners, and programs and events were discussed at the review meeting on the first draft of this report. These include:

- Provide a movie theater, but not IMAX. Movies, whether reruns of commercial movies, or a movie specifically made for the museum, appeal to audiences, and also give them a period of cool indoor rest. For certain premium movies, the museum may be able to charge a fee on top of admission. IMAX is not recommended due to the cost of an IMAX theater and equipment, and the relatively large number of IMAX options already available in the Washington area.
- Since weather is a potential issue that might reduce visitation at the outdoor Landscapes of War, it would be advisable to have sheltered spaces or small buildings along the outdoor portions of the museum.
- To facilitate access by elderly and handicapped visitors, a frequent shuttle service between the Visitor Center, the Landscapes of War, and parking is recommended. Shuttle buses should have low to the ground or wheelchair accessible features.
- Consider partnerships with organizations such as the VFW and other veterans groups; these could include conventional marketing such as placing brochures in convention materials, but also additional ventures such as package tours or product merchandising. AAA’s partnerships with travel providers and attractions are an example to study
- Specialized programming such as seminars, re-enactments on anniversaries of key dates, specific vehicle demonstrations, and other targeted events will be key to boosting visitation. Programming should be frequent, and on different days of the week and time slots. Competing museums tend to have events on weekends and on official holidays like Memorial and Veterans Days. The American Wartime Museum can attract more visitors to its special programs by selecting dates that are different from the mainstream.
- By adding meeting rooms, a multi-purpose room, or capability of an outdoor tent for special events and shows, the Museum can capture the attention of additional groups, such as Board meetings, military and gun shows, modelers’ and hobbyists’ conventions, etc.
- Consider programming geared to non-traditional museum audiences such as African American or Hispanic visitors

Recommended Follow-on Studies

The Museum has done an excellent job in positioning itself at its new site, and has a capable consultant team, Board of Directors and advisors. This visitor study confirms that the Museum has the potential of

being an important attraction for visitors to the Washington area and to local residents. As the Museum works toward its grand opening on Veterans Day 2014, it should consider the following additional studies:

- Conduct a survey of attendees at the August open house each year to determine what appealed to those who attended, how long they stayed, and the characteristics of their party
- Conduct surveys of visitors at competing museum to learn more about visitor characteristics and areas of interest
- Carry out more in depth analysis of operations and visitation at competing museums
- Track Northern Virginia and Washington area visitor patterns each year
- Develop more detail on the site plan and specific land use for the museum, in order to accommodate handicapped access, special programming, additional facilities to support special programs, events and attractions, parking, and other concerns critical to a well-functioning and successful museum
- Continue efforts to build the Museum “brand”. The name has changed several times, and a Google search leads to other museums that perhaps it would be better not to. The Museum must develop a clear identity, and its mission and exhibits must be cohesive and understood
- Prepare a business plan for the pre-opening and operating stages of the Museum to forecast cash needs and employment levels and be prepared for any eventualities
- Conduct an economic impact study which can be used in discussions with local jurisdictions and with potential donors and grantors.

Appendix A: Dynamics of Growth in Prince William County and the Region

The Washington region is fast-growing and this trend is not anticipated to change in the near future. The area continues to add households and jobs at a fast pace. Four of its counties are among the top 10 fastest growing counties in the United States. The table below shows the projected population in the counties forming the potential source of a resident market for the American Wartime Museum (Metropolitan Washington Council of Governments projections).

The remainder of this appendix discusses growth trends and transportation improvements in Prince William County that will be of benefit to the Museum.

Table A-1: Population Trends and Forecasts, Washington Metropolitan Area by Tier (distance from Museum)

	2000	2010	2020	2030
Prince William Co	329,524	467,707	545,958	604,486
Stafford County	92,400	133,180	176,996	217,973
Southern Fairfax Co.	321,671	361,128	394,694	421,289
Subtotal Tier 1	743,595	962,015	1,117,648	1,243,748
Arlington County	189,527	211,402	238,012	245,257
City of Alexandria	129,424	142,420	154,114	166,652
Northern Fairfax Co.	685,132	733,199	801,347	855,343
Fauquier County	55,100	74,463	98,821	131,211
Fredericksburg	19,360	23,374	25,281	28,335
Prince George's County	803,189	869,714	922,535	964,469
DC	572,100	610,732	679,001	735,893
Subtotal Tier 2	2,453,832	2,665,304	2,919,111	3,127,160
Loudoun County	173,897	288,556	375,616	436,559
Clarke County	12,700	15,421	16,913	18,804
Culpeper County	34,471	47,479	59,601	76,294
Spotsylvania County	91,504	105,662	136,243	165,043
Montgomery County	877,363	968,300	1,077,254	1,144,383
Anne Arundel County	489,656	532,529	556,105	572,829
Howard County	247,842	287,720	312,933	324,110
Frederick County	196,522	243,221	287,913	339,696
Charles County	120,500	144,950	177,200	204,197
Subtotal Tier 3	2,244,455	2,633,838	2,999,778	3,281,915
Total	5,441,882	6,261,157	7,036,537	7,652,823

Note: Prince William County totals include the cities of Manassas and Manassas Park
 Fairfax County totals include cities of Fairfax City and Falls Church

Source: United States Census Bureau, Metropolitan Washington Council of Governments Cooperative Forecasts 7.2, and Culpeper County Comprehensive Plan

The County's Role in the Region

The Museum is located in the eastern part of Prince William County adjacent to I-95. Both I-95 and Route 1 form a spine for development in eastern Prince William. A number of planning efforts are ongoing to revitalize the Route 1 corridor and to develop new communities along the Potomac River. A large regional shopping center, Potomac Mills Mall, attracts shoppers not only from Northern Virginia and other Washington suburbs, but also from throughout Virginia as well as other states. Numerous residential communities form the Woodbridge and Lake Ridge areas.

The County's other population nodes are far to the west, and include the cities of Manassas and Manassas Park, and the towns of Haymarket and Gainesville. Substantial growth is occurring along Route 29 and Route 28. A large band of semi-rural and agricultural reserve land separates the east and west portions of the county. Federally-owned land including the Quantico Marine Corps Base, the Manassas National Battlefield Park, Prince William Forest Park, and two wildlife refuges constitute almost 19% of the county's land area.

The County is one of the fastest growing in Virginia and the US. It has more young people and fewer seniors than the rest of the Washington area or the US. In 2000, Prince William County had a larger white population than the region as a whole and fewer African-American residents. Its proportion of people with a Hispanic/Latino descent was equal to the region's. Subsequently, the Hispanic population has tripled, while the African-American population has doubled. Its foreign-born population has also grown, from 12% in 2000 to 20% in 2008 (according to the American Community Survey).

Fewer Prince William County residents have a Bachelor's degree or higher (25%) than the Metropolitan area (45%). They move more than average, and have a lower per capita income. County households are larger, and more homes are owner-occupied. Prince William County has functioned as a bedroom community to the metropolitan area; its residents spend more time commuting than is average for the region.

The County's retail space consists of highway-oriented strip centers and the large regional outlet mall at Potomac Mills, which has spawned a number of free-standing restaurants, shops, and restaurants nearby. There is about 5 million square feet of retail in the Potomac Mills area and 1.5 million along Route 1. This huge amount of shopping is more than can be supported by local residents. In fact it is a regional draw, although on the discount end of the retail spectrum.

Office space tends to be of the flex variety and relatively low rise. Most is west of Potomac Mills rather than along Route 1. Office development has been constrained by the lack of a strong office market in an area known as a bedroom community, and the lack of higher end housing for business executives, other than in the Belmont area.

Revitalization plans for Route 1, the Potomac Communities plan, call for east and west connections between I-95, Route 1, and the Potomac River. These would enable obsolete development patterns to be replaced with activity centers with mixed-use development. This new development, when it takes place, will provide impetus for higher end housing, office space, and retail.

The east-west connections and change in the area's profile should benefit the American Wartime Museum.

Prince William County's tourism is based on historical sites, ecotourism, and activities at the Marine Corps Museum and Civil War battlefield sites. There has been little synergy with Potomac Mills or with the Potomac River.

The American Wartime Museum is well-placed to create new synergies and linkages in Prince William's tourism industry. Its proximity to Potomac Mills means that the millions of shoppers at the mall will have a nearby destination for those members of their families who are not shoppers, and there are opportunities for joint marketing to benefit both venues. New east-west connections and residents east of the museum site will also be of benefit.

The Museum's presence will support County economic development objectives of job creation, creation of major new tourism attractions, and cultivating relationships between local attractions. It is also consistent with the Urban Land Institute panel study in 2002, which recommended creating a critical mass of activity and tourist attractions by packaging existing facilities and new assets to build an overnight stay market centered on shopping, ecotourism, and recreation.

Although many residents of Prince William County commute to jobs outside the County, they tend to feel less connected to the region as a whole than residents of other jurisdictions in the region. The MWCOG's survey "Priorities for a Growing Region" determined that 70% of the Washington region's population feels strongly connected, versus only 51% of the Prince William County's population. Only 10% of the region's inhabitants feel no connection, versus 22% of Prince William County residents. Prince William County residents cite traffic and transportation, the economy, quality of schools, and lack of affordable housing as concerns.

The Washington Metropolitan Council of Governments adopted a new concept of Regional Activity Centers in 2007. It identified activity centers throughout the region, and projected their jobs and employment to 2030. In this scheme, two activity centers are identified in eastern Prince William County; Potomac Mills is classified as a suburban employment center, and Woodbridge as an emerging employment center. Potomac Mills is expected to grow faster than Woodbridge in total jobs and households from 2005 through 2030.

Regional "special attractors" are also defined in the COG Regional Activity Center approach. Near the museum are: Potomac Mills (retail over 500,000 square feet category), NVCC Woodbridge (university or college over 4000 students), and Quantico (Government center). These all influence the ease with which people can identify the location of the Museum of Americans in Wartime.

