



Association of Art Museum Directors

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**ASSOCIATION OF ART MUSEUM DIRECTORS
RELEASES SURVEY ON
STATE OF THE NATION'S ART MUSEUMS**

Survey Reveals Museums Remain Stable in the Face of Current Challenges

New York, Thursday, January 17, 2002. The Association of Art Museum Directors (AAMD) today released results of a national, year-end survey gauging the state of the nation's art museums in the face of an uncertain fiscal environment and the changing national mood. Despite economic challenges and the aftereffects of September 11, the survey reveals that the country's art museums remain strong and stable, and are serving more people than at any other time in the nation's history.

In the survey, conducted in January by the AAMD, 134 art museums responded to questions regarding the current status of their institutions in three major areas: attendance, revenue, and building expansions. The respondents represent a cross-section of museums around the country, capturing a range of large, mid-sized, and small institutions, including public museums, university museums, and federal museums. The survey gives a picture of the state of the country's art museums as 2002 begins, and may give indications of future trends.

Results reveal that attendance remains strong, with a number of museums seeing increases in attendance in the wake of September 11. In addition, more than half of those that experienced a drop in visitorship at that time have since seen their numbers rebound. All but one of the 102 museums planning an expansion are moving forward with these initiatives, and the majority of museums are maintaining or expanding their levels of programming. Philanthropic giving and other forms of support are relatively stable and most museums are maintaining their staffing levels. Museums that serve national and international audiences have been the most greatly affected by current challenges; museums in New York City are in a unique position, since their city is facing a special set of challenges.

“We conducted the 2001 year-end survey of AAMD members because we felt it was critical to assess how the country’s art museums are being affected by the current economic climate and to consider the role they are playing in a time of national re-examination,” said Mimi Gaudieri, Executive Director of the AAMD. “While the challenges confronting museums are significant, a long record of responsible management, fiscal caution, diversified sources of income, and thoughtful growth is enabling them to weather the current situation. Public involvement, measured both in terms of attendance and individual support, remains strong. The role of museums in the cultural and civic life of our country — and their wise use of resources in fulfilling this mission — makes clear the importance of a continuing national investment in these institutions.”

The long-range planning and growth that underlie museums' steady expansion of public services are evidenced in additional information released by the AAMD. Data from the AAMD's annual statistic survey (which includes responses from 122 museums) shows that in the past ten years, art museums have experienced extraordinary growth in their endowments, in their annual income, and in donated acquisitions. Investment in capital improvements has risen dramatically, as have expenditures for the core mission: curatorial research and public exhibition; education; conservation; and in libraries. Attendance and membership increased in tandem with this increased investment, with visitorship rising 22% and membership up 29%.

The year-end survey and longitudinal data together provide a sense of historical trends and future indicators that bespeak a growing public response to an institutional investment in programming, facilities, collections, and resources. This public involvement is especially evidenced at times of crisis, and is a reflection of museums' contributions to national vitality and resilience.

HIGHLIGHTS OF SURVEY DATA

Expansions

- Of the 102 art museums that are planning expansions, 99% will proceed with these initiatives.
- More than two-thirds (67%) are moving forward with no change in their plans.

Attendance

- Eighty percent (80%) of art museums report current attendance at – or above – levels prior to September 11.
- Twenty percent (20%) report a sustained increase in attendance since September 11.

Revenue

- While art museums express caution about future funding, half (50%) report no change or an increase in revenue levels.

- Art museums have highly diversified sources of revenue, with attendance accounting for an average of 5% of their income. No single source of funding accounts for more than 18% of the average museum's annual revenue.

Programming and Staffing

- Nearly three-quarters (72%) report no reductions in staffing (with a few museums reporting an increase in staffing) after September 11.
- More than three-quarters of art museums (76%) report no change or an increase in their level of public programming.

