

The Art & Science of Destinations

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DESTINOLOGY



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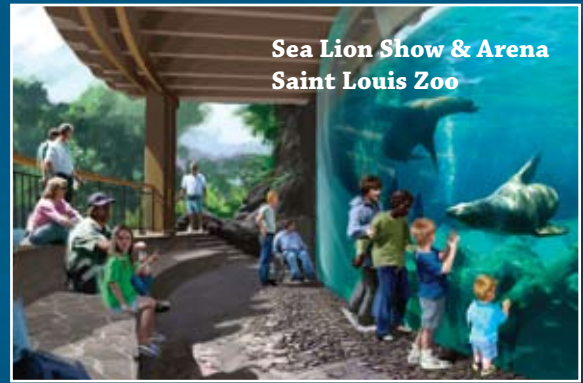


Releasing **Wild Success**

PGAV's latest study explores the interests
and motivations of Zoo-goers.

Success Stories

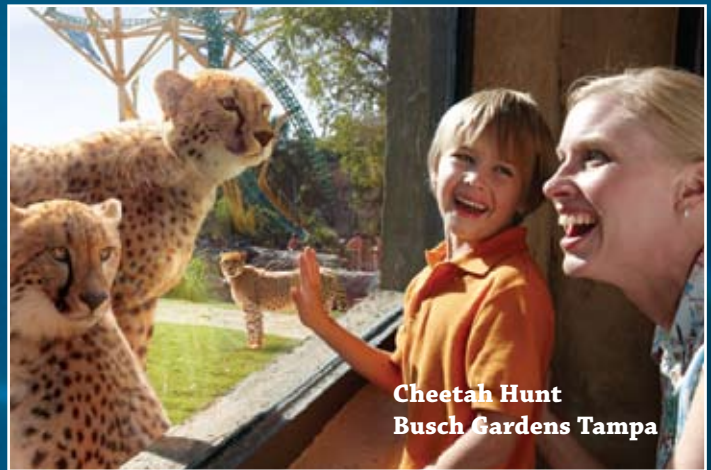
PGAV's most recent wonders of the natural world created exciting and engaging products tuned to their audiences.



Sea Lion Show & Arena
Saint Louis Zoo



Great Bear Wilderness
Brookfield Zoo



Cheetah Hunt
Busch Gardens Tampa



Glacier Run
Louisville Zoo



Penguin Point
National Aviary



Dolphin Tales
Georgia Aquarium



Polar Bear exhibit
Kansas City Zoo



Cold Water Quest
Georgia Aquarium

Releasing Wild Success

Presented by PGAV DESTINATIONS

Sometimes it seems like zoo-goers are a whole different breed. They are generally more educated, more ethnically diverse, and earn higher incomes than other attractions guests, but understanding how zoo guests operate can teach us about guests at all types of attractions.

Zoos are one of the most popular attractions in America, with almost half of all attractions visitors in the country having visited a zoo in the past 2 years. According to the AZA, over 150 million people visit accredited zoos and aquariums annually. That's more than all professional sports combined!

So, what gets Americans excited to go to the zoo in the first place? What would make their experience more exciting and more appealing? What would get zoo-goers to come back again and again? To answer these questions, PGAV Destinations commissioned H2R Market Research to perform a nationwide online survey of attractions visitors in March 2011. The survey was completed by 505 respondents and has a +/- 4.4% margin of error and 95% confidence interval.



1 Debunking the beast: “Zoos are Just for Families”

Nearly 40% of zoo-going households are ‘adults with no children.’ This is surprising since zoo figures tend to show that only 20% of their annual attendance is ‘adults with no children.’ What this indicates is interest in zoos is much further reaching than just households of families.

