

**MARKETING PLAN  
FOR THE LISBON ZOO**

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April 2013

## **Acknowledgements**

First of all, I want to use this space to thank my mother for being the woman she is, for inspiring me every day and being my role model. Her unconditional support and love made this project possible.

This thesis would not be possible without the guidance and advice of my supervisor, Professor Susana Marques. Thank you for your availability to supervise my thesis and for all the support and great advice over the past months.

I also want to thank Professor Elizabeth Reis for the availability, sympathy and patience to help me with my questions about the statistical analysis of data.

I want to thank the Lisbon Zoo, where I proudly am a volunteer, especially to Dr.<sup>a</sup> Paula Machado, Dr.<sup>a</sup> Sónia Matias, Tiago Carrilho, Ana Ferreira and Paulo Castro for the support and motivation given to the elaboration of this thesis. I also want to thank all the amazing Zoo's employees and volunteers, without exception, for being an inspiration to me. Your dedication to the Zoo and to its animals is what defined my vision of this thesis.

Thank you André Martins for always being at my side, motivating me and making me smile. Thank you for all the advice you have given me during this thesis and for being the person you are.

I also want to thank all of those not mentioned here, but who contributed in a direct or indirect way to the conclusion of this thesis.

## Index

<b>Chapter 1. Definition of the Problem Context.....</b>	<b>1</b>
<b>Chapter 2. Literature Review .....</b>	<b>2</b>
<b>2.1. Marketing Framework.....</b>	<b>2</b>
2.1.1. Definition .....	2
2.1.2. Evolution of marketing.....	2
2.1.3. Dimensions of marketing .....	3
<b>2.2. Marketing plan .....</b>	<b>3</b>
2.2.1. Definition .....	3
2.2.2. Importance of marketing plan .....	5
2.2.3. Advantages of marketing planning .....	6
<b>2.3. Nonprofit organizations .....</b>	<b>6</b>
<b>2.4. Leisure Sector .....</b>	<b>8</b>
<b>2.5. Zoos.....</b>	<b>10</b>
2.5.1. Definition .....	10
2.5.2. Evolution and challenges .....	10
2.5.3. Benefits of a visit to a zoo in the business context.....	11
2.5.4. Zoos and the internet .....	12
<b>Chapter 3. Conceptual Framework.....</b>	<b>13</b>
<b>Chapter 4. Methodology .....</b>	<b>15</b>
2.1. Data Collection.....	15
2.1.1. Primary Data .....	15
2.1.2. Secondary Data .....	19
2.2. Data Analysis Techniques.....	20
2.2.1. Primary Data .....	20
2.2.2. Secondary Data .....	20
<b>Chapter 5. Data Analysis.....</b>	<b>21</b>
3.1. Primary Data .....	21
3.1.1. Questionnaires .....	21
3.1.2. Interviews .....	42
3.2. Secondary Data .....	44
3.2.1. External Analysis - Market Analysis .....	44

3.2.2. External Analysis - Competition Analysis .....	52
3.2.3. External Analysis - Consumer Behavior Analysis .....	60
3.2.4. Internal Analysis - Organization Analysis .....	62
3.2.5. Internal Analysis - Portfolio Analysis .....	65
3.3. Competitive Analysis .....	65
3.3.1 SWOT Analysis.....	65
3.3.2 Critical Success Factors .....	67
<b>Chapter 6. Implementation Proposals – Marketing plan.....</b>	<b>68</b>
4.1. Strategic Plan.....	68
4.1.1. Segmentation.....	68
4.1.2. Targeting .....	69
4.1.3. Positioning.....	69
4.2 Operational Plan – Marketing Mix.....	71
4.2.1 Product .....	71
4.2.2 Price.....	77
4.2.3 Place .....	78
4.2.4 Promotion .....	80
<b>Chapter 7 – Conclusions .....</b>	<b>98</b>
7.1. Conclusions .....	98
7.2. Project Contribution .....	101
7.3. Project Limitations .....	101
7.4. Suggestions for future research projects .....	102
<b>Bibliography .....</b>	<b>104</b>
<b>Appendices .....</b>	<b>109</b>
Appendix 1 – Questionnaire Structure .....	109
<b>Demographics .....</b>	<b>109</b>
<b>Consumption habits .....</b>	<b>109</b>
<b>Perceptions about the Lisbon Zoo .....</b>	<b>110</b>
Appendix 2 – Questionnaires Analysis .....	113
Appendix 3 – Interviews Structure for the Lisbon Zoo’s employees .....	119
Appendix 4 – Communication Actions Budget .....	120

## Figure Index

Figure 1 Conceptual Framework.....	13
Figure 2 Equation of Sample dimension for a simple random sample .....	17
Figure 3 Brand Positioning Triangle.....	70
Figure 4 Brand Positioning Statement for the Lisbon Zoo and its basis concepts.....	71
Figure 5 Lisbon Zoo Logo .....	73
Figure 6 “Feed the ducks” from Zoo de Lagos .....	76
Figure 7 Example of a Mupi for the “More space for the big ones” campaign .....	84
Figure 8 Example of an ad for the “Come see the real ones” campaign.....	84
Figure 9 Example of an ad for the “A whole new zoo emerging in the city” campaign .....	85
Figure 10 Example of an ad for the “Lisbon Zoo, Wildlife at the City” campaign .....	86
Figure 11 Example of an ad for the “Come see them, without bars” campaign .....	86
Figure 12 Example 1 of an ad for the “Nothing replaces the zoo. Lisbon Zoo, Your Zoo” campaign .....	87
Figure 13 Example 2 of an ad for the “Nothing replaces the zoo. Lisbon Zoo, Your Zoo” campaign .....	87
Figure 14 Example of an ad for the “Education Matters! Here it roars!” campaign.....	88
Figure 15 Example of an ad for the “Come see the Zoo at night, if you dare!” campaign .....	89
Figure 16 Example of an ad for the “Bring the slippers, the camp is set” campaign.....	89
Figure 17 Eg. of a Valentine’s day ad .....	90
Figure 18 Eg. of a Christmas ad .....	90
Figure 19 Example of a new cub campaign ad .....	91
Figure 20 creating a banner ad for Facebook channel .....	93
Figure 21 Examples of Smartphone App: Gaming (game from Zoo’s website) and GPS .....	94
Figure 22 Example of new line of clothing “I Love Lisbon Zoo” .....	95
Figure 23 Examples of sugar packages .....	95
Figure 24 Facebook advertising price .....	120
Figure 25 Moop Price Table 2013 .....	120
Figure 26 Activa Advertising Prices 2012 .....	120
Figure 27 Logiprint prices .....	120

## Table Index

Table 1 Crosstab between Lack of motivation to visit the Lisbon Zoo and Age.....	37
Table 2 Crosstab between Lack of motivation to visit the Lisbon Zoo and Gender.....	37
Table 3 Crosstab between Lack of motivation to visit the Lisbon Zoo and Children.....	37
Table 4 Crosstab between Entertainment and Age .....	38
Table 5 Crosstab between Education and Age.....	39
Table 6 Hypothesis validation.....	39
Table 7 Rotated Component Matrix.....	41
Table 8 Principal Components interpretation.....	41
Table 9 Number of visitors of zoological and botanical gardens and aquariums in Portugal..	47
Table 10 Number of visitors of museums, zoological gardens, botanical gardens and aquariums per geographic location (NUTS – 2001) .....	47
Table 11 Number of visitors of museums, zoological gardens, botanical gardens and aquariums per habitant, by geographic location.....	48
Table 12 Foreigner visitors of zoological gardens, botanical gardens and aquariums .....	49
Table 13 Number of visitors included in school groups of museums, zoological gardens, botanical gardens and aquariums by geographical location.....	49
Table 14 Number of visitors included in school groups of museums, zoological gardens, botanical gardens and aquariums by typology .....	50
Table 15 Number of zoological gardens, botanical gardens and aquariums.....	51
Table 16 Number of goods in zoological gardens, botanical gardens and aquariums .....	51
Table 17 SWOT Matrix for the Lisbon Zoo .....	66
Table 18 Market Segmentation Criteria Variables for the Lisbon Zoo.....	68
Table 19 Ticket Price of the Lisbon Zoo.....	77
Table 20 Communication Messages .....	83
Table 21 Chronograph of the Lisbon Zoo’s Communication actions during 2014 .....	96
Table 22 Distribution of frequencies and percentage for the variable Gender .....	113
Table 23 Distribution of frequencies and percentage for the variable Age .....	113
Table 24 Distribution of frequencies and percentage for the variable Place of residence .....	113
Table 25 Distribution of frequencies and percentage for the variable Occupation.....	114
Table 26 Distribution of frequencies and percentage for the variable Qualifications .....	115
Table 27 Distribution of frequencies and percentage for the variable <i>Do you have children?</i> .....	115

Table 28 Distribution of frequencies and percentage for the variable Number of Children.. 115

Table 29 Distribution of frequencies and percentage for the variable *Have you visited the Lisbon Zoo?*..... 115

Table 30 Distribution of frequencies and percentage for the variable *When was the last time that you have visited the Lisbon Zoo?* ..... 115

Table 31 Distribution of frequencies and percentage for the variable *How often do you visit the Lisbon Zoo?* ..... 116

Table 32 Distribution of frequencies and percentage for the variable *Which week days you prefer to visit the Lisbon Zoo?* ..... 116

Table 33 Distribution of frequencies and percentage for the variable *Which season of the year do you prefer to visit the Lisbon Zoo?*..... 116

Table 34 Distribution of frequencies and percentage for the variable *Do you usually buy souvenirs at the Zoo Shop?* ..... 116

Table 35 Distribution of frequencies and percentage for the variable *How do you classify the Lisbon Zoo in terms of the following variables?*..... 116

Table 36 Distribution of frequencies and percentage for the variable *Why have you never visited the Lisbon Zoo?* ..... 117

Table 37 Distribution of frequencies and percentage for the variable *How do you consider the price of entry?* ..... 117

Table 38 Distribution of frequencies and percentage for the variable *How much do you consider to be adequate for the ticket price?* ..... 117

Table 39 Distribution of frequencies and percentage for the variable *Do you intend to visit the Lisbon Zoo?*..... 117

Table 40 Distribution of frequencies and percentage for the variable *Do you intend to visit it this year?* ..... 117

Table 41 KMO and Bartlett's Test..... 117

Table 42 PCA Total Variance Explained ..... 118

Table 43 Principal Components interpretation..... 118

## Chart Index

Chart 1 – Gender Variable Distribution .....	21
Chart 2 – Age Group Variable Distribution Histogram .....	22
Chart 3 – Place of residence Variable Distribution .....	22
Chart 4 – Qualifications Variable Distribution .....	23
Chart 5 – Children Variable Distribution .....	23
Chart 6 – Number of Children Variable Distribution .....	23
Chart 7 – Ages of Children Variable Distribution Histogram .....	24
Chart 8 – Have you visited the Lisbon Zoo? Variable Distribution .....	24
Chart 9 – When was the last time that you visited the Lisbon Zoo? Variable Distribution	25
Chart 10 – How often do you visit the Lisbon Zoo? Variable Distribution .....	25
Chart 11 – With whom do you usually visit the Lisbon Zoo? Variable Distribution .....	26
Chart 12 – Why do you visit the Lisbon Zoo? Variable Distribution .....	26
Chart 13 – Do you usually plan your visit to the Lisbon Zoo? Variable Distribution .....	27
Chart 14 – Which week days do you prefer to visit the Lisbon Zoo? Variable Distribution .....	27
Chart 15 – Which season do you prefer to visit the Lisbon Zoo? Variable Distribution ...	28
Chart 16 – Do you usually buy souvenirs at the Zoo shop? Variable Distribution .....	28
Chart 17 – Mean profile for the Variable How do you classify the Lisbon Zoo in terms of the following variables? .....	29
Chart 18 – Do you recall any of these advertising campaigns from Lisbon Zoo? Variable Distribution .....	30
Chart 19 – Were you able to observe environmental enrichment practices at your visit(s)? Variable Distribution .....	30
Chart 20 – Do you have knowledge about the following Lisbon Zoo’s educational programs? Variable Distribution .....	31
Chart 21 – Have you ever participated in any of the previous programs? Variable Distribution .....	31
Chart 22 – How would you like to obtain information about the Lisbon Zoo news? Variable Distribution .....	32
Chart 23 – Why have you never visited the Lisbon Zoo? Variable Distribution .....	32
Chart 24 – How do you consider the ticket price (18,00€)? Variable Distribution .....	33
Chart 25 – How much do you consider to be adequate for the ticket price? Variable	



Distribution .....	33
Chart 26 – Do you intend to visit the Lisbon Zoo? Variable Distribution .....	34
Chart 27 – Do you intend to visit it this year? Variable Distribution .....	34
Chart 28 – How would you like to obtain information about the Lisbon Zoo news? Variable Distribution .....	35
Chart 29 – Number of visitors of museums, zoological gardens, botanical gardens and aquariums by typology .....	48
Chart 30 – Occupation Variable Distribution .....	115
Chart 31 – Scree Plot .....	118

## **List of Abbreviations**

AIZA – Associação Ibérica de Zoos e Aquários

ATL – Actividades de Tempos Livres

CAE – Código de Actividade Económica

CSF – Critical Success Factors

DGPC – Direcção Geral do Património Cultural

DGV – Direcção-Geral de Veterinária

EAZA – European Association of Zoos and Aquariums

EEP – European Endangered Species Program

FMI – Fundo Monetário Internacional

GDP – Gross Domestic Product

IMC – Integrated Marketing Communications

INE – Instituto Nacional de Estatística

IVA – Imposto sobre Valor Acrescentado

OCDE – Organização para a Cooperação e Desenvolvimento Económico

PCA – Principal Component Analysis

SPSS – Statistical Package for the Social Sciences

WAZA – World Association of Zoos and Aquariums

## **Abstract**

Lisbon Zoo, “Jardim Zoológico e de Aclimação em Portugal, S.A”, is a Portuguese zoological garden, located at the heart of the Lisbon City. The Lisbon Zoo is a private non-profit institution of public and educative utility. The park first opened the doors to the public in 1884 and it has now one of the finest collections of animals of the world. The main key success factors of the zoo rely on its biodiversity, history, offer in terms of product and service and location. The specialized staff with their profound dedication to the cause of preservation of species and education, make the park a reference of quality and innovation in the sector.

The Lisbon Zoo is facing an extremely competitive market, characterized by the economic crisis and reduction of consumer’s buying power. The zoological market has suffered many changes in the last years in terms on enclosures, educational messages, interaction with animals and technology. The consumer’s habits and demands have also changed.

In this sense, this project thesis proposes a marketing plan for the Lisbon Zoo with an external, internal and competitive analysis and implementation proposal. This implementation proposal consists on the development of the marketing strategy (strategic options: segmentation, targeting and positioning) and operational plan. The operational plan is the set of recommendations in terms of the marketing-mix: product, price, place and promotion. For the promotion it is proposed a communication plan for the year 2014.

**Keywords:** marketing plan, zoological market, non-profit institutions, marketing-mix

**JEL:** M31 – Marketing, L31 – Nonprofit Institutions, L83 – Recreation, Tourism Industry Services

## **Resumo**

O Zoo de Lisboa, "Jardim Zoológico e de Aclimação em Portugal, SA", é um jardim zoológico português, localizado no coração da cidade de Lisboa. O Jardim Zoológico de Lisboa é uma instituição privada sem fins lucrativos de utilidade pública e educativa. O parque abriu pela primeira vez as portas ao público em 1884 e tem hoje uma das melhores colecções de animais do mundo. Os principais factores de sucesso do zoológico estão relacionados com sua biodiversidade, história, oferta em termos de produto e serviço e localização. O staff especializado, com a sua profunda dedicação à causa da preservação das espécies e educação, tornam o Zoo numa referência de qualidade e inovação no sector.

O Jardim Zoológico de Lisboa está a enfrentar um mercado extremamente competitivo, caracterizado pela crise económica e a redução do poder de compra do consumidor. O mercado zoológico tem sofrido muitas mudanças nos últimos anos em termos de instalações dos animais, mensagens educativas, interação com animais e tecnologia. Os hábitos e exigências dos consumidores também se modificaram.

Neste sentido, esta tese propõe um plano de marketing para o Jardim Zoológico de Lisboa, com uma análise externa, interna e competitiva e uma proposta de implementação. Esta proposta de implementação consiste no desenvolvimento da estratégia de marketing (opções estratégicas: segmentação, target e posicionamento) e o plano operacional. O plano operacional é o conjunto de recomendações em termos de marketing-mix: produto, preço, distribuição e comunicação. Para a comunicação é proposto um plano de comunicação para o ano de 2014.

**Palavras-chave:** plano de marketing, mercado zoológico, instituições sem fins lucrativos, marketing-mix

## **Executive Summary**

Esta tese tem como intenção a elaboração de um plano de marketing para o Jardim Zoológico de Lisboa. O Jardim Zoológico de Lisboa é uma instituição privada e sem fins lucrativos, situada em Lisboa. A missão do Jardim Zoológico é desenvolver e promover um parque, tanto zoológico como botânico, como um centro de conservação, reprodução e reintrodução de espécies ameaçadas de extinção no seu habitat natural. Ao mesmo tempo, este é um espaço que combina a componente educacional a um entretenimento dinâmico, tendo muitos espaços e actividades que estão disponíveis para os visitantes.

Os principais factores de sucesso do Zoo de Lisboa estão relacionados com sua biodiversidade, história (sendo o primeiro parque zoológico da Península Ibérica), a oferta em termos de produto e serviço e localização, no coração da cidade. O staff especializado e com a sua profunda dedicação à causa da preservação das espécies e à educação fazem do parque uma referência de qualidade e inovação no sector.

Hoje em dia o marketing é complexo devido à estagnação do mercado, comportamento do consumidor e sofisticação das suas técnicas. O marketing é também mais competitivo. O Jardim Zoológico de Lisboa está a enfrentar um mercado extremamente competitivo, caracterizado pela crise económica e pela redução do poder de compra do consumidor. A economia está em recessão, o que leva a um ambiente de instabilidade que afecta todos os sectores. A percentagem de despesa em lazer, recreação e cultura, no consumo total das famílias em Portugal, tem vindo a diminuir desde 2006.

O mercado zoológico tem sofrido muitas modificações nos últimos anos. Os parques zoológicos costumava ser um espaço apenas para a exposição das espécies e a expectativa dos visitantes era apenas para chegar perto de animais selvagens, que eram exibidos com informações limitadas. Hoje em dia essa realidade mudou. A questão de se aproximar e interagir com os animais tem sido descontinuada. Os zoológicos tendem a mudar as jaulas para instalações maiores, onde o enriquecimento ambiental é valorizado. As instalações também estão a perder as barras para barreiras naturais que encantam não só os animais, mas também os visitantes.

A variável de educação é mais valorizada, com mais informações disponíveis para os visitantes, no parque e também por outros canais, como sites de internet e redes sociais. Os programas educacionais também têm vindo a aumentar, num esforço para oferecer aos

visitantes mais experiências educativas, a fim de ampliar a conscientização sobre as questões ambientais e de preservação das espécies.

Em termos de concorrência, existe bastante oferta em termos de atracções educativas e de entretenimento na cidade de Lisboa. Devido à redução do poder de compra das famílias, mencionado acima, a questão da concorrência é cada vez mais pertinente, uma vez que as famílias tendem a seleccionar menos actividades para fazer fora de casa.