TEN YEAR TRENDS — 1990 TO 2000

- In the past decade, art museums have experienced a 113% growth in their endowments
- Growth of investment in capital improvements has grown 483%
- Museums have substantially increased their expenditures in their core mission:
 - Curatorial/Exhibition (85%)
 - Conservation (93%)
 - Education (96%)
 - Library (105%)
 - Building Maintenance (174%)
 - Protection Services (57%)
 - Energy (47%)
- While the number of artworks purchased decreased by 16%, the number of artworks donated increased 50%
- Attendance has increased 22%
- Family and individual memberships have increased 29%

Presenting the results of the year-end and ten-year survey were:

- **James Cuno**, Director, Harvard University Art Museums and President, Association of Art Museum Directors, Cambridge, Massachusetts
- **Ned Rifkin**, Director, Hirshhorn Museum and Sculpture Garden, Washington, D.C.
- **Vishakha N. Desai**, Director, Asia Society Museum, New York, New York
- **Lewis I. Sharp**, Director, Denver Art Museum, Denver, Colorado
- **Gary Vikan**, Director, Walters Art Museum, Baltimore, Maryland

The Association of Art Museum Directors is a membership organization representing 175 directors of the major art museums in the United States, Canada and Mexico. Its purpose is to aid its members in establishing and maintaining high standards for themselves and the museums they represent. AAMD does this by serving as a forum for the exchange of information and the exploration of ideas, and as a voice with which museum directors express their joint concerns and those of their institutions.

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EXPANSIONS

1. If you have an expansion planned or in progress, are you:
- A. Moving forward with the original plan: 73 museums (67%)
 - B. Changing the time frame: 30 museums (28%)
 - C. Changing the scope: 4 museums (4%)
 - D. Deferring indefinitely: 1 museum (1%)

Not applicable/no response: 32 museums

ATTENDANCE

2. Since September 11, has your attendance:
- A. Not changed from projections/comparable periods: 34 museums (26%)
 - B. Dropped: 27 museums (21%)
 - C. Initially dropped and then regained: 36 museums (28%)
 - D. Increased: 26 museums (20%)
 - E. Initially increased and then fallen off: 7 museums (5%)

Not applicable/no response: 4 museums

REVENUES

Since September 11, are you experiencing a decline, increase, or no change in financial support from:

3. Individuals:
- A. Decline: 30 museums (23%)
 - B. Increase: 28 museums (21%)
 - C. No change: 44 museums (33%)
 - D. Too early to tell: 30 museums (23%)

Not applicable/no response: 2 museums

4. Foundations:
- A. Decline: 23 museums (17%)
 - B. Increase: 11 museums (8%)
 - C. No change: 44 museums (33%)
 - D. Too early to tell: 54 museums (42%)

Not applicable/no response: 2 museums

5. Corporations:
- A. Decline: 43 museums (33%)
 - B. Increase: 10 museums (8%)
 - C. No change: 31 museums (24%)
 - D. Too early to tell: 45 museums (35%)

Not applicable/no response: 5 museums

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6. Government:

- A. Decline: 34 museums (27%)
- B. Increase: 6 museums (5%)
- C. No change: 40 museums (31%)
- D. Too early to tell: 48 museums (37%)

Not applicable/no response: 6 museums

7. Has your overall revenue

- A. Declined: 65 museums (50%)
- B. Increased: 20 museums (15%)
- C. Stayed the same: 46 museums (35%)

Not applicable/no response: 3 museums

Since September 11, are you planning changes or have you begun changes in the following areas:

8. Programming:

- A. No changes in programming: 86 museums (65%)
- B. Reduction in programming: 34 museums (26%)
- C. Increase in programming: 12 museums (9%)

Not applicable/no response: 2 museums

9. Staffing:

- A. No changes in staffing: 82 museums (63%)
- B. Reductions in staffing: 38 museums (29%)
- C. Increase in staffing: 10 museums (8%)

Not applicable/no response: 4 museums

10. Marketing:

- A. No changes in marketing: 74 museums (45%)
- B. Reductions in local/regional marketing: 17 museums (10%)
- C. Increase in local/regional marketing: 40 museums (24%)
- D. Reductions in national marketing: 25 museums (15%)
- E. Increase in national marketing: 10 museums (6%)

Not applicable/no response: 2 museums



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Attached are a series of graphs that present:

- Findings from a snapshot survey of our membership conducted by the AAMD in early 2002
- Longitudinal comparisons of data from the AAMD's annual statistical surveys of 1990 and 2000

These findings were presented earlier this year by a group of AAMD museum directors who provided interpretation and analysis of the data, and I would like to share some of the highlights with you.

I believe that our surveys reveal that the art museum community is built upon a solid foundation, one that reflects strategic investment in the areas of programming, financial stability and public service during the past 10 years.

The events of September 11, which accelerated existing recessionary trends, have affected the art museum community in North America, especially those museums that serve national and international audiences. However, our survey has revealed the resiliency that has come from the diversification of our revenue streams, and the enhancement of our role as civic resources.

