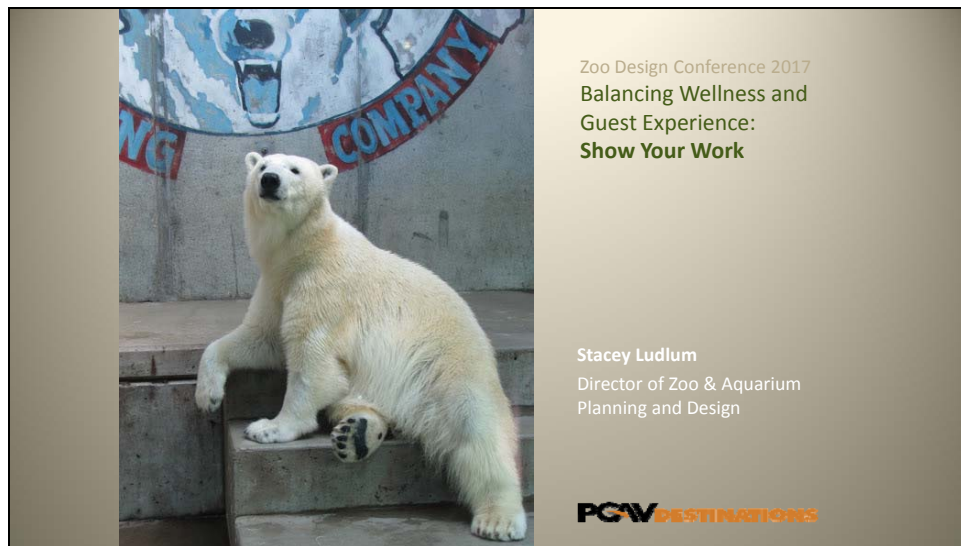


Slide 1



I'm going to take us on a journey to understand a little bit more about one of the other species at the zoo—the Visitors.

Slide 2



We've been talking much about animal wellness and how design plays a key role in that wellness.

Slide 3



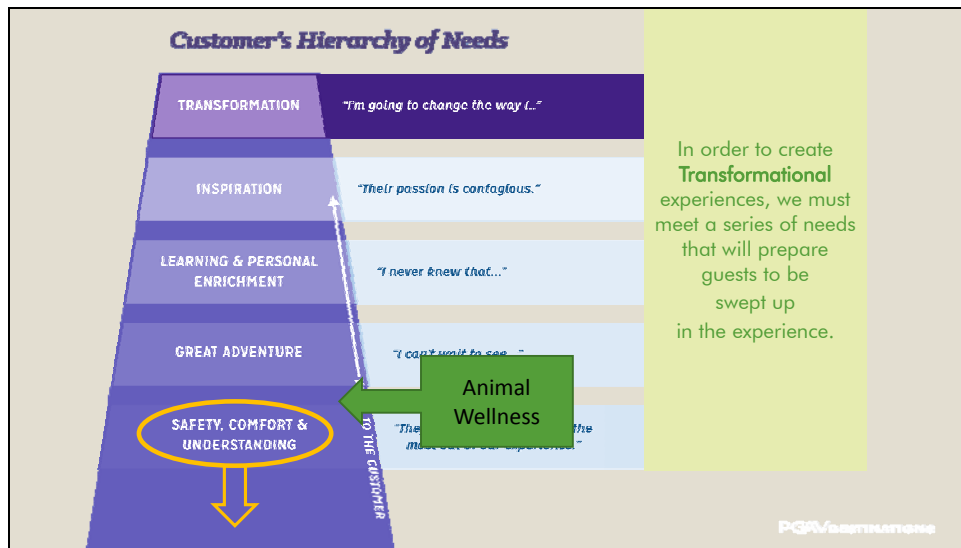
I've also heard a few people say something about 'animal wellness and visitor experience should be equal, not competing.'

I would like to suggest that it goes much further than that.

Slide 4



In fact, I believe that Animal Wellness should actually be considered as a key component of visitor experience. That we subtly shift our thinking from these two ideas competing against one another, to being, truly, inextricably linked.

