

H2R Market Research

Reveal Your Customer's Full Experience

New Science Center 2020 Concept Research and Attendance Potential

This Project was financed in part by a grant from the Commonwealth of Pennsylvania, Department of Community and Economic Development.

Project Overview

The purpose of conducting this research was to gauge consumer interest and attendance potential of a new science center in Allentown, PA.

This study was completed in two phases:

1. Concept Research
2. Attendance Potential

The **Concept Research** quantified interest in the science center concept to secure a baseline projection of market penetration which in turn informed the selection of science centers included in the industry benchmark.

The **Attendance Potential** research used a variety of industry recognized sources, including both the Concept Research and industry benchmarks, to create a series of algorithms. H2R's proprietary modeling methodology delivered the final results.





New Science Center
2020 Concept Research and Attendance Potential

Overall Science Center Concept

Concept Research Methodology

TARGET AUDIENCE. The Concept Research was conducted among consumers from a professionally managed panel of educational attractions visitors who have visited an attraction in the competitive set (Adventure Aquarium, Da Vinci Science Center, Franklin Institute Science Museum, Liberty Science Center and The Crayola Experience) and live within 0-100 miles of Allentown, PA.

SAMPLE. A total of 800 respondents were interviewed for this study. This sample size provides for a maximum margin of error of +/-3.5% at a 95% confidence interval. Throughout the presentation, respondents answering the survey will be referred to as *prospects*.

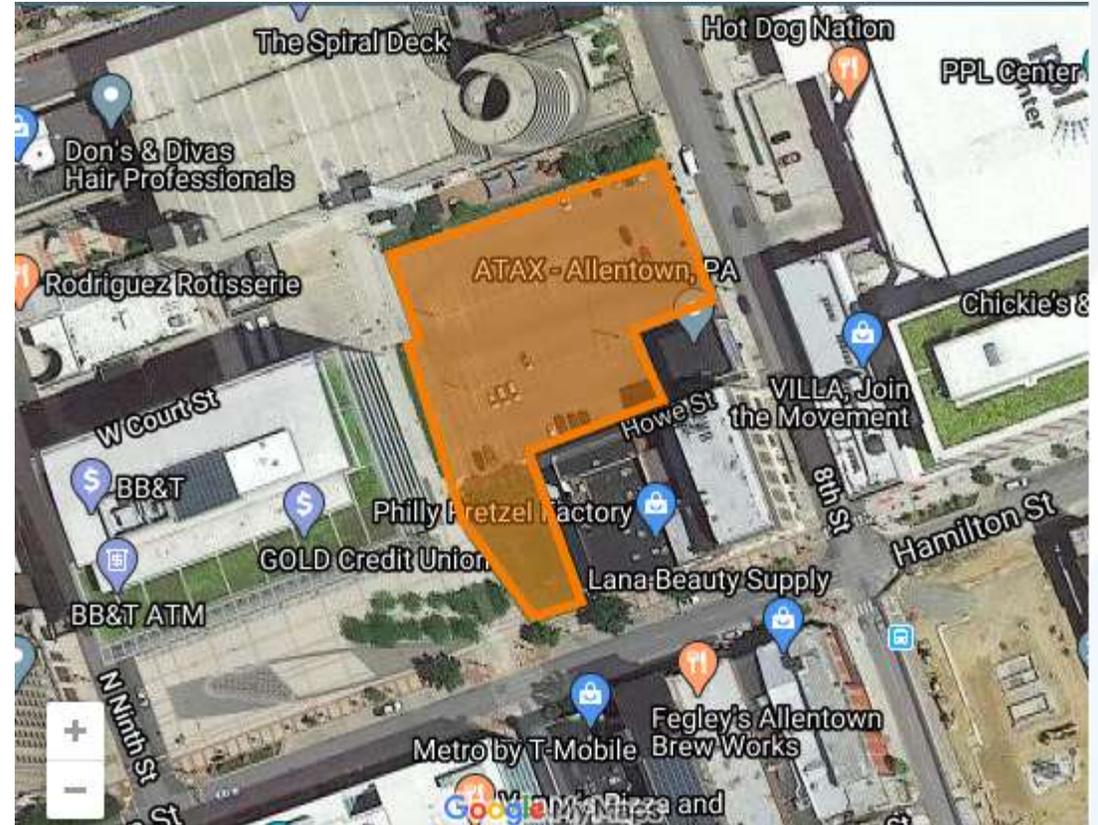
Within the overall sample, 211 respondents were 29-45 years of age, have families and report household incomes of \$75k+. This segment of respondents is known as our *Target Market*.

New Science Center Evaluation

The new Science Center to be located in downtown Allentown, PA yielded positive results compared to both its Competitive Set and Target Attractions.