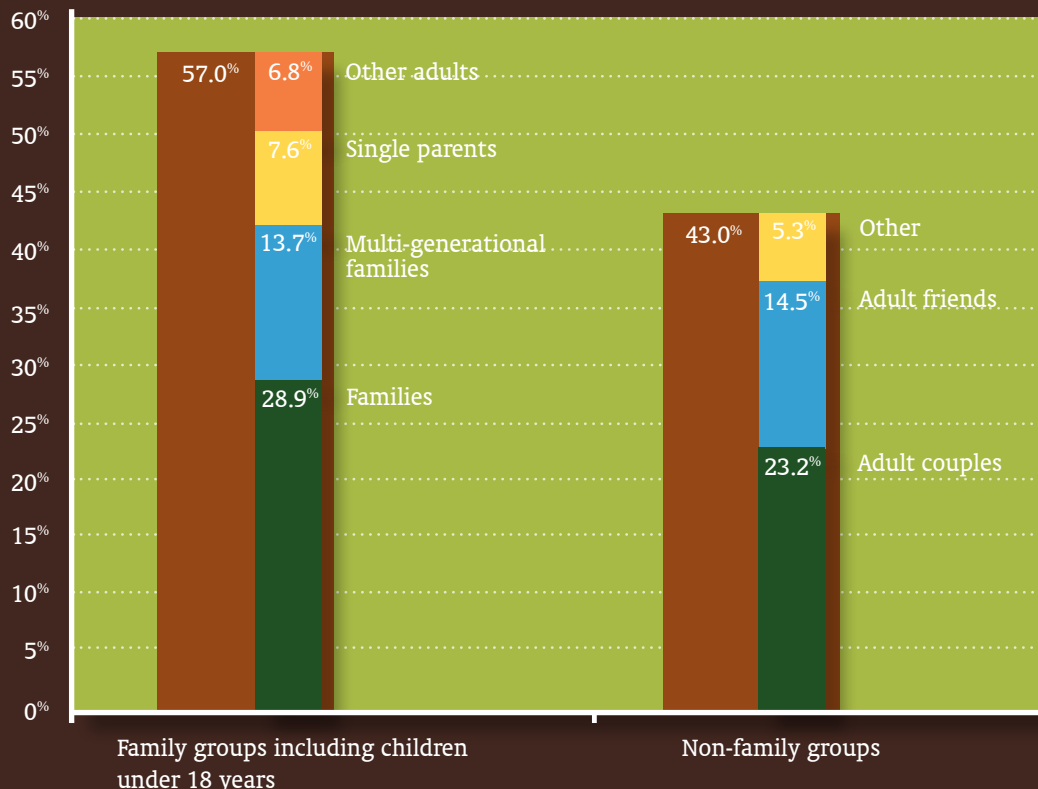
When asked why attractions visitors do not visit zoos, some of the most common responses related to not having children in the household. This tells us that adults do not believe zoos are a place for them.

Additionally, the top two responses (Price of Admission, Zoo Too Far) indicate that the zoo experience doesn’t offer enough benefit to non-zoo-goers to outweigh the burden of price and distance.

Implication: Zoos are missing out on a market segment that already has an interest in their product—Adults with no children. Breaking the perceptions that zoos are only for kids does not mean that zoos need to abandon their core group; it simply indicates that zoos should offer more adult-oriented products and programs. Adding value to the experience will not only increase the appeal to adults with no children, it may also increase the appeal to those attractions visitors that currently are not visiting zoos at all.

PARTY COMPOSITION ON LAST ZOO VISIT

The majority of zoo visitors (57%) were with some type of family group (including children), although it’s interesting to note that adults without children account for nearly 4 in 10 zoo visitors.



2 Don't be Shy about Animal Interactions

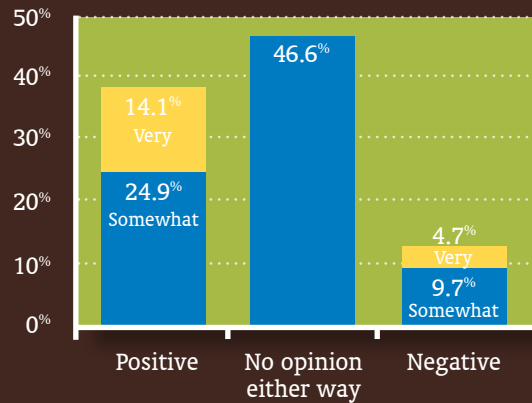
The zoo industry has been slower to accept special experiences like touching or feeding animals and leading special tours that have long been offered at theme parks. But zoos should fear not. The overall trend shows a positive perception of interactive experiences. And, zoo-goers are willing to pay for these experiences. Only 8% of guests that viewed these experiences as positive believe they should be free.

The most popular of these experiences across all respondents are Behind the Scenes Tours, described to respondents as a tour where you will “see where the animals live, learn how the zoo works, and meet one animal in a special face-to-face introduction.” Family groups tend to prefer the interactive experiences like Touching, Feeding, and Swim With more than groups of adults without children.

Implication: When designing new exhibits, plan to include at least one special experience that will allow the zoo to gain revenue while creating a new avenue to achieve educational goals. These additional experiences create lifelong memories and enhance the perception of the zoo.