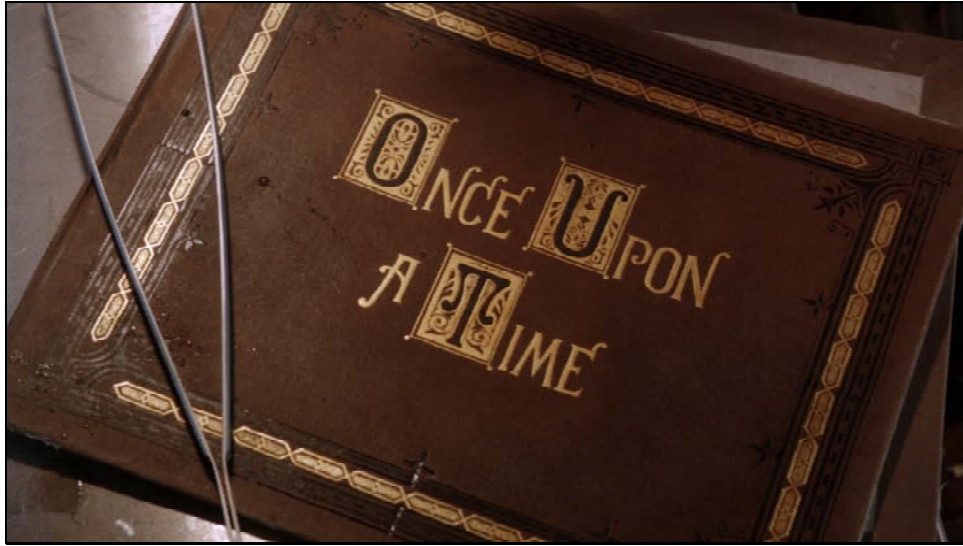


That in order to have a visitor experience that is FUN, that amazes and inspires, that transforms, we must begin on a strong foundation of animal wellness.

This is a diagram we often use to talk about how to achieve transformative visitor experiences. I'm suggesting an amendment from here on out.

This suggested subtle change of approach, I think is one of the most important indicators of a massive shift in zoo and aquarium history of which we are at the precipice. Let me explain by...

Slide 6



Telling you a little story.

Slide 7



Not long ago, there was an animal park. It long enjoyed success.

Slide 8



In fact, I went there as a little girl, and fell in love with dolphins. (That's not me, by the way)




Slide 9



Over the years, millions and millions of visitors also fell in love with marine animals at this park. It expanded its offerings to include attractions to reach all ages of people like roller coasters and elaborate shows. Inspired by Disney, it began creating immersive environments and story driven experiences.



Many families created lifetimes of memories, and came back again and again. This park became so successful. It added sister parks around the country...



The screenshot shows a DealBook article from April 19, 2013. The headline is 'SeaWorld Shares Close Up 24% in Trading Debut'. The byline is 'By WILLIAM ALDEN'. The article text describes SeaWorld's debut on the New York Stock Exchange, noting its 24.15% increase from the offer price to \$33.52. It also mentions the company's valuation at \$2.5 billion and its status as a private equity-backed company.

DEALBOOK | SeaWorld Shares Close Up 24% in Trading Debut

## SeaWorld Shares Close Up 24% in Trading Debut

By WILLIAM ALDEN APRIL 19, 2013 10:21 AM [Comment](#)

4:31 p.m. | Updated

SeaWorld Entertainment made a splash on Friday in its debut as a publicly traded company.

The stock of the theme park operator opened at \$30.56 a share on the [New York Stock Exchange](#), 13 percent above the initial public offering price. The shares, under the ticker symbol SEAS, closed the day at \$33.52, up 24.15 percent from its offer price.

The company, taken public by [the Blackstone Group](#), [priced each share](#) at \$27 Thursday evening, the top of its expected range, raising \$702 million and valuing the company at \$2.5 billion.