A oferta em termos de parques zoológicos e aquários em Portugal é dispersa em termos de território nacional. Esta oferta é normalmente mais especializada em termos de animais selvagens e tem menos diversidade do que o Jardim Zoológico de Lisboa. Uma análise benchmarking será realizada a fim de estudar as práticas de gestão e comerciais destes parques zoológicos e aquários.

Principais consumidores-alvo considerados do Jardim Zoológico de Lisboa são as famílias, escolas e turistas nacionais e internacionais. Os consumidores estão cada vez mais sensíveis ao preço e exigentes em termos da qualidade da oferta, dos serviços adicionais prestados e em relação às preocupações ambientais e de bem-estar animal.

Considerando estes fatos, é pertinente desenvolver um plano de marketing para o Jardim Zoológico de Lisboa, com uma proposta de implementação que se foca tanto em opções estratégicas (segmentação, segmentação, posicionamento) como também sobre o marketing-mix (produto, preço, praça e as políticas de promoção). O posicionamento do Zoo de Lisboa deve ser percebido como um negócio de *edutainment*. Isto significa que o Zoo alia, e deve continuar a aliar, a educação com entretenimento. O posicionamento também deve ter como base a paixão por animais e deve fazer os visitantes se sintam envolvidos com o Jardim Zoológico. Portanto, a declaração de posicionamento proposta é "Zoo de Lisboa, o seu Zoo".

Este projecto iniciou-se com a definição do contexto do problema e a definição de objectivos primários e específicos do projecto. Esta clara definição é importante para criar uma visão que guiará todo o estudo.

Em seguida, foi realizada uma pesquisa sobre a literatura específica do tema, com o objectivo de entender melhor o mercado zoológico e conceito plano de marketing. Esta parte do projecto é a revisão da literatura, que consiste na revisão de vários livros pertinentes e especializados e artigos científicos sobre os temas acima mencionados. As conclusões da

revisão da literatura permitiram desenvolver uma estrutura conceptual, que resumiu as questões da revisão de literatura que serão analisadas na fase seguinte.

A próxima etapa do projecto é identificar os métodos e técnicas de recolha e análise de dados, para complementar a revisão da literatura e ser a base para a implementação do plano de marketing. A pesquisa inclui a análise de dados primários e secundários. Os principais objectivos desta parte do estudo são compreender os comportamentos e opiniões dos mercados-alvo acerca do Jardim Zoológico de Lisboa e de analisar com maior foco o mercado zoológico nacional, os concorrentes e a organização.

Os dados primários foram recolhidos a partir de questionários aplicados a potenciais consumidores do Jardim Zoológico de Lisboa e de entrevistas semiestruturadas para colaboradores do Zoo de Lisboa, de modo a ter uma perspectiva de dentro da empresa. Os dados secundários recolhidos foram quantitativos e qualitativos, de fontes nacionais e internacionais. A análise dos dados incluiu métodos estatísticos univariados e bivariados de análise de dados e também análise de conteúdo.

Após a análise dos dados (que é a análise externa e interna do plano de marketing) foi possível definir uma proposta de implementação. Esta proposta de implementação consiste na definição de estratégia de marketing (com as opções estratégicas de segmentação, segmentação e posicionamento) e o plano operacional. O plano operacional é a estruturação do marketing-mix, que é subdividido descrição e propostas para: o produto, o preço, praça e promoção. A promoção inclui um plano de comunicação com a definição de acções de comunicação para o ano de 2014, o seu cronograma, orçamento e monitorização e avaliação.

A revisão de literatura, metodologia, análise de dados e propostas de implementação permitiram retirar então um conjunto de conclusões sobre o presente plano de marketing para esta tese projecto de mestrado.

## Chapter 1. Definition of the Problem Context

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Lisbon Zoo is a Portuguese private non-profit institution. The Lisbon Zoo's activity is classified as belonging to the economic activity of Zoological Gardens, Botanical Gardens and Aquariums. The mission of the Lisbon Zoo is to develop and promote a park, both zoological and botanical, as a center for conservation, reproduction and reintroduction into their natural habitat of endangered species. The Lisbon Zoo has a strong educational component, allied to an entertainment factor.

The zoological market has become extremely characterized by innovation, competitiveness and consumer's high expectations. The economic crisis and reduction of consumer's buying power, as well as the development of other substitute offers, pose as challenges for the Lisbon Zoo's management.

In this project, the main objective is to conduct a marketing plan for the Lisbon Zoo with the development of an operational plan. The operational plan has a temporal horizon of one year to implement on the year of 2014.

Based on this main objective, there are a set of defined specific objectives for the creation of this marketing plan. These are:

- Study the market (macro and micro environment);
- Study the competition;
- Understand the consumer behavior;
- Study the company;
- Identify the company's main strengths and weaknesses;
- Identify the market's main opportunities and threats;
- Decide on strategic options;
- Create an efficient marketing operational plan;
- Develop a communication plan for 2014 with specification and budgeting for each action.



## Chapter 2. Literature Review

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### 2.1. Marketing Framework

#### 2.1.1. Definition

Marketing is an extremely important subject in the current competitive environment. According to the American Marketing Association, the official definition of marketing states that “Marketing is the activity, set of institutions, and processes for creating, communicating, delivering, and exchanging offerings that have value for customers, clients, partners, and society at large”. Marketing are the means that an organization has to promote behaviors that lead to goal achievement, in the publics for who the organization has interest (Lindon *et al.*, 2004).

Kotler (1988) states that the marketing concept is based on four pillars: a market focus, customer orientation, coordinated marketing and profitability through customer satisfaction. It is an outside-in perspective, starting with a well-defined market, focusing on the customer needs, coordinating all the activities needed to produce profits through the creation of value and customer satisfaction.

#### 2.1.2. Evolution of marketing

Marketing has always existed in the business world. What has changed is the way people look at it and how the companies use its tools. Most companies, till the end of the nineteenth century, were focused on the production. Sales came only in addition. After World War I, sales became an important concern to most companies. The consumer became the focus, instead of the company itself. It was the beginning of brand management. In the second half of the twentieth century companies realized that marketing is a department which influences the whole company’s success. For a long time marketing was undertaken as only concerning sales. As companies realized that marketing involved more than just the sales department, the marketing functions were extended. Today we have three kinds of marketing functions: marketing studies, strategic marketing and operational marketing (Lindon *et al.*, 2004).

This evolution of the marketing concept and applications can be summarized in five different stages (Lindon *et al.*, 2004). The first is the artisanal stage (nineteenth century and the beginning of the twentieth). In this stage marketing is intuitive, interactive, relational and one-to-one. The second stage is the industrial era (till the 30’s). In this stage marketing is product

focused and its functions are oriented only to sales and promotions management. The third stage is the consumer stage (between the 40's and 50's). In this stage the marketing-mix concept appears. The next stage is the value stage, which occurred in the 70's and 80's. This stage is about differentiation marketing. Marketing evolves from transactional to relational marketing, a kind of personalized and individualized marketing. Finally, the fifth stage is the relational stage. It started in the 90's and it is the relational marketing era. This stage is characterized by technology and globalization.

Nowadays marketing is complex due to the market stagnation, consumer's behaviors and to its techniques' sophistication. Marketing is also more competitive. One of the challenges marketers face is that the marketing management must show profitability, since financial investors demand results.

### 2.1.3. Dimensions of marketing

Lindon *et al.* (2004) state that marketing has four dimensions: a personal attitude and an enterprise culture, a strategy, a set of techniques and means and a practice made of anticipation and reactivity. When the authors say that marketing is a personal attitude and an enterprise culture, they mean that the company's decisions must be based on the knowledge of the market. The marketing strategy dimension defines the following: the marketing objectives, the actual competition, the market targets, positioning and marketing-mix. The marketing techniques appeared in response of the need felt by the companies to know the market and also act on it. Some of the techniques concern the market studies, others are related to the preparation of decision making (like price fixation) or communication, involving publicity, merchandising or promotions.

## **2.2. Marketing plan**

### 2.2.1. Definition

Planning consists in taking a set of decisions in advance in a clear and formalized way. According to Abell and Hammond (1979), planning is becoming strategic in nature, requiring a general management orientation rather than a narrow functional orientation and it is depending more on market analysis. To plan in the enterprise world there are three aspects to take in consideration. They are: the dimension of the company, the kind of decisions and how well the future can be predictable. Planning is more needed when the company is large. When the decisions to take are complex, the planning becomes also more required. When the future

is unpredictable, like in the sectors characterized by constant innovation, planning is not crucial and even can be harmful to the process of adaptation of the company to the market. But when the future is predictable, planning allows the company to be better prepared to face the market (Lindon *et al.*, 2004).

Marketing planning is a systematic process that involves assessing marketing opportunities and resources, establishing marketing objectives and developing a plan for implementation and control. The marketing plan is the written document or a blueprint to implement and control an organization's marketing activities related to a specific marketing strategy. The marketing plan needs to be an informative, logical overview of the work, ideas and recommendations. It contains the analysis, strategy recommendations and marketing operational programs to the implement the plan (Dibb, Skimkin and Bradley, 1996).

According to Lindon *et al.* (2004), marketing plans can be categorized according to its objectives and according to its temporal horizon. There are four types of marketing plans: marketing plan for the company, marketing plan for the product, plan for each component of the marketing-mix and plan for specific operations. The marketing plan for the company is based on general objectives and on the environment analysis. It has a temporal horizon of medium/long term. The marketing plan for the product refers to the set of objectives, actions, budget, calendar amongst other factors needed to the execution of a marketing strategy for a product or activity. The temporal horizon for this kind of plan is short or medium term. The plan to each component of the marketing-mix is a specific plan for specific objectives of the company concerning the marketing-mix. This plan is has a short term temporal horizon. Finally, the plan for specific operations is similar to the plan for each component of the marketing-mix, but this is for a specific aspect of the marketing-mix, like for example a plan for merchandising for a launching campaign of a certain product. The temporal horizon for this kind of plan is also short term basis.

The process of conducting a marketing plan is based on four stages: define the theme of the plan which will define the rest of the work, getting information to support the decisions, the actual marketing plan elaboration and monitoring and control (Ambrósio, 1999). Kotler (1988) states that the marketing plan is one of the most important outputs of the marketing management process. According to this author, most of the marketing plans have the following structure: executive summary (brief overview of the plan), current marketing situation (external and internal data), opportunity and issue analysis (SWOT analysis),

objectives, marketing strategy (to meet the plan's objectives), action programs (operational part of the plan), projected profit-and-loss statement (expected payoff from the plan) and controls (how the plan will be monitored).

In the process of planning, marketing managers must take in consideration several points, defined by Lindon *et al.* (2004). The first is who must plan. Marketing activities' managers must be responsible to elaborate the marketing plan to the activities they manage. When these plans involve complex and important preparatory efforts the company can decide that a specialized organ elaborates it and the approval is made by the director of the activity. Another factor to take in consideration is when to plan. Specific plans for specific operations are done close to the operation itself. So it is not always possible to predict a fixed period of planning. In many companies there are annual plans like: marketing plan for the company, marketing plan for each product and plan for sales force activities. The third factor to consider is how to plan. The main difficulties to the act of planning are the interdependence between plans and also the complexity that characterize some marketing plans. Each plan must be coherent with the other plans. Other consideration marketers must take is what must be the content of the plan. For this, the authors state that the marketing plan has usually four principal parts: objectives, calendar, budget and control. The last point to take in consideration by marketing managers is to whom the marketing plan will be communicated. The plan must show in a clear way to the different marketing responsible what is expected from each one of them, how they will be evaluated and how their objectives and tasks are inserted in the set of the marketing activities of the company.

According to a study made to fifty six business firms located in the Netherlands (Leefleang and Mortanges, 1996), in the business world, two to three months are dedicated to the preparation of the marketing plan in most organizations. Most marketing plans are built around three components: the marketing report, a strategic plan, and an operational plan. The period which is usually covered in marketing reports is about one year, the strategic marketing plan usually has a time horizon of either three years or five years, whereas the operational plan covers a one-year period in many cases.

### 2.2.2. Importance of marketing plan

The marketing plan has a significant importance to organizations because it helps to ensure that resources are used effectively and that the organization is ready to respond to the

unexpected. Marketing planning analyses market trends, customer behaviors, competition and internal capabilities, making the picture of the actual situation of the organization and its environment more clear. Marketing planning develops strategies that target to the most profitable target markets. The marketing plan develops strategies that are based on the organization's real resources and perceived advantages in its markets. The operational programs of the marketing plan help to ensure the implementation of the strategies defined. (Dibb, Skimkin and Bradley, 1996).

### 2.2.3. Advantages of marketing planning

The act of marketing planning in the business context involves several advantages. According to a study made to fifty six business firms located in the Netherlands (Leefleang and Mortanges, 1996), the most important advantages of marketing planning are: that marketing plans are used as a vehicle to communicate what are the desired goals, chosen strategies, and activities of the company; the preparation of marketing plans results in careful considered action and coordination of activities; marketing plans lead to task identification and task allocation; marketing plans result in savings of time and money because the effectiveness of the functioning of the firm is improved and also marketing plans facilitate "control," evaluation, and corrective actions.

In addition, by using marketing plans more knowledge about the relevant decision parameters is acquired and newly hired marketing personnel is more quickly brought up to speed.

## 2.3. Nonprofit organizations

A non-profit organization is defined as "any organization without a financial objective, under private control, which aims to generate a social benefit for a specific sector of society" (Gonzalez *et al.*,2002). The main characteristics of this kind of organizations include: non-financial objectives, mission-driven, multiple customers, and a competitive-cooperative relationship with their competitors.

According to Kotler (1988) the nonprofit organizations are having increasingly more interest in marketing. This happens because these organizations have, like the profit organizations, marketplace problems. The changes in consumer attitudes, the competition, economical issues that led to the diminishing financial resources are some of the reasons why nonprofit organizations turn to the marketing practices as a solution to increase their profitability.

Managers in the nonprofit sector have realized that their missions involve influencing donors to give, volunteers to come forward and staff to be client-friendly, among others. In this sense, marketing and the marketing mindset are crucial for their organizations' success. These managers need to be able to influence all of the different publics whose behaviors determine the organization's profitable success (Andreasen and Kotler, 2003).

Even with the increasingly interest in marketing, non-profit organizations still limit the marketing activities to promotional activities. Not all acknowledge the importance of market research and strategic marketing. This suggests that many non-profit organizations have an organization-centered approach. Shifting from an organization-centered to a customer-centered approach represents a key opportunity for non-profit organizations to increase their competitive advantage and improve their outcomes in terms of the organizational mission. The primary strategy to achieve this aim is to make increased use of formally trained marketing staff.

When talking about the non-profit sector, it is important to define the non-profit consumer. The non-profit consumers can be classified into two groups: end customers (who may include clients, patrons, patients, donors, volunteer workers, advocates, trustees, committee members, local government inspectors, local community) and intermediary customers (who are involved in the process but are not the prime customer group. For example government agencies who refer patients to non-profit organizations). From this aspect, different audiences require different marketing campaigns (Bruce, 1995).

There is a wide range of marketing strategies and tools that non-profit organizations can implement to help accomplish their mission. Such strategies include: the identification of customers who are most interested in supporting their mission (market segmentation), ensuring that the image that is built is attractive to those people (product positioning), the development of communication messages most attractive to those people (advertising) and communicating with them through channels those people regularly use (place).

There is significant potential for improvement of the non-profit organizations' performance through the adoption of a customer-centered, market oriented approach that attempts to understand which service the market requires.

## **2.4. Leisure Sector**

Wildlife attractions, Safari parks and Zoos can be categorized as leisure organizations and are essentially types of service business (Dibb, 1995). The characteristics of this business are: intangibility, heterogeneity, inseparability, perishability and ownership. Services are mostly not tangible, standardization of services is difficult, so the service must be flexible. It is not possible to store services as they are perishable, and the consumers usually do not own them, just visit them. The leisure sector involves a large service component, so role of the people becomes crucially important. The significance of people in the service delivery leads to the question of the marketing mix extended. The authors Booms and Bitner (1981) formulated an extended version of the marketing-mix, which includes not only product, price, promotion and placement as well additional elements of people, process and physical evidence.

A study led by Dibb (1995) to measure the level of marketing activity in the animal attraction sector led to several important findings. Zoos have been giving increasingly emphasis to the role of protection of endangered species due to the changing public opinion. Some even are developing positioning statements that state those aims. The focus given to education, conservation and research does not mean that for most establishments the need to be profitable is not a vital point. To achieve corporate objectives it is important to keep a balance between the commercial and the educational role of the establishments. The marketing function of the zoos from the study can be organized in three ways: marketing is handled by a general manager and administrator or secretary, there is a small group of managers designated to handle marketing activities or there is a formal marketing department. The level of planning activities varies according to different establishments. In general, planning is more formalized when specific staff is designated to the marketing function. The level of marketing research carried out by the establishments also varies from none to continuous research programs implemented. Some of the issues considered on these researches are: customer satisfaction and visiting patterns, awareness of promotional activities, impressions of attraction's image and demographic profiles of visitors. The most common form of research involves conducting ad hoc surveys of visitor satisfaction. There can also be used external marketing researchers, although these are less used due to the high costs associated. In several cases local students have been involved in collecting information because they are seen as a cheap resource offering independent solutions to the marketing research problem.

In terms of customer profile, for most establishments of the study, families provide the core business. Couples without children are also frequent visitors. The teenage group is the type of customers that visit less these establishments. Most visitors live within one and a quarter hours away from the attraction. Other types of customers are corporate clients and educational establishments. In terms of competitor's analysis, the study defines as potential competitors: other animal attractions, theme parks, historical attractions, museums and stately homes. Not all establishments formally monitor other attractions visited by customers.

For many establishments fund-raising is essential for their profitability. Membership schemes and animal sponsorship are a way to raise funds and increase the general involvement and commitment of the public. The communications' target for these schemes is wide, because encouraging a huge range of individuals and organizations to become involved in the schemes helps to maximize their impact. These schemes can also be done in coordination with external organizations, to be more effective, like for example a photographic contest, done in coordination with a school. Many of the attractions also organize periodically special events, like dancing displays, car rallies and special displays. Some are even becoming involved in the wedding reception, banqueting and conference markets.

The use of marketing communication tools is considerable. Several of the establishments employ advertising agencies to manage television and advertising. The most used form of promotion is most likely to be advertising. The importance of good publicity has grown, considering the economic situation. The distribution of brochures at tourist centers, other attractions and local hotels is common.

The factor price is seen as a key to influence on visitor levels. Consumers are considered to be sensitive to price changes. The most common approaches to pricing are based on cost-plus approaches and competitive parity. The physical evidence factor for the establishments plays an important role in the leisure offering. This factor includes physical environment, layout, facilities, use of color, noise levels, amongst others. People, like it has been said above, play a vital role in delivering the service to customers in the leisure sector. It is important to have efficient staff, who demonstrates a positive attitude towards customer service.

In terms of marketing future trends in wildlife attractions there are mainly two concerns: the recession effects and the publics' negative feeling towards animals caging. The recession led to a reduced spending power. Many traditional zoos are responding to the negative feeling



towards caging animals by increasing the size of the enclosures and giving emphasis on conservational aspects. This study confirms the importance of performing formal marketing analysis, planning and control activities in this part of business of the leisure sector.

## **2.5. Zoos**

### **2.5.1. Definition**

Zoo, or zoological garden, is a place where live animals are kept, studied, bred, and exhibited to the public. Traditionally zoos spend their efforts in the satisfaction of the demand from the public who wants to be close to wild animals in a controlled setting. Zoos also provide to the public feelings of travel, specifically to the origins of the species they are viewing and to the conditions of the natural environments which the animals come from. Zoos respond to those public demands within three directives: education, conservation and recreation (Benbow, 1995).