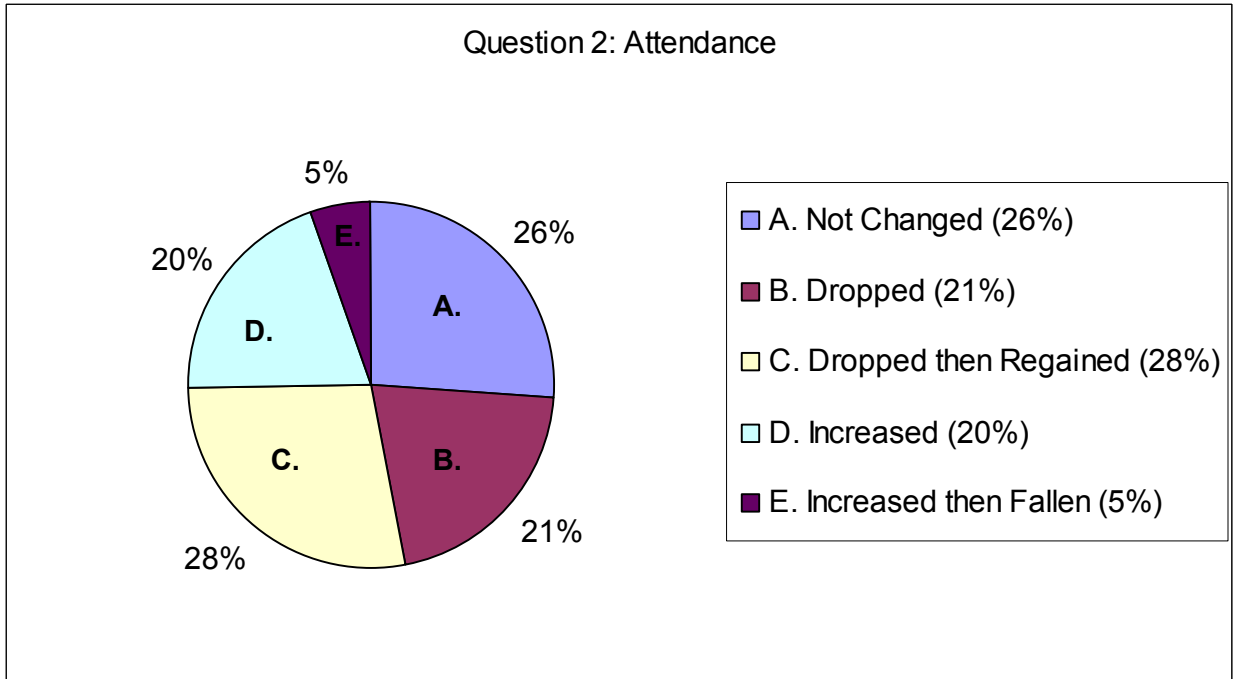
It is still too early to tell the longer term impact of the recession. As with virtually all other enterprises, our revenues declined in a number of areas after September 11. However, our conservative financial planning and sound investment in strengthening our institutions during robust economic times means that the support we receive from corporations, foundations, government sources and individuals can be very effectively directed towards the fulfillment of our public responsibilities.

I'd like to point out one finding in particular: of the 134 AAMD member museums that responded to the January survey, 102 indicated that they are planning expansions, but *only one* museum reported that it may not proceed with its plans. While this might seem startling at first, I should note that the survey captures a wide range of projects (from renovations of existing spaces to the creation of entirely new facilities) in various stages of completion (from initial needs assessment to public opening). As a rule of thumb, expansions of any complexity become visible five years into the planning process – when the project architect is announced – and take about a decade on average to complete.