BRAC and the Military Presence

When implemented, the 2005 BRAC (Base Realignment and Closure) actions will bring more military personnel, and affiliated civilians and contractors to the vicinity of the museum site. Ft. Belvoir, 8 miles north of the Prince William County border will add 12,900 jobs, while Quantico Marine Corps Base to the south will add 3,000 jobs. People with military-related backgrounds are a prime market for the Museum.

As a result of these population shifts, numerous road improvements are planned in local jurisdictional transportation and land use plans.

Planned Transportation Improvements

Access to the museum site is facilitated by an excellent road network. In the eastern part of the county, I-95 provides Interstate-level access, while Route 1 is a principal arterial linking Ft. Belvoir to Quantico. Prince William Parkway links the eastern and western halves of the County. Dale Boulevard, the intersection on which the museum site is located, is classified as a minor arterial in the county's Thoroughfare Plan – February 2010 edition.

Long range road improvement plans take into account already high traffic volumes and the needs created by new jobs at Ft. Belvoir, Quantico, and to support increasing retail and residential development in the

Woodbridge and Potomac Communities area. They include expansion of HOT lanes on I-95 from 2 to 3 lanes, eventually covering 36 miles from Garrisonville Road to Eads Street in Arlington. Another phase would extend the hotlanes to Massaponax in Spotsylvania County.

The widening of the Occoquan bridge on I-95 is to be completed in the summer of 2011. Bridge improvements to Route 1 at Neabsco Creek to Opitz Boulevard are fully funded and will result in widening Route 1 from 4 to 6 lanes. Improvements are planned to the interchange of Route 1 and Dale Boulevard, to improve turning movements and ease access to I-95. Additional local improvements include Dale Boulevard itself, and to Gideon Drive from Dale Boulevard to Smoketown Road, facilitating direct access to Potomac Mills and Hylton Chapel, and to the PRTC Transit Center.

Transit service is provided through OmniRide and OmniLink services. One route follows Dale Boulevard from west of Minnieville Road east to I-95 and Route 1. OmniLink covers portions of Dale Boulevard and Route 1. The County's Comprehensive Plan indicates that Bus Rapid Transit may provide service along Route 1 and along I-95, and along Prince William Parkway between Route 1 and Manassas. Much of the service is geared to commuting patterns of Prince William County residents going northbound in the mornings and returning home from northerly points in the evening.

Park and Ride lots have been established at Ashdale Plaza, Kmart, and the PRTC Transit Center in the vicinity of the museum. OmniRide routes provide service to Capitol Hill, the Pentagon, and the West Falls Church Metro. Additional routes are planned to connect to Tysons Corner and to Alexandria, including the new BRAC-133 building at Seminary Road and I-95.

Virginia Railway Express provides rail service to the existing stations of Quantico, Rippon, and Woodbridge, all east of Route 1. Future plans include a possible Cherry Hill Station between Rippon and Quantico. Spotsylvania County recently joined the VRE system, and a likely extension would be south of Fredericksburg to Route 17. VRE is a commuter rail network, unfortunately unlikely to be usable by museum goers.

Prince William County's more visionary future transportation plans include a Blue Line Metrorail station at Potomac Mills connecting with the Springfield Station, and ferry service up the Potomac River. Metrorail service would be very useful to the museum, as it would easily bring residents from the denser core, "inside the Beltway" communities comfortably to the vicinity of the museum, where they could then be picked up by a shuttle service and taken to the museum.

Appendix B: Characteristics and Trends of the Leisure Traveler

The Virginia Tourism Corporation commissions surveys of leisure travelers at three to four year intervals. These surveys ask a broad range of detailed questions, whose results are then compiled by visitor category – visitors to Virginia, visitors to Northern Virginia, Museum visitors, etc. Partial results of the FY 07-09 survey of Northern Virginia visitors are provided below.

**FY 2007 – 2009
Profile of Travel in Virginia that includes Northern Virginia**

Month of Travel <i>(Base = all cases)</i>	FY 2007-2009 All Trips to Virginia	FY 2007-2009 Profiled Travel Segment
January	5%	6%
February	6%	6%
March	7%	8%
April	8%	8%
May	9%	9%
June	11%	11%
July	11%	10%
August	10%	8%
September	8%	7%
October	9%	9%
November	8%	9%
December	9%	8%

Holiday Travel

(Base = FY08-09 Follow-up Only)

Household trips that included a holiday or holiday weekend	20%	22%
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Weekend Getaway

(Base = FY08-09 Follow-up Only)

Household trips that included Friday or Saturday night in Virginia and spent less than 2 nights in Virginia	25%	27%
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Total Travel Party Size

(Base = all cases)

1	32%	37%
2	35%	34%
3	13%	12%
4	11%	10%
5	4%	3%
6+	4%	3%

Mean	2.6	2.5
Median	2	2

FY 2007 – 2009
Profile of Travel in Virginia that includes Northern Virginia

Age of Travel Party Members <i>(Base = FY08-09 Follow-up Only)</i>	FY 2007-2009 All Trips to Virginia	FY 2007-2009 Profiled Travel Segment
Under 6 years	6%	6%
6 - 12	7%	6%
13 - 17	5%	5%
18 - 24	8%	10%
25 - 34	15%	15%
35 - 44	16%	15%
45 - 54	20%	16%
55 - 64	12%	15%
65 and over	10%	13%

Travel Party Members Under 18 Years Old

Travel parties that included children under 18	26%	22%
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(Base = all cases)

Average number of party members under 18 years old	2.0	2.1
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(Base = travel parties that included children under 18)

Multiple Households in Same Travel Party

<i>Household</i> travel parties that included 2 or more households	21%	18%
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(Base = all cases. Note that each household in a travel party is counted in the reported percentage. E.G. if there are two travel parties and one travel party includes two households, 67% of all household travel parties included 2 or more households)

Average number of travelers from a different household	3.3	3.0
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(Base = household travel parties with 2 or more households)

Total Nights Spent on Entire Trip
(Base = all cases)

0	23%	18%
1	15%	14%
2	19%	20%
3	12%	12%
4	8%	10%
5	5%	5%
6	3%	3%
7	4%	5%
8 - 13	7%	8%
14+	3%	5%

Mean (Including no nights)	3.3	3.9
Mean (NOT including no nights)	4.3	4.7

FY 2007 – 2009
Profile of Travel in Virginia that includes Northern Virginia

	FY 2007-2009 All Trips to Virginia	FY 2007-2009 Profiled Travel Segment
Total Nights Spent in Virginia		
<i>(Base = all cases)</i>		
0	33%	28%
1	21%	21%
2	18%	19%
3	10%	9%
4	6%	7%
5	4%	4%
6	2%	3%
7	3%	3%
8 - 13	3%	4%
14+	1%	2%
Mean (Including no nights)	2.1	2.6
Mean (NOT including no nights)	3.2	3.6

Traveler Spending - Travel Party Spending Anywhere in Virginia

<i>(Base = all cases)</i>		
\$0	8%	8%
\$1 to less than \$100	31%	27%
\$100 to less than \$250	24%	23%
\$250 to less than \$500	16%	18%
\$500 to less than \$750	7%	8%
\$750 to less than \$1000	4%	5%
\$1000+	9%	11%
Median Spending per Travel Party	\$145	\$183

Traveler Spending in Virginia - Mean Spending Including No Money Spent

<i>(Base = all cases)</i>		
Mean Spending Per Travel Party	\$418	\$485
Mean Spending Per Person	\$158	\$197
Mean Spending Per Day	\$133	\$135
Mean Spending Per Person Per Day	\$52	\$57

**FY 2007 – 2009
Profile of Travel in Virginia that includes Northern Virginia**

Traveler Spending in Virginia (Percentage of Total Spending by Category) <i>(Base = all cases)</i>	FY 2007-2009 All Trips to Virginia	FY 2007-2009 Profiled Travel Segment
Transportation (excluding parking/tolls)	24%	27%
<i>Percent of transportation spent on gasoline (FY2009 only)</i>	60%	48%
Parking/Tolls	2%	2%
Lodging	29%	26%
Food/Beverage/Dining (excluding groceries)	19%	19%
Groceries	5%	5%
Entertainment (excluding gaming)/Admissions	6%	6%
(Casino) Gaming	less than 0.5%	1%
Shopping/Gifts/Souvenirs	11%	10%
Amenities (golf fees, spa, health club, ski passes, etc.)	1%	1%
Other	3%	4%

General Activities / Attractions Visited in Virginia

*(Multiple responses possible)
(Base: * = FY08-09 All / ** = FY08-09 Follow-Up Survey Only / All others, Base = All Cases)*

Art & Culture		
Art galleries / museums	3%	6%
Colleges / Universities**	4%	5%
Cultural Event**	4%	5%
Historic sites / churches	10%	16%
History - African American**	2%	2%
History - Civil War**	7%	12%
History - Colonial**	11%	15%
History - Native American**	2%	2%
History - Other**	3%	5%
Museums (NET)	11%	19%
Museum - Children's**	1%	2%
Museum - History**	6%	11%
Museum - Military**	3%	6%
Museum - Science**	3%	6%
Musical theater	1%	1%
Old homes/mansions	7%	13%
Symphony/opera/concert	1%	1%
Theater/drama	2%	2%

Adventure Sports

Hanggliding/skydiving	less than 0.5%	less than 0.5%
Hiking/backpacking	3%	4%
Rock/mountain climbing	less than 0.5%	1%
Scuba diving/snorkeling	less than 0.5%	less than 0.5%
Skiing/snowboarding (cross country or downhill)	less than 0.5%	less than 0.5%
Water skiing	less than 0.5%	less than 0.5%
Whitewater rafting / kayaking / canoeing	1%	1%

