

Legend

- Water Course / Pond / Wetland
- Forest / Tree / Woodland
- Meadow



HABITAT

FIGURE 22





IMPLEMENTATION

PHASING PLAN AND COST SUMMARY

INTRODUCTION

The following Phasing Diagrams and Cost Summary have envisioned a series of prioritized projects over the next 15 years: between 2017 and 2032. This prioritization has been based upon the Strategic Plan Goals and an evaluation of critical elements that will improve animal welfare, educational opportunities, and visitor circulation and comfort while attempting to establish a **reasonable flow of funds to accomplish this important work**. The scope of this work includes facility upgrades, habitat renovation and expansion, new facilities to house new programs, and enhancement of revenue generation opportunities that can support both the physical campus of the Zoo as well as its ongoing conservation programs.

Each project references line item cost estimates that are fully documented in the Toronto Zoo Full Costs Spreadsheet that have been provided to Toronto Zoo staff and summarizes the projected design and construction costs in 2016 dollars. In all cases, these numbers should be considered as target budgets that should be escalated and confirmed through a scoping and preliminary conceptual design process prior to the formalization of a designated construction cost.

The estimated design and construction timelines are necessarily general in nature and reflect common assumptions for completing similar work within similar climatic conditions.

PHASING SEQUENCE

The four major phases are predicated on the following:

- Consolidate the visitor experience to make it easier for guests of all ages to get the most out of a visit to the Zoo without undue fatigue or discomfort.
- Focus the institution's conservation and conservation education on Canadian animals that do well in Toronto's climate and which tie into the messaging of the surrounding Rouge National Urban Park.
- Provide better winter circulation options to assist guests in getting around the Zoo comfortably.
- Provide a more welcoming and better functioning guest arrival and entry experience that reinforces the Toronto Zoo's values.
- Celebrate visitor's transit through the "core woods" to put them in closer touch with the natural habitat that surrounds the Zoo.
- Reinvest in the Zoo's iconic structures and animal habitats to improve welfare and meet the Zoo's accessibility and sustainability goals.
- Create more opportunities for engagement for the families of young children, including those families who live close by and can make use of these opportunities on a regular basis.
- Complete key animal habitat expansion and renovation, including the Savanna and African Rainforest areas.
- Expand the Zoo's conservation breeding and operations capabilities.

PHASING PLAN

DRAFT Master Plan Phasing Diagram & Distribution of Project Budgets

9-Nov-16

Phase	Description	Strategic Plan Goal	160801 - Full Ref. Cost Sheet Ref. #	Master Plan Capital Improvements Budgets										
Prelim.	DESIGN & CONSTRUCT EXTERIOR ORANGUTAN HABITAT	1, 2	1, 2	CAD 4,000,000										
1	A COMPLETE "WILDERNESS NORTH"	1, 2, 5, 7			2017	2018	2019	2020	2021					
	<i>Complete the conversion of the "Eurasia" exhibit zone to a comprehensive habitat that interprets the diversity of the "Canadian Wilds" experience and contrasts those species to key high altitude / cold-adapted species from Asia.</i>													
	Design of the Canada Pavilion													
	Construction of the Canada Pavilion		2.5	CAD 11,473,100										
	Design of "Wilderness North" Elements (incl. River Otter & Carousel relocation)													
	Construction of "Wilderness North" Elements		2.0, 1.8, 1.9	CAD 21,671,000										
	B IMPROVE WINTER CIRCULATION	2												
	<i>Complete the construction of a core area ZooMobile route that can be put into service during the Winter to facilitate Guest comfort.</i>													
	Design & Construction of Winter ZooMobile Route		4.6	CAD 600,000										
	Design & Construction of Accessible Ramp from Indo-Malaya Pavilion		7.3	CAD 1,327,600										
	C EXPAND DISCOVERY & LEARNING OPPORTUNITIES	2, 5												
	<i>Construct a new facility that will support formal learning opportunities within the Zoo while also supporting the learning and sharing goals of the surrounding Rouge National Urban Park.</i>													
	Design & Construction of Shared Education / Orientation Centre		3.1	CAD 15,000,000										
2	A REDEVELOP THE ENTRY & CORE VISITOR EXPERIENCES	2, 4								2021	2022	2023	2024	2025
	<i>Re-envision & re-invigorate the Zoo entry experience to facilitate a welcoming experience where ticketing does not interfere with the special Canadian sense of place, where the values of the Zoo are on public display, and where guest services are easily obtainable.</i>													
	Design & Construction of New Entry Elements		1.1 - 1.4, 1.10, 1.12 - 1.13	CAD 11,767,400										
	Design & Construction of New Restaurant/Café at Entry		1.8, 1.9	CAD 8,827,200										
	Design & Construction of New Aerial Lift		1.14	CAD 12,964,000										
	B GET IMMERSSED IN THE CAROLINIAN FOREST	1, 2, 7												
	<i>Enable guests to enjoy the experience of being surrounded by the Carolinian Forest.</i>													
	Design & Construction of "Raven's Roost" Treetop Cabins		8.1, 8.3	CAD 6,278,000										
	Design & Construction of "Carolinian Forest Boardwalk"		8.2	CAD 724,400										