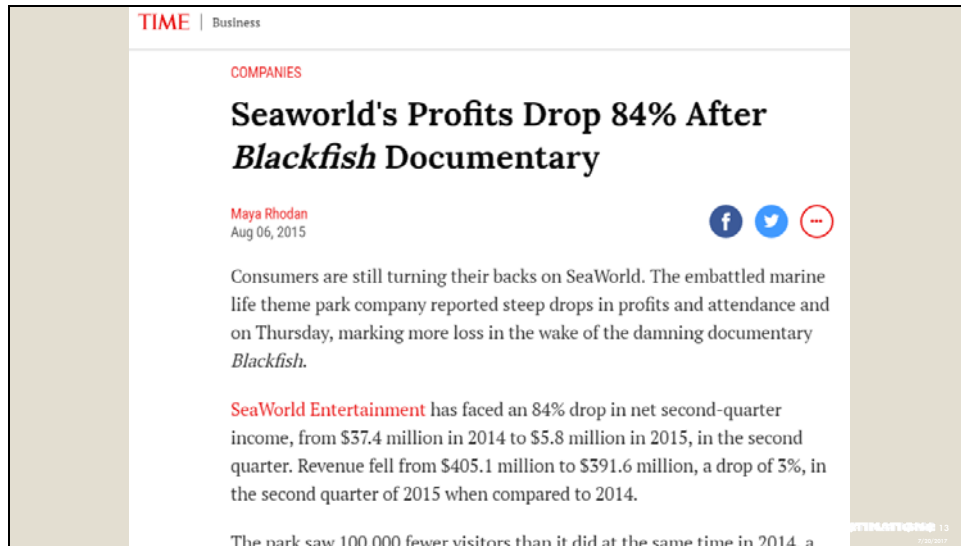
The deal is one of the biggest offerings of a private equity-backed company in recent months. Blackstone, which paid \$2.3 billion for SeaWorld in 2009, sold 16 million shares in the offering but retains control of the company.

SeaWorld earned \$77.4 million last [Q3](#) [W](#) [U](#)

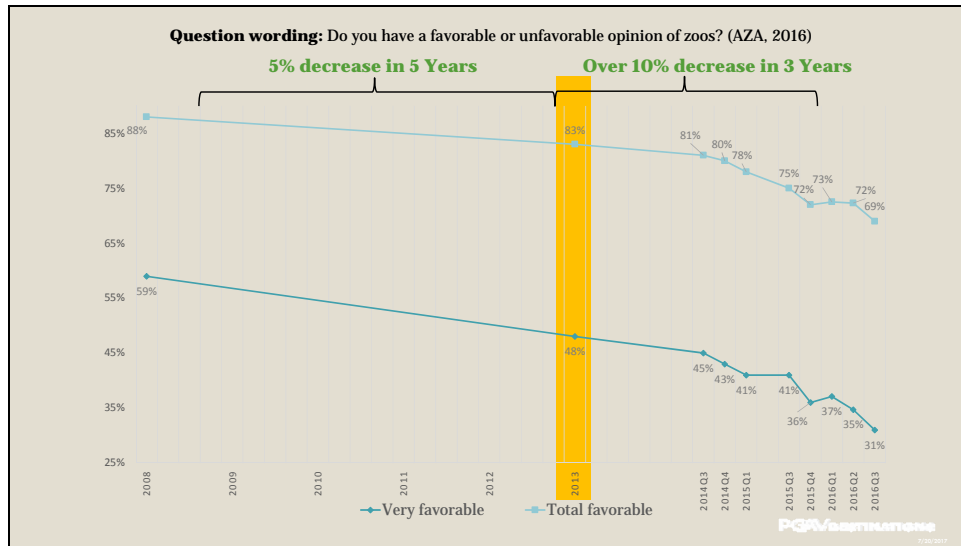
And made so much profit, it became a publicly traded company!



But one story it never told, was the one about itself, (Click) and all of the good work they were doing not only for the animals in their care, (Click) but also for animals struggling to survive in the wild around the world. (Click) Not only were they rescuing thousands upon thousands of marine animals and returning them to the wild when they could, (Click) but they were leading the world in research methodologies on marine animals and sharing the information with field researchers so they could do their work even better. (Click) But no one knew about this side of their work. They only knew of the fun parks. The shows and the rides.