The public still perceive zoos as being predominantly places for recreation (Lever, 1990). For many people zoos and botanic gardens are their only chance to be in contact with living biological diversity (Lewin, 1986). In this sense, zoos have "the potential for changing public attitudes concerning conservation of our natural environment by providing a glimpse, although somewhat distorted, of its wonder, beauty and mystery" (Polakowski, 1987).

### **2.5.2. Evolution and challenges**

In the eighteenth century there was an expansion in the number of zoos, as a result of the industrial era that allowed importation of animals because of the increased ease of travelling. Zoos were a place for recreation of species and the public expectation was only to get close to specimens that were exhibited with limited information. "Past zoos provided far greater access to the animals including trained animal shows, rides on elephants and camels and petting zoos allowing the public to interact freely with the least dangerous species" (Benbow, 1995). Nowadays this issue of getting close and interact with animals has changed for zoos and for visitors. The interaction with animals has been phased out because animals are unpredictable and because of the changing consumer demands. Zoos are tending to move from cages to wider enclosures where the environmental enrichment is prized. This means that there is an effort to provide to the animals that the most possible similarities from their wild life environment in the facilities. Environmental enrichment can be: social, occupational,

physical, sensorial or about food. The facilities are also losing the bars to natural barriers that delight not only the animals but also the visitors. Increased natural flora and complex enclosures make each species behave in more natural ways (Benbow, 1995).

The growing popularity of theme parks throughout the 80's decade became another challenge to the zoos, concerning their role. Zoos are increasingly combining the core activity of exposition of wild and domestic animals with other entertainments to motivate visitors to spend more, visit more often and stay longer (Dibb, 1995).

Nowadays the public, or the consumer, as also changed. The public is more informed and more knowledgeable and demand for more complex and realistic animal exhibits. The public also demands for more information about the animals and their natural environments.

Many zoos have been feeling the effects of the economic recession. In times of economic recession, zoos as being part of the leisure sector are severely affected. Consumers tend to reserve their resource to essential goods, so the number of visitors tends to decline. In these difficult times, the importance of effective marketing has become even more pertinent.

### 2.5.3. Benefits of a visit to a zoo in the business context

According to Kerfoot (2010), a trip to a zoo can have positive results in health care and help professional to think outside the box and come up with new ideas for their work. The author states that "in health care, it is extremely important to be exposed to very different situations that can potentially create very different answers for us; hence the trip to the zoo, to a factory known for quality outcomes, or other venues that will open new vistas in our mind". Heath and Heath (2009), narrate the story of a group at Procter & Gamble who had a problem that they were stuck on and went to the San Diego's Zoo to examine their program of biomimicry, which tries to solve problems by imitating solutions found in nature. With that visit they found eight new ideas they would not have found if they only did brainstorming sessions.

By these affirmations it is clear that a visit to a zoo is not only benefic to a generalist kind of public, or client, which is individuals and families, but it is also benefic to companies in a way that a visit to a zoo can improve their workers efficiency.

#### 2.5.4. Zoos and the internet

Hediger (1969) states that: "every zoo is a mine of information about nature, and this storehouse of knowledge should be made available to all, particularly to school and youth groups; the information should be disseminated through the relevant organizations, by means of organized courses, club activities, staff training schemes, lectures, information sources and so on". Nowadays, zoos have more resources to spread this knowledge, the internet being one of the most influent means. The correct use of the internet has become a crucial tool to communicate with the consumers and to make a deeper connection between them and the brands. It is a tool that can help zoos to aim a broader audience.

The consumer' demands more information delivered in more complex and challenging ways is a factor that leads organizations to adapt and adopt new technologies as a mean to get closer to their clients.

Most zoos do not make full use of the internet as they could, when compared to museums and galleries. Museums have been exploring the possibilities offered by the internet and as a result it has provided new formats for visitors to explore their collections (Taylor and Ryan, 1995). Zoos use the internet as a mean of advertising, but there are much more tools to explore, like educational resources provided, fund raising activities, behind the scenes information and direct interaction with the virtual visitors and consumers.

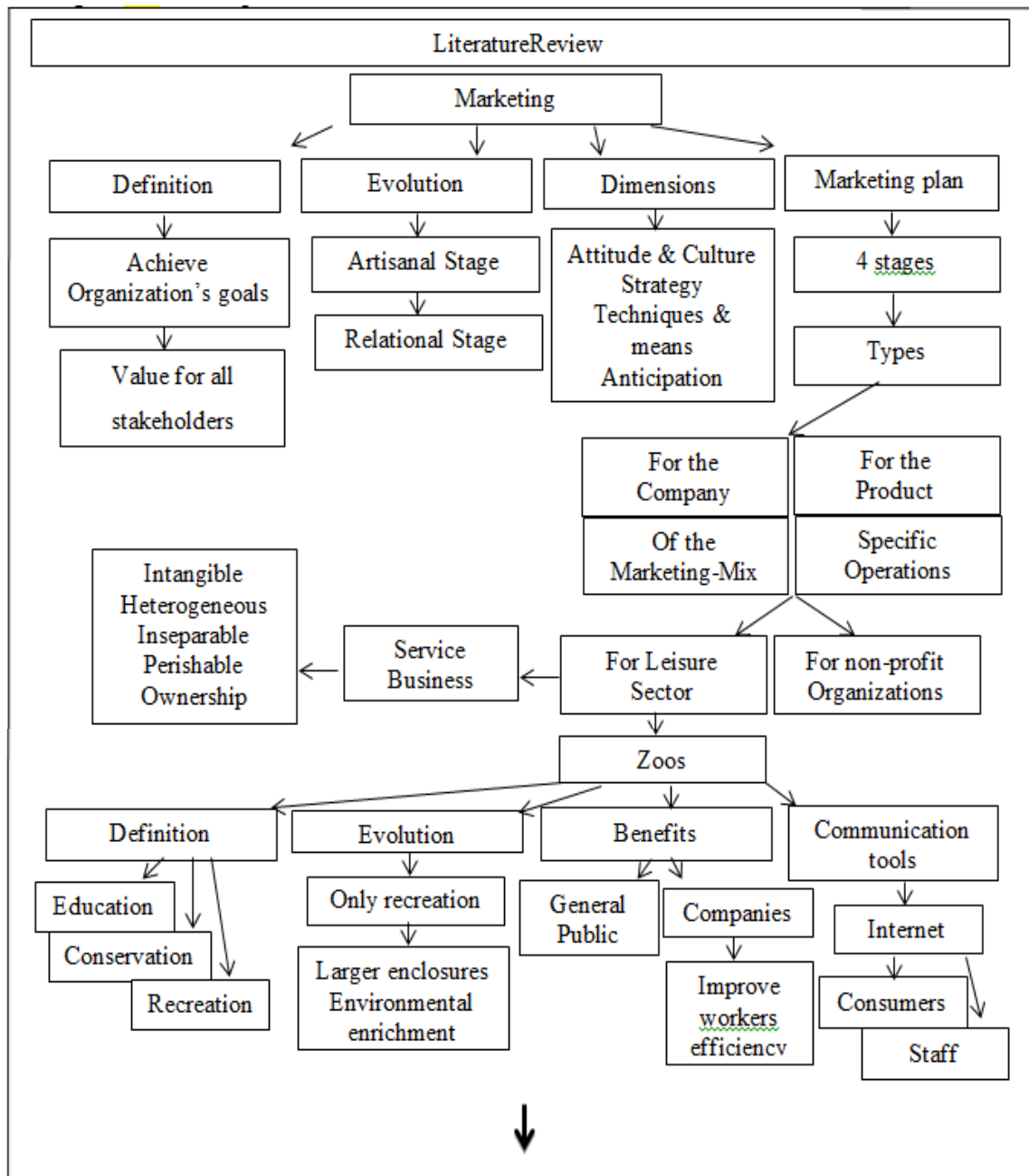
Although the internet cannot offer some of the experiences that many zoo visitors enjoy, zoo sites on the internet are becoming an important part of many zoos (Benbow, 1995). These sites are principally a mechanism to disseminate information, affecting the educational mandates of zoos. The same author states that "the increasing use of the internet by the public for recreation is also likely to affect the demands made on zoos and similar institutions for activities within their traditional boundaries".

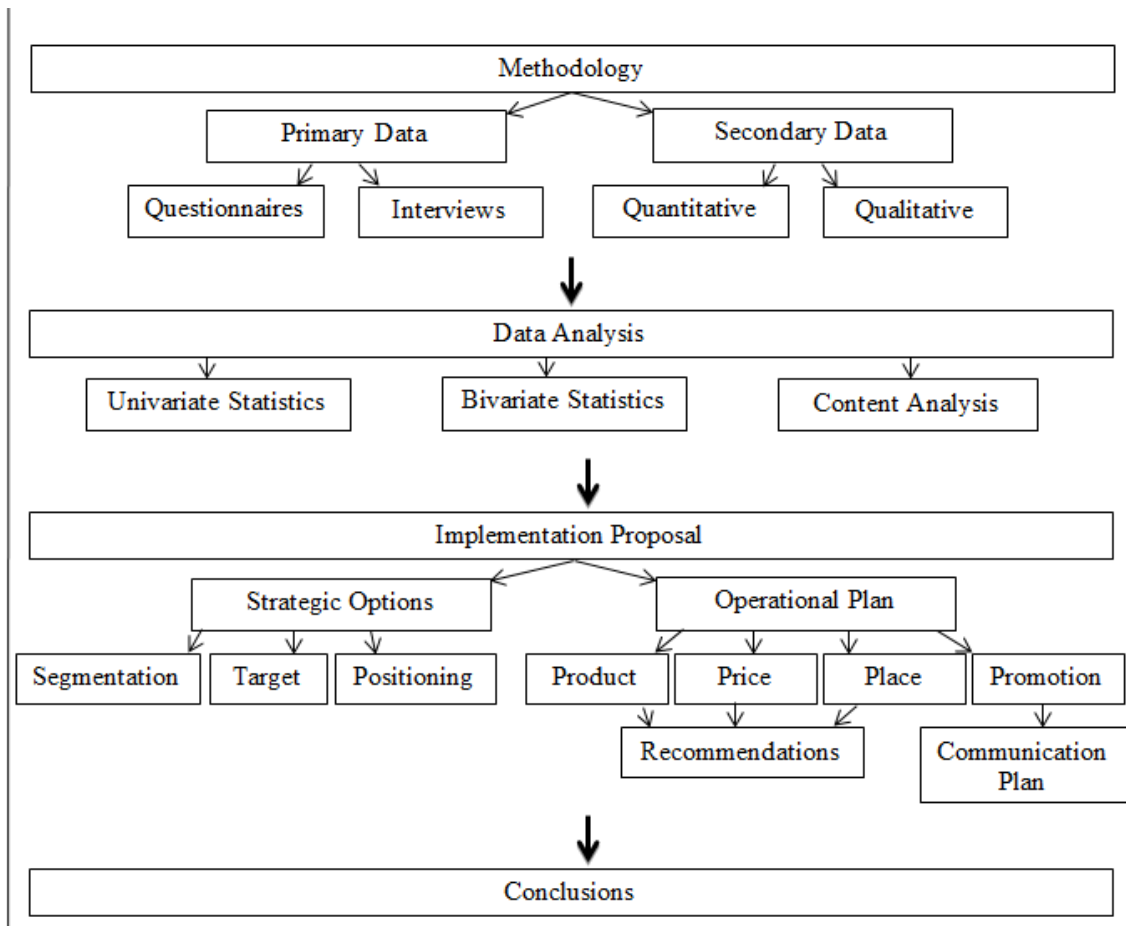
W. G. Conway, a director of the Bronx Zoo, said that "the zoo of the future will tend to be more national, even international, with 'annexes' often located far beyond their city fences" (Livingston, 1974). The internet provides the opportunity to link these annexes in one site, and also to extend the domain of a local zoo not only to other zoos as well to animals in the wild. The role of the internet in the zoos context can also have advantages for zoo staff and managers. The zoos websites can provide a platform for staff to exchange ideas.

Chapter 3. Conceptual Framework

According to the previous literature review, there is a set of questions to take into account when creating a marketing plan for the Lisbon Zoo. In order to synthesize the literature review and offer an idea of the questions that will be developed in the next chapters, it is presented a conceptual framework:

Figure 1 Conceptual Framework





Source: Own Elaboration

To conduct the marketing plan for the Lisbon Zoo there are three steps that must be followed:

- **Contextualization:** external and internal analysis, benchmarking, consumer behavior analysis and competitive analysis.
- **Differentiation:** study how to have an efficient differentiation facing competition, creating value to consumers, study the positioning of the brand and its elements, analyze how to communicate the differentiating factors of the Lisbon Zoo.
- **Execution:** define objectives and strategic options (segmentation, targeting, positioning) and study how to make an effective marketing-mix operational plan.

## Chapter 4. Methodology

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The main objective of this chapter is to describe the methods and techniques of data collection and analysis that assist the implementation of the marketing plan. The conceptual and theoretical approach on chapter two provided important knowledge about the marketing plan and the zoological market. In this part of the thesis there will be conducted a study to complement the previous analysis and to provide basis to the undertaking of decisions done on the implementation proposal.

The main objectives of this study were: to understand the target markets of the Lisbon Zoo, as well as their behavior and opinions about it and to understand with deeper focus the national zoological market, competitors and the organization.

### **2.1. Data Collection**

The data collected can be primary or secondary. The primary data is the one that is collected by the researcher himself. Secondary data involves the gathering and usage of existing data of several sources.

#### **2.1.1. Primary Data**

The primary data used on this project is collected from structured methods, including semi-structured in-depth interviews and a questionnaire survey.

##### **2.1.1.1. Questionnaires**

###### **2.1.1.1.1. Theoretical model and research hypothesis**

The theoretical background, through literature review, allowed to have knowledge about the marketing plan concepts and zoological and non-profit market. It is now pertinent to conduct a study about the Lisbon Zoo next to the consumers. The hypothesis for this study were defined according to the literature reviewed and the research objectives, defined above. These hypothesis will allow or not to validate some assumptions of the study about the Lisbon Zoo's visitors perspectives and habits of consumption. The hypothesis are:

H1: Lack of motivation to visit the Lisbon Zoo depends on age, gender and having children

H1a: Lack of motivation to visit the Lisbon Zoo depends on age

H1b: Lack of motivation to visit the Lisbon Zoo depends on gender

H1c: Lack of motivation to visit the Lisbon Zoo depends on having kids

H2: variables age and entertainment motives of visit are related (not independent)

H3: variables age and educational motives of visit are related (not independent)

#### **2.1.1.1.2. Type of study and measurement scale**

To study the consumer perspective, the type of study performed was a quantitative study, using a questionnaire. The quantitative research through the questionnaire is aimed to a large sample to collect casual facts, opinions, habits and attitudes towards the organization.

The main objectives of the questionnaires are:

- To study the Lisbon Zoo's consumer profiles;
- To understand their consumption habits;
- To study the consumers' perception in terms of the marketing mix components regarding the Lisbon Zoo;
- To understand the Lisbon Zoo's notoriety;
- To study the seasonality.

The present research uses a structured questionnaire survey (Appendix 1) that is divided into three parts: demographics, consumption habits and perceptions about the Lisbon Zoo. The variables of the survey led to the use of nominal and ordinal scales.

The questionnaire survey includes contingency questions (questions that are only answered if the respondent gives a particular response to a previous question. This was used to divide the respondents answers into the ones that have already visited the Lisbon Zoo at least once and the ones who haven't), closed ended questions, yes/no questions, multiple choice, multiple choice questions, scaled questions and open ended questions only for the variables occupation and place of residence and if the respondents answered "others" in the closed ended questions.

#### **2.1.1.1.3. Sample Design of the Study**

##### **Universe**

The target population consists of all the elements from which it is desired to obtain a certain set of information (Reis, E. and Moreira, R., 1993). For this project the universe consist on

both visitors and non-visitors of the Lisbon Zoo, with no limitations of age or place of residence. The only restriction on the target population is for the respondents to have knowledge about the existence of the Lisbon Zoo. In this sense, the universe of study is considered infinite (or very large). Since it is impracticable to study the universe there is necessary to determine a sample.

### Sampling method

The sampling method that was chosen to study the population was the method of non-random sample of convenience. “Convenience sampling is a non-probability sampling technique where subjects are selected because of their convenient accessibility and proximity to the researcher” (Castillo, 2009). The sample was selected by convenience, composed by persons nearby the Lisbon Zoo area who had more availability. This sampling method was chosen due to the time and financial limitations and constrains. The sample is, however, composed by a group of heterogeneous individuals, from several ages, both sexes and several backgrounds in order to have a most comprehensive and representative sample.

### Sample Dimension

To have a reference of the minimum sample dimension, it was considered the formula for a simple random sample with infinite population:

**Figure 2 Equation of Sample dimension for a simple random sample**

$$n = \frac{(Z^{1-\alpha/2})^2 \times S^2}{D^2}$$

Were:

n – calculated sample;

Z – standard normal variable associated with the level of confidence;

D = precision level;

S = standard deviation.

To estimate this sample it was considered a confidence level of 95% and a precision level of 5%. The normal distribution variable is 1,96. This choice of values is done in order to obtain a balance between reliability and precision of the results. It was assumed a pessimistic estimate for the variance with the maximum dispersion ( $p=0,5$ ). Therefore, the equation is:  $(1,962 \times 0,52) / 0,052 = 385$ . So the reference for the sample dimension is 385 individuals. Due to several constrains of the research, including time and financial constraints, it was not possible



to reach the sample dimension of reference. In the end, the number of questionnaires applied is 125. Due to this fact, the results of this research are indicative and not representative for the universe.

#### **2.1.1.1.4. Data collection instruments**

##### **Pre-test**

A pre-test was conducted to test the questionnaires' coherence amongst potential respondents. For this, it was assembled a group of 5 persons, that could be potential respondents. For the group selection it was done an effort for the pre-test group to be heterogenic in terms of age group, gender and socioeconomic and academic backgrounds. The main objectives of the pre-test were for the group to evaluate: the questions' comprehension, questionnaire's dimension, order of questions, questionnaire's general presentation and general reaction from the respondent to the questionnaire. The pre-test was applied on March, 21<sup>st</sup> 2013. Since the feedback was positive and no problems were pointed by the group, it was considered the questionnaires was entitled to be applied on the population selected and used as a tool for collecting information important for this thesis.

##### **Data collection and preliminary treatment of collected data**

The questionnaires were applied during the last week of March, 2013 (between 23<sup>rd</sup> and 30<sup>th</sup> of March) near the area of entry to the Lisbon Zoo. The survey was conducted in person so that the answers are more trustful and significant. All the questionnaires were fulfilled individually by persons who were standing in the area next to the entrance of the Lisbon Zoo, on Praça Marechal Humberto Delgado, in Sete Rios, Lisbon. The number of questionnaires applied was 125, like it is said above.

After the data collection, the preliminary data treatment consisted on constructing a database of the respondents answers and survey variables, using the statistical program SPSS (Statistical Package for the Social Sciences) version 20.

### **2.1.1.2. Interviews**

The research included semi-structured in-depth interviews. The semi-structured interviews are a method that consists on the development of an interview from a script with predefined topics.

These interviews were applied inside the company, to Lisbon Zoo employees, so that the research includes an inside perspective of the marketing practices of the Lisbon Zoo. The interviews done on this project aim to understand:

- Study the critical success factors of the Lisbon Zoo
- Understand the Zoo's main strengths
- Get a perspective of the main types of consumer profiles
- Study seasonality
- Study competition
- Study what areas can be developed inside the Zoo

The interviews were applied during the months of March and April to employees of the Lisbon Zoo from different departments. These were applied in person with a set of predefined equal questions to the respondents.

