



Toronto Zoo

Service Level Review

Executive Committee Presentation
June 30, 2015



Overview

- Recommended Service Levels by Program
 - Program Map
 - Service Levels and Service Performance
 - Service Challenges and Opportunities
 - Strategies to Address Issues/Opportunities
 - Priority Actions to Achieve Results

Toronto Zoo

2015 Program Map

Toronto Zoo Mission

A living centre for education and science, committed to providing compelling guest experiences and inspiring passion to protect wildlife and habitats.

Zoo Visitor Services

Purpose:

To provide a unique visitor experience that is fun, safe, welcoming, memorable, and interactive, while facilitating close, personal interaction among family members and friends, inspired by the Zoo's compelling wildlife population and its commitment to sustainable living, ultimately inspiring people to love, respect and protect wildlife and wild spaces.

Zoo Fundraising & Strategic Partnerships

Purpose:

To develop, plan and execute all fundraising programs and activities in two distinct program areas; annual fund and capital campaign, while building strategic relationships and realizing fundraising capacity.

Zoo Conservation & Science

Purpose:

To emphasize the role of zoos in providing leadership in conservation and sustainability programs including the preservation of endangered plants and animal species and threaten natural areas while emphasizing zoogeographical exhibits of habitats, the stewardship role of the human species in managing our planet, and the maintenance of biodiversity and natural ecosystems.

To provide compelling education and outreach experiences, delivered through programs, curricula and teaching strategies that support the Toronto Zoo's mission and efforts to save wildlife and inspired care for the world's natural heritage, with a focus on teachers, students and the general public locally and nationally to affect change in attitudes about wildlife and therefore motivate individuals to make sound environmental choices towards ensuring a sustainable future.

Service Customers

Zoo Visitor Services

- Zoo Visitor
- Schools
- Local Organizations
- Tour Groups
- Strategic Partners
- Local Business Community
- Local Hotels and Restaurants
- Transit Services

Zoo Fundraising & Strategic Partnerships

- Businesses and Corporations
- Corporate Business Sponsors / Alliances
- Media Partners
- Federal and Provincial Governments
- Not for Profit Organizations
- Universities & Colleges
- NGO's

Zoo Conservation & Science

- Educators
- Conservationists
- Federal and Provincial Governments
- Universities, Colleges, and Wildlife Societies
- Zoological Institutions & Accrediting Bodies
- Environmental Organizations
- Wildlife Researchers

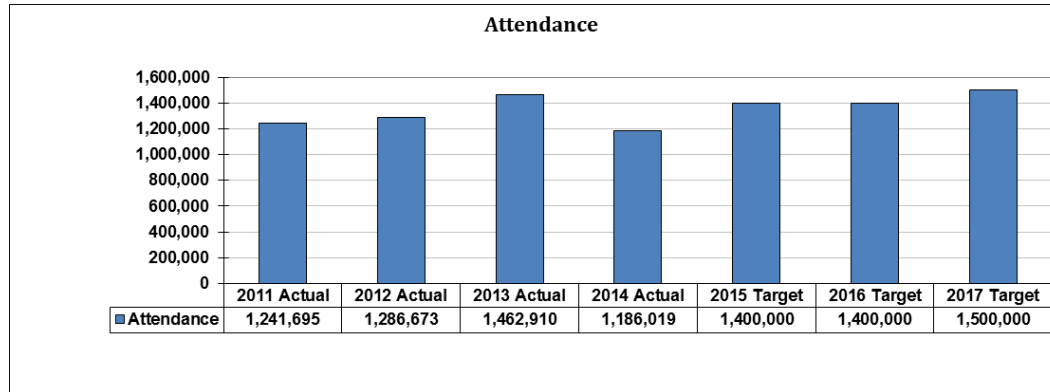
Key Service Levels 2012 - 2015

Service Level Description		2012	2013	2014	2015
Zoo Visitor Services					
Attendance	Approved	1,300,000	1,600,000	1,500,000	1,400,000
	Actual	1,286,673	1,462,910	1,186,019	n.a.
Memberships	Approved	31,400	34,119	33,000	32,000
	Actual	31,919	31,355	25,466	n.a.
Retail Sales per visitor	Approved	\$2.34	\$2.09	\$2.16	\$2.25
	Actual	\$2.01	\$2.76	\$2.36	n.a.
Food Sales per Visitor	Approved	\$4.51	\$4.32	\$4.35	\$4.36
	Actual	\$4.70	\$5.24	\$5.12	n.a.
Zoo Fundraising & Strategic Partnerships					
Sponsorships	Approved	\$575,000	\$575,000	\$675,000	\$675,000
	Actual	\$211,000	\$321,000	\$452,000	n.a.
Cost per \$ Raised	Approved	\$0.77	\$0.77	\$0.74	\$0.73
	Actual	\$0.60	\$0.50	\$0.20	n.a.