FY 2007 – 2009
Profile of Travel in Virginia that includes Northern Virginia

	FY 2007-2009 All Trips to Virginia	FY 2007-2009 Profiled Travel Segment
Sports and Recreation		
Biking	2%	3%
Fishing (NET)	3%	3%
Fishing - Freshwater**	2%	2%
Fishing - Saltwater**	2%	2%
Golf	2%	2%
Horseback riding	1%	1%
Horse Racing / Horse Shows**	1%	1%
Hunting*	1%	1%
Major sports event	2%	3%
Motorboat / Jet Ski*	1%	1%
Motor sports - NASCAR/Indy	1%	1%
Sailing	less than 0.5%	less than 0.5%
Snowmobiling	less than 0.5%	less than 0.5%
Snow sports other than skiing or snowmobiling	less than 0.5%	less than 0.5%
Tennis	less than 0.5%	1%
Youth/amateur/collegiate sporting events*	2%	2%

Nature / Outdoor Activities

Beach	9%	8%
Bird watching	2%	3%
Chesapeake Bay**	3%	3%
Camping	2%	2%
Caverns	2%	5%
Gardens	3%	7%
Lakes**	3%	3%
Mountains**	6%	7%
Nature travel/ecotouring	2%	2%
Rivers**	4%	4%
Scenic Drive**	15%	19%
State/National Park	13%	22%
Wildlife viewing	5%	5%

**FY 2007 – 2009
Profile of Travel in Virginia that includes Northern Virginia**

	FY 2007-2009 All Trips to Virginia	FY 2007-2009 Profiled Travel Segment
Entertainment / Amusement		
Casino/gaming	less than 0.5%	1%
Fine dining	10%	14%
Nightclub/dancing	3%	4%
Resorts**	3%	4%
Shopping (NET)	24%	30%
Shopping - Antiques**	3%	4%
Shopping - Arts & Crafts**	4%	5%
Shopping - Malls**	16%	23%
Shopping - Outlets**	9%	13%
Spa/health club	1%	2%
Special events/Festivals (NET)	4%	6%
Festivals - Arts/Crafts**	2%	3%
Festivals - Food**	1%	2%
Festivals - Heritage**	1%	2%
Festivals - Music**	1%	2%
Festivals - Wine**	1%	1%
Theme park	6%	7%
Wine tasting/winery tour	2%	4%
Zoos	2%	4%
Family Activities		
Family reunion*	3%	3%
Genealogical Research**	1%	1%
High School / College Reunion*	less than 0.5%	1%
Visiting Friends*	26%	31%
Visiting Relatives*	40%	46%
Sightseeing		
Rural sightseeing	10%	12%
Urban sightseeing	6%	9%

**FY 2007 – 2009
Profile of Travel in Virginia that includes Northern Virginia**

	FY 2007-2009 All Trips to Virginia	FY 2007-2009 Profiled Travel Segment
Top 25 Most Frequently Visited Cities in Virginia		
<i>(Base: * = FY08-09 All / ** = FY08-09 Follow-Up Survey Only / All others, Base = All Cases)</i>		
Alexandria	8%	29%
Fredericksburg	7%	25%
Fairfax	7%	25%
Arlington	6%	22%
Manassas	4%	17%
Richmond	18%	16%
Williamsburg	12%	12%
Virginia Beach	13%	10%
Falls Church**	3%	9%
Winchester	5%	8%
Charlottesville	7%	7%
Leesburg**	2%	7%
Norfolk	10%	7%
Roanoke	8%	7%
Harrisonburg	5%	6%
Newport News	5%	5%
Warrenton**	2%	5%
Culpeper**	1%	4%
Chesapeake**	4%	4%
Petersburg**	3%	4%
Lexington**	2%	4%
Bristol**	3%	4%
Martinsville**	2%	4%
Big Stone Gap**	2%	4%
Lynchburg**	3%	3%
Average Number of Cities Visited (FY08-09 Follow-up Survey Only)		
	2.2	3.3

**FY 2007 – 2009
Profile of Travel in Virginia that includes Northern Virginia**

**FY 2007-2009
All Trips to
Virginia** **FY 2007-2009
Profiled
Travel
Segment**

Top 25 Virginia Attractions Most Frequently Visited by Travelers

(Base = FY08-09 Follow-Up Survey Only)

Blue Ridge Parkway	7%	11%
Tyson's Corner Mall	3%	10%
Potomac Mills Mall	3%	9%
Shenandoah National Park (including Skyline Drive)	4%	8%
Arlington National Cemetery	2%	8%
Appalachian Trail	4%	8%
Skyline Drive	3%	7%
George Washington Memorial Parkway	2%	7%
Civil War Trails	3%	7%
Colonial Williamsburg	5%	6%
Mount Vernon	2%	5%
Luray Caverns	2%	5%
Manassas National Battlefield Park	1%	4%
Chesapeake Bay Bridge-Tunnel	5%	4%
National Air & Space Museum – Udvar Hazy Center at Dulles	1%	4%
Fredericksburg & Spotsylvania National Military Park	1%	4%
Busch Gardens	3%	4%
Natural Bridge / Natural Bridge Caverns	1%	3%
Prime Outlets – Williamsburg	3%	3%
Williamsburg Pottery	2%	3%
Kings Dominion	2%	2%
Jamestown Settlement (reconstructed village with the three ships)	2%	2%
Colonial Parkway	2%	2%
Monticello	1%	2%
Historic Jamestowne (national park with archaeological site)	2%	2%

Advance Planning Time - Considered Visiting Virginia

(Base = all cases)

Less than 2 weeks before the visit	37%	33%
Within 2 weeks - 4 weeks of visit	13%	14%
At least 1 month, but less than 3 months before the visit	19%	21%
At least 3 months, but less than 6 months before the visit	13%	14%
At least 6 months, but less than 1 year before the visit	9%	9%
More than a year before the visit	8%	9%

**FY 2007 – 2009
Profile of Travel in Virginia that includes Northern Virginia**

	FY 2007-2009 All Trips to Virginia	FY 2007-2009 Profiled Travel Segment
Advance Planning Time - Decided to Visit Virginia		
<i>(Base = all cases)</i>		
Less than 2 weeks before the visit	46%	44%
Within 2 weeks - 4 weeks of visit	14%	15%
At least 1 month, but less than 3 months before the visit	18%	19%
At least 3 months, but less than 6 months before the visit	10%	10%
At least 6 months, but less than 1 year before the visit	7%	8%
More than a year before the visit	5%	4%

Planning Information Sources for Virginia

(Multiple responses possible)

(Base = FY2007 & FY2009 cases only)

Offline Sources - Total	46%	54%
Corporate travel department (in person or by phone)	3%	4%
Destination printed material (brochures from a tourist/visitor center, etc.)	3%	3%
Friends/relatives	18%	21%
Magazine	1%	1%
Newspaper	1%	1%
Own experience	24%	29%
Radio	less than 0.5%	less than 0.5%
TV	1%	1%
Travel agent (in person or by phone)	1%	1%
Travel book	2%	3%
Travel club (e.g. AAA)	4%	6%
Travel provider (airline, hotel, rental car, cruise, etc.) either in person or by phone	2%	3%
Other 'offline' planning source	2%	2%
Online Sources - Total	23%	28%
Corporate desktop travel tool/Intranet	2%	3%
Destination website (official site of state, city, or attraction)	10%	11%
Online full service travel website (Expedia, Travelocity, etc.)	6%	9%
Traditional travel agency website (American Express, Carlson Wagonlit, etc.)	1%	1%
Travel provider website (airline, hotel, rental car, cruise, tour)	7%	9%
Other 'online' planning source	3%	2%
Someone else planned for me and I don't know the method (single response)	7%	6%
No plans were made for this destination (single response)	36%	26%

FY 2007 – 2009
Profile of Travel in Virginia that includes Northern Virginia

Ethnicity of Household Head <i>(Base = all cases)</i>	FY 2007-2009 All Trips to Virginia	FY 2007-2009 Profiled Travel Segment
White	82%	81%
Black/African-American	13%	12%
Asian or Pacific Islander	2%	3%
American Indian, Aleut Eskimo	0%	1%
Other	2%	3%

Hispanic Origin of Household Head <i>(Base = all cases)</i>	FY 2007-2009 All Trips to Virginia	FY 2007-2009 Profiled Travel Segment
Spanish/Hispanic	2%	3%
Not Spanish/Hispanic	97%	96%

Household Size <i>(Base = all cases)</i>	FY 2007-2009 All Trips to Virginia	FY 2007-2009 Profiled Travel Segment
1	22%	23%
2	35%	36%
3	17%	17%
4	16%	15%
5 or more members	9%	8%

Age of Household Head <i>(Base = all cases)</i>	FY 2007-2009 All Trips to Virginia	FY 2007-2009 Profiled Travel Segment
18-24	7%	8%
25-34	19%	18%
35-44	23%	20%
45-54	21%	22%
55-64	16%	18%
65+	13%	14%
Mean	46	46

**FY 2007 – 2009
Profile of Travel in Virginia that includes Northern Virginia**

	FY 2007-2009 All Trips to Virginia	FY 2007-2009 Profiled Travel Segment
Marital Status		
<i>(Base = all cases)</i>		
Now Married	60%	57%
Never Married	19%	20%
Divorced, Widowed, Separated	21%	23%

Education of Male Household Head		
<i>(Base = cases with male household head)</i>		
Less than High School	3%	3%
Graduated High School	17%	13%
Some College - no degree	23%	22%
College Degree	38%	40%
Post Graduate work/degree	19%	23%
No answer / Missing	33%	35%

Education of Female Household Head		
<i>(Base = cases with female household head)</i>		
Less than High School	2%	1%
Graduated High School	15%	13%
Some College - no degree	28%	25%
College Degree	39%	42%
Post Graduate work/degree	17%	19%
No answer / Missing	19%	21%

Annual Household Income		
<i>(Base = all cases)</i>		
Less than \$20,000	12%	11%
\$20,000 - \$29,999	8%	7%
\$30,000 - \$39,999	12%	10%
\$40,000 - \$49,999	10%	10%
\$50,000 - \$74,999	21%	20%
\$75,000 - \$99,999	15%	16%
\$100,000 - \$150,000	15%	19%
\$150,000 - \$200,000	4%	3%
\$200,000+	3%	4%

Appendix C: Trends in Museum Visitation

The number and breadth of museums in the US has been increasing every year. The American Association of Museums' survey conducted in 2010 indicated good news for museums in spite of the recession and continued unemployment. More than half the responding museums (57.4%) reported that their total attendance increased in 2009; 26% reported a significant increase.