### **2.1.2. Secondary Data**

The secondary data is important to complement the primary data. The secondary data collected was both quantitative and qualitative and from national and international sources. The main sources of the secondary data were: INE (Instituto Nacional de Estatística), DGCP (Direcção Geral do Património Cultural), national newspapers, organization's website, competitor's websites, Consumer Intelligence Lab. The investigation of Born Free Foundation to Portuguese zoos in 2011 was also analyzed.

The secondary data research was also complemented by the participation in the workshop "*Animadores de Educação Ambiental*" organized by the Lisbon Zoo pedagogical center. This workshop occurred during 10 and 11<sup>th</sup> November, 2012. It had a theoretical and a practical part and provided important information about the Zoo in general and educational practices and programs.

## **2.2. Data Analysis Techniques**

### **2.2.1. Primary Data**

The questionnaire data was analyzed through a statistical program, the SPSS version 20. After introducing the questionnaire database, it is possible to analyze the data and produce the outcome of descriptive statistics and analytical statistics. These outcomes will be studied through univariate and bivariate analysis. These conclusions will help to validate or not a set of hypothesis proposed previously.

The interviews analysis was performed through content analysis. The answers collected were based on the interviewees' own opinion and vision about the Lisbon Zoo's practices and so the analysis is qualitative.

### **2.2.2. Secondary Data**

The analysis of the secondary data was done through content analysis. The data analyzed was quantitative and qualitative. The quantitative data was interpreted through tables and graphics, representing the economic and social indicators of the sector. The qualitative data also helped to undertake conclusions about the company, market, consumers, and competitors.

## Chapter 5. Data Analysis

### 3.1. Primary Data

#### 3.1.1. Questionnaires

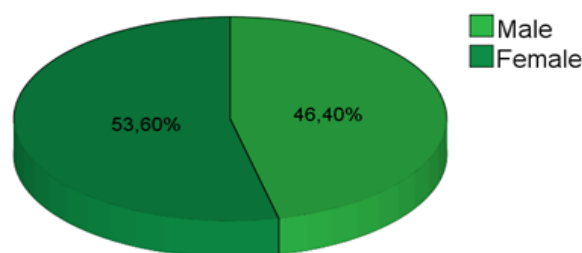
At this part of the chapter it is presented the analysis of the results from the quantitative research, the questionnaires. At first it is presented the descriptive statistical analysis of the questionnaire, divided into 4 parts: sample characterization, consumption habits, perceptions about the Lisbon Zoo and the survey part for the respondents that have never visited the Lisbon Zoo. This is the univariate analysis. On a second stage it is presented the bivariate analysis. At this part it is intended to study the relation between variables, to validate or not the hypothesis presented on the previous chapter. The questionnaire results presented are the outputs from the statistical program SPSS.

##### 3.1.1.1. Univariate Analysis

###### a. Sample characterization

The questionnaire was applied in the area of the entry of the Lisbon Zoo to both male and female individuals of heterogenic demographic and social backgrounds. By the usage of descriptive statistics it is possible to characterize the sample in terms of demographic characteristics. From the 125 answers collected it is possible to conclude that the respondents were 53,6% female and 46,4% male, as it can be seen in chart 1.

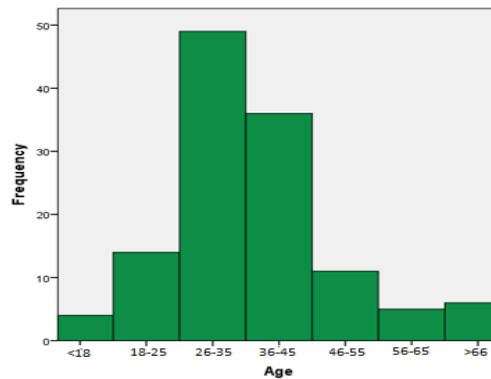
**Chart 1 – Gender Variable Distribution**



**Source:** Own elaboration

The variable age was divided into groups. The sample is characterized mainly by individuals from the age groups of 26 to 45 years old. The most representative age group of the sample is from 26 to 35 years old with 39,2% of the individuals, followed by the group of 36 to 45 years old with 28,8%. The less significant groups of ages were the respondents with more than 66 years old (4,8%), 56 to 65 years old (4%) and less than 18 years old (3,2%).

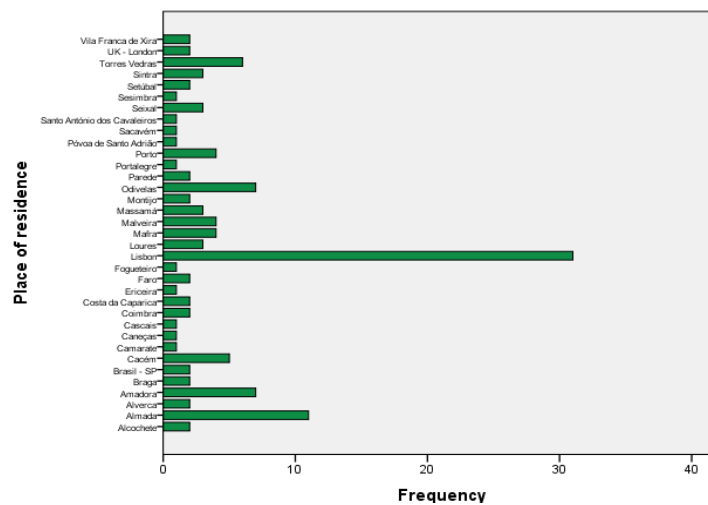
**Chart 2 – Age Group Variable Distribution Histogram**



Source: Own elaboration

The variable place of residence showed that most of the respondents live in Lisbon. These represent 24,8% of the total and 31 answers. A large group of respondents reside in the cities nearby the Lisbon metropolitan area, as it can be seen in the char 3 below. There are also foreigner respondents corresponding 3,2% of the total.

**Chart 3 – Place of residence Variable Distribution**



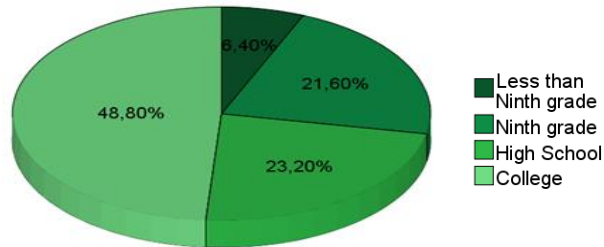
Source: Own elaboration

Regarding the variable occupation it is possible to note that there is a high dispersion of activities. The categories with more answers are students with 12,8% of the total and unemployed individuals with 10,4% of the total. This fact represents the current situation of the country, with the level of unemployment being alarmingly representative. The next categories of occupations with more answers are teachers and shop employees with 7,2%, retired individuals with 6,4% of the total.

Concerning the variable qualifications, almost half of the sample individuals have a college degree, corresponding to 48,8% of the total. The respondents with high school level

correspond to 23,2% of the total, the ones with ninth grade 21,6% and the respondents with less than the ninth grade correspond to 6,4% of the total.

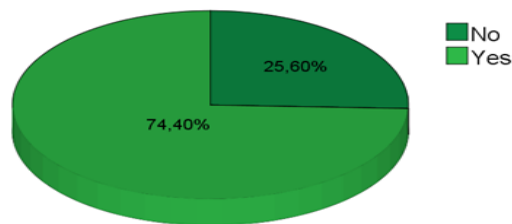
**Chart 4 – Qualifications Variable Distribution**



**Source:** Own elaboration

Concerning the fact that if the respondents have children, 74,4% answered yes. 25,6% of the sample individuals do not have children.

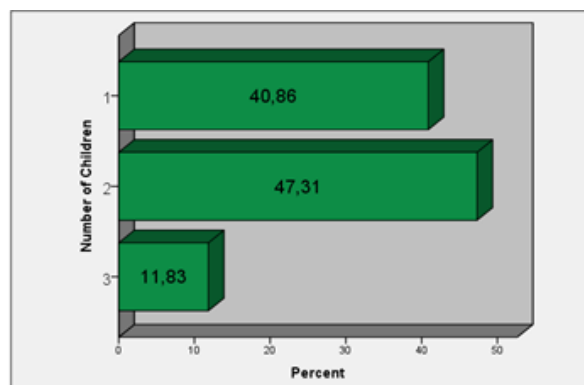
**Chart 5 – Children Variable Distribution**



**Source:** Own elaboration

All of the respondents who have children have between 1 and 3 children. From the respondents that have children, almost half have two children. These correspond to 47,31% of the total. 40,86% of the parents have only one children and only 11,83% have three children.

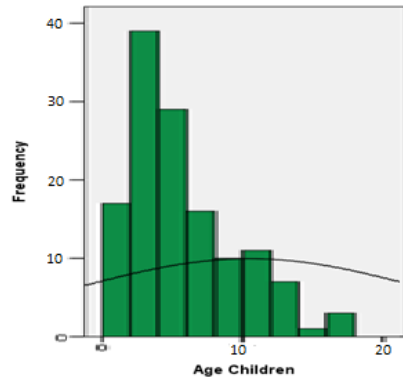
**Chart 6 – Number of Children Variable Distribution**



**Source:** Own elaboration

The mean of the respondents' children is 10 years old. The class of ages with more frequencies is from 0 to 12 years old, and the ages that are more representative are from 2 to 6 years old.

**Chart 7 – Ages of Children Variable Distribution Histogram**



Source: Own elaboration

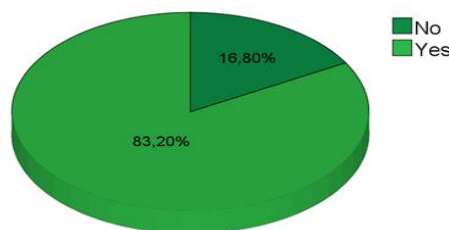
**b. Consumption habits**

This part of the questionnaire analysis concerns the study of the consumption habits and behaviors of the respondents. For this it was made a descriptive analysis of the variables concerning this section.

**Q1. Have you visited the Lisbon Zoo?**

From the 125 respondents, 104 have visited the Lisbon Zoo at least once. This represents 83,2% of the total. 16,8% of the respondents have never visited the Lisbon Zoo.

**Chart 8 – Have you visited the Lisbon Zoo? Variable Distribution**



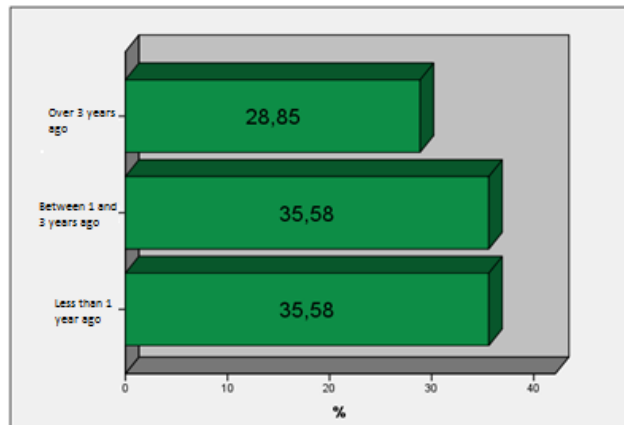
Source: Own elaboration

After this question, there are two different surveys. One for the persons that have already visited the Lisbon Zoo and other for the ones that did not. First, it is presented the analysis of the questions made for the respondents who have visited the Lisbon Zoo.

**Q2. When was the last time that you have visited the Lisbon Zoo?**

From the 104 individuals that have visited the Lisbon Zoo, 35,6% last visited it in less than one year ago. The same percentage visited it between one and three years ago. 28,8% of the sample say that the last time they have visited the Lisbon Zoo was over 3 years ago.

**Chart 9 – When was the last time that you visited the Lisbon Zoo? Variable Distribution**

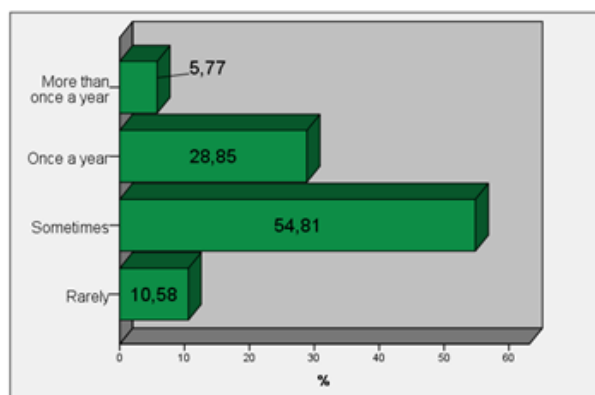


Source: Own elaboration

**Q3. How often do you visit the Lisbon Zoo?**

Most of the respondents say that they visit the Lisbon Zoo sometimes, when they are asked how often do they visit the Lisbon Zoo. This answer correspond to 54,81% of the total. 28,85% of the respondents say that they visit the Lisbon Zoo once a year, while only 5,77% visit it with a frequency of more than once a year. 10,58% of the respondents state that they visit the Lisbon Zoo rarely.

**Chart 10 – How often do you visit the Lisbon Zoo? Variable Distribution**



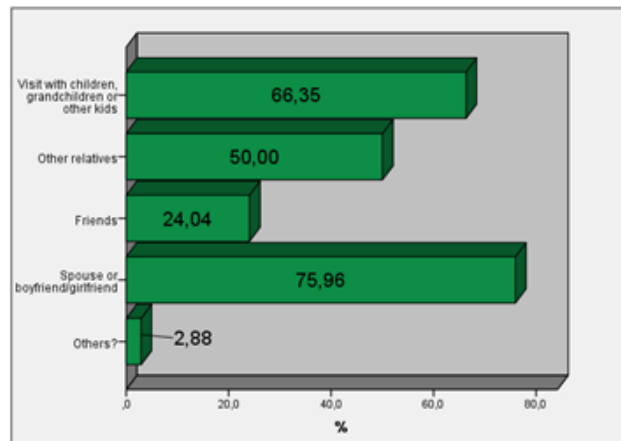
Source: Own elaboration



**Q4. With whom do you usually visit the Lisbon Zoo?**

Concerning the question of with whom the respondent visit the Lisbon Zoo, 75,96% visit the Lisbon Zoo with their spouse or boyfriend/girlfriend and 66,35% say they visit with children, grandchildren or other kids. 24,04% visit with friends. Only 3 individuals answered also with others, two of them said they do it with School visits and one individual answered alone.

**Chart 11 – With whom do you usually visit the Lisbon Zoo? Variable Distribution**

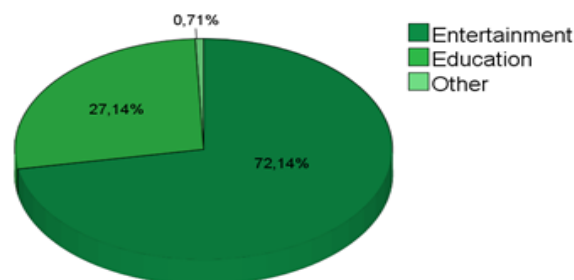


Source: Own elaboration

**Q5. Why do you visit the Lisbon Zoo?**

Concerning the reasons why the respondents visit the Lisbon Zoo, 98,1% said that they visit the zoo for entertainment. Only 1,9% said that they do not visit the Lisbon Zoo for entertainment. 37,5% of the respondents state that they visit the Lisbon Zoo for educational purposes.

**Chart 12 – Why do you visit the Lisbon Zoo? Variable Distribution**



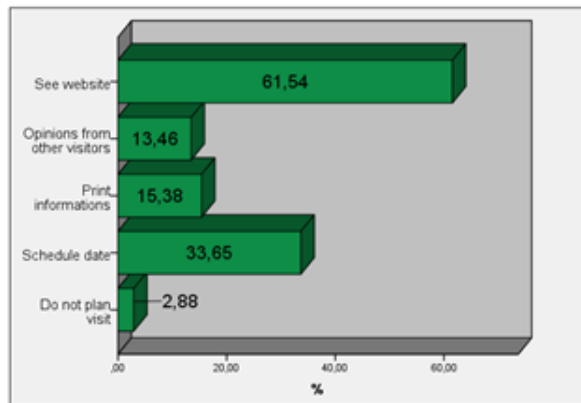
Source: Own elaboration

**Q6. Do you usually plan your visit to the Lisbon Zoo?**

More than half of the respondents see the organization’s website when planning the visit to the Lisbon Zoo. 15,38% of the respondents even print information from the website and

13,46% ask opinions from other visitors. These two variables show that there are a segment of consumer who carefully plan the visit and analyze the information present on the website but probably are not aware that all practical information (map, shows timetables, amongst others) are handed to all visitors at the entry of the Zoo. 33,65% only schedule the date and time of the visit and only 2,88% of the respondents do not plan the visit to the Lisbon Zoo at all.

**Chart 13 – Do you usually plan your visit to the Lisbon Zoo? Variable Distribution**

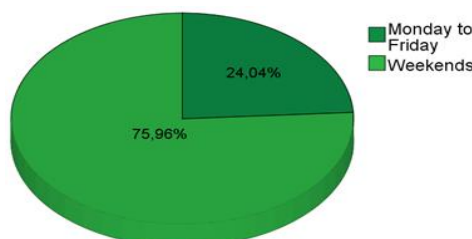


Source: Own elaboration

**Q7. Which week days do you prefer to visit the Lisbon Zoo?**

Most of the respondents prefer the weekends to visit the Lisbon Zoo. The percentage of respondents that prefer weekends is 75,96%. This can be due to work schedules and school schedules, family gatherings are therefore more easily done at weekends, personal preferences, amongst other factors. 24,04% of the respondents prefer to visit the Lisbon Zoo on working days, from Monday to Friday. This can be due to personal preferences, the fact that during the week the park has less visitors therefore is more calm, work schedules, amongst other factors.

**Chart 14 – Which week days do you prefer to visit the Lisbon Zoo? Variable Distribution**

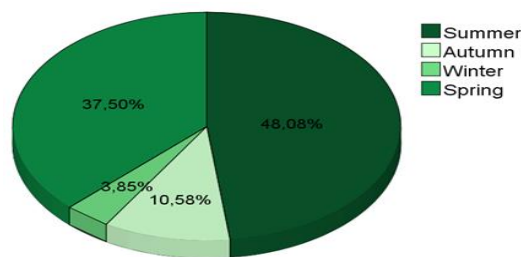


Source: Own elaboration

**Q8. Which season do you prefer to visit the Lisbon Zoo?**

Nearly half of the respondents (48,08%) prefer to visit the Lisbon Zoo in the summer, fact that matches the parks seasonality observed by the researcher. 37,50% of the respondents say they prefer to visit the Lisbon Zoo in the spring. This fact is due to the weather in spring being warm and sunny, which incentives outdoor activities. The fact that the research questionnaire was applied during spring time can also influence the data responses. 10,58% of the respondents prefer to visit the Lisbon Zoo on autumn and only 3,85% prefer to visit it on winter. This can be due to the fact that on these seasons the Lisbon Zoo is calmer, without the summer rush of visitors, amongst other factors.