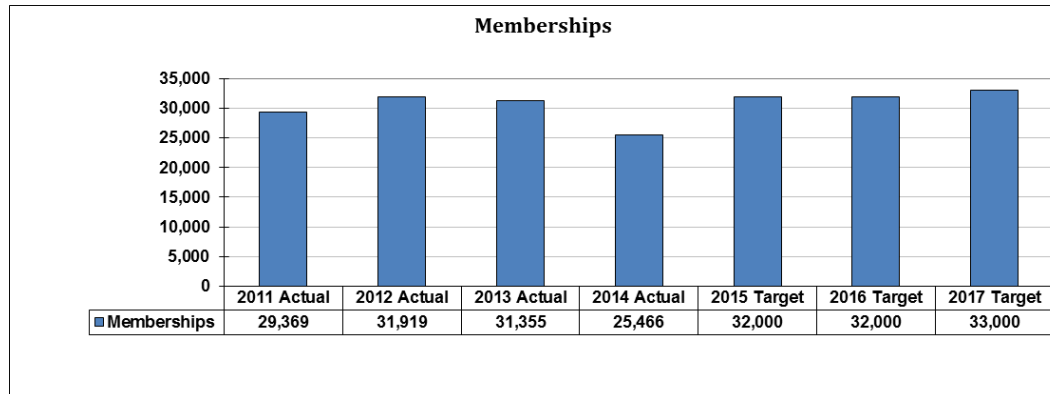
Key Service Levels 2012 - 2015

Service Level Description		2012	2013	2014	2015
Zoo Conservation & Science					
Zoo Day and Overnight Camps	Approved	4,450	4,450	4,450	4,550
	Actual	4,585	4,932	4,932	n.a.
Zoo School (Grade 11 Credit Program)	Approved	36	36	36	36
	Actual	36	36	36	n.a.
Volunteer Engagement with Visitors / Public	Approved	700,000	850,000	750,000	750,000
	Actual	596,718	867,278	778,400	n.a.
Volunteer Hours Contributed	Approved	30,000	45,000	35,000	35,000.0
	Actual	27,399	34,072	31,937	n.a.
Great Lakes Conservation Student Outreach	Approved	20,000	20,000	20,000	20,000
	Actual	21,650	23,225	21,150	n.a.

Performance Measures

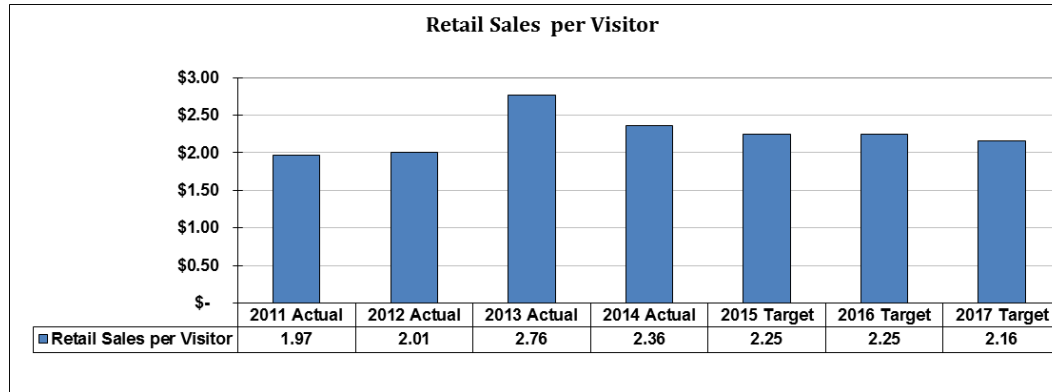


- 2015 Attendance decrease of 100,000 visitors versus 2014 to level anticipated in the 5-year plan for the Panda Exhibit.
- 2016 and 2017 levels anticipated to be adjusted to reflect actual trend experience.