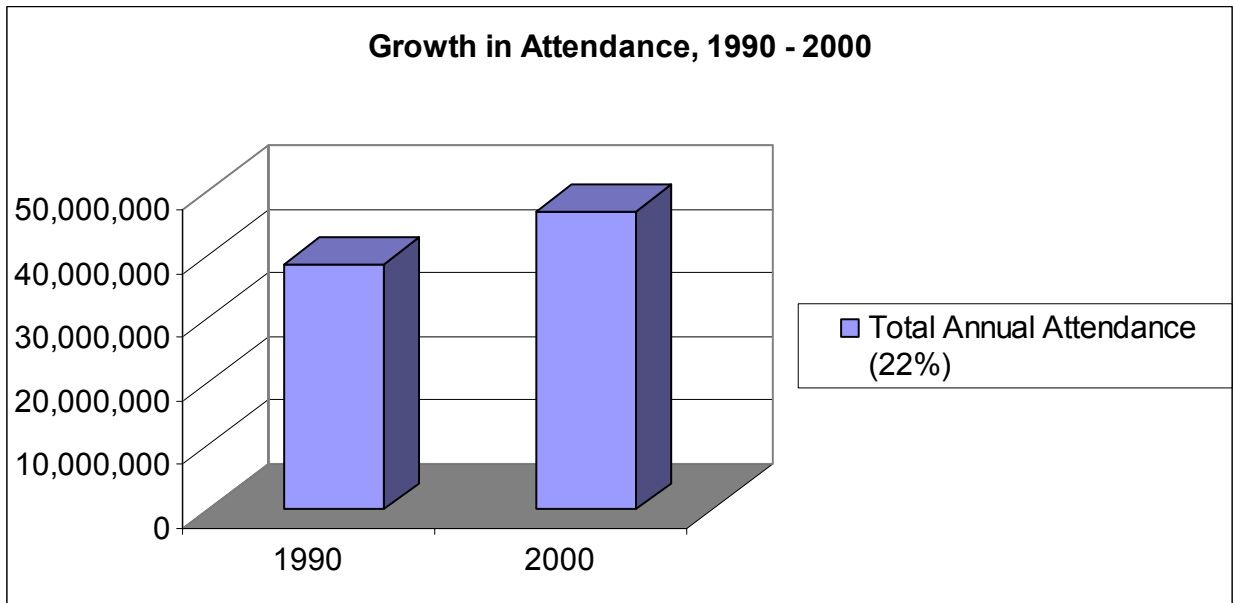
What is more interesting about this data is that it demonstrates how commitments to expand and invest in museums' core mission transcends short-term economic cycles. I believe this holds true because museum expansions really represent an investment in community, one that is designed to produce public benefit on an ongoing basis.

James Cuno

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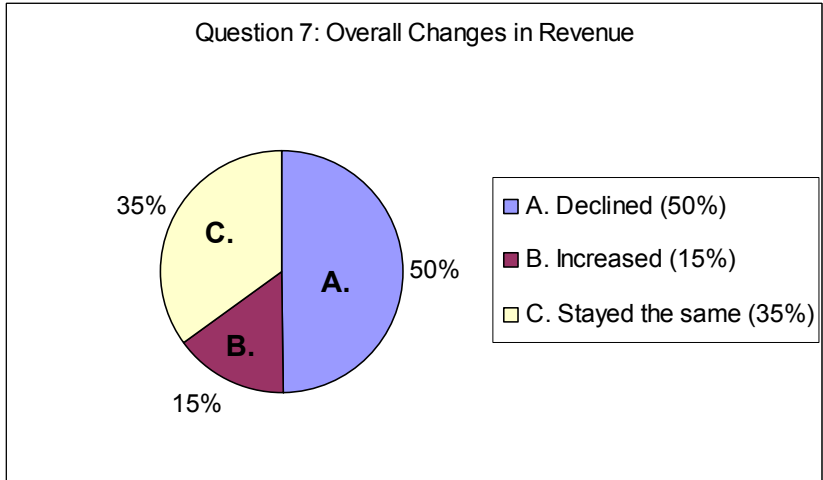


Attendance remains strong, with 20% of AAMD member museums seeing a sustained increase in visitorship since September 11. More than half of the museums that experienced a drop in attendance after September 11 have seen their numbers rebound. In the past ten years attendance at AAMD member museums has grown significantly, increasing by an average of 22%.