Overall results (0-100 miles), including performance among the Target Market, Resident Market Area (0-50 miles) and Tertiary Market (51-100 miles), all delivered intent to visit scores that exceeded those of the competitive set and target attractions.

While the *Human Body*, *Curiosity Lab* and the *Leonardo da Vinci Exhibit* were considered the most compelling components, all eight concepts performed comparatively well and had a positive impact on intent to visit the new Science Center in Allentown.



Concept Description

The new Science Center will be a new 21st Century Science Center featuring:

A 75-foot tall fully immersive walk-through human body exhibit.

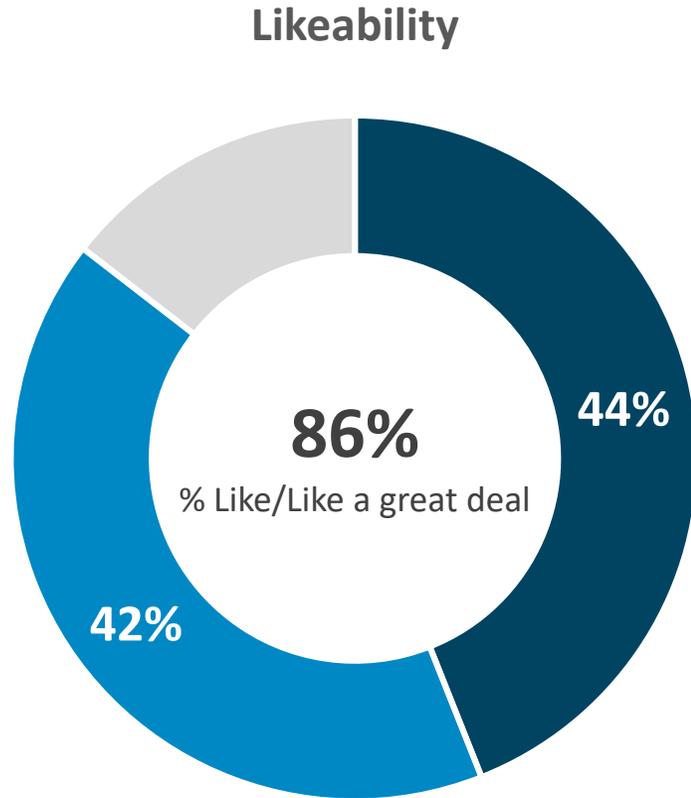
A Lehigh River Watershed exhibit that showcases live animals, including a curious and playful family of North American river otters.

A Curiosity Lab in which you don't just look at exhibits, you explore science and art by playing with dozens of mind-blowing exhibits.

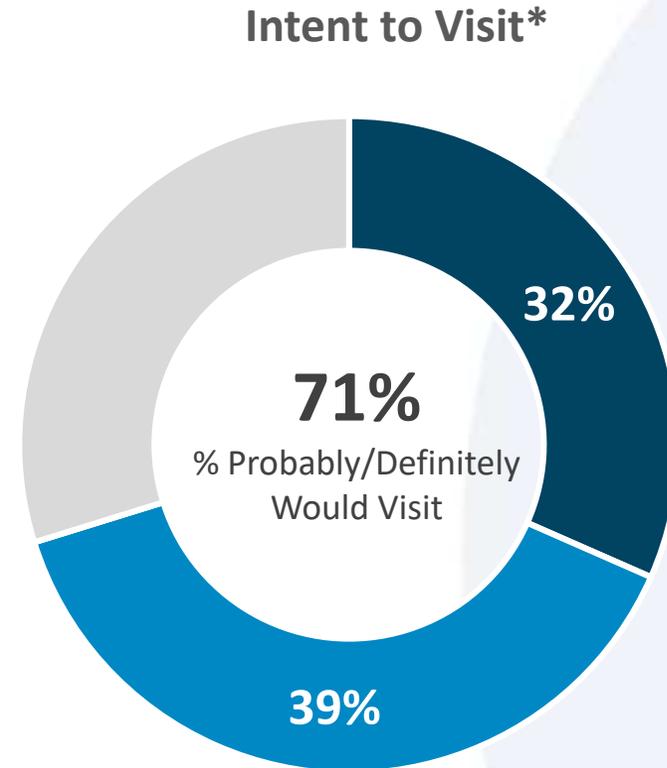
A simulated Factory Floor exhibit that allows visitors to get hands-on with the cutting edge design, production, and delivery methods used in state-of-the-art Smart Factories.

A science demonstration theater, a traveling exhibit hall, and a Leonardo da Vinci multimedia experience.

Nearly nine in ten prospects like the idea for the new Science Center, and intent to visit was strong at 71%.



■ % Like a great deal ■ % Like



■ % Definitely would visit ■ % Probably would visit

Q16: Please rate how much you like or dislike this idea for an attraction in Allentown, PA.

Q17: How likely would you be to visit this attraction if it were available in Allentown, PA?