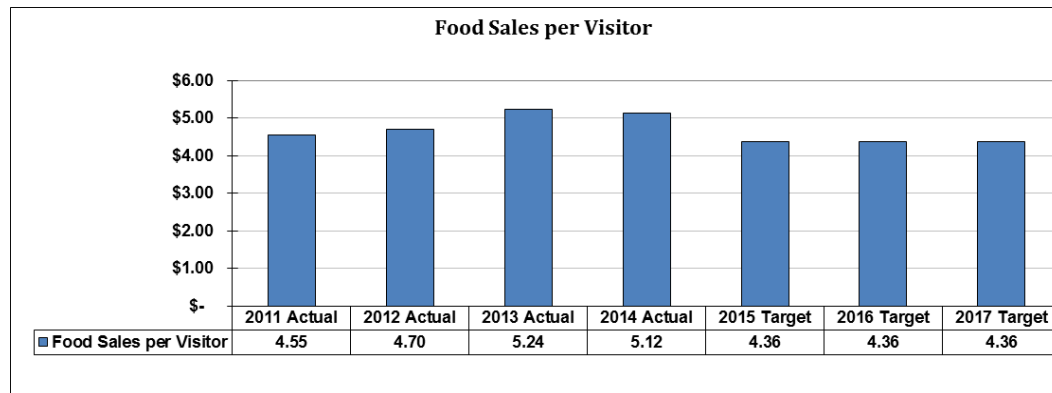


- Membership levels in 2015 anticipated to return to levels consistent with 2013 experience.
- Trend in Membership levels is correlated to attendance expectations.

Performance Measures



- Increase in 2015 vs. 2014 reflects the impact of the anticipated stability in revenue combined with the expected decrease in attendance associated with year three (3) of the five (5) year plan for the giant Panda exhibit.
- Retail Sales per Visitor anticipated to remain at same levels in 2015 and 2016 due to consistent revenue and attendance levels.



- Food Services target in 2015 – 2017 is anticipated at level consistent with more normalized trend(s) in Attendance.

Service Challenges & Opportunities

■ Challenges

- ✓ Competitive market for attractions and maintaining share of market.
- ✓ Achieving attendance of 1.4 million visitors.
- ✓ Fundraising in current organizational setting (pending establishment of external fundraising entity).
- ✓ Maintaining existing level of sponsor supports.

■ Opportunities

- ✓ Implementation of new 5 year Strategic Plan.
- ✓ Impact of new brands as new Food & Beverage agreement is implemented.
- ✓ Leverage impact of visitors to PanAm Games.
- ✓ New net revenues (Wild Connections).
- ✓ Leverage relationships with strategic partners (e.g. Rouge National Urban Park and TRCA).
- ✓ Utilize new Master Plan for future Budget deliberations and as investment / roadmap for future.



Zoo Visitor Services



Priority Actions to Address Challenges & Opportunities 2015 - 2018

Strategic Action/Service Objective: Zoo Visitor Services

Enhance the guest experience to appeal to a more diverse audience and inspire conservation action.

Actions	Anticipated Results / Progress-to-date
<p>Revitalize existing exhibits and amenities and develop new memorable experiences, to increase support for the renewed mission of the Zoo.</p>	<p>Increased guest satisfaction with exhibits/experiences. More opportunities for interaction and learning on-site. Increased attendance and earned revenue from new/special exhibits. Reduced number of complaints across various categories (as measured against established ratios). Increased percentage of visitors who were motivated to visit due to "word of mouth". Increase in the number of initiatives that give visitors opportunities to take direct action to support conservation.</p>
<p>Advance accessibility on the Zoo site.</p>	<p>Higher satisfaction levels with wayfinding/signage on visitor survey after improvements made; reduced number of wayfinding complaints. Increased number of school groups/participants.</p>
<p>Create various opportunities for new audiences to connect with and support the new mission and to increase revenue and attendance.</p>	<p>Increase in: earned revenue and attendance through new audiences (as measured by established targets), the number of Zoo membership households, the number of volunteers and volunteer hours and earned media value and audience reach.</p>
<p>Increase staff and volunteer interactions with guests to further advance conservation awareness and the role of the Zoo in achieving that goal.</p>	<p>Increase in satisfaction levels, and satisfaction with Zoo employees, as measured on guest surveys. More word of mouth recommendations. More repeat visits, increased attendance. For new programs, establish target satisfaction levels and meet or exceed them.</p>

Related Strategies

On-going and new

■ Strategies

- ✓ Based on our priority areas, include more mixed species, increase group size, and more immersive exhibits.
- ✓ Pursue temporary exhibits and seasonal programming to enhance the experience (e.g. Parks Canada display, travelling exhibits, interactive non-animal exhibits).
- ✓ Use new technology/interactive elements in exhibits and public areas to further engage our guests. Review the use of digital screens throughout the site to determine effectiveness.
- ✓ Improve guest amenities and services to create a strong platform for the guest experience, reflective of our conservation mission.
- ✓ Review hours, pricing and seasonal operations to manage guest expectations in all seasons.