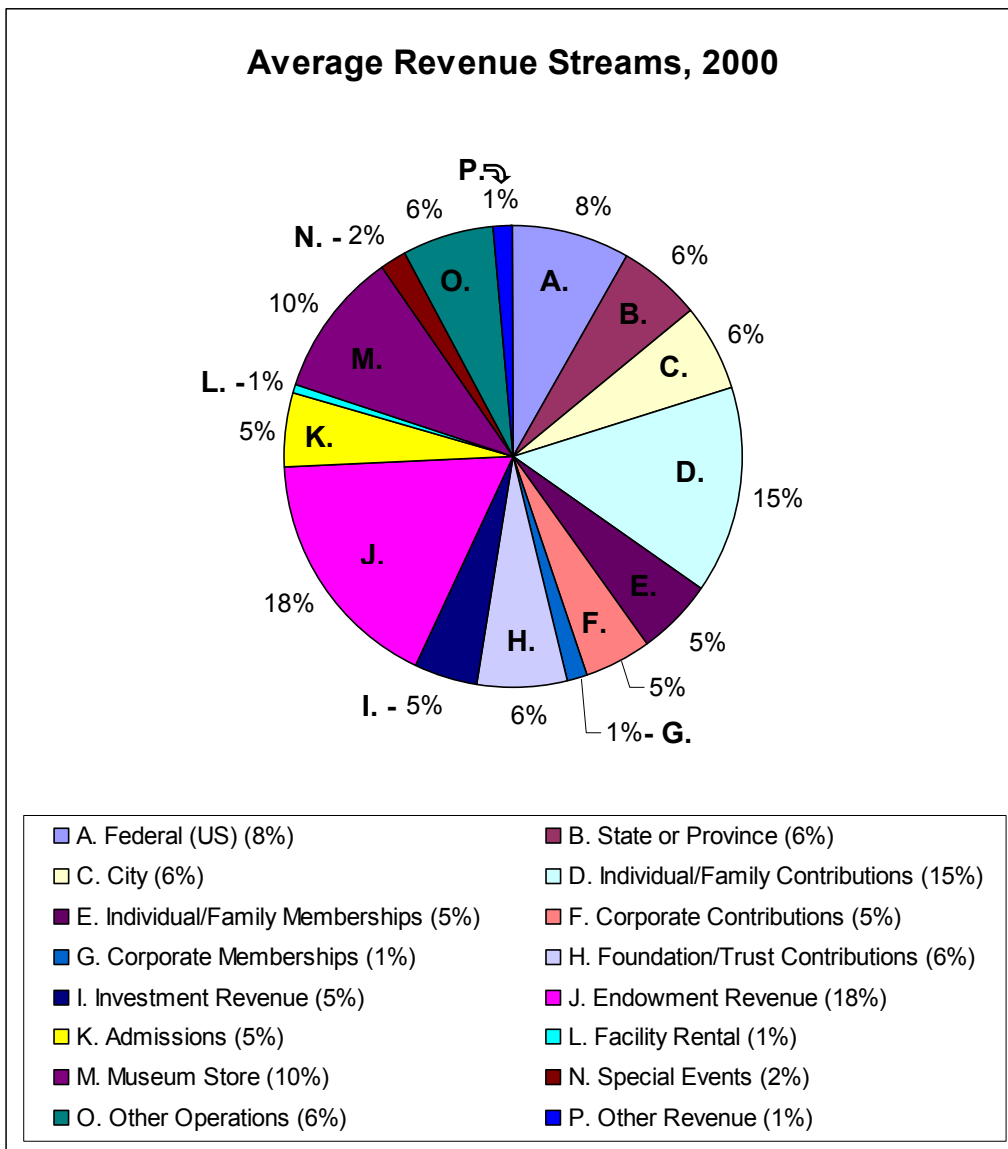


Results reflect AAMD member museums responding to a national, year-end survey (134 respondents), and longitudinal data from the 1990 and 2000 annual statistical surveys of AAMD member museums (with the same 122 museums responding in each year). AAMD has a membership of 175 art museums.

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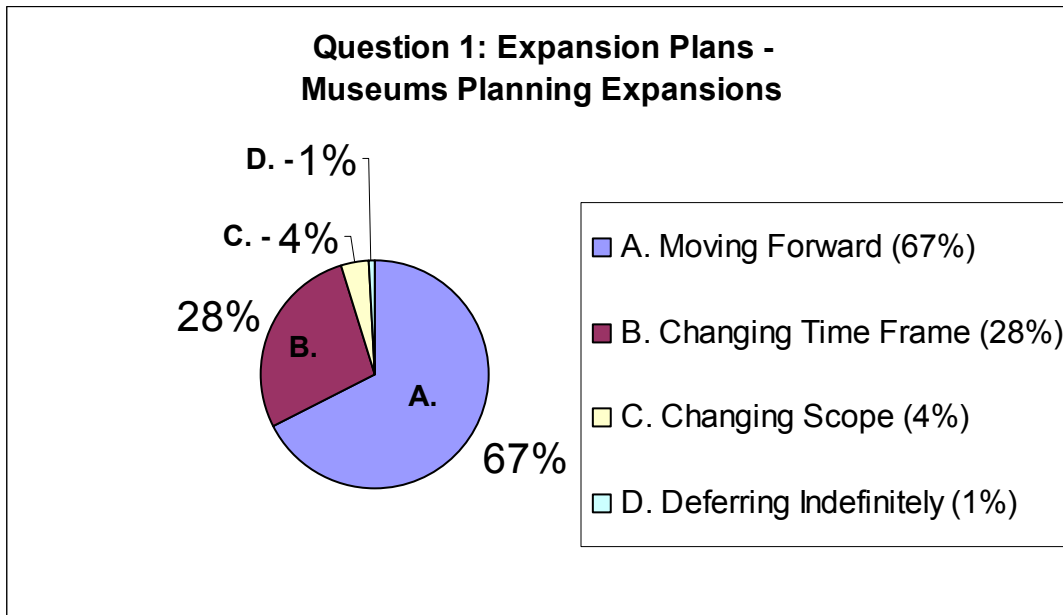