*In the Market Research Based Analysis of Attendance Potential, intent to visit is based on top box scores only.

Science Center Components

*75 ft. tall walk through
Human Body*

Traveling Exhibit Hall

The Curiosity Lab

*S.T.E.A.M. Education
Center*

*Science Demonstration
Theater*

*The Lehigh River
Watershed*

*Leonardo da Vinci
Exhibit*

*Made in the
Lehigh Valley*

- The eight Science Center components were tested using a sequential design where each concept was evaluated by each respondent who completed the survey.
- Prospects reviewed the components and evaluated them across a battery of metrics including appeal, consideration and intent to visit.
- The component concepts were then compared to the overarching average among all components to identify those that performed above average.

The Human Body, The Curiosity Lab and the Science Demonstration Theater received the highest scores across two of the three key measurements.

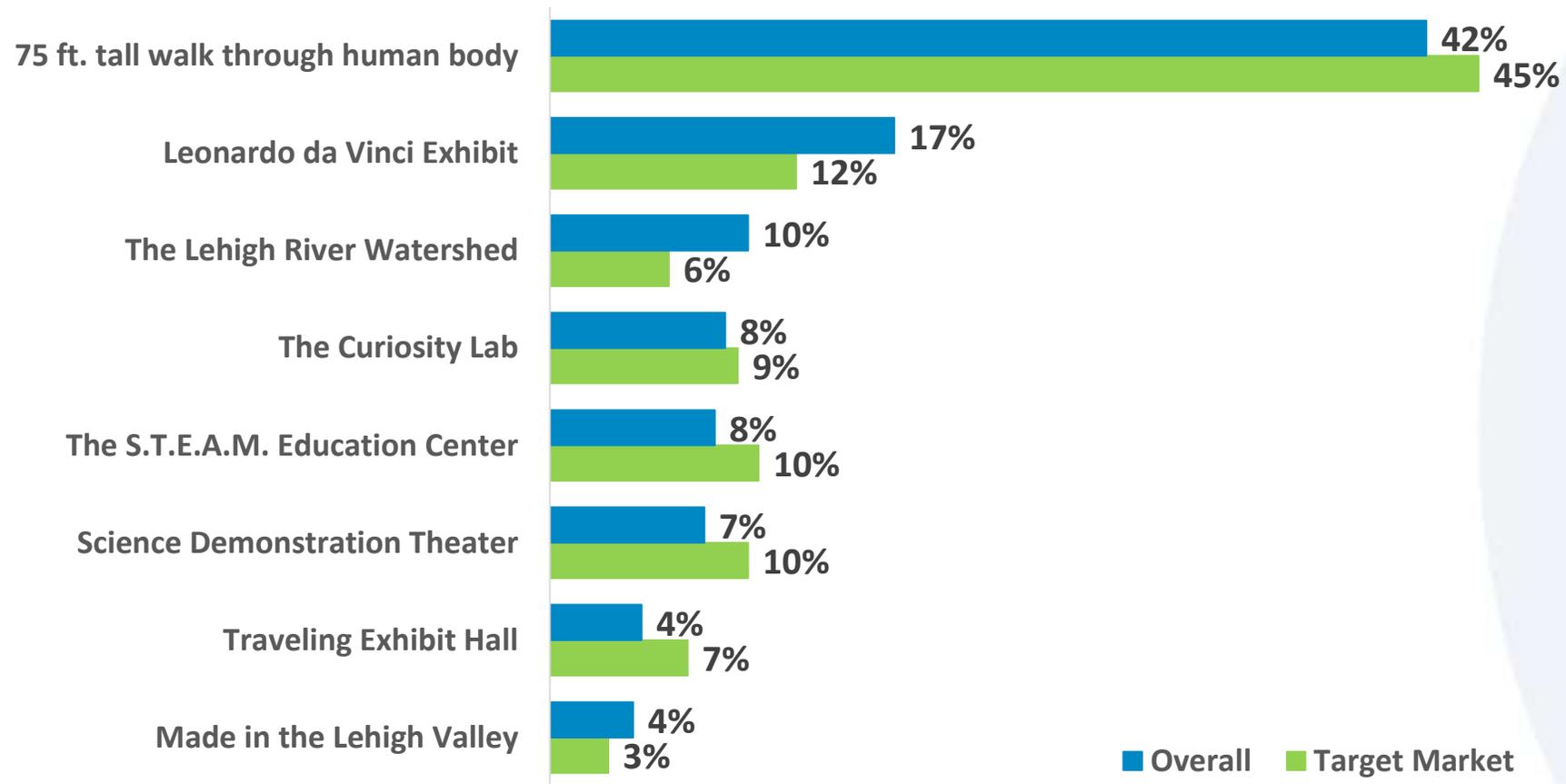
Component Measurements % Top 2 Box	Human Body (A)	The Curiosity Lab (B)	Science Demonstration Theater (C)	Leonardo da Vinci Exhibit (D)	Traveling Exhibit Hall (E)	S.T.E.A.M. Education Center (F)	The Lehigh River Watershed (G)	Made in the Lehigh Valley (H)	Component Average (I)
Component Appeal	83%	81%	79%	77%	73%	70%	70%	63%	74%
	C, D, E, F, G, H, I	C, D, E, F, G, H, I	E, F, G, H, I	E, F, G, H, I	H	H	H		F, G, H
Impact on Consideration of Visiting the New Science Center	77%	73%	70%	68%	65%	63%	61%	55%	66%
	B, C, D, E, F, G, H, I	C, D, E, F, G, H, I	E, F, G, H, I	E, F, G, H	G, H	H	H		F, G, H
Intent to Experience Components	82%	79%	75%	78%	72%	66%	68%	62%	73%
	B, C, D, E, F, G, H, I	C, E, F, G, H, I	E, F, G, H	C, E, F, G, H, I	F, G, H	H	H		F, G, H