**Chart 15 – Which season do you prefer to visit the Lisbon Zoo? Variable Distribution**

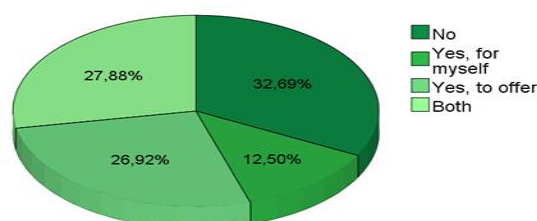


Source: Own elaboration

**Q9. Do you usually buy souvenirs at the Zoo shop?**

Most of the respondents usually buy souvenirs at the Zoo shop. These correspond to 67,31% of the total. 32,69% of the respondents do not buy souvenirs at the Zoo shop. All of the respondents that gave a reason for not buying a souvenir said that it is due to the financial crisis. From the visitors that usually buy a souvenir at the Zoo shop, 12,50% buy souvenirs for themselves, 26,92% buy them to offer and 27,88% buy souvenirs both to offer and for themselves. This data shows the importance of the Zoo’s merchandising. According to the present research, visitors give significant importance to the souvenirs of the visit. These represent a psychological connection the possessor has with the object as a symbol of the good experience and pleasant day spent at the Zoo.

**Chart 16 – Do you usually buy souvenirs at the Zoo shop? Variable Distribution**



Source: Own elaboration

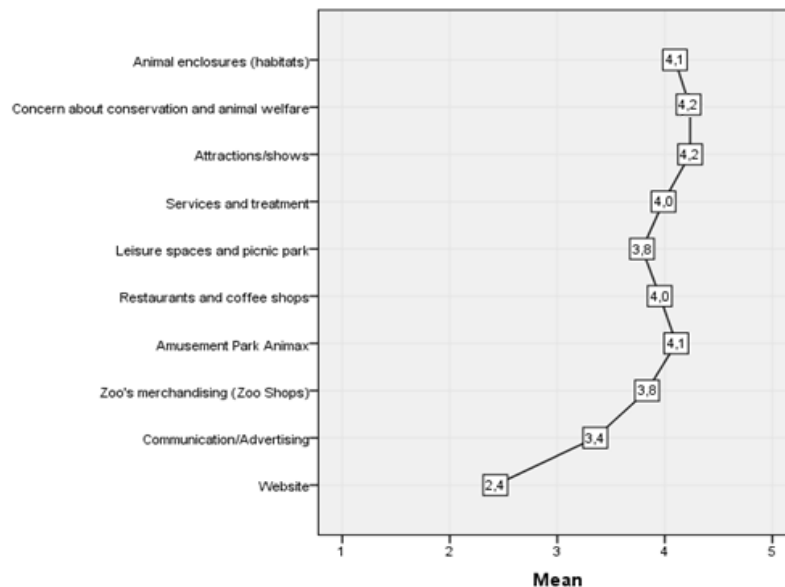
### c. Perceptions about the Lisbon Zoo

#### Q10. How do you classify the Lisbon Zoo in terms of the following variables?

In this question, respondents were asked to classify the Lisbon Zoo in terms of 10 variables. This question has a Likert response scale type, where the response scale goes from 1 (bad) to 5 (excellent) and there is an indifference point.

The chart 17 shows the mean profile for each of the 10 variables in study. The study for this variable is also present on the table 35 of the Appendix 2. The variables that had a better mean classification were: concern about conservation and animal welfare and attractions/shows, both with a mean answer of 4,2, animal enclosures (habitats) with 4,1 and amusement park Animax with 4,1. Next it were the variables services and treatment with a mean of 4,0 and restaurants and coffee shops with also 4,0. The variables with lower mean classifications were: communication/advertising with a mean of 3,4 and the website with 2,4.

**Chart 17 – Mean profile for the Variable *How do you classify the Lisbon Zoo in terms of the following variables?***



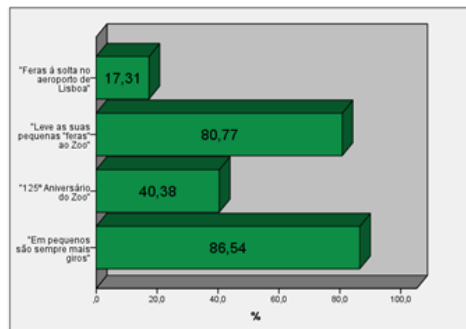
Source: Own elaboration

#### Q11. Do you recall any of these advertising campaigns from Lisbon Zoo? (television spots, billboards or radio spots)

When asked about which advertising campaigns they recall, the respondents state that the ones they most recall are: “*Em pequenos são sempre mais giros*” with 88,54% of the respondents reminding this campaign and “*Leve as suas pequenas “feras” ao Zoo*” with 80,77%. The campaign less remembered is “*Feras à solta no aeroporto de Lisboa*”. This was

a more specific campaign with one location to a more specific audience. This data shows the importance of the advertising campaigns of the Zoo and shows that they are retained by the audiences. These are an important mean to pass a message and communicate with the target markets.

**Chart 18 – Do you recall any of these advertising campaigns from Lisbon Zoo? Variable Distribution**

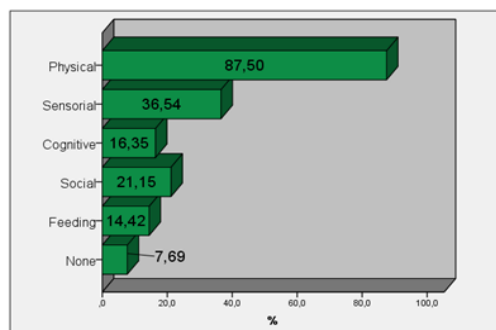


Source: Own elaboration

**Q12. The Lisbon Zoo carries out several environmental enrichment practices (which aim to preserve the natural wild behaviors). Were you able to observe that at your visit(s)?**

The physical environmental enrichment practices are very visible to the respondents. 87,5% of the respondents state they could observe these practices carried out by the Lisbon Zoo, with logs and ropes for the animals to swing, for example. The rest of the environmental enrichment practices were not so visible to the respondents, with 36,54% of the respondents observing sensorial practices, 21,15% social practices and only 16,35% observed cognitive practices and 14,42% feeding practices. However, only 7,69% of the respondents state that they have not observed any of the previous practices, but this fact is due that most of the respondents say they could see the physical practices that are more visible to the public.

**Chart 19 – Were you able to observe environmental enrichment practices at your visit(s)? Variable Distribution**

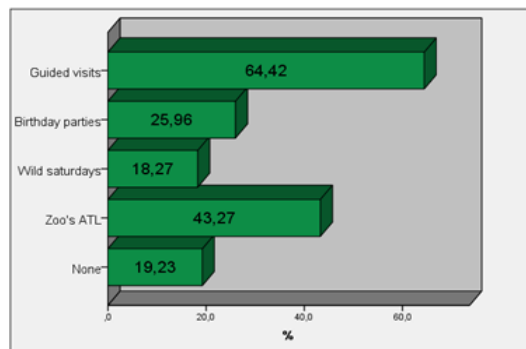


Source: Own elaboration

**Q13. Do you have knowledge about the following Lisbon Zoo’s educational programs?**

When asked if they have knowledge about the Lisbon Zoo’s educational programs, 64,42% of the respondents say they have knowledge about the guided visits, 43,27% have knowledge about the Zoo’s ATL (*Actividades de Tempos Livres* - free time activities programs) and only 18,27% know about the wild Saturdays. 19,23% of the respondents state they do not know any of these educational programs. The educational programs are an important part of the Lisbon Zoo’s offer, or product, since education is one of the vectors of the Lisbon Zoo’s activity. The communication of these programs to the targeted publics should be reinforced by bellow and above the line communication channels.

**Chart 20 – Do you have knowledge about the following Lisbon Zoo’s educational programs? Variable Distribution**

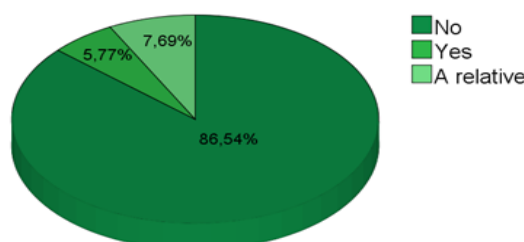


Source: Own elaboration

**Q14. Have you ever participated in any of the previous programs?**

Most of the respondents (86,54%) say they have never participated in any educational program. Only 5,77% say they have already participated in at least one educational program and the 7,69% that say that a relative of them had already participated in an educational program state that the relative that had participated is their child. This data again shows the need to reinforce the communication of these programs to the targeted audiences.

**Chart 21 – Have you ever participated in any of the previous programs? Variable Distribution**

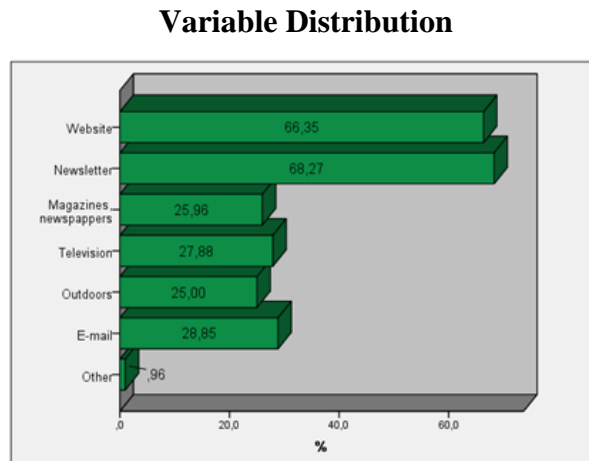


Source: Own elaboration

**Q15. How would you like to obtain information about the Lisbon Zoo news?**

Most of the respondents would like to obtain the Lisbon Zoo news through newsletter (68,27%) and the website (66,35%). The communication channels that are less preferred for the respondents are magazines and newspapers (25,96%) and outdoors (25%).

**Chart 22 – How would you like to obtain information about the Lisbon Zoo news?**



Source: Own elaboration

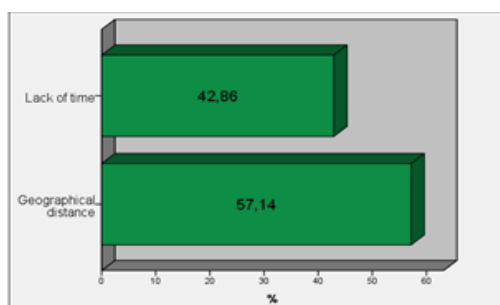
**d. Survey for the respondents that have never visited the Lisbon Zoo**

This part of the analysis is the description of the results from the survey that was applied to the respondents that have never visited the Lisbon Zoo.

**Q2. Why have you never visited the Lisbon Zoo?**

When asked why did they have never visited the Lisbon Zoo, more than half of the respondents (57,14%) pointed geographical distance. 42,86% of the respondents pointed lack of time. None of the respondent pointed lack of interest as a reason for not visiting the Lisbon Zoo, which is a good fact. The challenge is to attract these consumers and make them overcome the reasons for not visiting the park, by giving them better reasons to do so.

**Chart 23 – Why have you never visited the Lisbon Zoo? Variable Distribution**

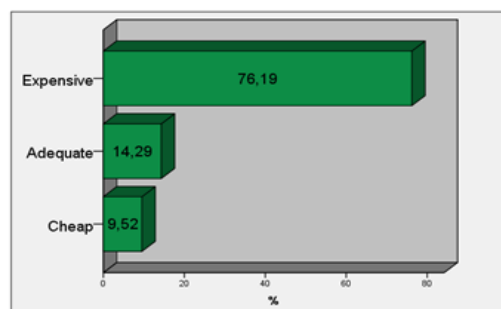


Source: Own elaboration

### Q3. How do you consider the ticket price (18,00€)?

To study the marketing-mix variable price, it was asked to the respondents who had never visited the Lisbon Zoo how they felt about the ticket price. Most of the respondents (76,19%) said they think the price is expensive. 14,29% state they think it is adequate and 9,52% said the price is cheap. This data shows the respondents are very price sensitive and this may influence them in the time of deciding either to visit the Lisbon Zoo or not. This data could show that the demand for the zoological market is elastic, this means that a variance in price has effects on the quantity of the demand.

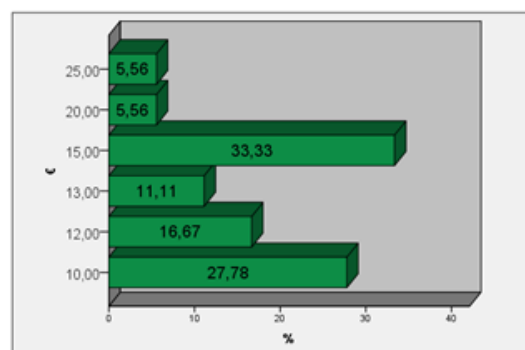
**Chart 24 – How do you consider the ticket price (18,00€)? Variable Distribution**



Source: Own elaboration

For the respondents that answered that the price is “expensive” or “cheap”, it was asked how much do they consider to be adequate for the ticket price. 33,33% of the respondents stated they would consider fair a ticket of 15€ and 27,78% think the adequate price is 10€. 11,12% of the respondents think the price should be higher. They state the adequate price could be 20€ (5,56%) and 25€ (5,56%). The rest of the respondents place the adequate price between 10 and 15€, 16,67% saying the right price would be 12€ and 11,11% said 13€.

**Chart 25 – How much do you consider to be adequate for the ticket price? Variable Distribution**



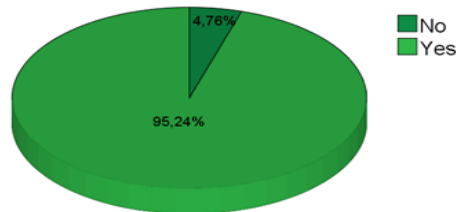
Source: Own elaboration



#### Q4. Do you intend to visit the Lisbon Zoo?

The large majority of the respondents who never visited the Lisbon Zoo state they intend to visit it (95,24%), against 4,76% who say they do not intend to visit the Lisbon Zoo. Again, here the challenge is to turn the intention into action, and this is mainly due to communication and advertising campaigns that aim to attract consumers to visit the Zoo.

**Chart 26 – Do you intend to visit the Lisbon Zoo? Variable Distribution**

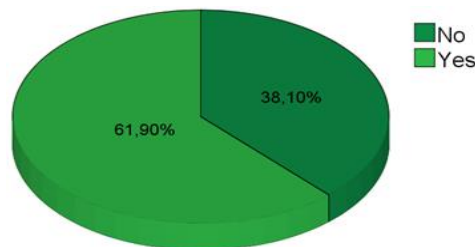


Source: Own elaboration

#### Q5. Do you intend to visit it this year?

When it is asked if the respondents intend to visit the Lisbon Zoo this year, 61,9% say they do intend to visit this year. 38,10% say they do not intend to visit the Lisbon Zoo this year.

**Chart 27 – Do you intend to visit it this year? Variable Distribution**



Source: Own elaboration

#### Q6. How would you like to obtain information about the Lisbon Zoo news?

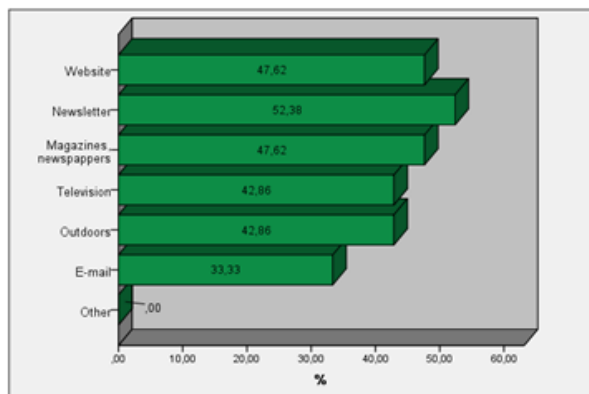
The question of how would the respondents like to obtain information about the Lisbon Zoo news was also applied to the respondents who never visited the Lisbon Zoo. The objective to have this question both for the respondents who have visited the Lisbon Zoo and for the ones who have not it is to study the differences between each audience preferences. These differences could help to determine which communication channels to use to each audience target.

The respondents who have never visited the Lisbon Zoo show a higher dispersion of answers in terms of this variable, like it can be seen in chart 28. 52,38% of the respondents say they want to receive news through newsletter. The rest of the variables have similar distribution. The one less preferred by these respondents is e-mail (33,33%).

The difference of these variables distribution between the respondents who have visited the Lisbon Zoo and the ones who have not is that the visitors who have not visited the Lisbon Zoo give more importance to channels that the Zoo visitors do not, like: magazines, newspapers, television and outdoors. Both of the groups give high importance to the on-line channels, mainly through the website and newsletter.

**Chart 28 – How would you like to obtain information about the Lisbon Zoo news?**

**Variable Distribution**



**Source:** Own elaboration

In summary of the univariate analysis, the sample characterization shows that most of the questionnaire respondents are female, with ages between 26 to 35 years old, in their active professional life, living in Lisbon or at the suburbs, have a college degree and are young parents, with children between 2 and 6 years old (normally 2 children).

Most of the respondents have already visited the Lisbon Zoo at least once, and they have visited last time less than 3 years ago. Most of the visitors state they visit the Lisbon Zoo sometimes and some say they visit it once a year. Most of the respondents visit the Lisbon Zoo accompanied by their spouse or boyfriend/girlfriend and children, grandchildren or other kids, and they visit the Zoo mainly for entertainment. When planning the visit, most of the respondents see general information on the website. Concerning the preferred date to visit the Lisbon Zoo, most respondents prefer to visit the park during the weekends and during summer and also spring. Most respondents usually buy souvenirs at the Zoo shops, for themselves, to offer or even both.

Concerning the perceptions about the Lisbon Zoo, the visitors give higher classification to the Zoo's attractions/shows and concern about conservation and animal welfare. The visitors most recall the "*Em pequenos são sempre mais giros*" and "*Leve as suas pequenas "feras" ao Zoo*" advertising campaigns. At their visits, the respondents could observe better the physical environmental enrichment practices. The respondents have general knowledge about the Lisbon Zoo's educational programs, mainly about the guided visits and Zoo's ATL, but most of them have never participated in any program. Most of the visitors would like to obtain information about the Zoo's news by newsletter or through the Zoo's website.

The respondents who have never visited the Lisbon Zoo point the geographical distance as major impediment to the visit. Most of the respondents consider the ticket price expensive and think the adequate price should be around 15€. Most of the respondents who never visited the Lisbon Zoo have intention to visit it, but most do not have intention to visit it this year. These respondents would like to receive the Zoo's news through several communication channels, being the most preferred the newsletter.

### **3.1.1.2. Bivariate Analysis**

To test the hypothesis mentioned previously at the methodology chapter, there was conducted a statistical bivariate analysis (methods of analysis of two variables). These analysis are:

#### **3.1.1.2.1. Crosstabs of variables Why have you never visited the Lisbon Zoo and Age, Gender and Have Children**

The Crosstabs are a statistical procedure that cross-tabulates two variables and displays their relationship in a tabular form. Crosstabs generates information about bivariate relationships.

This part of the study is to validate or not the following hypothesis:

H0: There is no relation between the lack of motivation to visit the Lisbon Zoo and the variables age, gender and having children

H1: Lack of motivation to visit the Lisbon Zoo depends on age, gender and having children

H1a: Lack of motivation to visit the Lisbon Zoo depends on age

H1b: Lack of motivation to visit the Lisbon Zoo depends on gender

H1c: Lack of motivation to visit the Lisbon Zoo depends on having kids

The age groups that mainly point as reason for having never visited the Lisbon Zoo geographical distance are: less than 18 years old and over 46 years old. The age group between 26 to 35 years old point as main reason for having never visited the Lisbon Zoo the lack of time. for the age group 36 to 45 years old, both reasons are pointed out. In general, the geographical distance has 57,1% of the answers and lack of time 42,9%.