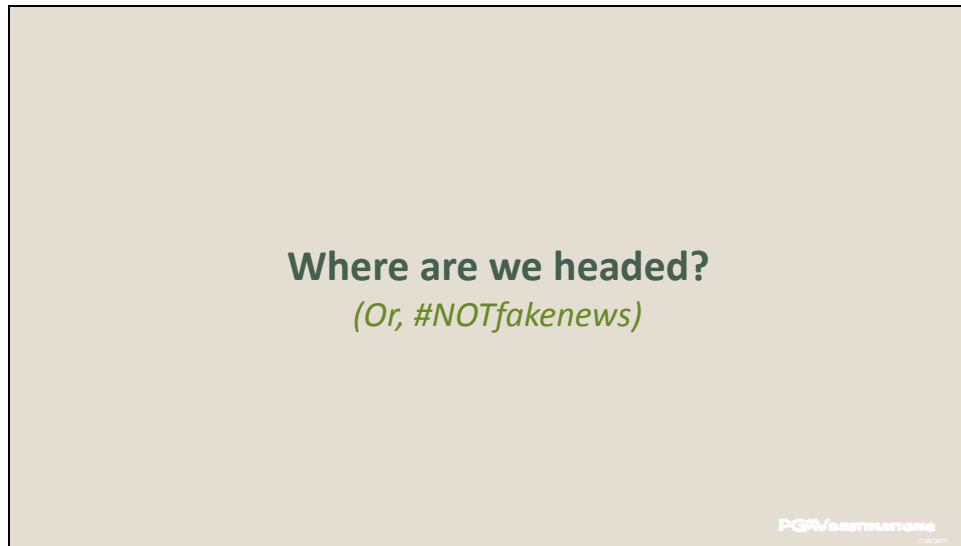


And one day, a well-intentioned, but ultimately dangerous enemy surfaced, and created a massive smear campaign against the park. The park was devastated. Attendance dropped, profits dropped, staff were fired. Despite their attempts to prove their good works, the enemy had won. No one would listen to the park. The public's trust was completely eroded.



Today, the park is recovering, but the impact of this single attack can be felt all throughout the world...even in non-profit zoos and aquariums.

This study released last year by the AZA shows the decreasing trend in favorability of zoos in the US. Yellow bar indicates the release of Blackfish. Coincidence?



With today's age of skepticism and general distrust of big, traditionally trusted institutions, we must ask ourselves: Where are we headed?

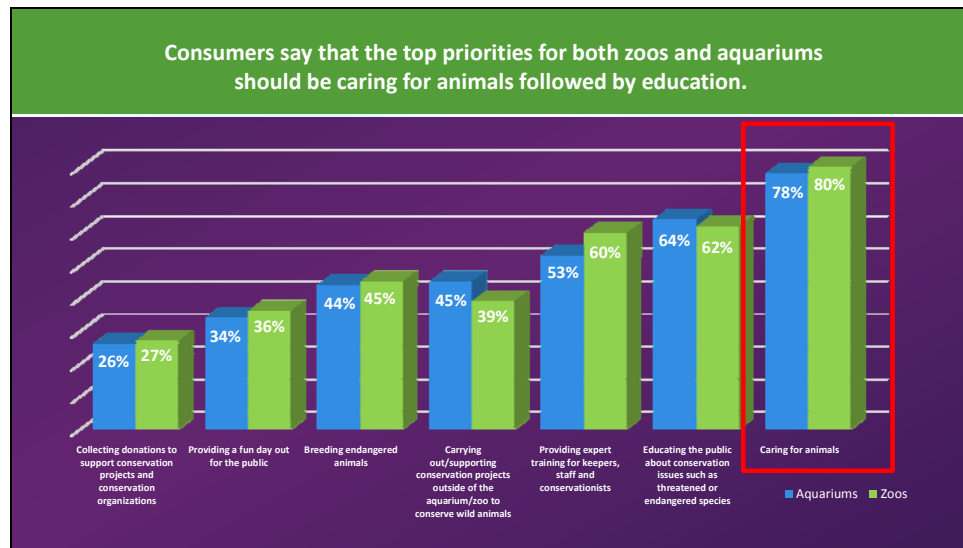
Do we bury our heads in the sand and hope that the crosshairs don't take aim at us? (Click) Or, do we become proactive in earning the public's trust?



That question led us to wonder: What can zoos and aquariums do to increase positive perceptions from the public? In this case, “public” is of course your visitors, but perhaps MORE importantly, non-visitors.