CAD 50,071,700

CAD 40,561,000

Legend:
■ : Design
■ : Construction
■ : Internal Zoo Design/Construction

DRAFT Master Plan Phasing Diagram & Distribution of Project Budgets

9-Nov-16

Phase	Description	Strategic Plan Goal	160801 - Full Ref. Cost Sheet Ref. #	Master Plan Capital Improvements Budgets	2024	2025	2026	2027	2028	2029	2029	2029	2029
3	A REINVEST IN SIGNATURE ANIMAL EXPERIENCES	1, 2											
	<i>Begin the process of renovation and re-investment in the Zoo's iconic structures & animal habitats.</i>												
	Renovation of the "Indo-Malaya Pavilion" to the "Oceania Pavilion"		5.1, 5.4	CAD 26,000,000									
	Design & Construction of "Rhino Ridge" Improvements		5.2, 5.3	CAD 3,531,900									
	Renovation of the "Americas Pavilion" to the "Tropical Americas Gallery"		9.1	CAD 11,768,800									
	Design & Construction of "Insects!" (after new Giftshop is complete)		4.2, 4.3	CAD 3,338,200									
	B CREATE MORE ENGAGEMENT OPPORTUNITIES FOR THE ZOO'S YOUNGEST GUESTS	2											
	<i>Expand the opportunities for imaginative play in natural surroundings & holding / training areas for animal ambassador programs.</i>												
	Water Play Expansion		4.6	CAD 389,900									
	4-Season Play & Program Space		4.7, 3.3	CAD 2,841,400									
	Wildlife Program Area Improvements		4.5	CAD 1,523,900									
	C CONTINUE CIRCULATION & GUEST SERVICES IMPROVEMENTS	2											
	<i>Complete improvements to the Entry area.</i>												
	New Gift Shop		1.11	CAD 1,951,200									
	Renovated ZooMobile Stop at Entry		1.6	CAD 325,300									
4	A COMPLETE KEY ANIMAL HABITAT EXPANSION & RENOVATION	1, 2, 7											
	<i>Reinvest in expanding & renovating animal habitats & back-of-house care facilities within "Across the Equator" zone.</i>												
	Savanna Improvements		6.1, 6.6, 6.7, 6.9	CAD 13,094,500									
	African Rainforest Improvements		6.4, 6.2	CAD 14,219,200									
	B EXPAND THE ZOO'S CONSERVATION BREEDING & OPERATIONS CAPABILITIES	1											
	<i>Use the North Campus to consolidate & expand the Zoo's conservation breeding & browse production capabilities.</i>												
	Conservation Breeding & Browse Production Area Improvements		11.2	CAD 2,000,000									
	Operations Complex Improvements		12.1 - 12.5	CAD 3,349,500									

