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Economic Confidence Snapshot Zoo Directors Survey

Findings and Discussion

September 2009

Resources Realized



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Survey Overview

- 49 Zoo & Society Directors responded from 28 States
- Conducted in second half of August 2009
- Quick snapshot of 'economic confidence' and impact of financial crisis
- Organization Size:
 - Less than \$5 million - 39%
 - \$5 million - \$14,999,999 - 31%
 - \$15 million - \$24,999,999 - 16%
 - \$25 million+ - 14%



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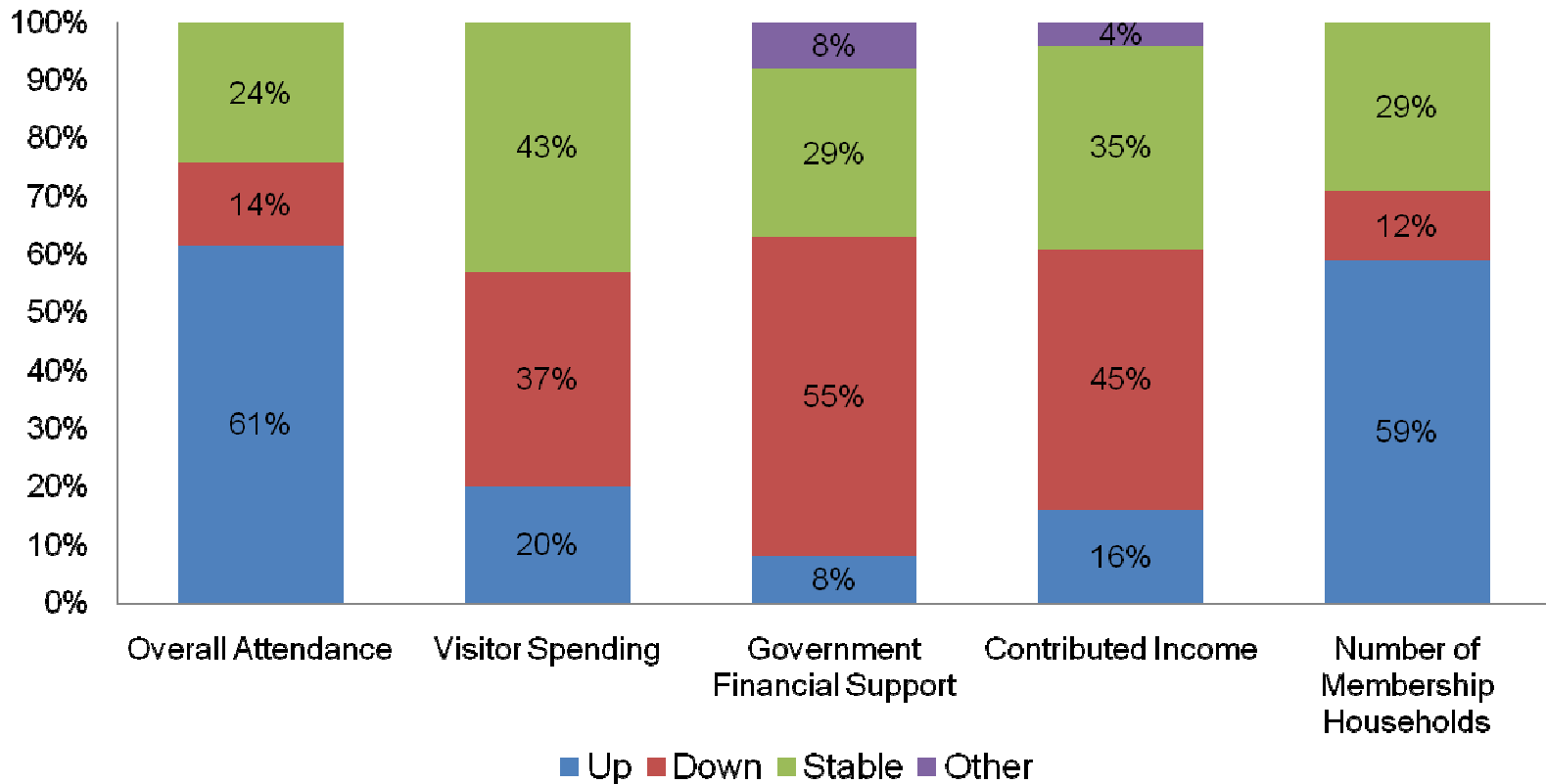
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Observations