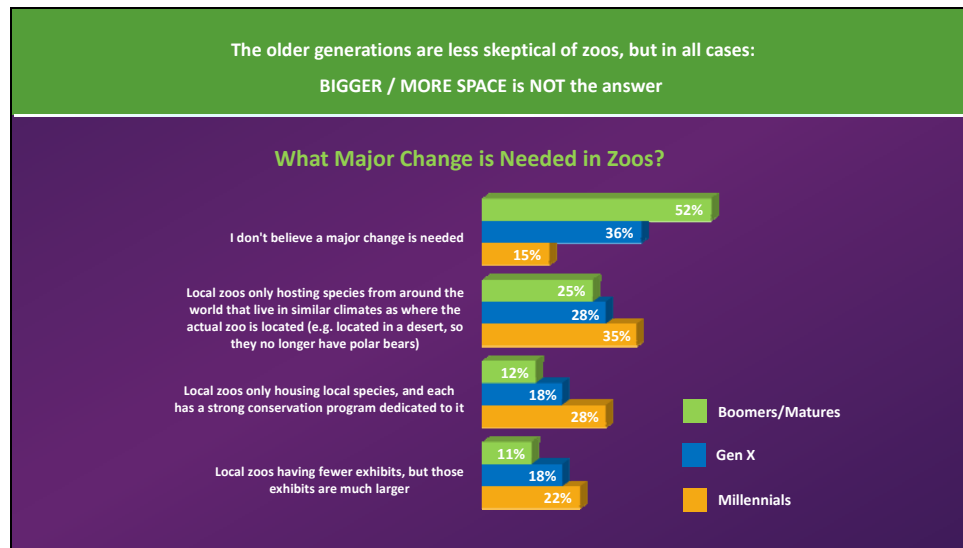
I want to share some of the data we uncovered in our recent market research that endeavored to answer this question. One caveat is that we have not yet finished evaluating the data. These are preliminary results. We will publish this data via our Destinology newsletter later this year.





We start to build trust by first understanding what the public expects of us. What do they believe our top priorities should be?

#1 is Caring for Animals. This was a theme throughout the study, which was a bit of a surprise to us...especially when you see that Conservation fell to the middle.



We wanted to know if the public had a strong inclination to how zoos should change. These are by no means a full list of options for change, but are representative of the level of change. We honestly believed that Larger Exhibits would be far and away the winner, but as it turns out, it completely depends on the generation.

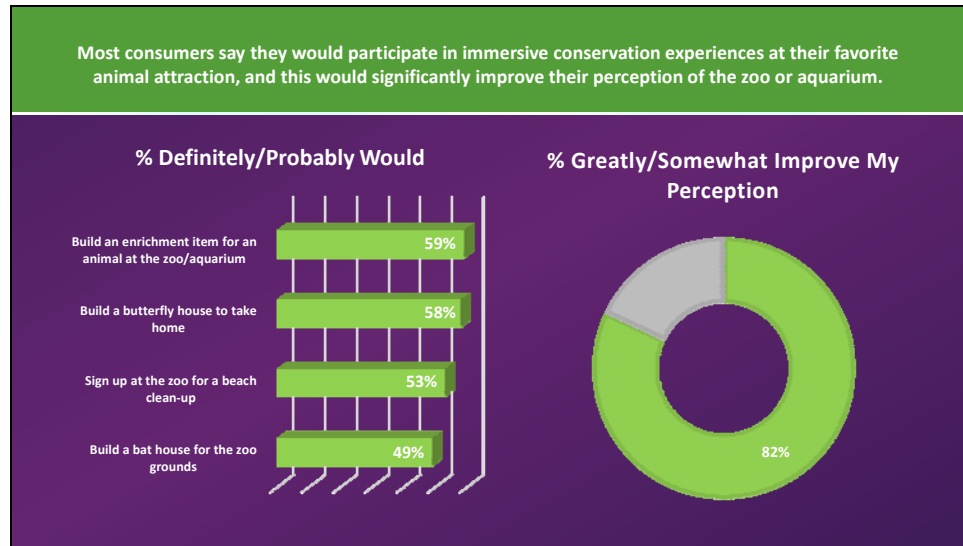
Millennials are the most skeptical group out there, but they are also potentially our strongest cheerleaders as they deeply believe in supporting organizations that do good work. And its important to point out, BIGGER is not the answer.