Key factors for the increase in attendance included:

- **Aggressive marketing to local visitors:** museums realize that they can attract more visitors from their local area for less of a marketing cost by focusing on market segments that are nearby and easily reachable; this taps in to trends indicating that spontaneous decisions, day trips, and familiarity are important factors in decisions to visit museums.
- **Staycations:** since 2001, people have shown a tendency to stay closer to home; this makes them feel more secure and reduces expenditures. When staying close to home, the visitor perceives a museum as a more significant attraction – there is not necessarily the option of going to the beach, and shopping seems like more expensive entertainment.
- **Museum admission costs are relatively low:** Admissions for adults range from about \$6 to a high of about \$20 in a few select museums, with a national median of \$7, less than the price of a movie ticket.
- **Focus on new or special exhibits and events:** museums today are far less static than in the past. They feature rapidly changing special exhibit galleries, special programs in the evenings or weekends, and even events that encourage audience participation. All of these encourage repeat visits from people who live close by but are constantly seeking new stimulation.
- **Museums are seen as a place to get away from stress:** Americans seem to be leading ever more hectic lives, and a museum may provide a brief respite, particularly if there are outdoor spaces with seating and amenities.

Changing demographic and lifestyle trends will affect the museum of the future. The American Association of Museums' Center for the Future of Museums commissioned a study by Reach Advisors in 2008 to identify and analyze emerging trends. Nine of the trends they identified have the potential to impact on the American Wartime Museum.

1. **Aging of the population:** the aging Baby Boomer population segment means that a large portion of museum goers is getting older, and the subjects they are interested in affect what museums can show. These aging Boomers are the ones whose parents may have been involved in World War II, Korea, and Vietnam, and they are likely to retain an interest in those wars. – They are also the group likely to volunteer to work at the museum as docents, guides, or escorts for the elderly and handicapped. Because of the aging of the population, museums will have to do more to ensure amenities for the handicapped as well as accessibility to all exhibits; of course this is even more pertinent to the American Wartime Museum since a significant number of visitors may be wounded veterans.
2. **Multi-ethnic America:** People of Caucasian race have traditionally been the museum-goers in the population. Their growth rate in the US is close to zero, while persons of other ethnicities are increasing at a faster rate. However, persons of Hispanic and African-American descent constitute a smaller percentage of museum goers than their percentage of the total US population. Museums generally will have to work to promote cultural understanding. For the American Wartime Museum, this poses a particular challenge: its focus on Americans, and on wars fought by Americans on foreign soil, may have less appeal to immigrants and to people of Hispanic descent whose relatives did not serve in these wars.

3. **Changing role of women:** as women increasingly become more educated, spend more time in the workforce, and delay childbearing, the traditional museum-goer that is a woman with young children visiting during the week to entertain the kids is going to be decreasing. There will be fewer opportunities to teach children 5 to 9 (the ages at which interests in and preferences for museums are formed) to like going to a museum. A museum showcasing war and war machines will have more difficulty attracting women and their children.
4. **Energy price volatility:** the fluctuating but generally increasing price of gas and of air travel is already discouraging some leisure travel. Museums that are long distances from other attractions or from population centers will suffer from the cost of travel. Fortunately the American Wartime Museum is in a large metropolitan area with many built-in visitors and should not unduly suffer from this trend – although its location is less convenient than a downtown DC location, it is within a corridor of military-related museums that includes the Marine Corps Museum and the future US Army Museum.
5. **Economic downturn:** concern over jobs and spending means that museums charging admission may have a diminished competitive position compared to museums that are free. However, museums charging admission are likely to still be less expensive than other entertainment alternatives such as movies, attendance at sporting events, concerts, and dining out.
6. **Income inequalities:** as the rich get richer and the poor get poorer, the middle-class erodes. Traditionally, the middle and upper-middle classes are museum goers.
7. **Communications revolution:** the increasing use of social media means that museums will have to learn new marketing techniques to reach their potential audiences. Gone are the days of a printed brochure in a rack at a roadside hotel influencing visitation decisions. Savvy audiences research their destinations online before leaving home, go to friends or relatives for recommendations on what would be fun for them, check online comments on sites such as tripadvisor.com; they also provide feedback by posting to such sites, on Facebook, or through Twitter. The American Wartime Museum will be able to tap in to online resources that appeal to its target segments, but at the same time must review online postings to find out what offerings appeal to its constituency and what visitors found to be not worthwhile.
8. **Shifting concept of narrative:** museums traditionally were places where objects were affixed to walls or protected by specially-designed cases, with explanatory labels pasted nearby. For several years now, there has been a noted preference for new museums to be designed with a high level of interactive features promoting participation (touching, using a computer terminal, being part of a guided activity) by the audience. The American Wartime Museum in a sense is already ideal for this new focus, as it features large equipment that audiences can touch, climb on, and feel. Within the Visitor Center, it will be important to have changing exhibitions and exhibits that also allow for audience participation. Children increasingly have short attention spans, and are used to highly charged games on handheld devices. Static displays have little appeal to them.
9. **Seeking respite:** the need for a quiet retreat from stress reportedly is a motivating factor of the modern museum-goer. This is less likely to be a helpful trend for the American Wartime Museum, but there may be opportunities within the wooded terrain between the Landscapes of War to define areas conducive for a pause, meditation, and contemplation.

Cultural Attractions

The Morey Group conducts an annual survey of non-profit cultural attractions (museums, aquariums, zoos, and botanical gardens). In 2006, 140 institutions out of 843 solicited responded to questions about attendance, admissions prices, and expenditures. Aquariums have the highest admissions prices and highest average attendance of all cultural attractions, through 2006; however, in recent years, aquariums have begun to decline in popularity. Zoos typically attract more visitors who are also “members” than other cultural attractions, since they tend to be visited by a larger percentage of local residents.

Table C-1: Average attendance in 2006

Museums	257,250
Zoos	768,795
Aquariums	822,347

Source: The Morey Group

Museums surveyed included: Buffalo Bill Historical Center, Cheyenne Frontier Days Old West Museum, Clark County Historical Society, National Watch and Clock Museum, North Carolina Maritime Museum, Petersen Automotive Museum, Pima Air and Space Museum, Please Touch Museum, Space Center Houston, Space Needle, The Contemporary Jewish Museum, The Tech Museum of Innovation, and the US Space and Rocket Center.

Historical Museums

History museums are in the process of reinventing how they fulfill their mission and display artifacts. While previous generations found static displays of objects in protective cases identified by paper labels interesting, Generation X thinks history is boring and not relevant to their lives.

People who are in school age groups also have short attention spans, having been raised with the Internet, computer gaming, 3D movies, and the general fast-paced nature of life today. Museums have to show how history helps us understand how we became who we are today. Oral histories have been found to be a key way of connecting with these new museum-goers.

History also has to be made interactive so children want to come, but can't look like a computer exercise like their history class at school. Computers are important, but the experience has to be almost seamless and feel natural – something intuitive and automatic rather than like homework.

Military and war museums have the additional challenge of appealing to moms, who are traditionally the ones who bring the kids to a museum. It is important to target special marketing to the moms, pointing out that war is not just weapons (even if that is what the kids want to see). The oral histories here too are likely to help increase the appeal of the military museum experience.

General travelers don't choose a destination because of it has historical significance – but they will stop at “must see” attractions; they can only take it in small doses, particularly if the content is “heavy”; one remedy is to bring history to life through reenactments, personal stories, and cultural immersion.

Heritage travelers like to see where they fit in the works, how today's world politics and society came to be; they are always curious to learn more. A successful museum can appeal to the heritage traveler by showing how a site relates to them, and how the past has shaped the present.

History Buffs think they know it all; they have read all the books, seen all the TV shows and movies. For them more than exhibits are needed; they need to feel the site, the energy of the battle. Reenactments can be a useful way to appeal to this segment.



Concept for the Visitor Center at the Wartime Museum

Appendix D: Museum Profiles and Case Studies

National World War II Museum

Dedicated in 2000 as the National D-Day Museum and now designated by Congress as America's National World War II Museum, this museum located in New Orleans' Warehouse District has made great strides in boosting its attendance and is a symbol of the city's resurgence after Hurricane Katrina.

The museum tells the story of the American experience in World War II, including the causes of the war, why the US became involved, and what it means today. It celebrates the courage and spirit of US troops on the war front and their supporters back home.

Located on a six-acre site, the museum features a new Solomon Victory Theater with a 120-foot wide immersive screen showing what is advertised as a 4-D experience, a Stage Door Canteen, and a restaurant named The American Sector featuring, naturally, American cuisine.

In 2011, the museum plans to debut a \$300 million expansion, the Restoration Pavilion. This 14,000 square foot facility will be an opportunity to showcase new acquisitions as well as educate audiences about the processes involved in caring for them. Three new buildings are also planned: a Campaigns Pavilion (Guadalcanal, Battle of the Bulge, the Mediterranean); a Liberation Pavilion (Holocaust, POW camps, closing months of 1945); United States Freedom Pavilion (covering all service branches and displaying land, sea, and air artifacts).

The museum has 40,000 square feet of exhibit area in a total of 244,000 square feet of building. Its most recent attendance figures place it at 316,000, of which 20% are local residents and 80% out of town.



Reproduction "Higgins Boat" from the National World War II Museum image collection.

National Museum of the Marine Corps

The Marine Corps Heritage Foundation began planning in 1995 to develop a national center to house and interpret its history for the American public. Opened on Veterans Day 2006, the new museum on a 135-acre campus in Quantico consolidates and expands the exhibits previously shown at the Navy Yard in Washington DC and the small airfield museum previously on base in Quantico. The museum is located just off I-95 in Triangle Virginia, 36 miles south of Washington DC and 76 miles north of Richmond VA.