- Overall optimism – zoos weathering crisis well
- Attendance and membership appear to have benefited because of value and closer-to-home trips
- Government and contributed funding will continue to be challenging
- 49% of the respondents felt that their local economy is “unfavorable”
- 49% felt that their local economy will improve in the next 12 – 18 months; 22% indicated that their local economy will take more than 18 months to improve



At your zoo, in the next 12 months, what do you foresee the trend to be in the following areas:

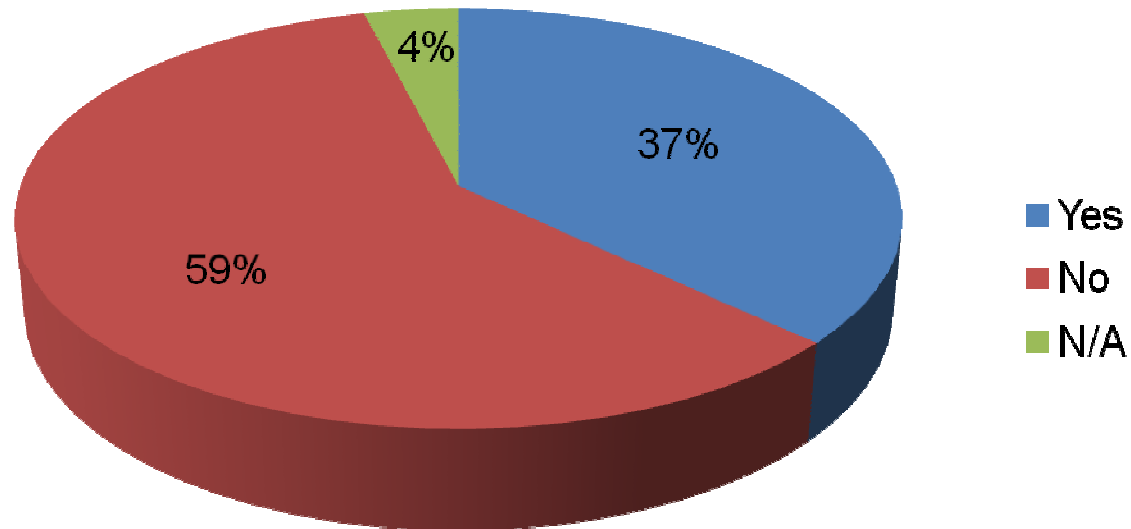




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Have you scaled back, postponed or halted a major capital project this year due to the economy?





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Do you intend to significantly (more than 10%) reduce your expense budget over the next year?

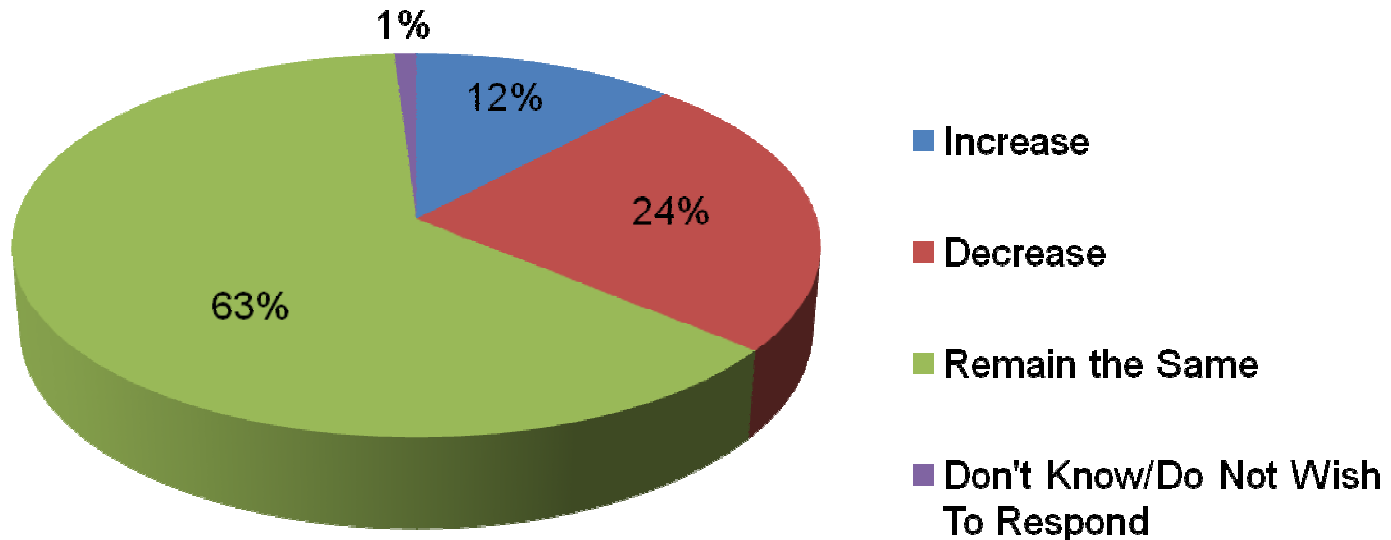
- Yes 27%
- No 73%



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What trend do you see in staffing levels at your zoo?