CAD 51,670,600

Legend:
: Design
: Construction
: Internal Zoo Design/Construction

CAD 32,563,200

DRAFT Master Plan Phasing Diagram & Distribution of Project Budgets

9-Nov-16

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	Design of the Canada Pavilion		2.5	CAD 11,473,100											
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	Design of "Wilderness North" Elements (incl. River Otter & Carousel relocation)		2.0, 1.8, 1.9	CAD 21,671,000											
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	Design & Construction of Shared Education / Orientation Centre		3.1	CAD 15,000,000											
2	A REDEVELOP THE ENTRY & CORE VISITOR EXPERIENCES	2, 4								2021	2022	2023	2024	2025	
	Re-envision & re-invigorate the Zoo entry experience to facilitate a welcoming experience where ticketing does not interfere with the special Canadian sense of place, where the values of the Zoo are on public display, and where guest services are easily obtainable.														
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	Design & Construction of "Raven's Roost" Treetop Cabins		8.1, 8.3	CAD 6,501,100											
	Design & Construction of "Carolinian Forest Boardwalk"		8.2	CAD 724,400											
3	A REINVEST IN SIGNATURE ANIMAL EXPERIENCES	1, 2								2024	2025	2026	2027	2028	2029
	Begin the process of renovation and re-investment in the Zoo's iconic structures & animal habitats.														
	Renovation of the "Indo-Malaya Pavilion" to the "Oceania Pavilion"		5.1, 5.4	CAD 26,000,000											
	Design & Construction of "Rhino Ridge" Improvements		5.2, 5.3	CAD 3,531,900											
	Renovation of the "Americas Pavilion" to the "Tropical Americas Gallery"		9.1	CAD 11,768,800											
	Design & Construction of "Insects!" (after new Giftshop is complete)		4.2, 4.3	CAD 3,338,200											
	B CREATE MORE ENGAGEMENT OPPORTUNITIES FOR THE ZOO'S YOUNGEST GUESTS	2													
	Expand the opportunities for imaginative play in natural surroundings & holding / training areas for animal ambassador programs.														
	Water Play Expansion		4.6	CAD 389,900											
	4-Season Play & Program Space		4.7, 3.3	CAD 2,841,400											
	Wildlife Program Area Improvements		4.5	CAD 1,523,900											
	C CONTINUE CIRCULATION & GUEST SERVICES IMPROVEMENTS	2													
	Complete improvements to the Entry area.														
	New Gift Shop		1.11	CAD 1,951,200											
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	Reinvest in expanding & renovating animal habitats & back-of-house care facilities within "Across the Equator" zone.														
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	Use the North Campus to consolidate & expand the Zoo's conservation breeding & browse production capabilities.														
	Conservation Breeding & Browse Production Area Improvements		11.2	CAD 2,000,000											
	Operations Complex Improvements		12.1 - 12.5	CAD 3,349,500											

Legend:
Design
Construction
Internal Zoo Design/Construction

CAD 90,071,700

CAD 40,784,100

CAD 51,670,600

CAD 32,665,200

COST SUMMARY

Toronto Zoo							
2016 Master Plan Cost Summary							
18-Nov-16							
Phasing Priority				Budget Sheet Ref. #	Master Plan Capital Improvements Budget	Partnership Opportunity	Notes:
	1.0	Entry & Circulation Improvements			CAD 24,641,480		
2		1	Parking area improvements	1.1	CAD 4,000,000		
2		2	New Plazas	1.2, 1.3, 1.4	CAD 3,943,100		
3		3	Renovated ZooMobile Stop	1.6	CAD 325,300		Revenue
3		4	New Washrooms	1.7	CAD 767,600		
2		5	New Guest Services, Membership, Offices, Tickets	1.10	CAD 942,600		Revenue
3		6	New Gift Shop	1.11	CAD 1,951,200		Revenue
2		7	New Information & Security	1.12	CAD 316,080		
1		8	New Canadian River Otter	1.13	CAD 2,411,500		
1		9	Carousel Relocation (incl. Shelter)	4.4, 1- 4.4.3	CAD 1,156,900		
2		10	New Restaurant / Café / Play Area	1.8, 1.9	CAD 4,000,000	CAD 4,827,200	Revenue
2		11	New Aerial Lift Transportation & Ride	1.14		CAD 16,190,280	(not incl. in Capital Budgets)
	2.0	Canadian Wilds / "Wilderness North" Improvements			CAD 31,987,200		
1		1	Infrastructure & Circulation Upgrades	2.1	CAD 632,200		
1		2	Expand Tundra Trek	2.2	CAD 3,441,400		
1		3	New Boreal Ridge - Bear Centre of Excellence	2.3	CAD 5,760,600		
1		4	New Beaver	2.4	CAD 1,332,300		
1		5	New Canada Pavilion	2.5	CAD 11,473,100		
1		6	Renovate existing Eurasia exhibits for Asian Highlands (not incl. Amur Tiger)	2.7, 2.8	CAD 5,000,000		
1		7	Renovate Conservation Herds to accommodate photo safaris	2.9	CAD 1,000,000		Revenue
1		8	Renovate existing Eurasia exhibits for Canadian Animals	2.10	CAD 2,975,000		
1		9	Expand tent camping opportunities in the Rouge Valley	7.3	CAD 372,600		Revenue
	3.0	Discovery & Learning Improvements			CAD 15,000,000		
1		1	Shared Education / Orientation Centre (Zoo portion)		CAD 15,000,000		
	4.0	Discovery Zone Improvements			CAD 7,615,000		
3		1	Infrastructure Upgrades	4.1	CAD 223,100		
3		2	"Insects!"		CAD 2,109,800		
3		3	Water Play Expansion	4.6	CAD 389,900		
3		4	4-Season Play & Programs	3.3, 4.7	CAD 2,841,400		Revenue
3		5	Wildlife Program Area Improvements	4.5	CAD 1,523,900		
1		6	Winter ZooMobile Route connections @ African Pavilion	6.4.1.1-3	CAD 526,900		
	5.0	Carolinian Forest Circulation & Experience Improvements			CAD 7,225,500		
2		1	"Ravens' Roost"	8.1, 8.3	CAD 6,501,100		Revenue
2		2	"Carolinian Forest" Boardwalk	8.2	CAD 724,400		

OPERATIONAL AND MARKETING RECOMMENDATIONS

The operational and marketing recommendations set out here take into account the phased elements of the Master Plan summarized earlier in this chapter and the attendance and revenue-related objectives that emerged from the Market Analysis report prepared in late 2015 by Lord Cultural Resources and Schultz & Williams.