**Table 1 Crosstab between Lack of motivation to visit the Lisbon Zoo and Age**

			Age						Total
			<18	26-35	36-45	46-55	56-65	>=66	
Why have you never visited the Lisbon Zoo	Geographical distance	Count	1	3	2	2	2	2	12
		% within Age	100,0%	33,3%	50,0%	66,7%	100,0%	100,0%	57,1%
Lack of time	Lack of time	Count	0	6	2	1	0	0	9
		% within Age	0,0%	66,7%	50,0%	33,3%	0,0%	0,0%	42,9%
Total		Count	1	9	4	3	2	2	21
		% within Age	100,0%	100,0%	100,0%	100,0%	100,0%	100,0%	100,0%

Source: Own Elaboration

Male respondents give the same importance to both geographical distance and lack of time as reasons for never having visited the Lisbon Zoo. Women point out more often the geographical distance (63,6%) as main impediment for the visit.

**Table 2 Crosstab between Lack of motivation to visit the Lisbon Zoo and Gender**

			Gender		Total
			Male	Female	
Why have you never visited the Lisbon Zoo	Geographical distance	Count	5	7	12
		% within Gender	50,0%	63,6%	57,1%
Lack of time	Lack of time	Count	5	4	9
		% within Gender	50,0%	36,4%	42,9%
Total		Count	10	11	21
		% within Gender	100,0%	100,0%	100,0%

Source: Own Elaboration

Concerning the relation between the variables reasons for having not visited the Lisbon Zoo and having children, it is possible to see that who does not have children and never visited the Lisbon Zoo give exactly the same importance to both reasons: geographical distance and lack of time. For the persons that have children there is slight difference, the geographical distance reason has 57,9% and lack of time registers 42,1%.

**Table 3 Crosstab between Lack of motivation to visit the Lisbon Zoo and Children**

			Children		Total
			No	Yes	
Why have you never visited the Lisbon Zoo	Geographical distance	Count	1	11	12
		% within Children	50,0%	57,9%	57,1%
Lack of time	Lack of time	Count	1	8	9
		% within Children	50,0%	42,1%	42,9%
Total		Count	2	19	21
		% within Children	100,0%	100,0%	100,0%

Source: Own Elaboration

With the information available it is possible to say that the hypothesis H1 is correct (do not reject H1). The lack of motivation to visit the Lisbon Zoo depends on age, gender and having children

**3.1.1.2.2. Crosstabs of variables Age and motives of visit**

This analysis intends to study the relation between the variable age and the motives that lead the visitors to go to the Zoo. For this, there are two hypothesis to test, one for the relation between age and entertainment motives for the visit and other for the relation between age and educational motives for the visit.

**a. Relation between variables age and entertainment motives**

Hypothesis:

H2: variables age and entertainment motives of visit are related (not independent)

H0: variables age and entertainment motives of visit are independent

Through the crosstabs analysis it is possible to see that the respondents who do not go to the Lisbon Zoo for entertainment motives belong to the age classes of 26 to 35 years old and 46 to 55 years old. The visitors that most state that they go to the Lisbon Zoo for entertainment purposes are aged mainly between 36 to 45 years old.

**Table 4 Crosstab between Entertainment and Age**

		Age							Total
		<18	18-25	26-35	36-45	46-55	56-65	>=66	
Entertainment	Count	0	0	1	0	1	0	0	2
	% within Entert.	0,0%	0,0%	50,0%	0,0%	50,0%	0,0%	0,0%	100,0%
	% within Age	0,0%	0,0%	2,5%	0,0%	12,5%	0,0%	0,0%	1,9%
	% of Total	0,0%	0,0%	1,0%	0,0%	1,0%	0,0%	0,0%	1,9%
	Count	3	14	39	32	7	3	4	102
	% within Entert.	2,9%	13,7%	38,2%	31,4%	6,9%	2,9%	3,9%	100,0%
	% within Age	100,0%	100,0%	97,5%	100,0%	87,5%	100,0%	100,0%	98,1%
% of Total	2,9%	13,5%	37,5%	30,8%	6,7%	2,9%	3,8%	98,1%	
Total	Count	3	14	40	32	8	3	4	104
	% within Entert.	2,9%	13,5%	38,5%	30,8%	7,7%	2,9%	3,8%	100,0%
	% within Age	100,0%	100,0%	100,0%	100,0%	100,0%	100,0%	100,0%	100,0%
	% of Total	2,9%	13,5%	38,5%	30,8%	7,7%	2,9%	3,8%	100,0%

Source: Own Elaboration

It is possible to say, with the available information, that there is a relation between the variables age and entertainment motives of visit to the Lisbon Zoo (do not reject H2).

**b. Relation between variables age and educational motives**

Hypothesis:

H3: variables age and educational motives of visit are related (not independent)

H0: variables age and educational motives of visit are independent

The visitors that state that they got to the Lisbon Zoo for educational motives are mainly aged between 26 and 45 years old. These age groups are also the majority of the ones who say that they do not go visit the Lisbon Zoo for educational motives.

**Table 5 Crosstab between Education and Age**

		Age							Total
		<18	18-25	26-35	36-45	46-55	56-65	>=66	
Education	Count	1	9	25	18	6	2	4	65
	% within Education	1,5%	13,8%	38,5%	27,7%	9,2%	3,1%	6,2%	100,0%
	% within Age	33,3%	64,3%	62,5%	56,2%	75,0%	66,7%	100,0%	62,5%
	% of Total	1,0%	8,7%	24,0%	17,3%	5,8%	1,9%	3,8%	62,5%
	Count	2	5	15	14	2	1	0	39
	% within Education	5,1%	12,8%	38,5%	35,9%	5,1%	2,6%	0,0%	100,0%
Yes	% within Age	66,7%	35,7%	37,5%	43,8%	25,0%	33,3%	0,0%	37,5%
	% of Total	1,9%	4,8%	14,4%	13,5%	1,9%	1,0%	0,0%	37,5%
	Count	3	14	40	32	8	3	4	104
Total	% within Education	2,9%	13,5%	38,5%	30,8%	7,7%	2,9%	3,8%	100,0%
	% within Age	100,0%	100,0%	100,0%	100,0%	100,0%	100,0%	100,0%	100,0%
	% of Total	2,9%	13,5%	38,5%	30,8%	7,7%	2,9%	3,8%	100,0%

Source: Own Elaboration

It is not possible to say, with the available information, that there is a relation between the variables age and educational motives of visit to the Lisbon Zoo.

**3.1.1.2.3. Conclusions**

The next table summarizes the validation of the previous hypothesis studied in this research:

**Table 6 Hypothesis validation**

Hypothesis	Validation
H1: Lack of motivation to visit the Lisbon Zoo depends on age, gender and having children	Validated
H2: variables age and entertainment motives of visit are related (not independent)	Validated
H3: variables age and educational motives of visit are related (not independent)	Not validated

Source: Own Elaboration

### 3.1.1.2.3. Principal Component Analysis

To simplify the information about the visitors' opinions about several variables of the Lisbon Zoo it is possible to do an analysis that reduces the dimensionality of the original variables without losing too much information. This is the Principal Components Analysis (PCA). The PCA is a technique for exploratory analysis of multivariate data that transforms a set of correlated variables into a smaller set of independent variables. To apply the PCA, some conditions must be fulfilled:

- KMO Test:

$$KMO = 0,781 > 0,5$$

- The number of observations is at least 5 times bigger than the number of variables

$$\text{Observations} = 125$$

$$\text{Variables} = 10 \quad 10 * 5 = 50$$

- All variables measure the same
- There are correlation between variables

$$\text{Bartlett's Test sig} = 0,000 < 0,05$$

Since all the conditions are fulfilled, it is possible to proceed with the analysis. To determine how many components to retain it was two analysis. First it was used the Kaiser criteria. This criteria states that the number of components to retain is determined by the ones that have an eigenvalue greater than 1. The number of components to retain is 3, since the third component has an eigenvalue equal to 1. But the retention of three components only explains 59,784 of the variance. This leads to the next analysis, the content interpretation analysis. From this it was decided to retain 4 components. The 4 component has an eigenvalue very close to one and in general all variables are better explained with the retention of 4 components. With the retention of 4 components it is possible to explain 69,135 of the variance. This could also be sustained by looking at the scree plot (chart 31, Appendix 2).

To interpret the 4 components it is presented the rotated component matrix, by the VARIMAX rotation method.

**Table 7 Rotated Component Matrix**

	Component			
	1	2	3	4
Animal enclosures (habitats)	,797	,225	-,224	,104
Concern about conservation and animal welfare	,709	,473	-,033	,045
Restaurants and coffee shops	,267	,774	-,045	,047
Amusement Park Animax	,044	,761	,087	,131
Services and treatment	,395	,583	,216	,216
Website	-,192	,055	,814	-,043
Communication/Advertising	,546	-,007	,676	,046
Attractions/shows	,120	,117	-,125	,870
Zoo's merchandising (Zoo Shops)	,554	,091	,230	,567
Leisure spaces and picnic park	-,105	,273	,502	,525

Extraction Method: PCA. Rotation Method: Varimax with Kaiser Normalization.

Source: Own Elaboration

So the interpretation of the components is presented on the following table:

**Table 8 Principal Components interpretation**

	Variables	Name of the Principal Component
<b>PC1</b>	Animal enclosures (habitats) Concern about conservation and animal welfare	Animals and conservation aspects
<b>PC2</b>	Restaurants and coffee shops Amusement Park Animax Services and treatment	Services
<b>PC3</b>	Website Communication/Advertising	Communication
<b>PC4</b>	Attractions/shows Zoo's merchandising (Zoo Shops) Leisure spaces and picnic park	Attractions and leisure aspects

Source: Own Elaboration

With this PCA analysis it is possible to simplify the 10 variables used to evaluate the visitors' opinions and evaluations about the Lisbon Zoo into 4 categories: animals and conservation aspects, services, communication and attractions and leisure aspects. This reduction of variables it is done without losing to much information. To the Lisbon Zoo's marketing department this is useful to do satisfaction surveys to apply to the visitors in order to understand their opinion about the Zoo, and this can be done in terms of only this 4 variables. This is better for the visitors that only have to answer to 4 questions instead of 10 and this also simplifies the data analysis. This process of consumer satisfaction evaluation should be



done on the consumer service department to understand the consumer's perspective of the Zoo's practices and activity and also the consumer's evaluation of the same.

### **3.1.2. Interviews**

The interviews applied at Lisbon Zoo employees (Appendix 3) allowed to obtain a set of conclusions about: the zoo's main critical success factors, strengths and opportunities, types of consumer profiles, seasonality and competition. Concerning the question about the Lisbon Zoo's critical success and differentiator factors, the main answers were:

- Lisbon Zoo's history (the fact that is the oldest zoological park of the Iberian Peninsula and that it is present on classic Portuguese movies);
- Animal collection (one of the biggest of the world);
- Being member of EAZA (European Association of Zoos and Aquariums), AIZA (*Associação Ibérica de Zoos e Aquários*) and WAZA (World Association of Zoos and Aquariums);
- Having large animals, like elephants;
- The fact that the Lisbon Zoo coordinates conservational projects.

The main Lisbon Zoo's consumer profiles pointed by the respondents were:

- Families,
- Schools,
- International tourists during the summer.

When asked about the weight that schools have on the total visitors, it was pointed that school visits are an important part of the Lisbon Zoo's business. The educational center registers around 700.000 students per years. And there are a lot more school that do not register on the Zoo's educational center.

Concerning the question about competitors, the respondents say that the Lisbon Zoo has an unique offer proposition and a central location that makes the same a non-substitute "product" to other attractions (in the city or in other locations of the country). It was referred, as an example, that a visit to the Lisbon Zoo does not exclude a visit to the Lisbon's Oceanarium and vice versa.

The respondents were asked about their opinion of the seasonality factor as a conditioning to the Lisbon Zoo's activity. The answers confirmed that seasonality affects the Zoo's activity, mainly concerning schools. These usually visit at the end of the school period and are planned according to the professor's schedule. It was pointed that there is a more important factor that conditions the Zoo's activity when compared to seasonality: the weather. If there is a beautiful day, the Lisbon Zoo receives many visitors and guided visits, but if in the next day the weather is rough, the visitors decrease drastically. This fact has to do with the Portuguese culture of only doing outdoor activities when the weather is favorable. When looking at other culture realities, this fact does not have the same importance, like it happens in the United Kingdom.

When asked what areas could be improved, it was pointed that the educational area is an area that has to be in constant change and adaptation. And this is what happens at the Lisbon Zoo, the educational programs are in constant adaptation, trying to always improve and adapt to new realities and audiences. There are other areas that are changing and improving, for instance the Lisbon Zoo's flora information is now being more exposed to the public, because there are new signalizations being placed. The Zoo's extremely rich flora has been, until here, given less attention than the fauna and the Zoo is trying to attract the visitors attention to this natural patrimony of the Zoo. Other area in constant change is the EAZA campaigns spaces.

In conclusion, the critical success factors and differentiator factors are mainly linked to the Zoo's history, animal collection and conservation of species concern. The consumer profiles are divided into three categories, with predominance for families and schools. This fact is consonant with the segmentation and target defined later on this project thesis. The school visits are a segment of consumers that are an important part of the Zoo's revenue and must be taken into count when conducting the operational marketing-mix. The competitors do not represent a threat to the Lisbon Zoo, since it offers a unique selling proposition, but this is important to study in terms of benchmarking. The Lisbon Zoo's activity is conditioned by seasonality but more importantly by the weather. This is an important factor that makes the visits increase or drop in significant values. The education is an important variable of the Zoo's activity and it has to be in constant change and adaptation to new cultural realities, technology and changing in the audience's behaviors.

## **3.2. Secondary Data**

This analysis is both external and internal. The external analysis focus on the market, competition and consumer behavior. The internal analysis focus on the organization and its portfolio.

### **3.2.1. External Analysis - Market Analysis**

#### **3.2.1.1. Macro environment - P.E.S.T. Analysis**

- **Political/Legal Environment**

In a general political environment Portugal, officially Portuguese Republic, is a developed country that belongs to the European Union, is a founding member of the OCDE (*Organização para a Cooperação e Desenvolvimento Económico*) and of the euro zone.

In terms of legislation of the zoological gardens, the process of licensing in Portugal began in 1999. This was done by following an European Directive (1999/22/CE). From this directive it was established the Decree-Law number 59/2003 of April 01, transposed by the General Direction of Veterinary (DGV, *Direcção-Geral de Veterinária*). DGV is the organization that regulates this area. Since 2005 the zoological gardens in most of the country members of the European Union are obligated to follow the minimum requirements of the European Directive 1999/22. By a process of licensing and inspection these are also obligated to implement a set of measures to ensure the conservation of species, education of the public and maintain their animals in conditions that are adequate to the needs of each species.

The Zoological Garden is classified according to the Economic Activity Code (*CAE – Código de Actividade Económica*) into the class 91041 – Activities of Zoological Gardens, Botanical Gardens and Aquariums.

- **Economic Environment**

Portugal is living an economic crisis. The economy is in recession which leads to an environment of instability that affects all sectors. In 2012 the Portuguese economy registered the second largest recession since there is register, with the GDP (Gross Domestic Product) falling 3,2%. Imposed by European Union and FMI (*Fundo Monetário Internacional*), Portugal is taking severe measures to compensate the macro economic imbalances. These

measures include the increase of taxes and cutting on benefits and subsidies which has reduced the disposable income of the families. The decrease of the GDP in 2012 was explained also by the reduction of exportation of goods and services, as well as the contraction of consumption.

The unemployment rate in Portugal was 16,9% on the last quarter of 2012. The mean was of 15,5%. At the end of the same year there were more than 923 thousand unemployed persons in Portugal. This represents an increase of 152.000 people without a job. Portugal is the third country with a largest unemployment rate of the OCDE, only behind Spain and Greece. The inflation rate of 2012 in Portugal was registered at 2,8%, registering a lower number than in the previous year, following the tendency of the countries of the OCDE. The minimum wage in Portugal is 565,83 euros (counting 14 months in the year). The same registered no alterations from 2011. The average salary has been decreasing since 2009, registering a drop of 4,5% in 2012.

The direct consequence of the economic recession is that families have to adapt their budget to less income and greater expenses, cutting on the goods and services that are not essential.

- **Social/Cultural Environment**

In terms of demographics, the population density has been increasing in the past decades, with a mean number of 114,5 individuals per kilometer in 2011. The aging of the population index has also increased, registering a ratio of 127,8 in 2011. The Portuguese population registered in 2011 52,22% of females and 47,78% of males. The changes in the lifestyle of the Portuguese population have been remarkable in the past decades. The technology, access to information and education, globalization and other factors have changed the lifestyle of families around the world. Also the notion of family is more subjective, with more forms of family, like mono parental family being more common. The economic environment has an enormous influence on the lifestyle and social environment of the population. The percentage of expense in the total consumption of the families in Portugal dedicated to leisure, recreation and culture has been decreasing since 2006.

According to the Consumer Intelligence Lab, there are 11 tendencies of consumption in Portugal. The first, *frugalismo*, states the Portuguese consume less, waste less and depend more of personal valorization in detriment of material goods. The new references in consumption status state that consumers value more the behaviors of affirmation of life style

and values like sustainability or solidarity. The consumers spend more time in their homes, valuing new infrastructures and possibilities of entertainment at home. The consumers have developed the need of simplicity, of convenience and easiness while performing the daily tasks, consuming products and service, while at work and while interacting with the government. The growing awareness of the importance of choosing products made in Portugal is also a tendency. The consumer is co-creator of value to customize their products, create goods for their own use or to sell. The consumer also gives more attention to health. The Portuguese value local and concrete business actions with short term results. The consumer is more informed and questions more the companies practices. Portuguese consumers question companies mainly in terms of price, quality, social responsibility, employment policies, and investment in the country. Another tendency is that consumers seek differentiation, they are deciding on consumptions and having behaviors that differentiate them. The last tendency, discount society states that consumers see the price tag only as a reference, and seek for discounts.

- **Technological Environment**

The technology in zoological gardens has helped to improve the conditions of the installations where the animals live and also the way the zoos communicate with the visitors. The zoos general practice used to be to maintain the animal in cages, with few concerns for their wellbeing or even health care. Nowadays zoos have evolved from the cages to enclosures, wide spaces that have environmental enrichment, which means that there is a concern to recreate the wild environment so that the animals preserve the wild behavior. The security is guaranteed by the means of technology, being the enclosures usually encircled by electrical barriers. Technology is used to support the environmental enrichment, to maintain temperature, humidity or other conditions needed to ensure that the enclosure satisfies the needs of each species.

In terms of communication, the internet has allowed zoos to communicate with a much larger audience and also to keep in touch with the consumers. It is common for zoos to have a website, a blog, live web cams transmissions that show several points of the zoo live at the website, amongst other tools to communicate. This technological boost has allow zoos to become more sophisticate and helped them to achieve their goals with more efficiency.

### 3.2.1.2. Micro environment

To study the sector with more focus, the following data were collected:

**Table 9 Number of visitors of zoological and botanical gardens and aquariums in Portugal**

Date	Number of visitors of zoological gardens, botanical gardens and aquariums; Annual	
	Portugal	
2011	3317790	
2010	3476885	
2009	3387383	
2008	3265653	
2007	3094910	

Source: INE, Culture Statistics – Historical Series (2007-2011)

The number of visitors of zoological gardens, botanical gardens and aquariums in Portugal increased from 2007 to 2010. This number suffered a reduction in 2011. This fact can be explained due to the economic recession and instability, that led consumers to be more cautious while spending their resources and cut on the non-primordial dispenses.