Revenue remains relatively stable since September 11, with 15% of AAMD member museums experiencing a growth in revenue since that date. AAMD museums have highly diversified sources of revenue, with attendance accounting for only 5% of income on average. No single source of funding accounts for more than 18% of these museum's average annual revenue.

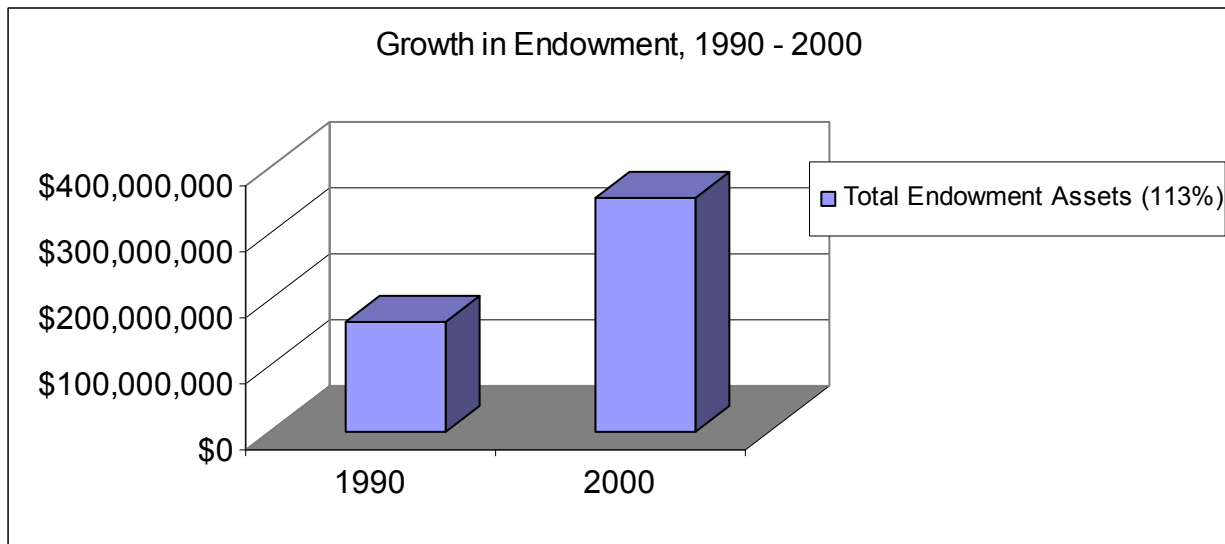


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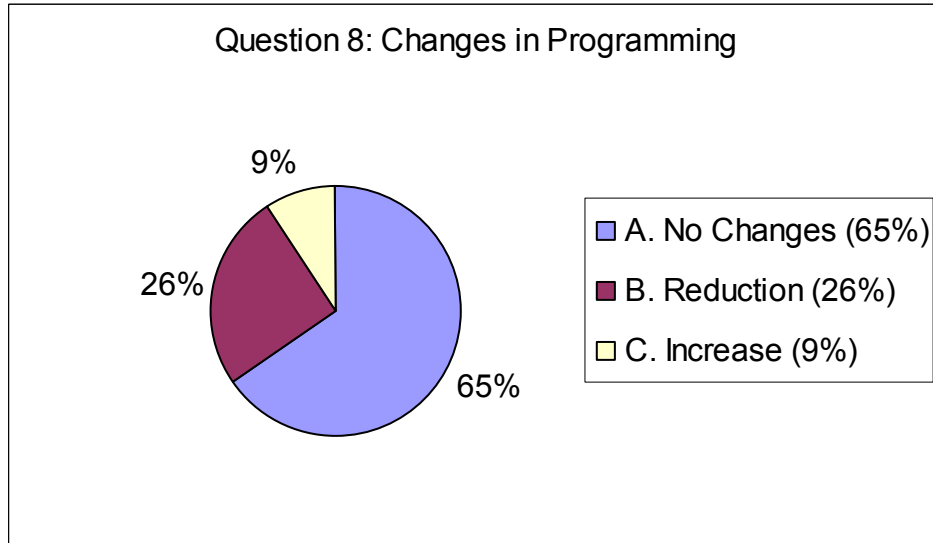