The 240,000 square foot (at full build-out) museum has embarked on an ambitious program of exhibits to showcase some of its 60,000 artifacts, along with ancillary facilities such as a 225 foot by 450 foot parade ground and associated events program, an auditorium/lecture hall, gift shop, and two restaurants. Additional facilities include a Memorial Park and Chapel, a future conference center and hotel, an archive facility to restore and preserve artifacts, and an office building for the Marine Corps' History and Museums Division. From its highly visible location along I-95, the museum attracts close to 500,000 visitors.

Three new galleries opened in June 2010 on a date selected to coincide with the Battle of Belleau Wood, adding 12,000 square feet of exhibit space within the existing museum building. The galleries cover the early history of the Marine Corps, from its founding in 1775, through the Civil War, 19th Century, and World War I. Among the museum exhibits are 14 major aircraft and 11 major ground vehicles.

The museum is available for military ceremonies, private receptions, reunions, diplomatic and VIP visits, and special tours for seniors, by advance reservation.

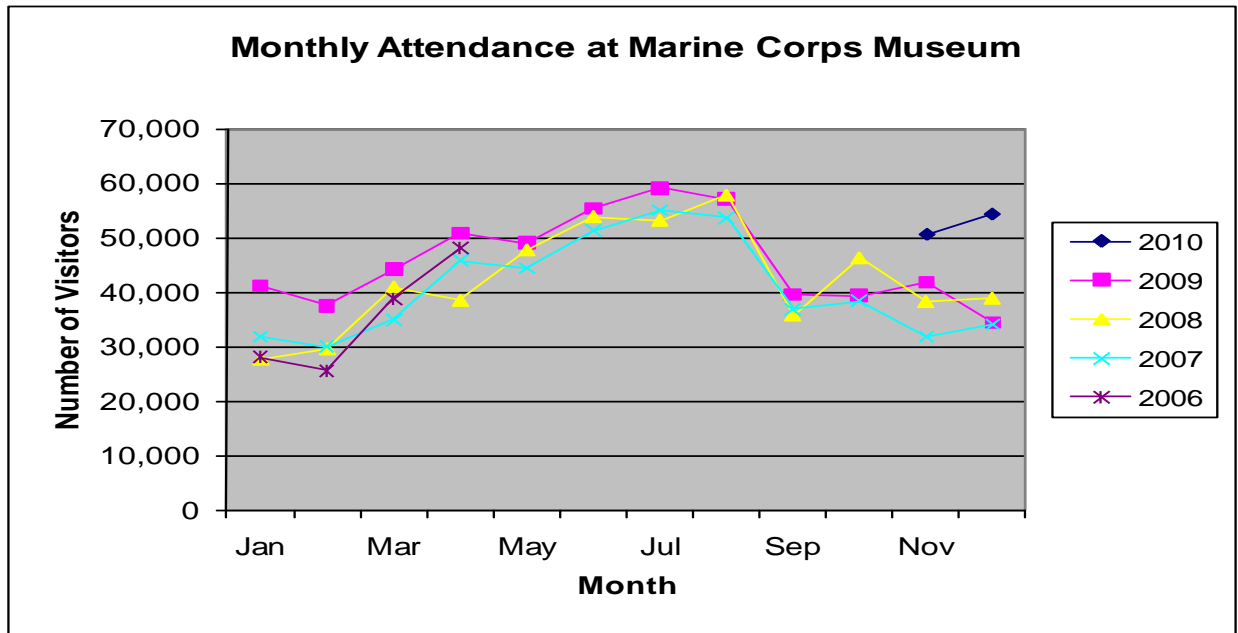
Family days on the second Saturday of each month reportedly attract nearly 100 children. A new Children's Summer Program drew 152 participants in 2009.

The Marine Corps Museum recently conducted a visitor survey in cooperation with the Center for Nonprofit Management, and quoted the following findings:

- About 39% of visitors come from within 60 miles of the facility
- An additional 16% come from 61 to 120 miles from the museum
- Almost two-thirds of the visitors are male (64%), as would be expected given the subject matter
- 34% of the respondents were aged 19-34; 25% were in the 35-54 age bracket; and 41 % were 55 or older

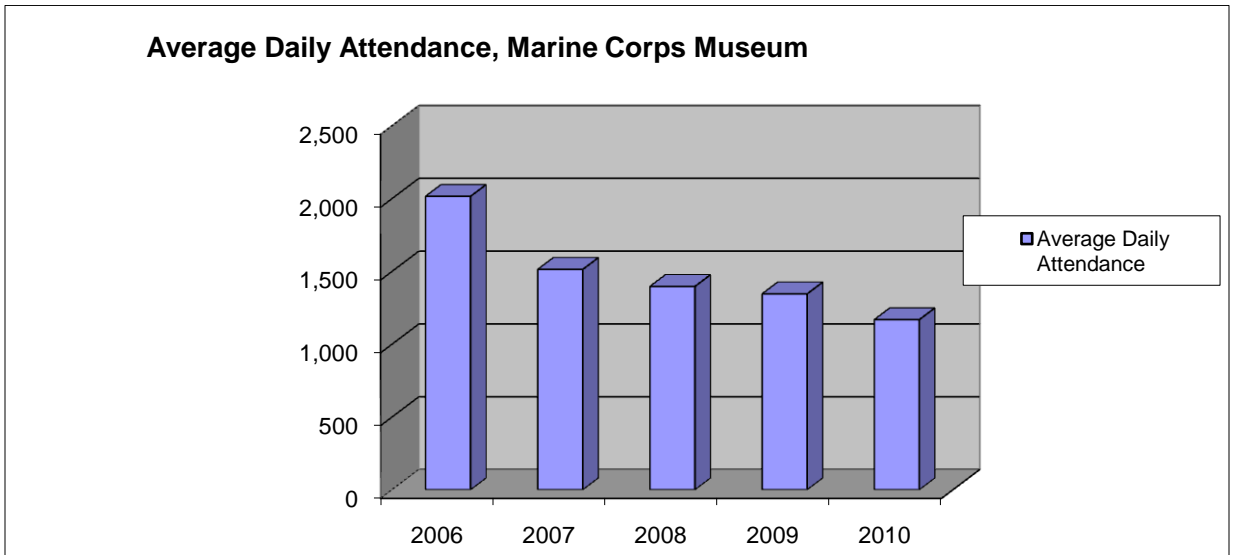
Since the museum opened, about 67,000 school age children visited as part of an organized school tour led by an educator or student leader.

The Museum's visitor counts show the months of June, July, and August as peak visitation months and February as the low month.



Source: Marine Corps Museum daily visitor counts.

The Museum’s average daily attendance has been declining, following typical patterns of high attendance in the year or two following a museum’s opening with declines in following years. The museum is still too new and in the process of adding museum galleries and programs, to determine the eventual stabilized attendance.



Source: Marine Corps Museum daily visitor counts.



Interior of the Marine Corps Museum (courtesy of Museum website)

Constituencies served include:

- Active duty military
- Students at Marine Corps Base Quantico and Marine Corps University
- Military veterans
- Reunion groups
- Family members of active and retired military
- Employees of various government agencies
- History buffs
- Tourists
- School age children
- Educators

Cold War Museum

The Cold War Museum is dedicated to education, preservation, and research on the global ideological and political confrontations between East and West from the end of World War II to the dissolution of the Soviet Union. After a several year search, the Museum submitted a proposal to the Fairfax County (VA) Park Authority to lease a 25-acre parcel, the former site of the National Nike Missile Base, as the location for its museum, research library, artifact restoration center, and related operations. The museum also planned to offer meeting rooms, a theater, café, restaurant, and gift shop at the site.

The museum expected to occupy the more than a dozen buildings on the site in three phases, culminating in a grand total of 92,900 square feet of indoor space, of which 26,500 square feet was designated as exhibit space. Large equipment such as aircraft and Nike Missiles and launchers were to be located outdoors on the site. Specific exhibits included: the U-2 Incident, Cuban Missile Crisis, Civil Defense. Other activities of the museum include an oral history collection project, spy tours of Washington, conferences, educational programs, a movie series, Cold War lecture series, and special events built around key dates in the Cold War.

The proposal was accepted, but fundraising lagged targets, and the museum continued to operate primarily as a “virtual museum” with traveling exhibits. It has leased a small space at Vint Hill in Fauquier County, Virginia until it can begin development of the physical museum in earnest.

The original opening dates were 2006 – introductory exhibits; 2008 – full complement of visitor services in 30,000 square feet; 2011 – full development of interactive exhibits, library and research center, white tablecloth restaurant.

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 museum’s planned *Fighting for the Nation Gallery* “will allow visitors to experience stories that get to the heart of the Army’s role as a fighting force at home and abroad” according to the Museum’s Capital Campaign newsletter Call to Duty. Components of the gallery include: Founding the Nation, Preserving the Nation (Civil War), Nation Overseas (World War I), Saving Democracy: Global War (World War II), Saving Democracy: Cold War (Korea, Vietnam); and An Uncertain Battlefield (Panama, Somalia, Persian Gulf, War on Terrorism).

A kick-off ceremony at Ft. Belvoir in 2003 marked the beginning of activities, including the development of a master capital formation and fundraising plan to galvanize public and private financial support to raise more than \$120 million to complete the museum. In June 2004, Congress gave \$2 million as seed money for the museum’s fundraising efforts. The architectural firm of Skidmore, Owings and Merrill was selected to design the museum complex, with an original opening date of June 14, 2009.

Subsequently, Ft. Belvoir was the subject of a major BRAC decision in 2005 which has led to revisions in the base’s land use plans and ongoing construction of a variety of facilities. The Army Museum’s site has not received the final approval of the Department of the Army, although the original 55-acre site is still the “preferred” site. Groundbreaking could occur in 2011; the opening date could be 2015. In the meantime, the Museum continues with its fundraising efforts through the Army Historical Foundation (Boeing recently announced it was donating \$5 million, and is sponsoring the Soldiers’ Stories Gallery) and the planning of exhibits and space utilization for the museum. A special gallery for Veterans’ groups is being added to provide name recognition as well as to increase the potential for contributions. The museum will

also include a memorial park and gardens, parade grounds, and a variety of events such as ceremonies, reenactments, and educational programs.