**Table 10 Number of visitors of museums, zoological gardens, botanical gardens and aquariums per geographic location (NUTS – 2001)**

Geographic location (NUTS - 2001)	Number of visitors of museums, zoological gardens, botanical gardens and aquariums per geographic location (NUTS - 2001); Annual				
	Date				
	2011	2010	2009	2008	2007
Portugal	13495187	13839829	12931846	11647913	9971128
Continent	12610560	13130203	12148977	10835758	9187062
North	3476013	3833342	3480725	2920586	2314802
Center	1003042	955743	902090	947642	745513
Lisbon and Vale do Tejo	7137811	7123976	6958928	6250418	5517805
Alentejo	331291	439030	539087	455932	378607
Algarve	662403	778112	268147	261180	230335
Azores	125464	94804	109202	111358	96073
Madeira	759163	614822	673667	700797	687993

Source: INE, Museums Survey (2007-2011)

Focusing the analysis, it is clear that Lisbon receives the majority of visitors of museums, zoological gardens, botanical gardens and aquariums when compared to other regions of Portugal. Azores is the country's region which has the least number of visitors of this kind of attractions. It is pertinent to say that this analysis, unlike the one above, includes the visitors of museums which enlarge the number in total. Lisbon registered a constant growth of the

number of visitors of museums, zoological gardens, botanical gardens and aquariums in all the years of study.

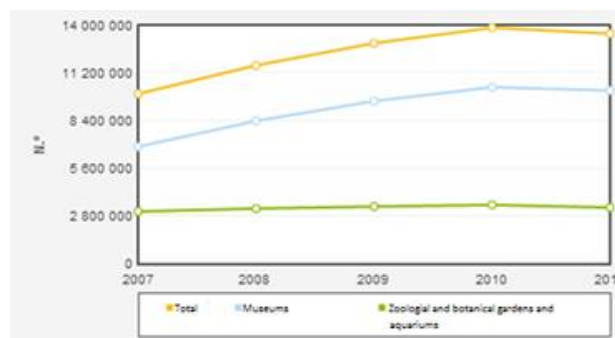
**Table 11 Number of visitors of museums, zoological gardens, botanical gardens and aquariums per habitant, by geographic location**

Geographic location	Number of visitors of museums, zoological gardens, botanical gardens and aquariums per habitant, by geographic location; Annual				
	Date				
	2011	2010	2009	2008	2007
Portugal	1,3	1,3	1,2	1,1	0,9
Continent	1,3	1,3	1,2	1,1	0,9
North	0,9	1	0,9	0,8	0,6
Center	0,5	0,5	0,5	0,5	0,4
Lisbon	2,4	2,4	2,3	2,1	1,9
Alentejo	0,5	0,7	0,8	0,6	0,5
Algarve	1,5	1,8	0,6	0,6	0,5
Azores	0,5	0,4	0,4	0,5	0,4
Madeira	2,8	2,5	2,7	2,8	2,8

Source: INE, Museums Survey (2007-2011)

In terms of the number of visitors of museums, zoological and botanical gardens and aquariums per habitant in Portugal, Lisbon has by far the highest number when compared to the other continental regions. The number of visitors per habitant in Lisbon has increased in the studied period of 2007 to 2011. This indicates that the Lisbon Zoo, botanical gardens and aquariums receive more visitors per habitant than the other continental regions which is a positive indicator to the Lisbon Zoo.

**Chart 29 – Number of visitors of museums, zoological gardens, botanical gardens and aquariums by typology**



Source: INE – Museums Survey (2007-2011)

The number of zoological and botanical gardens and aquariums' visitors has had a stable growth along the period of study, suffering a decrease between 2010 and 2011. The same can

be said about museums, which register a higher number of visitors than zoos, botanical gardens and aquariums. Like it was said before the reduction of visitors between 2010 and 2011 can be explained due to the economic recession that led to a shorter buying power of the families.

**Table 12 Foreigner visitors of zoological gardens, botanical gardens and aquariums**

Date	Number of foreigner visitors of zoological gardens, botanical gardens and aquariums; Annual	
	Portugal	
2011	895111	
2010	941776	
2009	779337	
2008	1001951	
2007	31405	

Source: INE, Museums Survey (2007-2011)

In terms of foreigner visitors to zoological and botanical gardens and aquariums, there was a significant growth from 2007 to 2008. This was followed by a decrease in the next year. From 2009 to 2011 it is registered a gentle recovery, although in the last year of study there is a slight decrease registered of foreign visitors. The projection of the country's branding identity to foreign markets is crucial to attract foreign tourists to Portugal. A great effort has been made by the division of tourism of Portugal to communicate the country as a strong brand and a diversified touristic package offer.

**Table 13 Number of visitors included in school groups of museums, zoological gardens, botanical gardens and aquariums by geographical location**

Geographic location	Number of visitors included in school groups of museums, zoological gardens, botanical gardens and aquariums by geographical location; Annual				
	Date				
	2011	2010	2009	2008	2007
Portugal	2477354	2940165	2959922	2376368	1792173
Continent	2428072	2886384	2900276	2325575	1735732
North	1088048	1279175	1204915	944007	710456
Center	268567	334093	366338	318805	254521
Lisbon	945360	1105430	1172013	963369	660755
Alentejo	73548	100790	113086	61537	73327
Algarve	52549	66896	43924	37857	36673
Azores	17328	17706	20404	12649	13184
Madeira	31954	36075	39242	38144	43257

Source: INE, Museums Survey (2007-2011)



The country's region that has a higher number of visitors of museums, zoological and botanical gardens and aquariums included in school groups is the north of Portugal, followed by Lisbon. Lisbon registered a growth of school groups visitors from 2007 to 2009 and these visitors have been decreasing from that year to 2011. School groups are a very important group of consumers in the zoological market, since one of the objectives of the zoo lies in the education for the conservation of species. Education is such a fundamental part of the zoo's mission that in the Lisbon zoo exist specific programs for school groups, so that these can appreciate the most of the educational experience that the Lisbon zoo provides.

**Table 14 Number of visitors included in school groups of museums, zoological gardens, botanical gardens and aquariums by typology**

Date	Typology	Number of visitors included in school groups by typology;
		Annual Portugal
2011	Total	2477354
	Museums	2111452
	Zoological and botanical parks and aquariums	365902
2010	Total	2940165
	Museums	2526542
	Zoological and botanical parks and aquariums	413623
2009	Total	2959922
	Museums	2162435
	Zoological and botanical parks and aquariums	797487
2008	Total	2376368
	Museums	1783019
	Zoological and botanical parks and aquariums	593349
2007	Total	1792173
	Museums	1369948
	Zoological and botanical parks and aquariums	422225

Source: INE, Museums Survey (2007-2011)

When observing with more focus at zoological gardens, botanical gardens and aquariums, it is clear that these register a minor number of school groups' visitors when compared to museums. The number of school groups' visitors to zoos, botanical gardens and aquariums increased from 2007 to 2009 and decreased from that year to the last year in study, 2011. The fall from 2010 to 2011 registered a lower rhythm than in the year before. In terms of the museums, the number of school groups' visitors increased until 2010 and decreased in 2011.

**Table 15 Number of zoological gardens, botanical gardens and aquariums**

Date	Number of zoological, botanical gardens and aquariums; Annual
	Portugal
2011	20
2010	20
2009	20
2008	21
2007	17

Source: INE, Culture Statistics – Historical Series (2007-2011)

The number of zoological and botanical gardens and aquariums in Portugal increased from 2007 to 2008, decreased in the following year and remained stable to the last year in study, 2011.

**Table 16 Number of goods in zoological gardens, botanical gardens and aquariums**

Date	Number of goods in zoological, botanical gardens and aquariums; Annual
	Portugal
2011	259930
2010	235681
2009	199797
2008	197641
2007	180278

Source: INE, Museums Survey (2007-2011)

The number of goods (or assets concerning physical evidences) in zoological gardens, botanical gardens and aquariums in Portugal has increased in all the years of study. From 2009 to 2011 the rhythm of growth is faster than the previous years.

According to a study made by Born Free Foundation, there are Portuguese zoological gardens that are not fulfilling the requirements of the legislation about the preservation of species and animal welfare and do not have conditions to function and put the animals and visitors in danger. This study was done in 2011 to several European zoological parks and the evaluation of the Portuguese zoos was severely negative. This study had negative repercussions on the Portuguese media, especially on the beginning of the year of 2012, being a negative publicity to all Portuguese zoological parks. The report, called “European Union Investigation to Zoo 2011”, criticizes several aspects of the generality of the Portuguese zoological parks. The investigators visited 10 zoological parks including the Lisbon Zoo. The data was collected

through the installation of video cameras in all of the above, without the knowledge of their managers. The results of the data analysis revealed that the Portuguese zoological parks do not give a significant contribution to the conservation of threatened species. The report criticizes many safety and hygiene faults made by the Portuguese parks, including the Lisbon Zoo that had a good reaction and responded to the safety and hygiene faults allegations to the press. The investigation criticizes the zoological parks that motivate the visitors to touch the animals, saying that it can have risks to the health and well-being of the public. The majority of the shows also had a negative evaluation, since they do not present the animals in their natural behaviors. The investigators go even further and recommend to the national authorities to banish all animal performances from zoological parks, since they give a nonrealistic vision of the species natural behavior. Concerning the life conditional and animal welfare, the report states that 81% of the enclosures do not fulfill the minimum standards required. The report states that the educational value of the Portuguese zoos seems to be limited. This statement is supported by the signalization conditions: more than 25% of the signalization was not present, 19% was in bad conditions and 9% had incorrect scientific names. The investigation concludes that the licensed zoological parks do not respect entirely the European Directive 1999/22 or the Decree-Law number 59/2003 that regulates the Portuguese zoos (like it is said above, on the macro environment analysis, on the political and legal chapter). In this sense, the Born Free Foundation recommends to the Environment Ministry to take the actions needed to review the zoological licensing process.

### **3.2.2. External Analysis - Competition Analysis**

The Lisbon Zoo's direct competitors fall into 3 categories: Zoological gardens, Wildlife parks and Aquariums. There are also other indirect competitors that can be substitute offer of entertainment and educational attraction. These include all substitute offer of entertainment in the Lisbon metropolitan area: museums, movie theaters, theaters, thematic parks, amongst others. For a deeper analysis of the direct competitors, each will be examined individually. The analysis includes the offer, strategic statements, strategic partnerships and prices of each competitor. The analysis is complemented with the reflection of the main strengths and weaknesses for each competitor.

▪ **Zoomarine**

Zoomarine is a thematic and oceanographic park located in the south of the country, at Guia, close to Albufeira. Algarve's Zoomarine is part of the company "Mundo Aquático – Parques Oceanográficos de Entretenimento Educativo SA". The company's main activity is the management of theme parks inspired by the marine life with a strong entertainment component, also recreation and environmental education. Zoomarine is member of AIZA (Associação Ibérica de Zoos e Aquários) and EAZA (European Association of Zoos and Aquariums). The communication of the park includes: the website, an educational blog, outdoors and occasional television ads.

The Zoomarine's main attractions are: dolphins show, sea lions and seals show and tropical birds show. The offer also include: aquarium with sharks, several habitats, 4D cinema, amusement park, swimming pool and special programs. The special programs include: the dolphin emotions experiences, Zoomarine guardians (free time activities programs), school groups visits and birthday parties. The dolphin emotions experiences consist on programs of interaction with dolphins that include: educational session, interaction with dolphins inside water and photographic and film session. These can be in group (dolphin emotions premium) or private (dolphins emotions exclusive for 2 participants).

The Zomarine is open 9 months a year, from March to November. The price range is the following: 28,00€ for adults (11 to 64 years old), 19,00€ for senior (more than 65 years old) and children (over 1 meter tall to 10 years) and free for babies (with less than 1 meter tall). The dolphin emotions premium program costs 169,00€ for each participant and the dolphin emotions exclusive program costs 849,00€.

The Zoomarine's main strengths are: the park has a unique offer in the country of programs of interaction with dolphins, it has several shows, has other attractions like 4D cinema and swimming pool and special programs; the communication and notoriety is strong.

The Zoomarine's main weaknesses are: it does not open all year, prices are high when compared to other parks (according to Born Free Foundation investigation it is the most expensive).

- **Zoo Santo Inácio**

Zoo Santo Inácio is located in Vila Nova de Gaia, in the north of the country. The Zoo has around 1000 animals from 300 different species. According to the Zoo Santo Inácio's website it has become the zoo reference of the north zone of Portugal, having received more than 1 million visitors. The profile of this Zoo's target consumer is divided into 60% families and 40% schools. The Zoo's attractions include: birds in free flight demonstration, wild life demonstrations, reptiles demonstration, penguins feeding, reptile house, insectarium, pedagogical farm, kingdom of the apes, tropical greenhouse, woods and museum house and gardens. The Santo Inácio Zoo also offers: birthday parties programs, activities for school groups and animal godfather programs. The Zoo Santo Inácio also has enterprise sponsors: Aveleda and Nestlé ice creams.

The Zoo Santo Inácio is open all year. The price is 10,50€ for adults (13 to 64 years), 7,00€ for children (3 to 12 years), 8,00€ for seniors (more than 65 years) and free for children till 2 years old. The Zoo also has an annual pass card that costs 35,00€ for adults and 25,00€ for children. The animals sponsorship has a cost of 50,00€ per year.

Strengths: it is open all year, it has a press pack with a formal description of the zoo for others to use publications or as references, the price is lower and has an offer of annual pass at a low price.

Weaknesses: does not have interaction with animals programs, more limited in terms of diversity of species and shows when compared to the Lisbon Zoo.

- **Zoo da Maia**

The Zoo da Maia is located in the Maia city, inside the Porto's metropolitan area. The zoo is considered one of the most visited parks in the Porto's area. The zoo's main attractions are: the sea lion show, reptile house, the Noah's ark, the train and the little farm. The Zoo offers a set of pedagogical activities: "let's feed the animals", incubation room, guided visit, pedizoo paper and environmental enrichment. The Zoo da Maia also offers programs for birthday parties, a picnic park and a playground. The Zoo has several enterprise sponsors, like Olá, Cin, Jumbo, Maxmat and REN. The zoo opens all year. The price of the entry practiced by Zoo da Maia is 7,00€ to adults (more than 12 years) and 4,00€ to children (less than 12 years old).

Strengths: it is considered one of the most visited parks in the Porto's area, diversity of birthday parties programs, price is accessible when compared to other parks, opens all year.

Weaknesses: has only one show, less offer in terms of diversity.

- **Zoo de Lagos**

The Lagos Zoological Park is located in the south of the country, near Lagos. In 2011 the Lagos Zoo received a praise from the Lagos' city council due to the developed work in terms of conservation of species and biodiversity education. Besides education and conservation of species, the Lagos Zoo also carries has a mission investigation, collaborating with various institutions and universities in scientific investigation projects. The Zoo de Lagos facilities include: a multimedia room, clinic, picnic area, library, playgrounds and events space. The park offers special programs for school groups and organizes birthday parties. The park has several sponsors and patronages like: Continente, Montepio, Tivoli and Slide and Splash.

The Lagos Zoo opens all year. The prices are: 16,00€ for adults, 14,00€ for seniors over 65 years old and 12,00€ for children with ages between 4 and 11 years old. The park also has a year free pass, the friends club, that costs 45,00€ for adults and 30,00€ for children. Lagos Zoo has an individual sponsorship/patronage program that has a minimum donation of 100,00€ per year.

Strengths: it is open all year, it has a component of investigation in association with institutions and universities.

Weaknesses: website was few information, it has no shows, price is considered high facing offer, less diversity in terms of offer.

- **Badoca Safari Park**

The Badoca Safari Park is a natural park located in Vila Nova de Santo André. The park has around 600 wild animals belonging to 75 different species. The offer includes a safari, that provides direct contact with wild animals, shows, recreational and educational spaces and other attractions. The Badoca Park's shows consist on a presentation of birds and a feeding session of the lemurs. The park's attractions are: interaction with lemurs, islands of the primates, rainforest, family trampoline, African rafting, adventure safari and wagon rides. Moreover than these offers, the Badoca Park also offers courses (is presently offering a

capture course) and workshops like photography workshops. The park also has partnerships with associations and enterprises like *Associação Salvador*, Delta, *Cartão Jovem*, *Cartão Solidário*, Sporting Clube de Portugal, Benfica and ACP, amongst others. The park opens doors from February to October. The prices practiced in Badoca Park are similar to the Lisbon Zoo prices. The adult price is 17,50€, children (4 to 10 years) and seniors (more than 65 years) 15,50€. The Lemur interaction costs 12,00€ to adults and 10,00€ to children.

Badoca Park also offers other experiences as: backstage visits, falconer for one day and godfather in action. The backstage visits include a trip to see the preparation of food to the animals, release of the animals from nocturne shelters and to see the alimentation of quarantined animals. This experience costs 60,00€ per person. The falconer for one day experience is similar to the previous one but it is focused on hunting birds. The cost of this experience is also 60,00€ per person. The godfather in action is a program is similar to the Lisbon Zoo's adopt an animal program and costs 60,00€. Badoca Safari Park also offers a season pass valid for a year that costs 50,00€.

The strengths found in Badoca Park are: it provides the safari experience (unique offer), has high level of interaction which makes the consumer feel more involved, develops partnerships with associations and companies that give benefits to the visitors, the backstage visits offer a different experience to the visitors.

The weaknesses found in Badoca Park are that it is not opened all year and the offer of live shows is poor compared to other parks.

- **Monte Selvagem**

The Monte Selvagem (Wild Hill) is located in Montemor-o-Novo, in Alentejo. The park has around 300 animals from 70 species. The Monte Selvagem's attractions include: giant trampoline, small lectures during animal feeding, tractor ride visit. Monte Selvagem also has space to rent for private events, like birthday parties, product launching, business lunches, expositions, amongst others. The park also has partners in terms of conservation and other activities.

The Monte Selvagem is open 9 months a year. The price is 13,00€ for adults, 10,50€ for children (3 to 12 years), 11,50€ for seniors and free for children with less than 2 years. There is also a family pack that includes tickets for 2 adults and 2 children for 38,00€. The Monte

Selvagem also has an annual pass, called “Salvage Friend Card” that costs 38,00€ for adults, 30,00€ for children and 32,00€ for seniors.

Strengths: website has many information, has space to grow.

Weaknesses: it is recent so it lacks of experience, it has no shows like the Lisbon Zoo, it is not open all year, less offer and variety of animals.

- **Europaradise Park**

Europaradise is a zoological and ornithological park located in Montemor-o-Velho, in the center region of the country. The park has around 250 species, 70% of them being birds and 30% being mammals. Europaradise Park offers to the visitors a walking route of 2 kilometers where they can see several animals that come from all around the globe. The park also offers educational services. The park opens all year. The prices are: 5,00€ to adults and children with more than 12 years old, 2,50€ to children with ages between 3 and 11 years and it is free for children with less than 2 years old.

Strengths: different concept with a protected forest area, prices are lower when compared to other parks.

Weaknesses: few offer of animals, website has little information.