Top 2 Box Scores:
 Component Appeal=% Very/Somewhat Appealing; Impact on Consideration=% Makes Me Much More Likely/More Likely to Visit; Intent to Experience=% Definitely/Probably Would

Q18: Please rate how appealing each of the following new Science Center experiences would be to you.
 Q19: How will these individual components affect your consideration of the new Science Center?
 Q20: Please indicate how likely you would be to experience each of the individual components if visiting the new Science Center.
 A, B, C, D, E, F, G, H or I below the rating indicates a statistically significant difference between the scores.

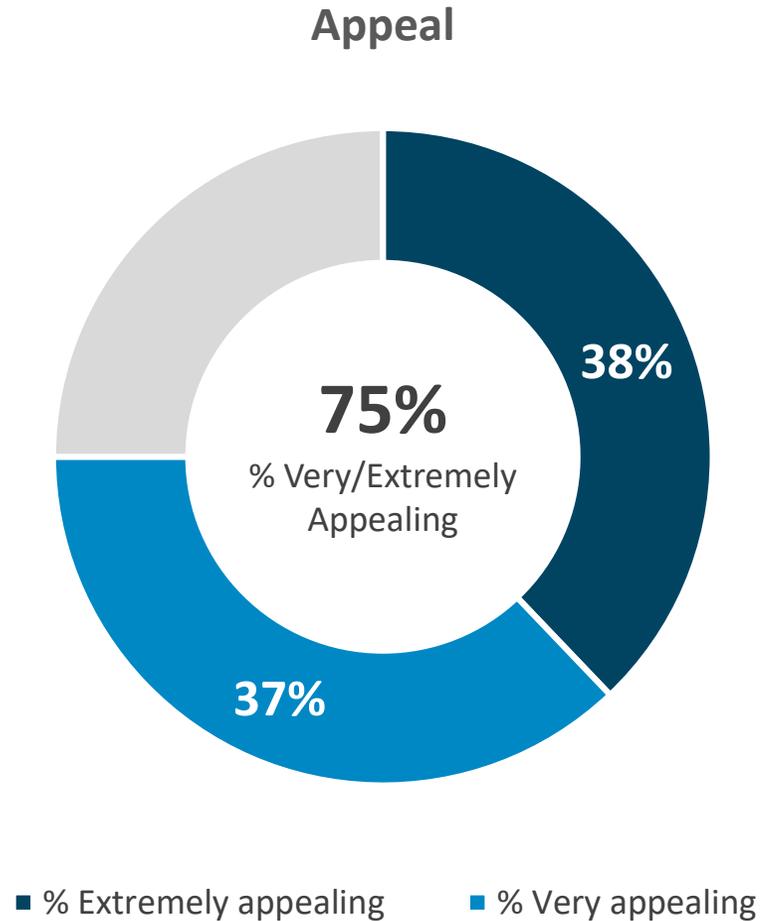
Prospects indicated they would be most likely to experience the *Human Body* followed by the *Leonardo da Vinci Exhibit*, if forced to choose one.

Component Most Likely to Experience – Choose 1

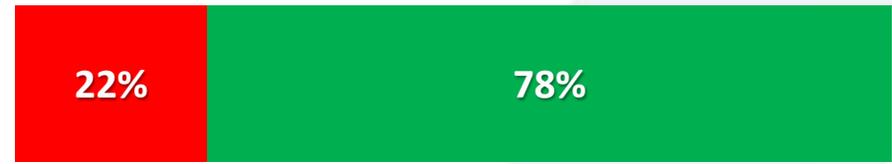


Q21: Which one of the following new Science Center components would you be most likely to experience?

After reviewing each of the eight components, three-quarters of prospects indicated they found the new Science Center concept appealing – also generating 3.6 positive comments for every 1 negative comment.