Of the 102 AAMD member museums that are planning expansions, 101 will proceed with these initiatives; more than two-thirds (67%) are moving forward with no change in their plans. These plans are supported by very strong growth in these museums' endowments, which increased by an average of 113% in the past decade.

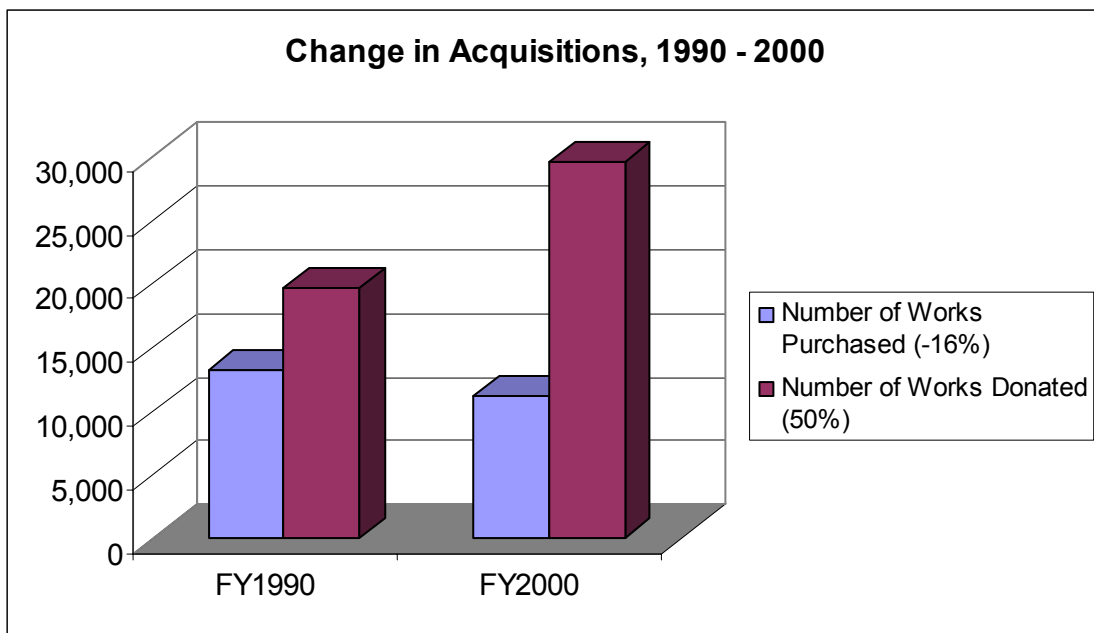


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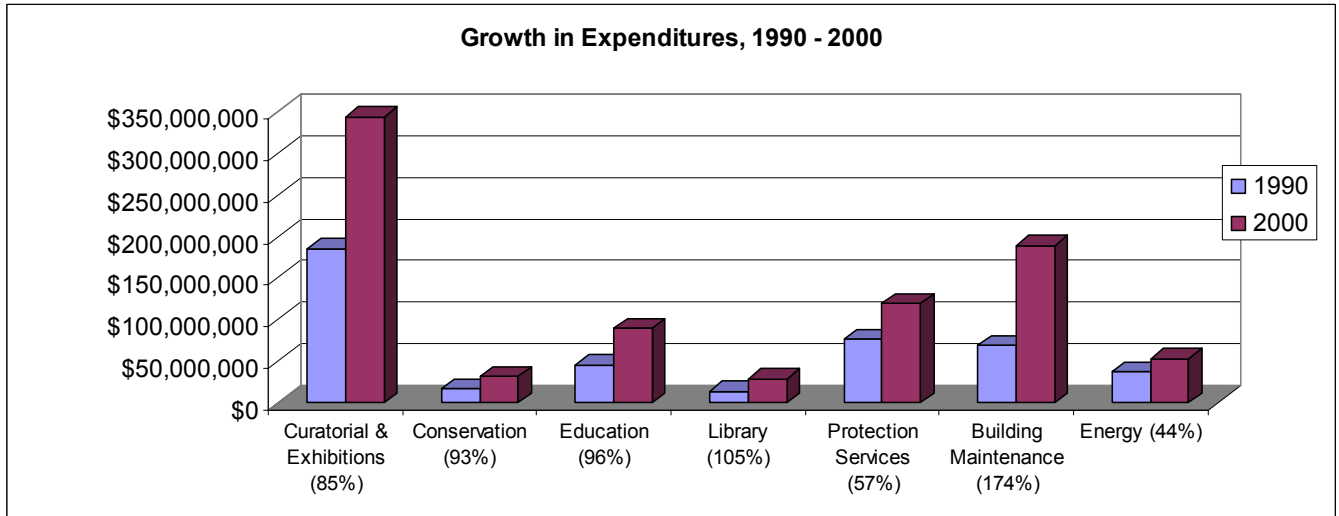