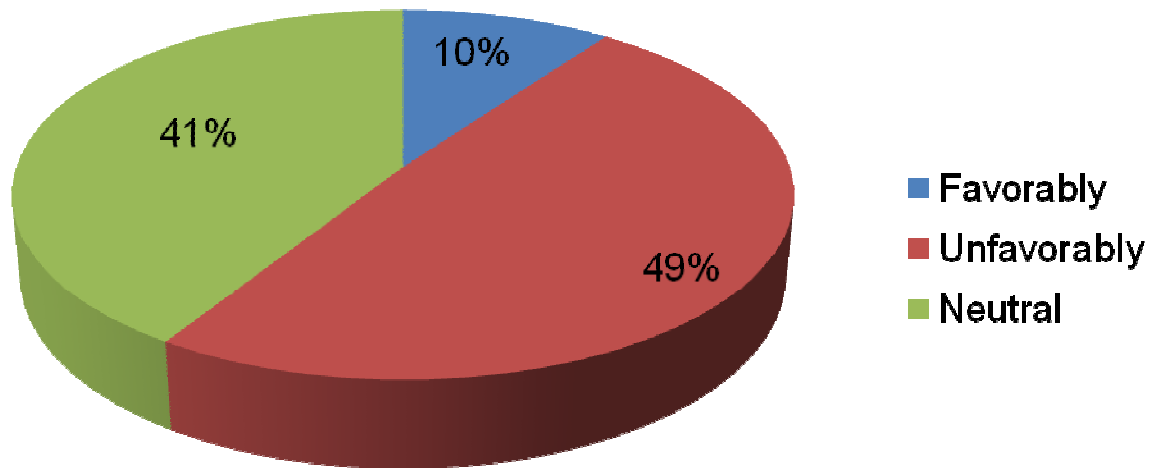




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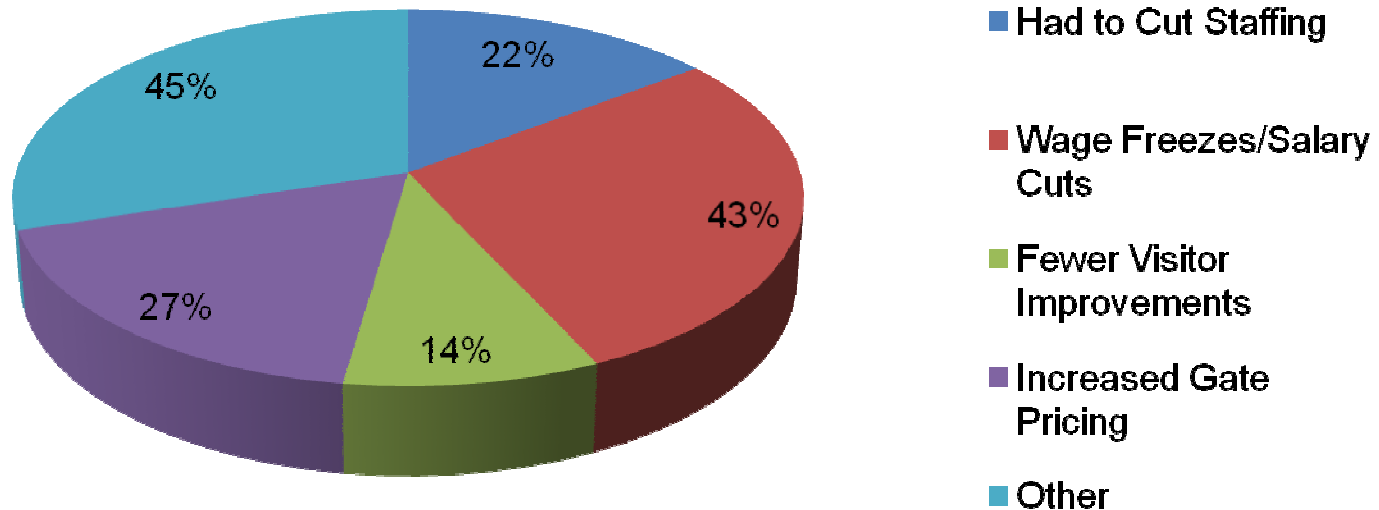
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How would you describe your current assessment of your local economy?