Ratio: 3.6



■ Negative ■ Positive

**Educational
(10.3%)**

“Educational opportunities for children.”

**Hands On
(9.8%)**

“I like how it is very interactive and geared towards hands on activities with kids.”

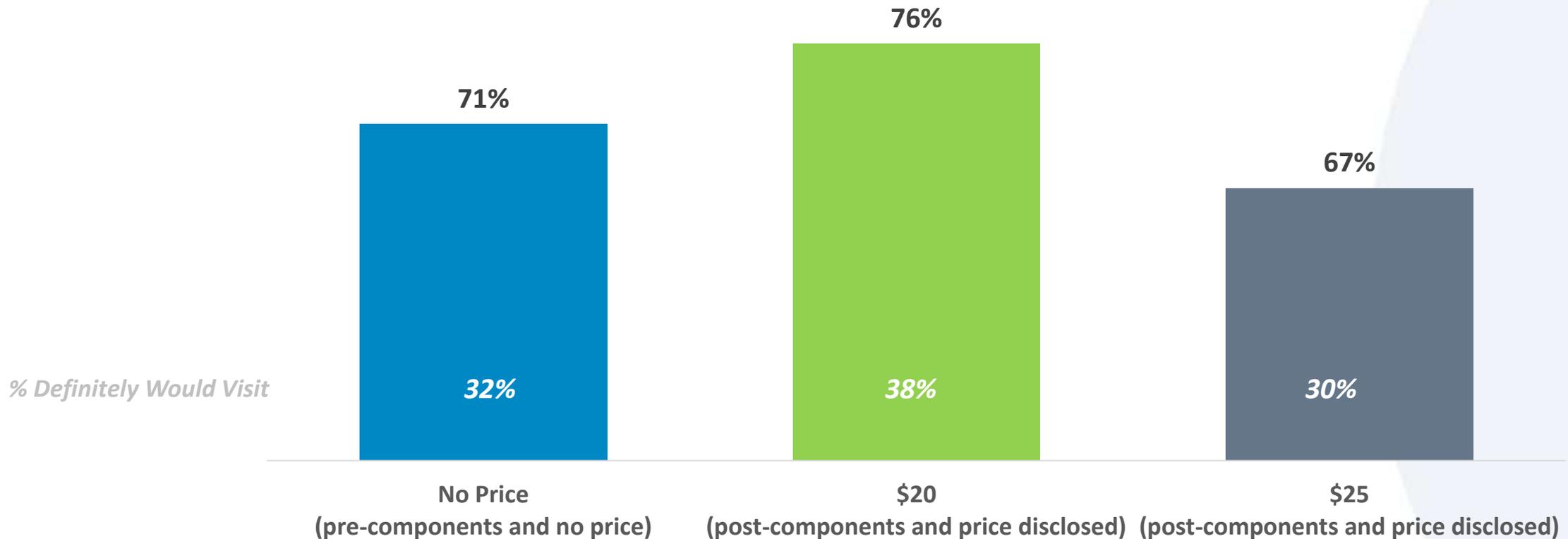
**Distance
(20.9%)**

“Very far away from me.”

Q22: Taking all aspects/components into consideration, please rate how appealing this new Science Center attraction is to you.
 Q23: What, if anything, do you particularly like about this overall idea for the new Science Center?
 Q24: What, if anything, do you not like about this overall idea for the new Science Center?
 *Likes/Dislikes comments were asked prior to pricing being shown.

Intent to visit the new Science Center increased five points over the baseline at the \$20 price but fell four points when a \$25 price point was introduced.

Intent to Visit Comparison - % Probably/Definitely Would Visit (Top 2 Box)



Q17: How likely would you be to visit this attraction if it were available in Allentown, PA?
Q25a/b: Now that you've seen all aspects of the new Science Center, if you knew the admission price was \$20/\$25 for adults, how likely would you be to visit?

Only two price points were tested, but extrapolations across intent per 10,000 consumers indicate demand would likely decline at the higher \$25 price point, but overarching admissions would likely be slightly higher.