Components of the Museum's full build-out include:

- Main museum building of 155,000 gross square feet
- Memorial garden, 1.4 acres to honor the service and sacrifices of the US Army soldiers, veterans, and their families
- Parade ground and grandstand – 5.6 acres with a 6,000 square foot grandstand and staging area for special events and ceremonial events
- Amphitheater – a 6,700 square foot staging and production site
- Drop off and arrival plaza – almost one acre site for passenger drop-off
- Parking totaling 500 to 550 visitor spaces and 75 employee spaces
- Bus and RV parking totaling almost one acre and accommodating up to 20 vehicles
- Service court for food service
- Controlled access main and service entrances.

The construction of these various elements will be done in phases, consistent with progress in fundraising.

Potential future expansion phases include an additional 95,000 gross square feet of museum exhibit space, up to 12,000 square foot expansion of the grandstand, a building to serve as a stable or store cannons near the grandstand, a 31,000 square foot building to display combat and support vehicles, additional parking, and a 2 acre outdoor education center and training area.

The Museum estimates it will host 750,000 to 1 million visitors a year.



Exhibit D-1. Artists' Concept of the Entrance to the US Army Museum at Ft. Belvoir

Summary Characteristics of Comparable Museums

The following multi-page table presents key characteristics of military-theme and comparable museums which were used in evaluating the market potential of the Wartime Museum.

The museums included in the table represent museums depicting the history of a specific branch of the Armed Forces, a particular war or specific types of equipment.

GENERAL CHARACTERISTICS OF SELECTED MILITARY MUSEUMS					
Army Themed					
Museum Name	U.S. Army Ordnance	Natl. Infantry Ft. Benning	General Patton	1st Division Cantigny	101st Airborne Division
Location	Aberdeen, MD	Columbus, GA	Fort Knox, KY	Wheaton, IL	Ft. Campbell, KY
Type of organization	Private, nonprofit	Fed. Govt & nonprofit	Federal/U.S. Army	Private Non-profit	U.S. Army Museum systems
Year museum opened	1924	2009	1948	1960	1956
Annual attendance	85,000	400,000 (exceeded projections by 100k)	150,000	106,000	<100,000
Exhibit area (s.f.)	Check	79,000	35,000	10,000	
Total building area (s.f.)	“”	190,000	55,000	38,000	14,000
Site area (acres)	25	290		14	33
Theme/period interpreted	Ordnance equipment from WWI and II, foreign military equipment, small arms, ammunition	A tribute to Infantrymen past, present and future; 1 st of its kind in the U.S. features interactive journey through every war fought by the U.S. over the past 200 yrs.	Tanks, armored vehicles, mechanized cavalry and armor, Gen. Patton memorabilia	1 st infantry division. 1917 to present, American military history	The main exhibit gallery moves the visitor through time, starting in 1940 with the conception of the U.S. Army Parachute Test Platoon and ending with today's airborne and special operations unit
Principal indoor exhibits		Signature exhibit is, "The Last 100 Yards" and contains scenes from 8 wars in US infantry history features lifelike figures cast from actual soldiers		A selection from 12,000 artifacts pertaining to military history	displays of uniforms, weapons, Jeeps and an original 80-foot-long glider used during the invasion of Normandy.
Other features		IMAX Theater a collection of more than 30,000 artifacts		12,000 volume library, 41,000 photos, 73,000 documents	

GENERAL CHARACTERISTICS OF SELECTED MILITARY MUSEUMS					
Army Themed (continued)					
Museum Name	U.S. Army Ordnance	Natl. Infantry Ft. Benning	General Patton	1st Division Cantigny	101st Airborne Division
Outdoor exhibits	250 pieces of artillery & tanks from World War I era forward	Park includes a parade field, memorial walk of honor & authentically recreated World War II Company Street.	16 exhibit pads 25 ft. in diameter	Military vehicles	
Comments	The museum plans to move to a massive, all-indoor museum at Fort Lee , south of Richmond, Virginia, in 2011. As directed by the 2005 round of the Base Realignment and Closure Commission .	400k attendance exceeded expectations by 100k – Imax not as popular, spent more time on \$s than operational issues	Being moved under BRAC – may seek new facility at Fort Benning but needs private funds	On grounds of Robert R. McCormick estate, editor and publisher of Chicago Tribune	Plans in progress for a new museum; \$15 million for phase 1, total cost \$36 million Will contain 80,000 s.f. Bldg and 200 seat IMAX theater
	www.ordmusefound.org	www.nationalinfantrymuseum.com/		www.firstdivisionmuseum.org	www.campbell.army.mil/pratt/index.htm

GENERAL CHARACTERISTICS OF SELECTED MILITARY MUSEUMS			
Navy Themed			
Museum Name	Mariners' Museum	U.S. Navy Museum	Pensacola Naval Museum
Location	Newport News, VA	Washington, DC	Pensacola, FL
Year museum opened	1930	1963	1963
Total annual attendance	267,165	250,000	717,649
Exhibit area (s.f.)	80,000		3,000,000
Total building area (s.f.)			
Site area (acres)	550		37
Theme/period interpreted	Regional, national & international maritime history, equipment, armament, decorative arts, books, photos	only naval museum to chronicle the history of the U.S. Navy from its creation to the present.	History of naval aviation from dawn of flight to space exploration
Principal indoor exhibits	Collection contains approx. 35,000 two and three-dimensional objects and images documenting nearly 3,000 years of mankind's experiences on the seas and waterways of the world.	General history, plus replica USS Constitutions' fighting top', world's deepest -diving submersible Trieste, Navy ship models	Full-size aircraft, models & aviation art; more than 150 aircraft & spacecraft , including four former Blue Angel A-4 Skyhawks
Other features	Lecture room , theater, classrooms		Aircraft include the NC-4 flying boat, the 1 st plane to cross the Atlantic, as well as combat veterans such as an SBD <i>Dauntless</i> that flew at the Battle of Midway & an A-7 <i>Corsair II</i> that logged missions during Operation <i>Desert Storm</i> .
Outdoor exhibits	167 acre lake with 5 mile shoreline trail	Willard Park contains many iron guns on display -- 6-inch deck gun salvaged from the battleship <i>USS Maine</i> , a bathysphere from the <i>Alvin</i> undersea exploration vehicle, the Swift Boat <i>PCF-1</i> , and a 14-inch naval railway gun from the <i>First World War</i> .	Aircraft displayed outside, practice demonstrations by the Blue Angels
Comments		Flagship museum for the U.S. Navy, located at Washington Navy Yard	Located at the Naval Air Station Pensacola, FL
	www.marinersmuseum.org		www.navalaviationmuseum.org

GENERAL CHARACTERISTICS OF SELECTED MILITARY MUSEUMS			
Navy Themed			
Museum Name	Hampton Roads Naval	Nauticus	Naval Heritage Center
Location	Norfolk, VA	Norfolk, VA	Washington, DC
Type of organization	U.S. Naval museum	Municipal, tax-exempt	Private non-profit
Year museum opened	1994	1994	1991
Total annual attendance	552,975	325,000	70,000
Exhibit area (s.f.)	10,063		2,500
Total building area (s.f.)	Share 1,500 s.f. w/Nauticus	120,000	
Site area (acres)			
Theme/period interpreted	Artifacts pertaining to naval heritage of Hampton roads, art of Naval history significance & vintage photographs	a contemporary museum that uses the natural setting of Norfolk's harbor to showcase global maritime commerce and the world's largest Navy.	Information on 250,000 sea service veterans
Principal indoor exhibits	One third of the museum's gallery space is devoted to the Battle of the Atlantic and the Naval Station Norfolk role in WWII.	Nauticus features Battleship <i>Wisconsin</i> - related exhibits, hands-on exhibits, national-caliber traveling exhibits, HD films on a giant screen, sharks, the Hampton Roads Naval Museum,	1,000 volume library, 250 seat auditorium 250 seat large screen theater
Other features	New display of 1812-era cannon	Computer & video inactives; Design Chamber: Battleship X an interactive theater where visitors are challenged to match wits with America's best ship designers on the eve of World War II in a race against time to create the greatest battleship ever.	Arts festival, concerts, docent program & official Navy events
Outdoor exhibits		Battleship Wisconsin	Located with the Navy Memorial
Comments		Co-located with Hampton Roads Naval museum	Site includes a public plaza and the Naval Heritage Center. The plaza is a round ceremonial amphitheater paved in granite to form a 100-foot diameter of the world. Surrounding the plaza are fountains, pools, flagpole masts, and sculptural panels depicting historic achievements of the sea services.
		www.nauticus.org	www.lonesailor.org

GENERAL CHARACTERISTICS OF SELECTED MILITARY MUSEUMS		
Air Force/Marine		
Museum Name	National Museum of the Air Force	National Marine Corps Museum
Location	Riverside, OH	Quantico, VA
Type of organization	U.S. Air Force	Military
Year museum opened	1971	2006
Total annual attendance	1.3 million	489,000
Exhibit area (s.f.)	17 acres indoor	40,000
Total building area (s.f.)		100,000
Site area (acres)	400	
Theme/period interpreted	Oldest and largest military aviation museum	
Principal indoor exhibits	400 aerospace vehicles	The museum features the following permanent exhibits, which were designed by Christopher Chadbourne and Associates, Inc.: Leatherneck Gallery; Legacy Walk - timeline with artifacts; Making Marines; World War II; Korean War; Vietnam War
Other features	IMAX theater, extensive education program reaches 130,000 students, teachers and adults	
Outdoor exhibits		
Comments	Opened 3 rd hangar and hall of missiles in 2004, raising \$40 mil. For 4 th hangar for Space Gallery	the exterior design is meant to "evoke the image of the flag raisers of Iwo Jima
	www.nationalmuseum.af.mil	www.usmcmuseum.com