What has been the most significant impact of the economy over the last year on your zoo operations?





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What has been the most significant impact of the economy over the last year on your zoo operations?

Respondents selecting “other” cited the following as significant economic issues affecting zoo operations:

- Reduced number of operating days
- Maintenance issues
- Attendance
- Fewer rentals and sponsorships
- General uncertainty of government/business partners
- Delayed capital giving and fewer marginal donors
- Decreased operating budget
- Held off purchasing large dollar equipment
- Significant slowdown on receipt of state funding
- Lower per capita spending
- Concession and gift shop spending decreased
- Animal acquisitions
- Privatization of zoos



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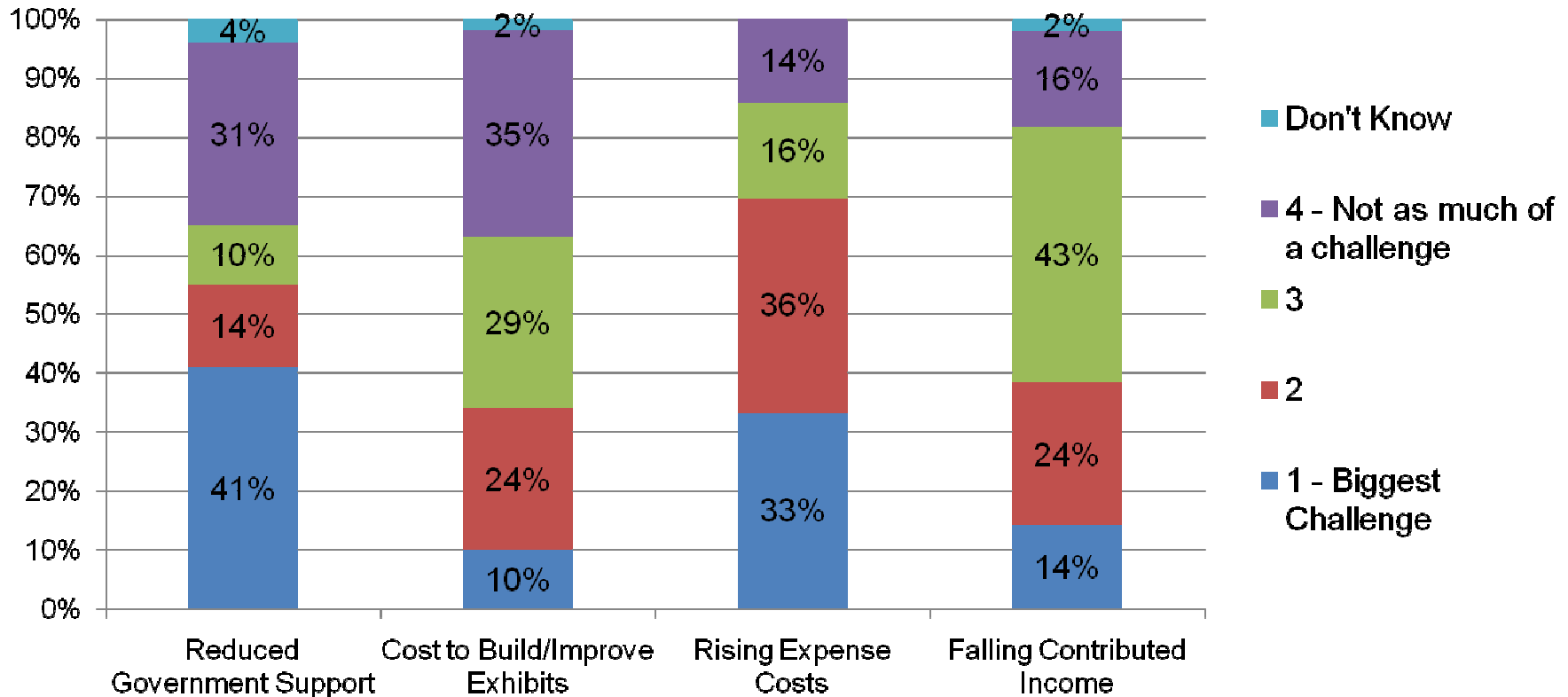
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Have you had to reduce or eliminate your conservation or education programs?

- Yes 22%
- No 78%



What do you see as the greatest challenges facing your zoo over the next twelve months?





How long until you feel the local economy will improve?