% Definitely Would Visit (Top Box)	% Intent	Per 10k	Price Point	Est. Admissions
At \$20 Price	37.9%	3,790	\$20.00	\$75,800
At \$25 Price	30.4%	3,040	\$25.00	\$76,000
Variance \$25 vs \$20	-7.5%	-750	+\$5.00	+\$200
% Variance	-19.8%	-19.8%	+25.0%	+0.3%

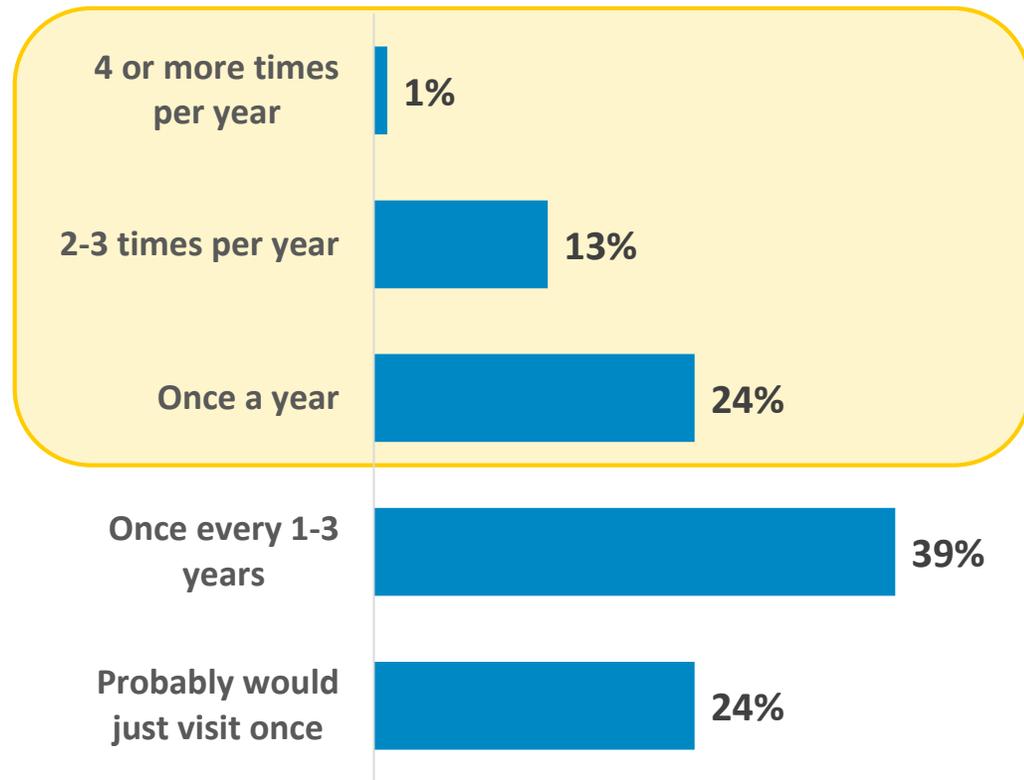
% Definitely/Probably Would Visit (Top 2 Box)	% Intent	Per 10k	Price Point	Est. Admissions
At \$20 Price	75.8%	7,580	\$20.00	\$151,600
At \$25 Price	66.8%	6,680	\$25.00	\$167,000
Variance \$25 vs \$20	-9.0%	-900	+\$5.00	+\$15,400
% Variance	-11.9%	-11.9%	+25.0%	+10.2%

Q17: How likely would you be to visit this attraction if it were available in Allentown, PA?

Q25a/b: Now that you've seen all aspects of the new Science Center, if you knew the admission price was \$20/\$25 for adults, how likely would you be to visit?

Nearly four in ten prospects (38%) said they would likely visit once a year or more and have a length of stay of approximately 3.3 hours.