The majority of AAMD member museums are maintaining or expanding their exhibition and programming plans. These museums have substantially increased their collections in the past ten years, with a 50% average increase in the number of works donated.

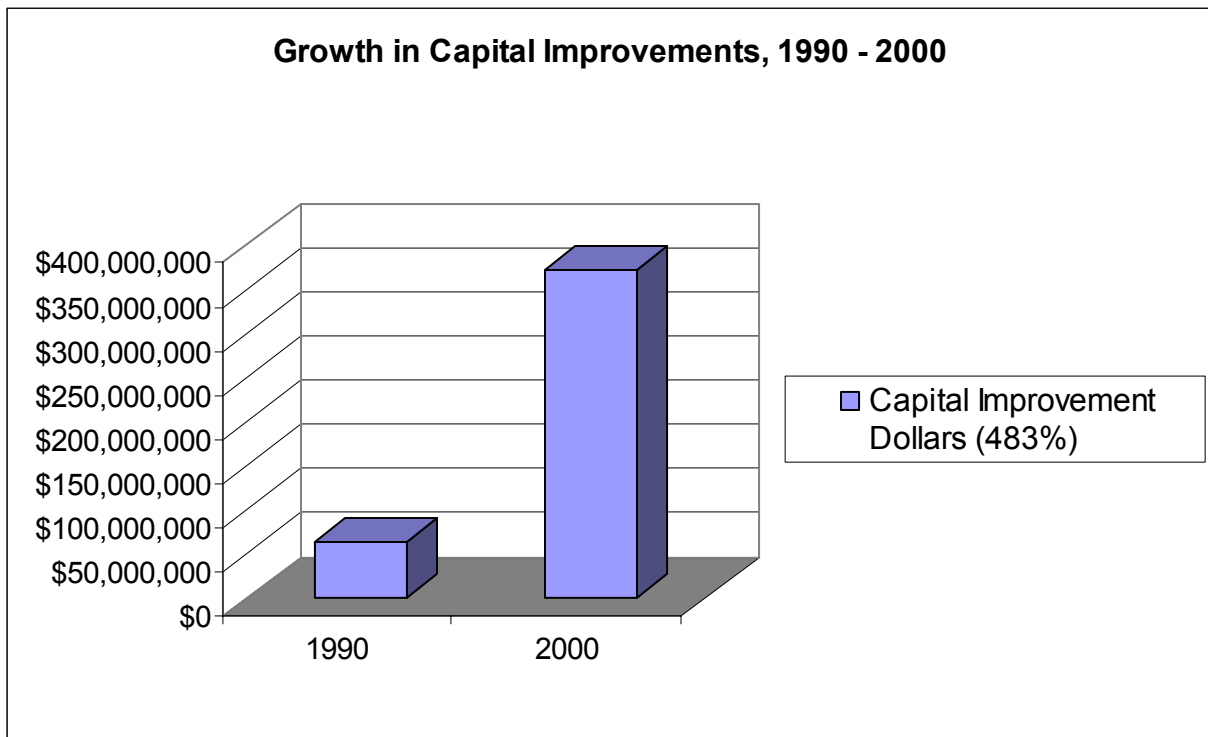


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In the past decade, AAMD member museums have substantially increased expenditures on their core mission and public services, nearly doubling their investment in education, curatorial/exhibition programming, and conservation of their collections. These museums have also substantially enhanced their facilities, with a 483% average increase in capital improvements.



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