

Facilities Master Plan

Construction Budgets (1 of 3)

<u>Item</u>	<u>Description</u>	<u>Const Budget</u>
1	Adventure Play w/restrooms (Use outside vendor) [\$\$\$]	\$ 1.5 million
2	Asian Highlands Village Phase 1 Snow Leopard and Red Panda [\$\$\$]	\$ 6.0 million
3	Tropics: Nocturnal Area Exhibits Tropics: Red Panda change to Spider Monkey	\$ 2.0 million
4	Carousel (\$1 mil) with Crossroads Park (Carousel Play / Food / Restrooms) [\$\$\$]	\$ 5.0 million
5	Camel Ride and Dinosaur	funded
6	Temporary Africa	funded
7	Service Center: Off Exhibit Breeding Center	\$ 1.5 million
8	Northern Trail improvements	\$ 2.5 million

Construction Budgets (2 of 3)

<u>Item</u>	<u>Description</u>	<u>Const Budget</u>
9	Service Center: Greenhouse	\$ 1.0 million
10	Tram Barn area: Hay Barn	\$ 1.5 million
11	Service Center: Animal Care Facility/rainwater harvesting	\$ 14.0 million
12	Africa Grasslands Exhibits/Floating Biofilter Islands	\$ 15.0 million
13	Service Center: Vehicle Storage Building/rainwater harvest for greenhouse use	\$ 1.0 million
14	Relocate Butterfly House / Arctic Fox area [\$\$\$]	\$ 1.0 million
15	Discovery Bay main level improvements	\$ 7.0 million
16	Discovery Bay Dolphin conversion to Sea Lion	\$ 13.0 million
17	Group Picnic facility [\$\$\$]	\$ 7.0 million

Construction Budgets (3 of 3)

<u>Item</u>	<u>Description</u>	<u>Const Budget</u>
18	Africa Tent Camp facility [\$\$\$]/rainwater harvest for landscape use conservation message, composting toilets	\$ 5.0 million
19	IMAX Rehab to Offices and Classrooms/rainwater harvest for toilet flush and Bison/Pronghorn use	\$ 2.0 million
20	Events Center & Orangutan [\$\$\$]	\$ 30.0 million
21	Tropics: Tapir to Warty Pig	\$ 0.3 million
22	Tropics: Vacate Small Clawed Otter	\$ 0.0 million
23	Africa Forest [\$\$\$]	\$ 20.0 million
24	Africa Kopje	\$ 10.0 million
25	Horse Barn at Family Farm	\$1.0 million
26	HOTZ Phase 2 and 3	\$20.0 million

Key Findings

- *“Option A” of the FMP addresses key planning objectives*
- *Implementation/phasing linked to a business strategy that it viable and sustainable – maintain/grow 1.3MM++ visitors*
- *Focus on 2012 – 2017 (next five years)*
- *Deliver new animal experiences (wows) that leverage visitation, \$\$\$ and awareness*

Overall Funding Strategy

Assumptions

- **Visitor Revenue Initiatives**: funded by “others”
 - ✓ Adventure Play/Carousel/Picnic/Food/Retail
- **Infrastructure**: State Asset Preservation & State bonding
- **Experiences**: Animal & Mission
 - **New Bold Approach**: individuals, corporations, partners;
need for key (NEW) stakeholders to step up
 - Builds on the Zoo/Foundation’s funding success; new vision
& facility master plan; timing of State resources

Recommended Schedule of “Openings”

2012

- ✓ *Tropical Reef & Black Bear*
- ✓ *Camel Ride \$*
- ✓ *Dinosaur \$\$ & people*

2013 - \$1.7MM (not including Discovery Bay)

- ✓ *Adventure Play \$\$/\$\$\$ & new people*
- ✓ *Temporary Africa & Restrooms + Discovery Bay*

2014 - \$10MM

- ✓ *Carousel with part of Cross Roads Park with “play/fun/wet” area \$\$*
- ✓ *Nocturnal & Spider Monkey (coati & capybara)*

2015 - \$8MM

- ✓ *Asia Highlands (snow leopard & red panda) \$\$ & new people – 3 – 4% increase (50K)*

2016 - \$25MM

- ✓ *Africa Phase One – giraffe; tent camp experience - \$\$\$ & people – 8 – 10% increase (100k)*

2017 - \$5MM

- ✓ *Snow Monkey \$*

Recommendations of Planners

- Discovery Bay
 - ✓ *Change is coming*
- Monorail – *a business decision*
- Tram
 - ✓ *No tram route or new infrastructure*
 - ✓ *Other options to transport visitors*
- Heart of the Zoo – *phases 2 & 3*
 - ✓ *Celebrate the Zoo's success; exceeded expectations*
 - ✓ *Master plan process identified new priorities*
 - ✓ *Some new components will be implemented*

New Business Strategies

- *Focus on renewing first-year members*
- *New “tools” – data; users/non-users; wealth-management; Web-site as tool: pre-paid/online tickets*
- *Re-investing in core visitor experiences*
 - ✓ *Programs*
 - ✓ *Visitor Amenities/Experiences/Engagement*
 - ✓ *Picnic*
- *Continue with “back-stage” concept*
- *Sponsorships – partnering with the Zoo*

ROI Criteria of New Revenue Options

	Average Fee	Utilization Rate	Annual Rides	Gross Revenues	Operating Cost %	Potential Annual Net	Notes
<i>Carousel</i>	\$2.00	15%	187,500	\$375,000	33%	\$251,250	<i>Operating costs only; Fund-raising potential</i>
<i>Adventure Park</i>	\$30.00	5%	62,500	\$1,875,000	75%	\$468,750	<i>Projection only based on partnership terms</i>
<i>Back Stage Pass</i>	\$45.00	30/pday 100 days	3,000	\$135,000	33%	\$90,450	<i>Low investment costs; conservative estimate</i>
Zoo Attendance	1,250,000						
<i>Opportunities for Annual Pass with Carousel and Adventure Park would increase utilization</i>							
<i>Adventure Park net could be higher depending on investment and capitalization</i>							