SUMMARY OF MAIN CONCLUSIONS AND KEY ISSUES EMERGING FROM THE MARKET ANALYSIS

RELATIVE PERFORMANCE OF THE TORONTO ZOO

Compared to Peer Zoos

The Toronto Zoo has higher than average admission charges and earned income, average market penetration, staff levels and governmental support and lower than average private support. The Toronto Zoo also allocates about 2.1% of its operating funds to non-staff marketing costs which is much lower than the 4-5% common for both zoos and museums.

Compared to Other Attractions in Toronto the Zoo's Attendance Levels Are Relatively Strong

The Toronto Zoo remains the highest attended education-focused attraction in Toronto despite lower capital reinvestment over the years than the Art Gallery of Ontario, Royal Ontario Museum and Ontario Science Centre. Higher Zoo attendance is also despite higher admission prices, a less accessible location and greater susceptibility to weather. On the other hand the Toronto Zoo has the strongest appeal to the important young family market. Attendance levels at the Zoo have varied on the basis of the appeal of specific animal exhibitions, weather and competitive factors, including the introduction to the Toronto market of another animal-focused attraction, the Ripley's Aquarium of Canada. The decline in attendance in the year after the addition of the giant pandas for the second time in Toronto was to be expected and mirrors the experience of the King Tut and Body Worlds exhibitions at the AGO and OSC respectively, which also had substantially lower attendance the second time those exhibitions were at those institutions.

Increasing Competition has Limited Attendance Growth at All Main Attractions in Toronto, Including the Toronto Zoo

Despite substantial regional population growth, attendance levels at the Toronto Zoo are in the same general range they have been in for a decade or more. Major capital reinvestment in the Art Gallery of Ontario and Royal Ontario Museum has helped to boost attendance levels somewhat but the results have been far below attendance expectations. In large part this is because the attendance expectations were unrealistic. That attendance levels have not matched population or tourism growth is very much a reflection of increasing competition for leisure time and so many more choices today than in the past and because of a general decline in school field trips. Without reinvestment in the Toronto Zoo it is likely that attendance levels will decline in large part as a consequence of continued competition from the well located Ripley's Aquarium, which is itself planning additional reinvestment.

The Toronto Zoo Outperforms the AGO, ROM and OSC in Earned Income and Operates with a Substantially Lower Level of Financial Support for Operations from Government Sources.

The greatest opportunity for revenue growth is in private support. The Strategic Plan identified a focus on conservation as the main goal of the Zoo and a Foundation to help generate more private support. We anticipate that the master plan will further assess and analyze the current visitor experience as the Zoo could be positioned to increase its operating revenues by “programming the visitor experience” to allow for increased and branded visitor and animal interactions, new fee-based exclusive experiences and strategies for creating repeat member and visitor options. The main opportunities for the Toronto Zoo, with the addition of a Foundation partner, are to increase private sector support (contributed revenues) on an annual basis in addition to capital fundraising to help pay for reinvestment in the Zoo. Strengthening the Zoo’s conservation focus and brand should help to meet these objectives.

Implications of Limited Capital Reinvestment

The Toronto Zoo has had a combined total of about \$174 million in capital reinvestment since its founding in 1974 at an initial capital investment of only \$24 million. In the past decade there has been capital reinvestment of about \$54 million at the Toronto Zoo compared to nearly \$300 million for upgrades to each of the ROM and AGO. There was also an initial \$130 million investment in the opening of the Ripley’s Aquarium of Canada. Capital reinvestment in the Toronto Zoo emerging from the Master Plan should have a positive impact on attendance and earned income levels and thus the ability of the Zoo to help communicate its conservation messages. The recent \$94.5 million investment for Journey to Churchill at the Assiniboine Park Zoo in Winnipeg provides an important benchmark. Its objectives were both conservation and attendance/revenue-related and it demonstrated that a strong focus on conservation helped to generate substantial support from government and private sources and also helped to boost attendance and earned income levels. Capital reinvestment is crucial to the future of the Toronto Zoo.