GENERAL CHARACTERISTICS OF SELECTED MILITARY MUSEUMS			
Period of History			
Museum Name	Pamplin Historical Park	National WWII Museum	Civil War Museum
Location	Petersburg, VA	New Orleans, LA	Harrisburg, PA
Type of organization	Private, nonprofit	Private, nonprofit	Non-profit corporation
Year museum opened	1994	1991	2001
Total annual attendance	Do not release	316,000 (20% local, 80% out of town)	
Exhibit area (s.f.)	15,000	40,000	27,000
Total building area (s.f.)	25,000	244,000	65,000
Site area (acres)	422		92
Theme/period interpreted	3 themes of Civil War Military history; the “breakthrough battle”, the common soldier and life in the antebellum south	Artifacts, archival and audio/visual materials relating to the American experience in WWII	Period from 1850 through 1876; vast majority of the collections contain artifacts and archival materials of the average soldier from the North and South
Principal indoor exhibits	Civil War artifacts, antebellum furnishings, decorative arts	Permanent exhibitions highlight the nation’s road to war, life on the Home Front and the amphibious landings at Normandy and in the Pacific.	more than 4,400 three dimensional artifacts and 21,000 archival pieces
Other features	plantations, antebellum	Oral histories part of most exhibits, some rudimentary interactive exhibits, future plans include highly interactive exhibits 4-story education center opened in 09	
Outdoor exhibits	Battlefield with earthworks, recreated military encampment, historic trench lines	None yet	
Comments	4 museum buildings plus 4 historic homes, lots of touch screen interactive exhibits, recreated Civil War camp for day and overnight camp programs	2010 – start restoration 14k, s.f. pavilion; done in early 2011; and Land, Sea & Air Pavilion for opening in early 2012	Current dispute over bringing a casino near the battlefield (NYT, 07/04/10)
	www.pamplinpark.org	www.nationalww2museum.org	www.nationalcivilwar museum.org

GENERAL CHARACTERISTICS OF SELECTED MILITARY MUSEUMS			
Period of History			
Museum Name	Canadian War Museum	Pennsylvania Military	Museum of the Confederacy
Location	Ottawa, Ontario	Boalsburg, PA	Richmond, VA
Type of organization		Commonwealth of PA	Non-profit corporation
Year museum opened	2005	1963	1896
Total annual attendance	500,000	10,00 – 15,000	47,060 (6,824 from VA, 1,066 foreign visitors)
Exhibit area (s.f.)	100,104	8,000	
Total building area (s.f.)	439,705	18,000	2 bldgs. – historic Confederate White House and museum bldg.
Site area (acres)	7	67	
Theme/period interpreted	Over 5,000 years of military history from earliest times to present	honors Pennsylvania’s military history from 1747 to present with focus on the 20th century	Artifacts & documents from the Confederate States of America, southern history and American Civil War
Principal indoor exhibits	500,000 artifacts, 55,000 volume library		includes the former White House of the Confederacy and maintains the largest collection of artifacts, manuscripts and photographs from the Confederate States and the American Civil War (1861-1865).
Other features	Morse Code windows that spell out “Lest We Forget” & CWM”		Surrounding growth of VCU Medical Center has limited expansion
Outdoor exhibits	none	New Battleship Pennsylvania display with two 14 inch/45 caliber gun barrels opened in 2009	The 1 st ironclad warship, the CSS Virginia is displayed in the front of the museum
Comments	Award winning design with green building elements; 115,000 s.f. green roof	80,000 – 100,000 visit outdoor exhibits – no admission fee; one of 26 historic sites and museums on the Pennsylvania Trail of History	Have raised \$6 million of a needed \$7.5 million to fund for a satellite location in Appomattox & plans for 3 more satellite sites
		www.pamilmuseum.org	www.moc.org

Appendix E: Cultural Attractions in Prince William County, Northern Virginia, and the DC Metropolitan Area

This section provides profiles of a number of attractions in the vicinity of the Museum of Americans in Wartime, in Northern Virginia as a whole, and in the Washington area. The extent to which they are competitive versus complementary depends on the Museum's eventual marketing plans. Cooperative and package programs could be jointly marketed with some of these attractions, boosting visitation to each. Others cater to different audiences, but it is useful to know they exist, and perhaps some day there may be reason to affiliate or work together on promotional activities.

This section updates and adds to material provided in the ERA report in 2005.

Cultural Attractions in Prince William County

The Manassas Museum, Manassas

The current 7,000-square-foot building on eight acres opened in 1991. Permanent and temporary historical exhibits interpret Northern Virginia Piedmont history through artifacts, documents, videos, and images. The museum seeks to preserve the region's history through permanent and changing exhibits. Two exhibit videos describe settlement of the region and the impact of the Civil War on the community.

The Museum houses the McBryde Library and Archives and Echoes, the Museum Store. Plans for expanded exhibit galleries, artifact conservation facilities, and an educational center are currently under development. The admission fee is \$3.00 for adults.

Manassas National Battlefield Park, Manassas

The park was established in 1940 and preserves the site of two major Civil War battles: the First Battle of Bull Run on July 21, 1861, and the Second Battle of Bull Run which was fought between August 28 and August 30, 1862 (also known as the *First Battle of Manassas* and the *Second Battle of Manassas*, respectively). The 5,000 acres park includes historic landmarks such as the Stone Bridge, Stone House, Henry Hill, Lucinda Dogan House, Brawner Farm and Stonewall Jackson's memorial. It was here that Confederate General Thomas J. Jackson acquired his nickname "Stonewall."

Today the National Battlefield Park provides the opportunity for visitors to explore the historic terrain where men fought and died for their beliefs more than a century ago. More than 700,000 people visit the battlefield each year. As an historic area under the National Park Service, the park was administratively listed on the National Register of Historic Places on October 15, 1966.

The Henry Hill Visitor Center, on Sudley Road by the south entrance to the park, offers exhibits and interpretation regarding the First Battle of Bull Run, including civil war era uniforms, weapons, field gear and an electronic battle map. The center offers the orientation film "Manassas: End of Innocence", as well as a bookstore.

Freedom Museum, Manassas

Located in the terminal building at Manassas Regional Airport, the Freedom Museum's main purpose is to honor veterans and fallen comrades of recent wars, concentrating on the 20th century. The museum is free and open to the public.

Hylton Performing Arts Center in Manassas

Opened in May 2010, this \$46 million arts center is located on George Mason University's Prince William County campus in Manassas. The facility is a joint partnership funded by three public entities: George Mason University, the City of Manassas and Prince William County.

The new 1,140-seat hall, named for its major donors, Cecil D. and Irene V. Hylton, is a nine-story structure that had been planned for a decade. The county contributed 60 percent to the project, the university gave 30 percent and the rest came from the city of Manassas, the state and private fundraising.

The Hylton Performing Arts Center is an 85,000 square foot facility that contains the 1,121-seat Merchant Hall, an elegantly styled opera house with a 100-foot stage and orchestra pit. The 270-seat Gregory Family Theater offers flexible seating arrangements that make it ideal for dance, theater, cabaret and chamber groups. With an open floor plan, it is the optimal choice for customizing special events.

The Didlake Grand Foyer is a two-story lobby with a full glass front for plenty of natural light that seats over 200 for dinner and holds over 500 for receptions.

The Buchanan Partners Gallery on the second floor of the lobby serves as a focal point to showcase works by local and regional visual artists on a rotational basis and add yet another artistic element to the Didlake Grand Foyer.

The Hylton Center also has dressing rooms, a scene shop, a catering kitchen and all the professional technical equipment run by expertly trained staff to support a performing arts center of this caliber.

Cultural Attractions in Northern Virginia

Air and Space Museum – Steven F. Udvar-Hazy Center

The National Air and Space Museum's Steven F. Udvar-Hazy Center in Chantilly, Va., opened in December 2003, and permits the display of many more artifacts in an open, hangar-like setting, including a Lockheed SR-71 Blackbird, a Concorde, the Boeing B-29 Superfortress Enola Gay, the "Dash 80" prototype for the 707, the sole-surviving Boeing 307 Stratoliner and space shuttle Enterprise.

The first or opening phase of the center includes the massive Boeing Aviation Hangar, the James S. McDonnell Space Hangar, the Donald D. Engen Observation Tower, the Airbus IMAX theater, three classrooms, museum shop and offices. The Udvar-Hazy Center will ultimately display 80 percent of the museum's aircraft and large space artifact collection, most of which was in storage for many years because of a lack of display space. The museum's Mall building can only house about ten percent of the collection and another ten percent is on loan. The Udvar-Hazy Center will eventually house the museum's new artifact restoration and preservation facility as well as an archive center. Admission is free and parking is \$15 a day.

Fairfax City Museum & Visitor Center, Fairfax

The Fairfax City Museum and Visitor Center is located in the former Fairfax Elementary School. The school building, built in 1873, is the oldest 2-story building in the city and listed on the National Register of Historic Places. The museum portion of the facility contains special exhibition on city history, provides educational outreach to school and youth groups, offers walking tours of this historic district and provides general information.

The visitor center provides general visitor information for both tourists and residents, including lodging, restaurants, transportation and historic and natural attractions. The visitor center also is the place to find out about special events in and around the city. The facility's gift shop stocks books, art prints and souvenirs related to Fairfax and Virginia history. Admission is free.

National Firearms Museum, Fairfax

The museum is owned and operated by the National Rifle Association and the museum's mission is to promote gun collecting, and the preservation of the heritage of firearms. Covering approximately 20,000 square feet, the museum displays historically significant firearms from 1350 to the present. The museum's 14 galleries, located at the National Rifle Association Headquarters, trace the development of firearms and their relevance to America's heritage. Some of America's firearms treasures are on display, including the oldest gun in America, a wheel lock musket that came over on the Mayflower, Kentucky rifles, oddities & curiosa, military arms, sporting guns, and target guns including those of Olympic gold medalists and national champions. Famous individuals whose guns are on display include Dwight Eisenhower, Theodore Roosevelt, Annie Oakley, Buffalo Bill Cody, Napoleon, Chuck Yeager, Jesse James, Tom Selleck, & more. NFM store features NRA apparel, souvenirs, & great selection of gun books.