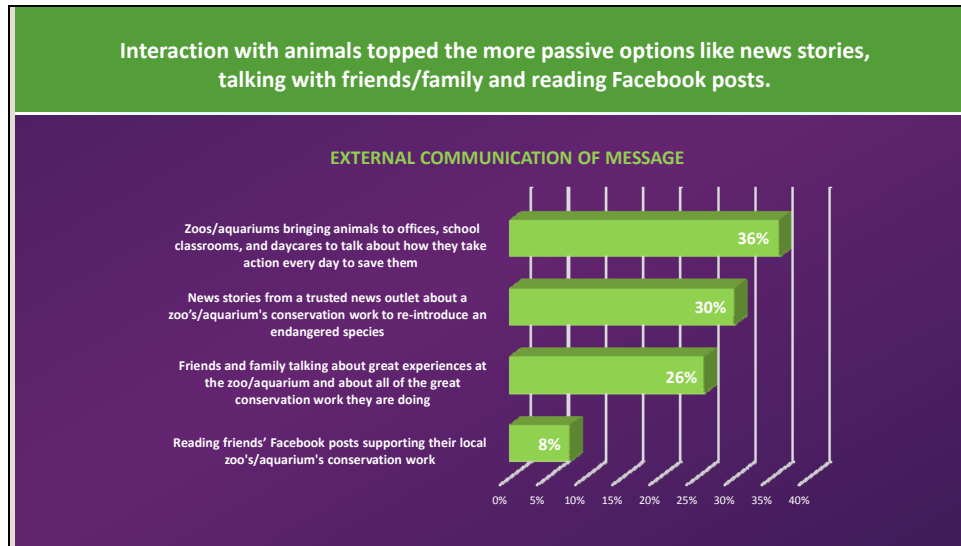
When it comes to understanding where to prioritize conservation programs and efforts, it helps to understand what the public EXPECTS of us. We must meet these first, then exceed them.

Interestingly, public expects zoos to be doing ACTUAL conservation work and RESEARCH above leading by example with green practices or green building initiatives.

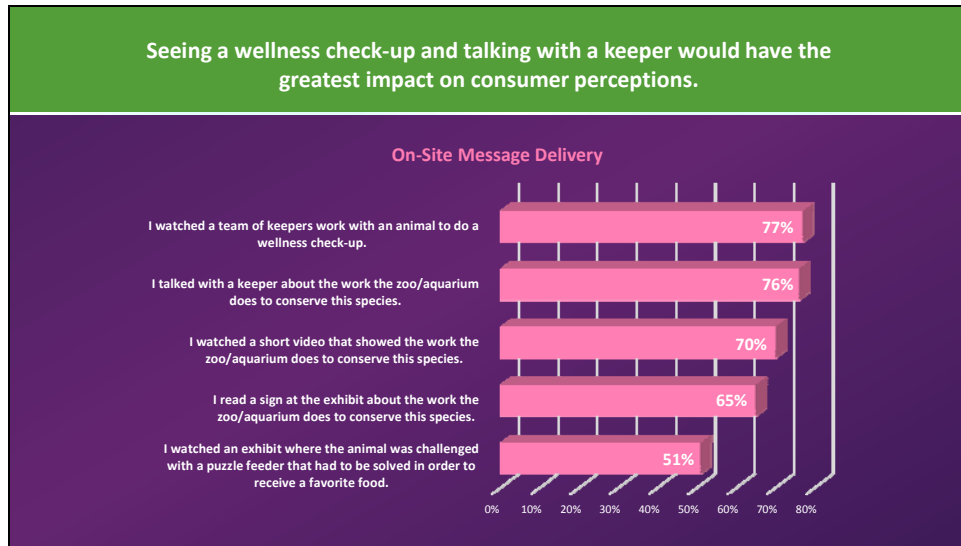
And, it seems, most people understand the value of simply getting close to animals as a means to conservation inspiration.



One way to improve perceptions is to offer actual, hands-on opportunities for conservation—even in small ways. And even if they don't expect to participate.