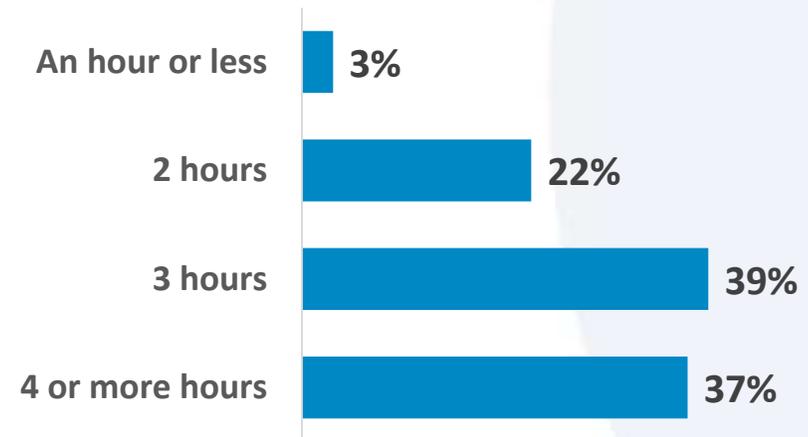
Estimated Frequency of Visitation



Amount of Time You Would Spend at this New Science Center



Estimated 3.3 Hours on Average



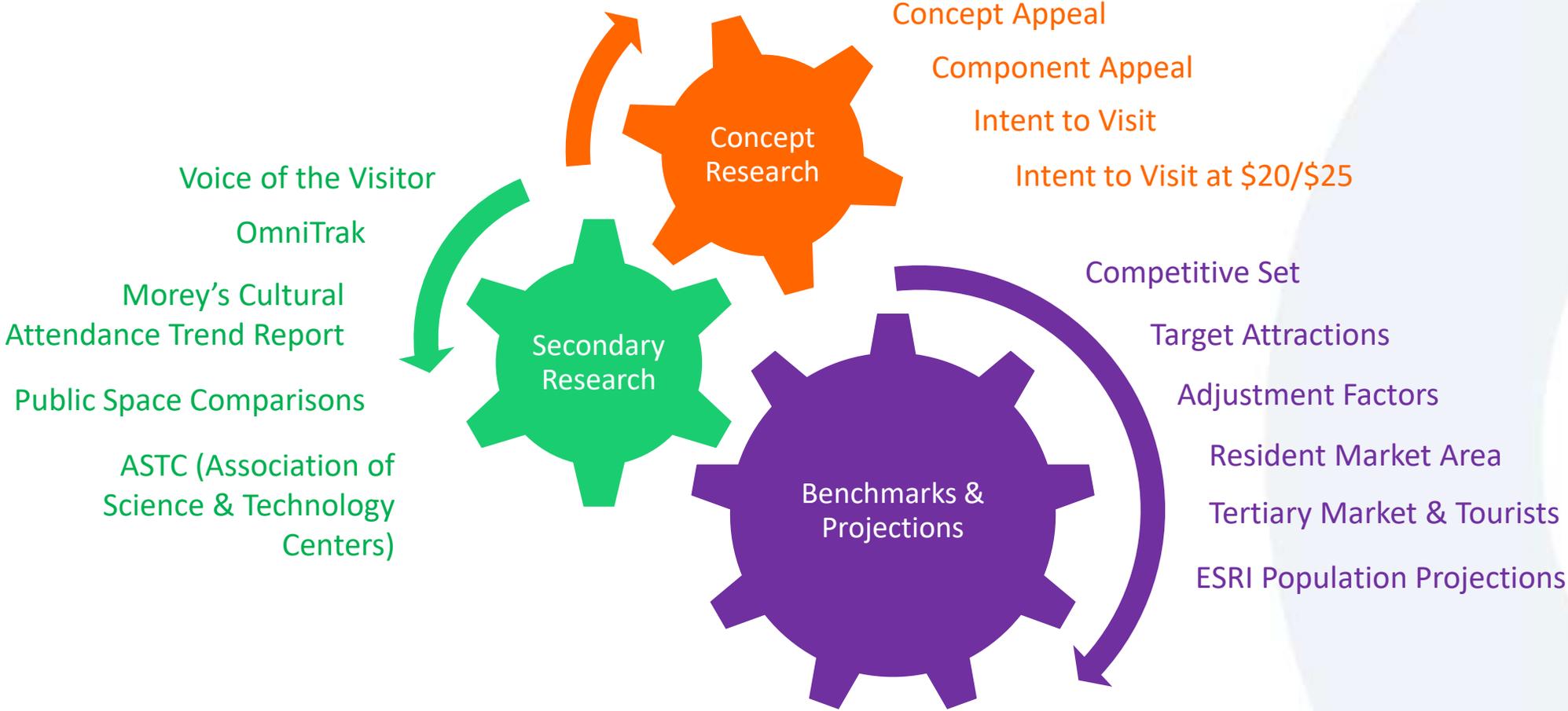
Q26: Having seen this idea for the new Science Center, how often might you envision yourself visiting?
Q27: How much time do you think you would spend at the new Science Center if you were to visit?

A photograph of a woman with blonde hair, wearing a dark purple sweater, interacting with a science exhibit. The exhibit is a white table with various yellow and blue components. Three children are also present: a young girl in a black and white striped shirt, a boy in a blue shirt, and a boy in a red shirt. The background is slightly blurred, showing other people and a blue wall. The image is overlaid with a large purple diagonal shape on the left side.