Admission is free.

George Washington's Mount Vernon Estate & Gardens, Fairfax County

This is George Washington's former estate and plantation home on the banks of the Potomac River, totaling roughly 500 acres. The mansion is built of wood in neoclassical Georgian architectural style. Mount Vernon was designated a National Historic Landmark in 1960 and is listed on the National Register of Historic Places. It is owned and maintained in trust by The Mount Vernon Ladies Association and is open every day of the year, including holidays and Christmas.

Visitors can see 20 structures and 50 acres of gardens as they existed in 1799. The estate also includes a museum, the tombs of George and Martha Washington, Washington's green house, an outdoor exhibit devoted to American agriculture as practiced by Washington. In 2007, Mount Vernon estate officially opened a reconstruction of Washington's distillery. This fully functional replica received special legislation from the Virginia General Assembly to produce up to 5,000 gallons of whiskey annually, for sale only at the Mount Vernon gift shop. The construction of this operational distillery cost \$2.1 M and is located on the exact site of Washington's original distillery, a short distance from his mansion on the Potomac River. Frank Coleman, spokesman for the Distilled Spirits Council that funded the reconstruction, said the distillery "will become the equivalent of a national distillery museum" and serve as a gateway to the American Whiskey Trail.

Mount Vernon reports an annual attendance of over 1 million visitors. Tickets are \$15 for adults.

Theme Parks in the Metropolitan Area

Kings Dominion, Doswell, VA

Kings Dominion is a 400-acre theme park that's home to more than 60 rides, shows and attractions, located 20 miles north of Richmond. The park features 15 world-class roller coasters making it one of the largest coaster collections on the East Coast. Kings Dominion also has large children's areas and WaterWorks, a 20-acre water park playground that's included with park admission.

The 2010 season marks Kings Dominion's 35th anniversary and 36th year of operation. New in 2010, Kings Dominion will introduce the 15th world-class coaster to the lineup, Intimidator 305, at 305 feet-tall and over 90 miles per hour it is the tallest and fastest coaster of its type on the East Coast. In 2009 Kings Dominion introduced two new rides, Americana, a giant 110-foot Ferris wheel, and El Dorado, a high-in-the-sky swinging pendulum ride, adding to Kings Dominion's impressive lineup of family friendly attractions.

The park hosts more than two million visitors annually and employs over 3,000 seasonal and 110 year-round employees, according to the Kings Dominion website.

Six Flags, Upper Marlboro, MD

The Washington, DC metropolitan area's only theme park, Six Flags America, is located in Prince George's County, MD. Featuring over 200 acres of family fun and excitement, it is two thrilling parks in one - the theme park and the wet-n-wild Hurricane Harbor water park. There are over 100 thrilling rides, games shows and attractions including 7 fast and phenomenal roller coasters such as BATWING, SUPERMAN: Ride of Steel, Joker's Jinx, Mind Eraser, and the top-rated "Wild One" wooden coaster. In 2010, Six Flags America makes its largest park expansion in over a decade, opening North America's largest Thomas Town. This whimsical world is based on Thomas and Friends. Six Flags America is open March 27, 2010 through October 31, 2010.

Busch Gardens, Williamsburg, VA

The European countries of England, Scotland, Ireland, France, Germany and Italy serve as the setting for Busch Gardens' 350+ acres of fun-filled world exploration. The Williamsburg adventure park is committed to authentic and accurate theming. To create old-world European flair throughout its six countries, Busch Gardens carefully depicts each detail from quaint cobblestone streets and building facades to designer landscapes and beautiful statuary. It is home to top-rated roller coasters including Griffon, the world's tallest floorless dive coaster, more than 50 rides and attractions, live stage shows, and a wide variety of culinary experiences and world-class shopping. It added an all-new Sesame-themed children's area. It was voted the world's "Most Beautiful Park" for 19 consecutive years. Its location is three miles east of historic Williamsburg, Va., 50 miles from Richmond, Va. and the Virginia Beach resort area, and 150 miles from Washington D.C.

The park is open March through December. Attendance was 3.09 million in 2008, down 2.0% from 2007.

Planned Cultural Attractions in Prince William County

Upcoming Civil War Sesquicentennial (2011-2015)

Hundreds of events are planned throughout Virginia for the anniversary of the Civil War. Prince William County contains several major historic Civil War sites, and is planning its own celebrations and events that will be the focus of extensive tourism promotion activities for the next four years. At least one new museum is planned in conjunction with these events, a satellite facility of the Museum of the Confederacy based in Richmond. The current museum attracted 47,100 visitors last year, of which 6,800 were from Virginia. They have raised \$6 million out of a total \$7.5 million for an 11,000 square foot satellite location in Appomattox planned to open in 2012. Fredericksburg and Fort Monroe locations would open subsequently.

Belmont Bay Science Center

The Belmont Bay Science Center will be built at the juncture of the Occoquan and Potomac Rivers in Prince William County, approximately 23 miles from downtown Washington, D.C. Located on 5 acres of land within the new Belmont Town Center development, it is also adjacent to the 680-acre Occoquan Bay National Wildlife Refuge, the science museum is planned for approximately 170,000 square feet. The State appropriated \$5 million in 2005. Groundbreaking was supposed to occur in 2005 with the facility opening in 2007, but to date, construction has not started.

Planned Cultural Attractions in Metropolitan Washington, D.C.

Martin Luther King Jr., National Memorial

Dr. King's Memorial site is a four-acre plot on the north east corner of the Tidal Basin within the precinct of the Jefferson Memorial and north of the memorial to President Roosevelt along the National Mall in Washington, D.C. The Memorial, currently under construction, includes 340 structural piles, a 2,350 cubic ft. granite inscription wall weighing 194 tons, 47,000 sq. ft. of granite paving, a 30 ft. Stone of Hope/Mountain of Despair sculpture and the installation of 185 Yoshino cherry trees, 32 American elm trees and 16,835 pieces of Big Blue Liriope plantings. It is expected to be completed in 2011. There has been some controversy over the statue of Dr. King that is being made in China. In addition, the Country of Greece offered to transport the custom carved sculpture for the memorial from China to Washington DC, but now due the economic conditions of the country... has backed out, so expect further delays.

African American Museum

The Smithsonian Institution museum, dedicated to the legacy of African-Americans in America, will occupy a five-acre plot near the Washington Monument and the National Museum of American History. It is one of the last open spaces on the Mall, and the museum's founders have specified that the building must respect the history and visage of the monument.

The building is intended to function as a night-and-day destination. Officials with the Smithsonian, which will oversee the details of construction and exhibition content, said they didn't expect the building to be very tall, but it would cover 300,000 to 350,000 square feet, roughly the same size as the National Museum of the American Indian. Construction is scheduled to begin in 2012 and the museum is expected to open in 2015.

Dwight D. Eisenhower National Memorial

The memorial, to celebrate Eisenhower's accomplishments as a General, President, and World Citizen, will be built on a four-acre parcel just south of the Mall near the National Air and Space Museum, will be a mix of traditional and contemporary elements, designed by renowned architect, Frank Gehry.

The design and construction cost for the Eisenhower Memorial will be \$90 - \$110 million. The Commission has received full federal funding through the design period and seeks public/private funding through the construction period. The Memorial is scheduled for completion approximately 5 years from the signing of the design contract, which occurred in January 2010. The tentative dedication date is Memorial Day 2015.

Armenian Genocide Museum

The Armenian Genocide Museum and Memorial Inc., being planned for the long-vacant Federal American National Bank building at 14th and G Streets NW in downtown Washington, D.C., has been delayed due to financial difficulties including delinquent tax payments. The bid for an opening “before 2011,” as the museum’s website continues to promise, is unlikely. The museum has not broken ground on the 50,000-square-foot museum complex. The building, is listed on the [National Register of Historic Places](#), has an assessed value of \$8 million and is subject to the District's vacant property tax.

Museum of the American Latino

After the Museum of the American Indian and the African American Museum found spots on the National Mall, the supporters of a Latino Museum have appealed for a similar location for their constituency. Four locations are currently being considered, from the area near L’Enfant Plaza to the Washington Monument.

Commercial Accommodations in Prince William County

According to local tourism sources there are 40 hotels in Prince William County with a total of 3,007 rooms, including the following:

- 13 hotels in Manassas, VA with 1,384 rooms;
- 13 hotels in Woodbridge, VA with 1,154 rooms;
- 7 hotels in Dumfries, VA, with 605 rooms;
- 1 hotel in Triangle, VA with 135 rooms; and
- 1 hotel in Gainesville, VA with 95 rooms

Appendix F: Sources and References

This section contains a listing of the major published and unpublished reports and documents consulted for this study, along with the websites of specific museums and lists of people and organizations interviewed for this study.

The sources used in the preparation of this report are listed here by general topic area.

Museums and Attractions

Email correspondence

Air Force Memorial

Busch Gardens

Canadian War Museum

Hampton Roads Naval Museum

International Spy Museum

Mariners Museum

Naval Aviation Museum

National Building Museum

National Civil War Museum

National World War II Museum

Pamplin Historical Park

Patton Museum Ft Knox

Pennsylvania Military Museum

Pentagon 9/11 Memorial

Potomac Mills Mall

Six Flags America

Strategic Air and Space Museum

Titan Missile Museum

US Army Transportation Museum

USS Intrepid

White Sands Missile Museum

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Prince William County Tourism Office

Virginia Association of Museums

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National Building Museum

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National Infantry Museum

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Smithsonian

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US Navy Museum

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Korean War Museum, Springfield IL

Manassas Museum, VA

Manassas National Battlefield Park, VA

Mariners Museum, Newport News VA

Monticello, Charlottesville VA

Mount Vernon, Fairfax County VA

Museum of the Confederacy, Richmond VA

National Air & Space Museum – Udvar Hazy Chantilly

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National Building Museum

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