Zoo Conservation & Science



Priority Actions to Address Challenges & Opportunities 2015 - 2018

Strategic Action/Service Objective: Zoo Conservation & Science	
Advance to a zoo-based conservation centre of excellence.	
Actions	Anticipated Results / Progress-to-date
Establish the Toronto Zoo as the national leader in conservation, with a focus on Canadian species and habitats.	Increased reach and depth of conservation programs, particularly with Canadian species. This is measured by number of Recovery programs, number of publications, number of grants, number of attendees at programs and increased funding and support. Achieve EMS certification. Increase number of collaborative relationships.
Achieve a sustainable wildlife population with high degree of biodiversity within the Zoo.	Annual wildlife management plan that reflects a balanced approach for conservation, education, visitor experience and Zoo resources. Sustainability assessments on each species. A clear rationale for each species at the Zoo. A stable animal acquisition/disposition budget.
Provide exemplary care to the Zoo's wildlife population.	Recognized by our communities as providing the best standards of wildlife care. Successful accreditation by CAZA, AZA, OMAFRA, CCAC. Positive public perceptions of TZ animal care.
Invest in renewal of facilities and infrastructure to meet and exceed standards and regulations.	Implement a Master Plan for investment that is aligned with the mission and vision. Showcase excellent Canadian interactive exhibits and effectively describe projects for the future.

Related Strategies

On-going and new

■ Strategies

- ✓ Review and advance established criteria to prioritize conservation and research projects, while increasing efforts on Canadian species and habitats.
- ✓ Further develop the Zoo's conservation "areas of excellence": wildlife nutrition, reproduction, freshwater and wetlands conservation, veterinary science, education, etc.
- ✓ Strengthen the Zoo's advocacy role in wildlife conservation.
- ✓ Continue to apply new approaches to wildlife management to meet wildlife behavioural and environmental needs.
- ✓ Fully implement the Zoo Information Management System (ZIMS), to modernize animal records and to link with other organizations in the zoo community.
- ✓ Fully utilize the new Wildlife Health Centre as centre of excellence, and be a model for all zoos in meeting and exceeding standards and regulations.



Zoo Fundraising & Strategic Partnerships



Priority Actions to Address Challenges & Opportunities 2015 - 2018

Strategic Action/Service Objective: Zoo Fundraising & Strategic Partnerships	
Build an organization that is fiscally and environmentally sustainable for the long term.	
Actions	Anticipated Results / Progress-to-date
Nurture a strong and supportive relationship with the new fundraising entity to facilitate significant contributions to the Zoo.	The Zoo's identified capital and operating program needs can be sustained through fundraising and supportive donors.
Increase earned revenue through the creation of new experiences and programs.	A strong, sustainable revenue base from various sources to offset core expenditures and new sponsorship opportunities (e.g. having a major sponsor from each industry sector etc.).
Establish compelling opportunities for partners, sponsors and donors, to support wildlife and habitats in our priority areas and our conservation focus.	Stronger communication and interrelations with partners/sponsors/donors for long-term relationships. Broader scope involvement/contact with the Zoo by various partners/sponsors.
Develop other strategic alliances using a diverse platform of conservation actions and stewardship programs.	Greater reach and depth of TZ conservation programs. Increased awareness of the Zoo and its conservation programs by partners. Recognition as a strong active partner for conservation. An engaged Scientific Advisory Group.
Develop a strong partnership with the Rouge National Urban Park (RNUP).	Establishment of a shared Facility Needs Assessment with RNUP. Strong working relationship with the RNUP. Greater depth and quality of programs. Greater public visibility for the Zoo and conservation programs and new programs and facilities to maximize the education impact on the public.

Related Strategies

On-going and new

■ Strategies

- ✓ Work closely with the new fundraising entity to define the Zoo's fundraising priorities and case for support.
- ✓ Using the priorities of the Master Plan, develop and implement a capital campaign.
- ✓ Build a strong working relationship and ongoing communications channels between the Zoo and the new fundraising entity.
- ✓ Work jointly to increase funding through grants using local, national and international sources.
- ✓ Establish new sources of funding to significantly increase the level of support for the Zoo's conservation programs (e.g. endowment funds for research chairs).
- ✓ Implement an Environmental Management System (EMS) to improve operations and reduce the impact of our activities on the environment.
- ✓ Establish and build on existing relationships with government, NGO's and zoos/aquariums to access to additional funding to support for conservation priorities.



Thank You