SELECTED KEY MARKET ISSUES AND OPPORTUNITIES

Widening Appeal to Adults Not Accompanying Children

The Toronto Zoo is perceived to be a place one visits with young children or grandchildren, or attends as a child on a school field trip. The Master Plan has sought to identify ways and means to widen the life cycle of Zoo visitation to include more visits by adults not accompanying children. Of particular note is that seniors will account for 21% of the population of the Toronto CMA by 2030, compared to the current 14%.

Increasing Winter and Shoulder Season Attendance

Only 7% of total annual visitors to the Toronto Zoo in 2014 arrived during the colder weather months of November through February. The Master Plan includes a plan for a smaller core experience that will reduce walking requirements and outdoor exposure during colder weather. The Master Plan has identified pricing and other marketing-related recommendations set out below to help increase attendance levels during the off-peak periods, recognizing that fixed costs do not change very much during those months and that higher attendance and earned income are possible. Regarding price, while it is true that people will be far less likely to attend during the cold weather even with a larger price incentive the reality is that there are many fair weather and warmer days in the winter in which potential visitors will be more likely to think of the Zoo with a larger price reduction than is currently in place. Pricing incentives for the shoulder seasons are set out below as well.

Responding to Growing Ethnic Diversity and Appeal of Festivals

The resident market is already ethnically diverse as some 47% of Toronto CMA residents are “visible minorities.” By 2031 some 78% of Toronto CMA residents will either be immigrants or the Canadian born children of immigrants. In that year some 24% of the Toronto CMA population will be part of the South Asian visible minority. There is at least one free admission festival almost every weekend in Toronto during the warmer weather months. These are usually sponsored and offer very substantial competition for the Toronto Zoo and other charged admission attractions. Change is essential to remain competitive not only against other attractions but also in the context of such free admission opportunities. The Master Plan has recommended future opportunities for multicultural festivals on site.

Declining School Field Trips

A common phenomenon throughout North America and certainly in Toronto has been a reduction of school field trips for financial and liability reasons and due to an increased emphasis on test scores. The Toronto Zoo faces even greater challenges associated with both price and distance. The greater focus on conservation impact, pricing and other strategies in the Master Plan should help the Zoo to increase its share of school field trips.

Role of Technology and Social Media

The trends analysis for zoos, attractions and travel has revealed the importance of technology in not only in helping visitors to plan, but also in how they choose to experience an attraction once there. Additionally, being able to immediately share photos and experiences on social media sites has become the new currency in establishing one's social status. An interesting aspect of social media is that it has effectively become the new “word of mouth” advertising and visitors are equally likely to post “good” content along with “bad”. Recommendations associated with the Web and social media are set out below.

Growth in Garden Tourism

Reflecting the aging of the population, gardens attendance is expected to grow by 40% by 2026 according to the American Public Gardens Association. This is also due to a change in the way people live with the majority of the population now living in cities. This means less green space for relaxation and recreation, making parks and gardens that much more attractive as places to visit and relax. The Master Plan has identified opportunities to emphasize its green spaces and develop collaborative opportunities with the neighbouring Rouge National Urban Park.

OPERATIONAL AND MARKETING RECOMMENDATIONS

The issues and opportunities set out above provide the basis for the following operational and marketing recommendations intended to help increase attendance and revenues and also control operating costs, to the extent practical. The focus of the recommendations is primarily on attendance and earned income since the Zoo has initiated a Foundation that will have primary responsibility for generating financial support from private sources for both capital development and to support operating cost requirements.

Variable Admission Charges (Dynamic Pricing)

Variable admission charges by means of a dynamic pricing model reflects the reality that the perception of value in attending the Toronto Zoo changes during colder weather months relative to warmer months and during inclement weather relative to sunny days. There are also differences in attendance on weekdays relative to weekend days during non-peak months. With staffing and other operating costs that are largely fixed and thus available to support year-round public access, strategies are needed to encourage visitation during traditionally slower attendance periods but do not require additional capital investment. In this regard, price is clearly an important motivator of behavior. Dynamic pricing seeks to help boost attendance levels during traditionally slower attendance periods and to recognize a greater willingness to pay during peak attendance periods. It is a concept that has been used by airlines and hotels for years with proven success. The main benefit of dynamic pricing is that it leads to higher attendance and exposure to revenue centres. However, the benefits of higher attendance also extend to contributed income because higher attendance is an important performance measure

for public and private funders. To give effect to dynamic pricing a variety of specific changes are recommended. These include the following points:

- Pricing Adjustments for Peak, Shoulder and Off-Peak Periods: The peak attendance period is defined as the Canada Day to Labour Day weekends, with the shoulder seasons as March Break to the end of June and Early September through Halloween. Off-peak is essentially from November to mid-March and reflects the Master Plan recommendation for a smaller core campus during that period in order to reduce the walking requirements and the time outdoors. Accordingly, the off-peak admission charges are recommended to be much lower than current charges.
- Pricing for Weekdays and Weekend Days: With the exception of the peak period in which weekday and weekend prices would not change, there would be higher admission prices on weekend days and holidays than during weekdays.
- A New Youth Admission Category and Redefinition of Adults: The “adult” category is recommended to start at age 25 and a

new “youth” category introduced for visitors aged 13-24. This creates a pricing incentive for youth that recognizes the need for the Toronto Zoo to widen appeal to this segment and that those aged 18-24 are either in school or in low paying first jobs. For them the Toronto Zoo admission prices appear particularly prohibitive. This pricing incentive also increases the likelihood of the Toronto Zoo being selected as a date place. The recommended prices are the same as senior rates.

- Having Posted Admission Charges “Plus HST”: This is a common pattern in Toronto and recognizes that a large percentage of visitors pay with credit cards, whether on-site or on-line.
- Daily Pricing Modifications on the Web Site and Electronically at On-Site Ticket Kiosks that are Adjusted the Previous Evening Based on the Weather Forecast: This will create incentives for visits during inclement weather conditions. We recommend that visitors arriving during inclement weather when the forecast was for fair weather should receive the lower price. If unexpected

inclement weather takes place after the ticket purchase is made then those visitors should receive a 10% discount on retail purchases up to a specific amount. Conversely if tickets are purchased at a lower inclement rate and the weather turns out to be fair then there should be no request for additional funds from visitors.

No Differentiation in Price for School Groups

At present the admission price including HST is \$8.00 for elementary level students, \$9.00 for high school students and \$10 for post-secondary. We recommend no price differentiation because the vast majority of school field trips take place at the elementary level. Creating incentives for school groups at the high school level will help to change the perception that the Toronto Zoo is for “little kids” and allow the Zoo to emphasize conservation messages to teenagers and young adults. We recommend a \$7.50 plus HST charge for all who attend in school groups during shoulder and peak seasons and \$6.50 during the off-peak. For rare school visits during the peak months, the recommended charge is \$8.50 per student.

Variable Pricing for the Zoomobile

Walking requirements are barriers to visitor enjoyment during inclement weather and off-peak periods when the Zoomobile is not operational and is a particular issue for seniors and those with medical conditions. Below we recommend the seeking of sponsorship for shoulder seasons operation of the Zoomobile and positioning the Zoomobile as a “people mover” rather than a “ride” to enhance its appeal to potential sponsors. Here we recommend a lower price for seniors and those with medical conditions. If the current price is \$8.00 including HST for all we recommend a \$6.00 charge for those in the two categories above, with no need for visitors to prove a medical condition.

OTHER REVENUE GENERATION, OPERATIONAL AND MARKETING RECOMMENDATIONS

The Master Plan has included a variety of physical changes that should enhance the revenue potential of the Toronto Zoo. These include creating opportunities for private investment in a destination lodge and full service, higher-end restaurant, as well the Zoo investment in relocation and enhancement of the primary gift shop, an additional camping experience, and longer-term enhancements to birthday party, food and refreshment opportunities. Additional recommendations are as follows:

Provide Opportunities for Visitors to Earmark Where Part of Their Admissions or Membership Money Goes

In particular there should be options about helping to focus on specific conservation programs, including staff and other costs related to them. This should not only help to mitigate concerns about pricing as found in a variety of Toronto Zoo surveys and focus groups but also help to emphasize the centrality of the focus of the Zoo as a conservation centre of excellence. The specifics of how this would be implemented are to be determined by Zoo senior management.

Implement Additional Value Added Experiences both On-Site and in Association with the Rouge National Urban Park

The Toronto Zoo already offers a variety of charged value added experiences including Tundra Air Ride \$12; Gorilla Climb \$8.00; Conservation Carousel \$3.00; and Zoomobile \$8.00. There may be opportunities for additional behind-the-scenes-tour opportunities and other program/animal based experiences that could offer other value added opportunities. There may also be opportunities for the Toronto Zoo to contract with the Rouge National Urban Park to deliver charged admission programming there. Additional price packaging should be tested with the dynamic pricing strategies including “unlimited rides” passes and/or day/member passes.

Widen Guided Behind the Scenes Tour Opportunities

These would be available to small groups to be guided by specific specialists on a scheduled basis and surcharged over basic admission charges.