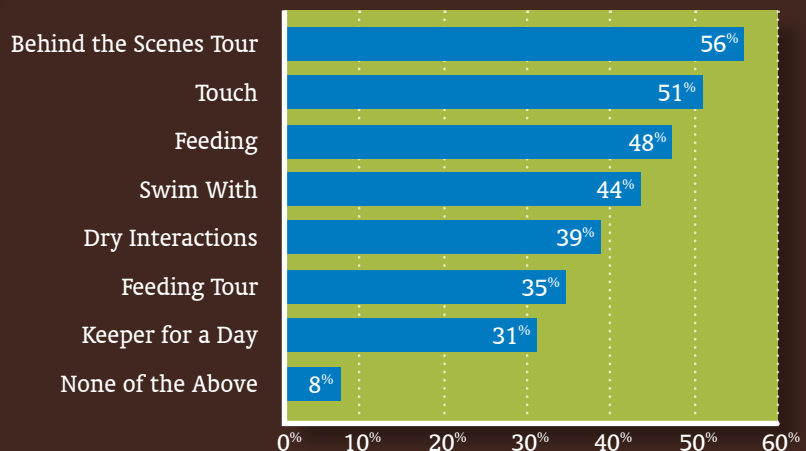
OPINION/ATTITUDE TOWARD SPECIAL EXPERIENCES

Nearly half of respondents have no opinion either way about exclusive experiences; however, the trend of opinions skew more toward the positive than the negative.



TYPES OF EXPERIENCES WILLING TO PAY EXTRA FOR

Of those who have a positive opinion of Special Experiences, the Behind the Scenes Tour was the most popular followed by Touch experiences, Feeding Experiences and Swim With experiences.



3 Build the Yellow Brick Road

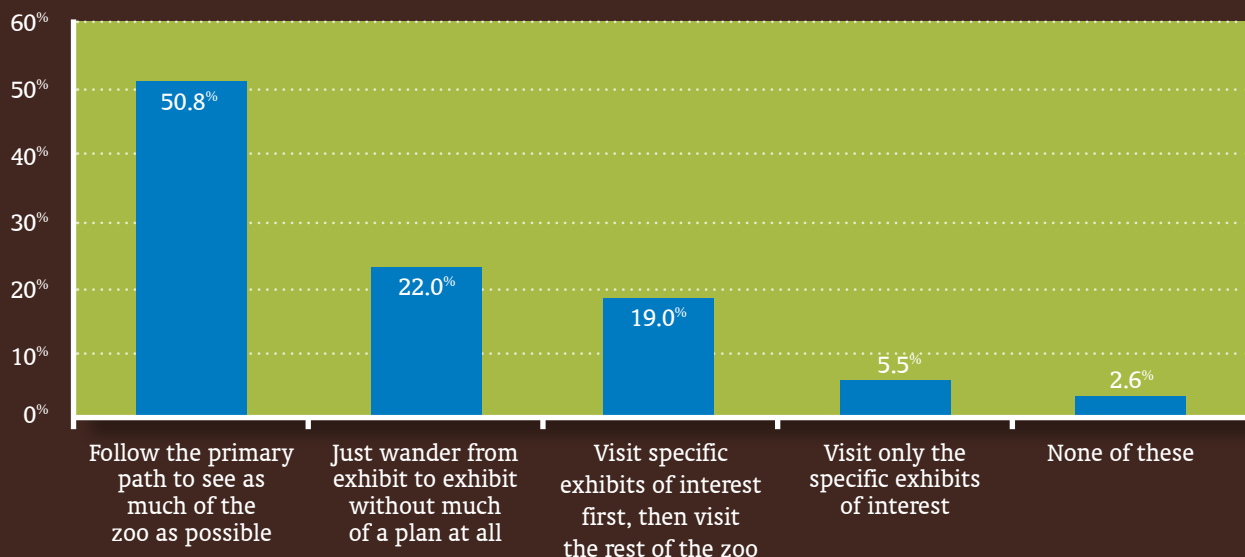
When asked how guests navigate their way through a zoo, less than 20% said they seek out specific exhibits to visit. The vast majority of guests either follows the designated main path of the zoo or wanders without any real intention or plan. This trend held true for both family groups and groups of adults without children.

Additionally, only about half of all visitors intentionally skip past specific exhibits. These guests indicated the exhibits most often skipped are those related to Insects and / or Arachnids.