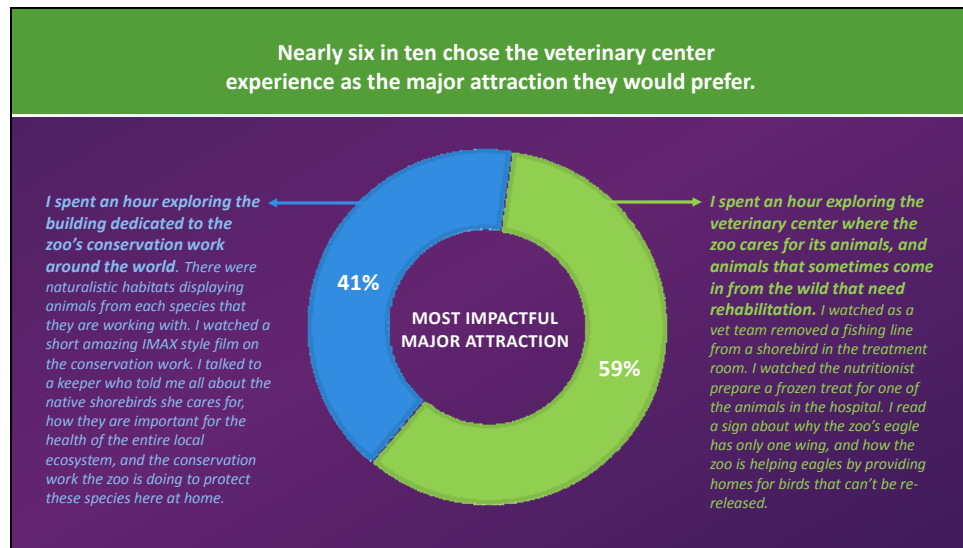


Another lesson is HOW you communicate OFF-SITE. We have always been told that Social Media dominates in this world. However, the market tells us ACTUAL experiences interacting with Zoo people and hearing directly from the Zoo is the best way to build trust in your message.

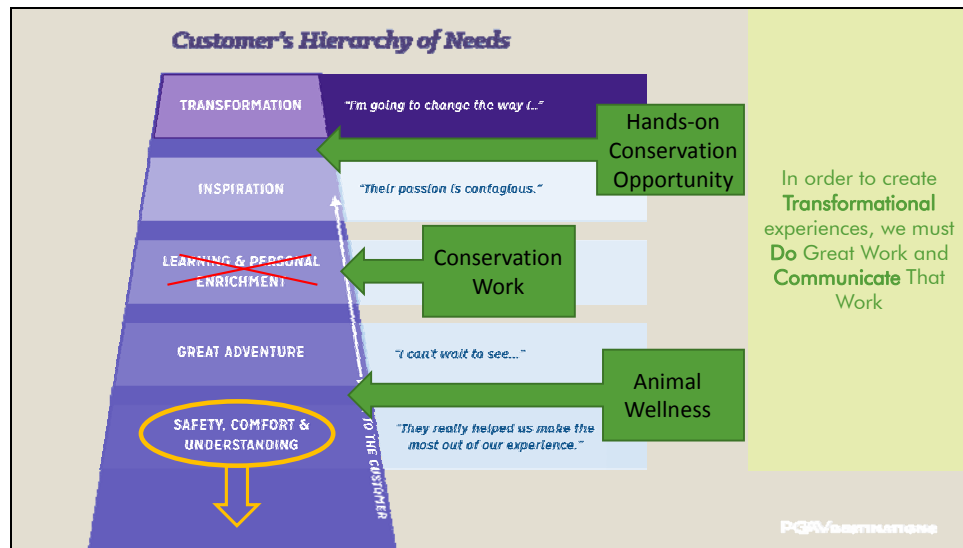


On-site message delivery follows a similar trend in that the public wants to SEE you do your work, rather than just TALK about it.

Note, the least popular was Enrichment...Which we believe was potentially a misunderstanding of what a puzzle feeder was. Research question error.



Finally, we asked about major capital investment options. Animal care won over conservation. So, instead of investing in a major experience about your conservation work, begin with bringing people behind the scenes.



All of this leads us back to the beginning...And I'm suggesting a few more amendments to our Hierarchy of Needs Pyramid that gets us to conservation transformation...

The moral of the story is that you need to have great animal care, but we also must SHOW that animal care, BEFORE the public will be willing to trust you about your conservation work. It means we need to think about turning the zoo inside out. To show some of the inner workings...Things like training panels, behind the scenes tours, hospital viewing, and nutrition center viewing are already setting the stage. Turning Animal Care into Visitor Experience. Where can this kind of 'inside out' thinking take us??

This is not to say we abandon immersive experiences. These are all modes of storytelling, tools in our design toolkit. Layers that when stitched together tell a holistic story of the organizations you are.



Slide 25



Let me know if you'd like to be added to our Destinology newsletter to receive our full report.