Zoo-Tested Entrepreneurial Revenue Generation Ideas

To support the visitor experiences, amenities and business opportunities previously discussed with the Zoo, we have identified a number of operating revenue ideas that are serving to generate new sustainable sources of revenues for zoos:

- **All Day Value Pass:** Zoos are finding new revenues by offering an “all-day value pass” option to guests who do not understand the “free all year” membership concept. The all-day pass, priced differently for adults and children, could include a combination of offerings ranging from general admission, unlimited carousel rides for children, a conservation bracelet, discounts for gorilla climb and potentially discounts for the Zoomobile. Based on the Zoo’s current summer adult admission fees of \$28, all-day adult pricing could be offered in the \$33 - \$35 range and be a cheaper alternative for visitors than buying a membership. Depending on the Zoo’s cost to service members, it may be a better value for the Zoo, as less year-long

expenses for serving the member who for the most part only visits the Zoo once. The Houston Zoo is one example of a successful “all day pass” with a membership program.

- **Promoting the Zoo’s Conservation Brand:** A once monthly in the summer Zoo Brew Event at Utah’s Hogle Zoo from May through September offers a different conservation-related theme for each event. Zoo leadership then uses the funds earned from one of these events to fund their contribution to the SAFE Program. This year, Hogle themed their events in the following way:

Tortoise – Let’s toast the tortoise!

Graffes – Let’s tip a long neck for long necks!

Lions – We’ll roar while we pour!

Orangutans – Have an ale for the apes!

Hogle’s two-hour events focus on millennials over age 21 and largely markets to them via social media. The cost is \$10.95 (adult general admission to the Zoo is \$14.95). The event includes a cash bar as well as dinner and snack options for purchase and has had “sold-out” status with between 1,500 and 2,000 guests all year long. Toronto Zoo could do something similar, identify a corporate sponsor and use the funds earned to raise greater awareness for conservation and/or fund conservation-related programming – i.e. “summer conservation series”.

- **Conservation Bracelets:** To further connect Zoo visitors to conservation, zoos are selling colourful, animal-themed rubber bracelets that serve to link guests to the Zoo’s specific conservation efforts. These bracelets can be sold as part of the admission process, at retail locations or in kiosks throughout the Zoo. Children love the bracelets, as zoo staff are encouraged to interact with kids wearing the bracelets – further connecting children as conservation stewards. Both the Houston and Dallas Zoos have very successful conservation bracelet programs.

- **Conservation Gala/Party:** This could be a future year revenue stream once the new Foundation is better established, but zoos are branding their conservation initiatives through very successful galas and/or parties. The Houston Zoo’s “conservation gala” (in addition to its annual Feast for the Beasts) will provide over \$1 million in conservation support to the Zoo in 2016. Potentially, the Toronto Zoo could start with a smaller concept (cocktails/lunch) and then build out to a larger venue in future years. The key is to focus on the Zoo’s conservation programs and initiatives and to engage major donors/partners in supporting the Zoo’s efforts.
- **Greenhouses/Off-Site Farming:** Zoos have begun to develop on/off-site sustainability programs to grow fresh produce and hay to feed their animals. Such programs (Cincinnati Zoo among others) utilize local farmers to help manage these facilities and “share” in the outputs and cost. Such programs could help to save operating costs while producing high-quality, locally grown and healthy food products.

Reconsider the Role of the Zoo's Website as a Public Engagement Tool

Cultural attraction websites in the past traditionally focused on establishing presence and providing the public with information about planning a visit. Today, websites are moving beyond merely posting opening hours, ticket prices and directions to become an integral part of the overall visitor experience. Websites are not a substitute for on-site visits, but represent a new frontier for engagement; providing comprehensive access to an institution's collection, expertise and knowledge base, as well as providing a virtual guest experience with exhibitions, educational and interpretive content. Cultural attractions are now improving their websites so that they seek to virtually mirror the physical experience of a visit. Everything that the institution has come to stand for is now represented in digital form, providing a parallel virtual showcase of an institutions' exhibitions, collections and programs. Opportunity exists for the Toronto Zoo to expand the role of its website to provide a more enjoyable virtual experience and increase engagement with the animals, staff, conservation efforts, and research.

Refresh the Website with a More Modern and Visually Appealing Design

Web design is ever-evolving, and has recently moved towards an aesthetic that is more innovative, visual and crisp. Key elements include unique font typography, textured and subtle background patterns, bold colours, full screen HD videos, full bleed high resolution images, vintage filters, scrolling interfaces, infographics and flat icons, card-based content presentation, and all with an eye for minimalism and simplicity. Zoos and aquariums that employ this modern design for their websites include the San Diego Zoo, Bronx Zoo, Edinburgh Zoo and the Monterey Bay Aquarium. Website images are immensely important to entice people to visit and sets visitor expectations before they arrive. The Toronto Zoo's major asset is its animals. More could be done to leverage these assets to improve the Zoo's website to provide a highly visual and image rich format, as well as its overall user-friendliness. Currently, the user experience online is very cumbersome with text-heavy menus in small fonts, a vertical or deep organization of information which requires a lot of clicking and navigation to find things, and webpages are not formatted to fill the entire screen. Additionally, priority should be given to

imagery that reflects the dynamic nature of a visit to the Zoo in all seasons and its target visitors (i.e. diverse families and a recommended focus on teenagers, young adults and older visitors without kids).