New Science Center
2020 Concept Research and Attendance Potential

Attendance Potential

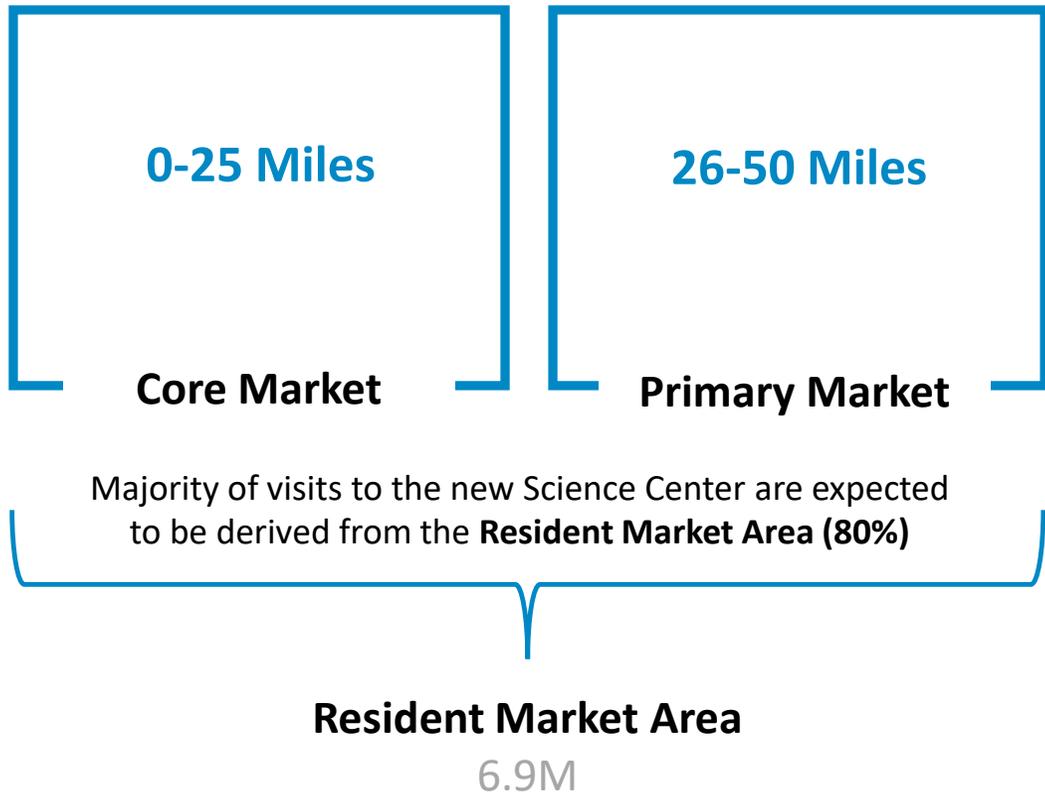
H2R's Integrated Attendance Potential Projection Process



Key Assumptions

- The size and design of the new Science Center will create a high-quality experience.
- The facility will be competently and effectively managed.
- An aggressive marketing campaign will be developed and implemented across the region.
- There will be no physical constraints obstructing visitation.
- Every reasonable effort has been made to assure that the data contained in this report reflects the most accurate and timely information possible and the data is believed to be reliable.
 - This report is based on estimates, assumptions and other information developed by H2R from independent research and primary market research efforts, general knowledge of the industry and consultations with the client.
- This report may not be used for any purpose other than that for which it was prepared.

Resident Market Area is defined as a 50-mile radius around Allentown while Tertiary and Tourist markets include those from beyond 50 miles.



New Science Center's Mid-Range Attendance Projection Stabilization Year – Year 3

	Market Penetration	Attendance	% of Attendance
Core Market (0-25 miles)	8.2%	100,421	21%
Primary Market (26-50 miles)	5.0%	285,264	59%
Total Resident Market Area	5.6%	385,686	80%
Tertiary (51-100 miles) & Tourist Markets	0.4%	99,315	20%
Total Projection	1.5%	485,000	100%

**Attendance is projected to stabilize in year 3 of operation*

New Science Center's projected mid-range attendance potential is 485,000.

Resident Market Penetration of 5.6% and a Total Market Penetration (including the 25M residents living in the Tertiary Market and overnight tourists to Lehigh Valley) is 1.5%.

The projected range of performance for the new Science Center runs from a low of 450,000 to a high of 520,000 in the Stabilization Year*

	Population	Low Range		Mid-Range		High Range	
		Market Penetration	Attendance	Market Penetration	Attendance	Market Penetration	Attendance
Core Market (0-25 miles)	1,232,164	7.8%	96,232	8.2%	100,421	8.9%	109,047
Primary Market (26-50 miles)	5,691,601	4.9%	278,960	5.0%	285,264	5.3%	302,610
Total Resident Market Area	6,923,765	5.4%	375,192	5.6%	385,686	6.0%	411,657
Tertiary (51-100 miles) & Tourist Markets	25,796,000	0.3%	74,808	0.4%	99,315	0.4%	108,343
Total Projection	32,719,765	1.4%	450,000	1.5%	485,000	1.6%	520,000

*Attendance is projected to stabilize in year 3 of operation

Market penetration of total market size including only "effective tourist" projections is 5.5%.

It is projected that stabilized attendance will occur in year 3 after the new Science Center is built. That is, attendance will open higher before stabilizing.

	YEAR 1	YEAR 2	YEAR 3 (STABLE)	YEAR 4	YEAR 5
Percentage of Stabilized	125%	110%	100%	100.5%	101%
Attendance Potential					
Low Range Visitation	562,500	495,000	450,000	452,250	454,500
Mid-Range Visitation	606,250	533,500	485,000	487,425	489,850
High Range Visitation	650,000	572,000	520,000	522,600	525,200

Thank You!



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