Implication: Zoo guests want to get the most out of their zoo experience, seeing and doing everything that is available to them. Because of this, clear wayfinding throughout the zoo is of the utmost importance to the zoo experience. Additionally, a strong wayfinding plan would include not only more signage and other physical clues, like wider sidewalks, but also would take advantage of the guests' desire to be guided throughout their day, strategically placing revenue opportunities and planning timed interactions and shows throughout the experience.

HOW VISITORS TYPICALLY EXPERIENCE A ZOO

Just over half of zoo visitors follow the primary path to see as much of the zoo as possible. Other popular approaches include visiting specific exhibits first and just wandering with no specific plan.



4 The Cache of New

Guests are overwhelmingly motivated by 'new.' In fact, a majority of the respondents agreed that the addition of a new species within a new exhibit would entice them to visit the zoo again more than the rejuvenation of a treasured favorite like Frosty the Polar Bear.

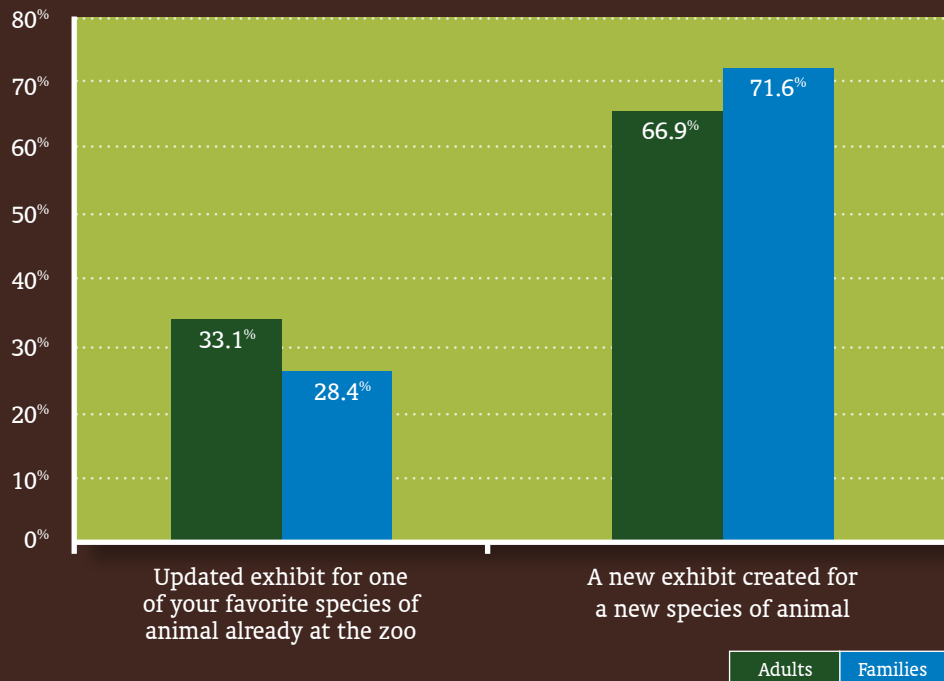
Still, about one third of the respondents more highly valued a renovation of Frosty's home. This is a surprisingly substantial segment of the market and indicates that guests have a wider definition of 'new' than previously believed.

Implication: Keeping things fresh and new is critical to the success of attractions. But 'new' doesn't always mean expensive. Making smaller changes over the course of several years will reinforce the notion of new while maintaining lower costs. Of course, big changes make the biggest splashes, so master planning that balances large and small projects is essential to long-term success.

EXPERIENCE THAT WOULD PERSUADE YOU TO VISIT

Families vs. Adults

Families are a little more likely to prefer a new exhibit where adults are more satisfied with an updated exhibit of their favorite species likely because they visit more for specific animals.



Destinology is produced by PGAV Destinations, a firm providing growth solutions to cultural, natural, and entertainment destinations worldwide. Learn more about us at www.pgavdestinations.com.



The Grand Aquarium Debuts Ocean Park Hong Kong

Ocean Park Hong Kong recently opened “The Grand Aquarium,” the Jewel of the renewal of the park. Its journey starts at the sunny seashore but will quickly bring you to the darkest depths of the ocean floor! Nearly 2.5 million people have enjoyed the aquarium in the 6 months since its opening and the Park is on a record pace to eclipse the prior attendance record of last year.

“It has to be said that Aqua City, including Grand Aquarium, are key contributors to the success we are enjoying.”

—Tom Mehrmann



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