Enhance the Mobile Compatibility of the Website

Research by Catalyst Canada reveals that 76% of Canadians own a smartphone (2016), an increase of 38% from 2014. Smartphone consumers use their phones at home, on the go and at work, and more and more people are getting rid of their landlines and computers all together, using mobile devices at home. Millennials are especially active on mobile phones, approximately 81% of those age 18-34 use a smartphone and this is expected to increase to 98% by 2018. As more and more people use smartphones and tablets to access the internet, it is essential that the Toronto Zoo's website is not only updated, but also optimized for mobile viewing and functionality. Mobile users need to be able to easily get directions, watch videos, and buy tickets to the Zoo using their smartphones no matter where they are in the city or on-site.

Increase Dedicated Social Media Staff Support

Developing content for, managing and evaluating social media efforts today is now an intensive, round the clock job which requires input, output and monitoring 24 hours a day, 7 days per week. The Toronto Zoo has achieved a good level of reach and engagement when compared to other Toronto institutions, especially considering that the Zoo only initiated its Twitter profile last year. However, growth of online and social media audiences and key performance indicators such as number of followers, impressions (views) and engagement (e.g. clicks, likes, shares, etc.) will begin to stagnate without increased staff resources. While there are a number of software programs available that can be used to time the release of posts, instantaneously cross-post on various platforms, aggregate data, and analyze performance metrics. However, maintaining the level of social media presence and engagement by an attraction the size of the Toronto Zoo is not achievable by a single employee. Furthermore, limited staff resources means that new social media platforms cannot be explored or adopted, and that staff cannot be as reactive to new social media trends (e.g. tapping into the recent Pokémon GO phenomenon

was immensely successful for the Zoo). Many institutions are now recognizing the importance of social media and are increasing staff support to appropriately manage this essential form of visitor engagement. Just last year the ROM hired a second staff member to share and balance the social media workload. The Zoo should also consider hiring at least one additional staff member to support all aspects of managing social media. This might be an item that will be quickly selected from the recommended menu of sponsorship opportunities discussed below.

Invest in Technological Support Software to Help Manage Analytics

Staff time could be freed up with investment in social media analytics and “listening” software such as Radian6. These software tools help organizations to monitor brand mentions across the social landscape, reducing the need for staff members to hunt through the web for mentions of the Zoo using traditional keyword searches. By streamlining the monitoring and reporting process, staff time could instead be devoted to other outward facing activities such as content development and engagement.

Increase Video and Photo Content on Social Media

Facebook analytics suggests that posts which include photos and video generate about 120% more engagement than the average post. Compared with other cultural attractions, both in Toronto and worldwide, Toronto Zoo's animals provide ample opportunity to satisfy audience demand for unique images and videos capturing their beauty and those “cute” moments. Every opportunity should be taken to leverage these moments to increase the number of high quality visuals posted on social media to surprise and delight followers. While the giant pandas are a key feature of the Zoo at this time, a balanced approach to image and video content should be taken so that the other amazing animals and living elements at the Zoo are given prominence. Additionally, photos and videos which capture unique moments at the Zoo should be prioritized over stock images.

Explore the Use of Infographics to Share Information about the Animals and Conservation Impact

Sharing more information in a visual and graphic medium is increasingly popular among millennials as it is an easy and accessible way to digest dry stats or complex concepts with a bit of fun, in an aesthetically pleasing way with minimal text. The “infographic” is worth a thousand words as they say and is a particularly effective in using the increasingly-visual nature of social media to share the expertise and information that many people are interested in. Discussions with Zoo staff on a range of subjects (perhaps focusing on one species of animal at a time or conservation efforts), can then be turned into information which a graphic design/production team can creatively transform into a useful infographic for distribution.

Create a menu of sponsorship opportunities beyond the major capital sponsorship to be developed by the Foundation

This could include sponsorship of school buses, free Wi-Fi on site, specific conservation-related initiatives, sponsorship of the Zoomobile outside of the peak periods when it is currently operational, multi-cultural festivals, etc. The first come, first served menu should be posted on-line and also available on site for those enthusiastic about sponsorship opportunities available to them at a wide variety of price points. Important as well is recognition of the sponsors on an easily accessible video wall that could be rapidly updated.

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