- **Zoo Lourosa**

The Lourosa Zoo is an ornithological park located in Santa Maria da Feira. It is the only park dedicated exclusively to birds in Portugal. The zoo offers the activities of being a zookeeper for one day, where the visitor participates in several activities like preparation and distribution of food, cleaning the enclosures and environmental enrichment. The price of this activities is 30,00€. Besides this activity the zoo also offers several birthday parties programs and school groups activities and has a playground. The zoo has several enterprise sponsors, like: McDonald's, Continente, Pingo Doce and Clube Olá. The Lourosa Zoo opens all year, except on some holidays. The price of entry is to 4,00€ to adults (more than 12 years), 3,00€ to children (from 6 to 12 years old) and free for children with less than 5 years old. The park also has an annual free pass card called “My Zoo, Your Zoo” that also allows the sponsorship of one bird and has the annual cost of 15,00€.



Strengths: program zookeeper for a day, price is low, annual card allows to bring one more person freely.

Weaknesses: few offer in terms of animal diversity.

- **Oceanário de Lisboa**

The Lisbon's Oceanarium was opened in 1998 for the Expo 98 which had the oceans thematic. It is a public aquarium and it is considered to be the most visited cultural space in Portugal, receiving around 1 million visitors per year. The Lisbon's Oceanarium is composed by a permanent exposition and a temporary exposition. The aquarium's offer include: guided tours, audio guide, thematic workshops, birthday parties, thematic visits and school programs. The offer also includes several activities like: holidays under water, programs for children and family, sleeping with sharks program, concerts for babies, CSI activities and an aquarium shuttle that takes the aquarium's educational activities to other cities of the country. The website has a virtual tour of the aquarium. The Lisbon's Oceanarium is sponsored by Pingo Doce.

The Lisbon's Oceanarium is open all year. The cost of the combined ticket (including the permanent and temporary expositions) costs 16,00€ for adults (13 to 64 years old), 11,00€ for children (4 to 12 years old) and 11,00€ for seniors (more than 65 years old). There is also a family ticket that costs 42,00€. The sleeping with sharks program includes: a cinema session, a multimedia presentation about sharks, visit to the backstage of the central aquarium and a guided tour to the permanent exposition. The prices are 60,00€ per visitor. The CSI activity costs 40,00€ per participant. The audio guide service has a cost of 2,50€.

Strengths: it is the most visited cultural space in Portugal, website is very complete, has a virtual tour, it has several unique programs like the sleeping with sharks.

Weaknesses: pricing policy, special programs like the sleeping with sharks have a high cost.

- **Aquário Vasco da Gama**

The Vasco da Gama's Aquarium is located in Lisbon and it is one of the first aquariums in the world, opened in 1898. The Vasco da Gama's aquarium is divided into a live exposition, the aquarium, and a museum. The aquarium has a large diversity of live animals in aquariums and tanks. The Aquarium's museum offers a large diversity of sea animals conserved in liquid

environment as well several replicas. The collections allow visitors to observe animals that are hard to keep captive, like large animals, from deep underwater or rare species. The Vasco da Gama Aquarium offers an auditorium and a coffee shop, school programs, guided tours, birthday parties programs, holidays activities, a library and study and leisure spaces. The aquarium has several partnerships that offer discounts to the visitors, like: ACP, Lisbon Card and Jojoi Club. The prices are: 4,00€ to adults (17 to 64 years old) and 2,00€ to children and seniors. Guided tours cost in average 5,00€.

**Strengths:** aquariums history, it is one of the first aquariums in the world, large diversity of species, has holidays activities, prices are accessible when compared to other parks and aquariums.

**Weaknesses:** space limitations, lack of shows and lectures.

- **Sea Life Porto**

Sea Life Porto is the first subaquatic tunnel of the country, located in the Porto city. The Porto's Sea Life has partnerships with Tripadvisor, other touristic offers in Porto and QREN (*Quadro de Referência Estratégico Nacional*). The Sea Life offers to the visitors: lectures and sessions of feeding the animals, special programs for schools, groups and birthday parties. The visitors can touch sea stars and urchins during the route. Sea Life Porto is open all year. The prices are: 13,00€ for adults (more than 12 years old), 9,00€ for children (4 to 12 years old), seniors (more than 65 years old) and also students. The Sea Life offers special family tickets that can cost from 26,00€ to 39,50€. The annual pass costs 25,00€ for adults and 14,00€ for children. It also has an adopt an animal program that has a minimal cost of 50,00€.

**Strengths:** is a specific thematic park that works well its thematic, it belongs to a larger group of parks, it allows visitors to interact with some animals, it is open all year, it has special prices for families.

**Weaknesses:** the website could have more information, has few offer in terms of attractions like shows.

- **Fluviário de Mora**

Fluviário de Mora is located in the center of the country, close to Mora. The park has several aquariums containing different animal and vegetal species from rivers. The park has generated

a net profit of 1 million euros since the opening, six years ago, and nearly 700 thousand visitors. Fluviário de Mora received the award of best Portuguese museum, on the first year of opening. The offer includes: audio guides, the recreation of fluvial ecosystems and thematic expositions. There are several commercial partnerships, including: Monte Selvagem, Bertrand, ANA Aeroportos de Portugal and Fnac. The Fluviário de Mora is open all year. The prices are: 7,20€ for adults, 4,90€ for children (3 to 12 years) and 5,20€ for seniors (more than 65 years old). There are special process for groups, families and schools. There is also an annual card that includes an annual visit to the backstage. The prices suffered a decrease in the beginning of the present year due to the economic crisis, so that families feel more motivated to visit the park.

Strengths: it recreates the fluvial ecosystems, it received an award for best Portuguese museum, it is open all year, the prices are accessible when compared to other parks.

Weaknesses: location, the offer is scarcer than other parks, lack of offer in terms of shows, lectures and demonstrations (or feedings).

- **Parque Biológico de Gaia**

The Gaia's Biological park is located near Vila Nova de Gaia. The animals presented in the park are from the natural Portuguese fauna and were not brought from other places. The park activities include: study group visit, environmental education ateliers and activities, park discovery ateliers, thematic and seasonal ateliers, lab ateliers, night ateliers, outside guided routes, one night at the park and holidays' camp. The park is open all year and the prices are: 4,00€ for adults, 2,00€ to seniors (more than 65 years) and to child from 7 to 17 years old.

Strengths: one night at the park program, natural fauna presented.

Weaknesses: offer of fauna is scarce when compared to other parks.

### **3.2.3. External Analysis - Consumer Behavior Analysis**

According to the General Direction of the Cultural Patrimony (DGCP - Direcção Geral do Património Cultural), the main profiles of visitors to monuments, museums and palaces in Portugal in 2012 are: regular (27%), weekend visitors (19%), free (14%), circuit and combined tickets (9%), schools (8%), more than 65 years old (8%), Lisbon Card (5%), young

(less than 14 years, 4%), other cards (3%) and family tickets (1%). By this data it is possible to see that the public visiting attractions (in this case monuments museums and palaces in Portugal) on weekends has a high share of the total. The combined tickets are also important that attract mainly tourists. The schools have an important role in the consumer of these kind of attractions. The young audience is one that can be more motivated. The senior sector is one that has been emerging, since the Portuguese population is characterized by the emerging predominance of an older population.

In 2012 the total number of visitors of monuments, museums and palaces in Portugal was 3.175.585 persons. This number reflects a negative variation (-2%) in the number of entries when comparing to 2011. The decline in the number of visitors of monuments, museums and palaces in Portugal is mainly in terms of national public (less 6,5% visitors than in 2011). The foreign visitors had a slight increase when compared to 2011 (more 0,3% or more 6.797 entries).

In the same year, 2012, there was a slight positive variation in the number of entries in museums belonging to DGPC. This fact is due to the contribute of several initiatives, including: exposition, opening of the museum spaces during the night, musical concerts, guided tours, holiday's activities, workshops, lectures, amongst others.

The DGPC classifies the visitors of monuments as:

- The visitor is mainly foreigner (85%);
- The visitor goes mainly to paid monuments (68%);
- 32% of the entries correspond to the regular category, 15% to combined tickets, 8% to seniors, 5% to other cards and 5% to Lisbon Card;
- From the visitors that went to free entry monuments, 19% done so on weekends and holidays, 4% were schools, 4% were young visitors with less than 14 years old;
- The paid entries, 53% suffered reductions on the price.

The DGPC also classifies the visitors of museums and palaces as:

- The visitor is mainly national (61%) although the foreign visitor has a significant weight (38%);
- The visitor goes mainly to non-paid museums and palaces (66%);

- From the non-paid entries 19% were done at Sundays and holidays, 12% were schools and 3% young visitors with less than 14 years old;
- From the paid entries 19% correspond to the regular category, 6% to seniors, 3,6% to the Lisbon Card and 1% to group tickets;
- From the total paid entries, 42% registered reductions on the price (20% has 50% discount on the entry, 2% has 60% reduction and the rest has variable discounts).

### **3.2.4. Internal Analysis - Organization Analysis**

The Lisbon Zoological Garden, also named as “Jardim Zoológico e de Aclimação em Portugal, S.A”, or simply the Lisbon Zoo is an important space and landmark in Lisbon. The Lisbon Zoo is a private institution of public and educative utility without governmental support. It is also a non-profit organization. The park has a great set of attractions that stimulate the knowledge of the visitors about the animals and amuse children.

#### **History**

The Lisbon Zoo first opened the doors to the public in 1884, being the first park with flora and fauna in the Iberian Peninsula. The idea of creating a zoo in Portugal started in 1882. The persons who had the idea were Dr. Van Der Laan, Bento de Sousa, Dr. Sousa Martins and May Figueira. They decided to create a zoological society and of acclimation of animals and plants, like the ones that already existed in France and in Netherlands. For this, they travelled through Europe, visiting the existing Zoo’s to gather knowledge and practices that would fit on a Zoo in Lisbon. In February 19<sup>th</sup>, 1883, a group of Portuguese personalities joined to see the presentation of the project and with the incentive of the king D. Luís, the project was carried away. In May 28<sup>th</sup>, 1884, the Lisbon Zoo was opened in São Sebastião da Pedreira, the zoo’s first location.

Ten years later the zoo was forced to move to Palhavã, in the place where now is located the Calouste Gulbenkian foundation. But this place was not as beautiful as the previous one, it did not had as much plants and did not had the lake. So, in order to attract more visitants, the zoo administration decided to have concerts performed in the zoo. This initiative made the Lisbon Zoo a cultural space.

In 1905 the Lisbon Zoo was relocated into the actual place in Quinta das Laranjeiras, in Sete Rios. This happened because the lease of the Palhavã was ending, and the zoo society decided to move again. This was an excellent space with ninety four acres of forested land, which allowed more room for the animal facilities. The opening of this new space was in May 28<sup>th</sup>, 1905. In March 12<sup>th</sup>, 1913 the zoo was declared as a Public Utility Institution. With the contribution of the animals sent from Africa and Brazil, the Zoo had one of the largest and more diverse collections of animals. Some of the movie scenes of “*Canção de Lisboa*”, directed by Cottinelli Telmo in 1933 were recorded on the Lisbon Zoo, which gave more visibility to the same, since this movie was a huge success and it is now considered a classic movie of the Portuguese cinema. In 1952, the city of Lisbon gave this institution the Gold Medal of the City besides the recognition of a Public Utility Institution.

The fall of *Estado Novo* in 1974 and the subsequent independence of former colonies in Africa, lead to the disruption of the strong support provided by those countries in the diversification and renewal of the animal collection. The national authorities suspended the official financial supports. The number of visitors also declined substantially. It was therefore necessary to develop and implement a new management strategy for the Zoo, adapting it to the values and needs of that time. In 1990 a new management policy was adopted by Felix Naharro Pires. There were created specific working areas with its own objectives, to improve the collection and animal well-being and veterinary care. At the same time there were created the departments of marketing, commercial services, public relations and press. One of the major concerns were to promote conservation education with the visiting public, which quickly led to the creation of another service, the Pedagogic Center. The zoo also started the individual sponsorship campaign which revealed to be a success and still is nowadays.

In 1992 the zoo became part of the European Association of Zoos and Aquariums (EAZA), and also participated in the “International Species Information System”, which aimed to create a database of all the animals in captivity in the world. In 1994, the Lisbon Zoo created new attractions to the public: the dolphinarium named Dolphin’s Bay, the cable car and the reptiles habitat, amongst others.

### **Mission and values**

The mission of the Lisbon Zoo is to develop and promote a park as a center for conservation, reproduction and reintroduction into the natural habitat of endangered species. This is done

through scientific research and environmental enrichment programs. It is the Lisbon Zoo mission also to promote this important park where the component of education is allied to the element of entertainment and fun.

The values of the Lisbon Zoo include the following concepts: conservation, education, preservation, professional ethic, global awareness, quality, and dedication. The Lisbon Zoo has a specific role in the plan of the conservation of species. There are many areas of actuation in the name of conservation like: EEPs – European Endangered Species Program, investigation and conservation *in situ* (in the natural habitat), environmental enrichment, reintroduction of species in their natural habitat and EAZA campaigns.

### **Goals and objectives**

The objective of establishing the Lisbon Zoo was, and still is, to promote a zoological and botanical park that functions as a center for conservation, reproduction and reintroduction of threatened species in their respective natural habitats. But the zoo is not just a space for research. At the same time, this is also a space that combines the educational component to a dynamic entertainment, having many spaces and activities that are available to visitors.

### **Strategic Alliances**

The Lisbon Zoo has several partnerships with companies from different economic sectors. These partnerships have several objectives: for the companies to sponsor habitats or animals, to offer discounts and special conditions to visitors and for touristic objectives. The companies that have sponsorship programs and strategic partnerships with the Zoo are: BP, Sporting Clube de Portugal, Fnac, Volvo, Avis, Nestlé, Universidade Lusófona, Volkswagen, Lacoste, Coca-cola, Banif, Sical, EDP, amongst others. Some partnerships with these companies include special offers for the clients of the companies mentioned above. The touristic partnerships include hotels, travel agencies and others. These companies are: Hotel Açores Lisboa, Hertz, Bairro Alto Hotel, Hotéis Real, Sana Hotels, My Lisbon Holidays, Abreu, Europcar, Turismo de Lisboa, Comboios de Portugal, amongst others.

### **Competitive advantage**

The main key success factors of the zoo rely on its biodiversity, history (being the first park on the Iberian Peninsula), offer in terms of product and service and location at the heart of the

city. The specialized staff with their profound dedication to the cause of preservation of species and education, make the park a reference of quality and innovation in the sector.

### **3.2.5. Internal Analysis - Portfolio Analysis**

#### **Product portfolio – attractions and services**

The portfolio analysis of the Lisbon Zoo takes into account not only the number of animals, but also the attractions and services offered. In the zoo live several species of mammals, birds, reptiles and amphibians. Fifty four of the more than three hundred and sixty species of zoo are part of the European Endangered species Program (EEP).

The Lisbon Zoo attractions include: dolphin's bay, cable car, rainbow park, enchanted forest with birds in free flight show and snakes and lizards show, sea-lion feeding show, pelicans feeding show, train, reptile habitat, amusement park Animax, education center and a small farm. The Lisbon Zoo services include: educative programs for schools, pet hotel, animals graveyard and the offers of the pedagogic center. These include: formation, birthday parties, free time activities program (ATL in Portuguese), wild Saturdays, guided visits and senior programs.

### **3.3. Competitive Analysis**

This analysis consists on the development of a SWOT analysis (summarizing main company strengths and weakness and market opportunities and threats) and Critical Success Factors (CSF) analysis.

#### **3.3.1 SWOT Analysis**

From the previous analysis it is possible to identify the Lisbon Zoo's main strengths and weaknesses. It is also possible to identify a set of opportunities and threats of the market that can influence the Lisbon Zoo's performance.



**Table 17 SWOT Matrix for the Lisbon Zoo**

Strengths	Weaknesses
<p>Notoriety and brand awareness</p> <p>History</p> <p>Strong branding</p> <p>Diversity of species</p> <p>Attractions</p> <p>Location</p> <p>Accessibility</p> <p>HR expertise</p> <p>Unique selling proposition</p> <p>Quality (spaces, offer)</p> <p>Market position</p> <p>Modern enclosures</p> <p>Partnership with companies (i.e. sponsorship of animals, enclosures, exhibits)</p> <p>Birth rate</p> <p>Opening Hours</p> <p>Opens all year</p> <p>Education Programs</p>	<p>Space limitations</p> <p>Price perception</p> <p>Weather dependent</p> <p>Visitors expect to see the animals constantly in action</p> <p>Digital interfaces</p> <p>Loses touch with the visitors</p>
Opportunities	Threats
<p>New attractions (shows, special programs, amongst others)</p> <p>New enclosures or animals</p> <p>New uses of space (expositions, workshops, amongst others)</p> <p>Attract new segments of consumers</p> <p>Changes in consumer habits</p> <p>New strategic alliances</p> <p>Intra-country tourism</p> <p>International visitors (emerging markets of consumers from Asia and Brazil)</p>	<p>Financial Crisis</p> <p>Higher cost of living</p> <p>Other touristic destinations in Portugal (such as Algarve)</p> <p>Study from Born Free Foundation</p> <p>Substitute offer of zoological parks</p> <p>Substitute offer of other attractions</p> <p>Climate alterations (unpredictable weather may discourage visitors to go to the zoo)</p> <p>Weakening Tourism Market tendency due to financial crisis</p> <p>Change in consumers' habits</p> <p>Changes in taxes and laws</p>

Source: Own Elaboration

### 3.3.2 Critical Success Factors

From the previous analysis it is possible to define a set of Critical Success Factors (CSF) for the market of zoological parks. These are:

**Notoriety** – the Lisbon Zoo’s notoriety is significant amongst the national audience;

**Product** – the diversity of animals in the Lisbon Zoo is one of the factors that most differentiate it from other parks;

**Offer** – the offer of the Lisbon Zoo in terms of attractions and services is diverse and one of the critical success factors;

**Animal welfare and conservation concern** – the Lisbon Zoo belongs to EAZA, WAZA and AIZA and is involved into several conservation of species programs;

**History** – the Lisbon Zoo’s history has an important role on its brand awareness, since it is an important landmark of the Lisbon city;

**Location** – the location is also a critical success factor to attract visitors and the Lisbon Zoo has a privileged location at the heart of the Lisbon city.

## Chapter 6. Implementation Proposals – Marketing plan

This chapter of the project thesis includes all strategic and operational implementation proposals for the Lisbon Zoo marketing practices. The strategic marketing plan consists on the definition of the Lisbon Zoo's segmentation, targeting and positioning. The operational marketing plan of this project consists on the description and recommendations for the four "p's" of the marketing-mix: product, price, placement and promotion.

### 4.1. Strategic Plan

#### 4.1.1. Segmentation

Market segmentation is the process of dividing a large market into different segments, each one characterized by similar needs, attitudes and demands. This process is important to design a marketing-mix fitted to the selected market segments. The market segmentation involves two steps: identification of segmentation variables and segmentation of the market and development of profiles of resulting segments.

The most important segment criteria variables for the Lisbon Zoo are:

**Table 18 Market Segmentation Criteria Variables for the Lisbon Zoo**

<b>Criteria</b>	<b>Variables</b>
<b>Demographic</b>	Age, family structure and size, occupation
<b>Geographic</b>	Place of residence, place of work
<b>Social and economic</b>	Income, education
<b>Psychographic</b>	Lifestyle and attitudes, motives
<b>Behavioural</b>	Benefits expectations, price sensitivity, brand loyalty, occasions

Source: Own elaboration

The first three criteria are easier to measure, since the variables are quantitative. Psychographic and behavioural are qualitative data, therefore harder to measure and evaluate. Nevertheless, it is important to combine all these segmentation criteria to have clearly defined segment groups to target the marketing-mix. After profiling different segments, the next stage is to target one or more for the organization to focus on.

#### **4.1.2. Targeting**

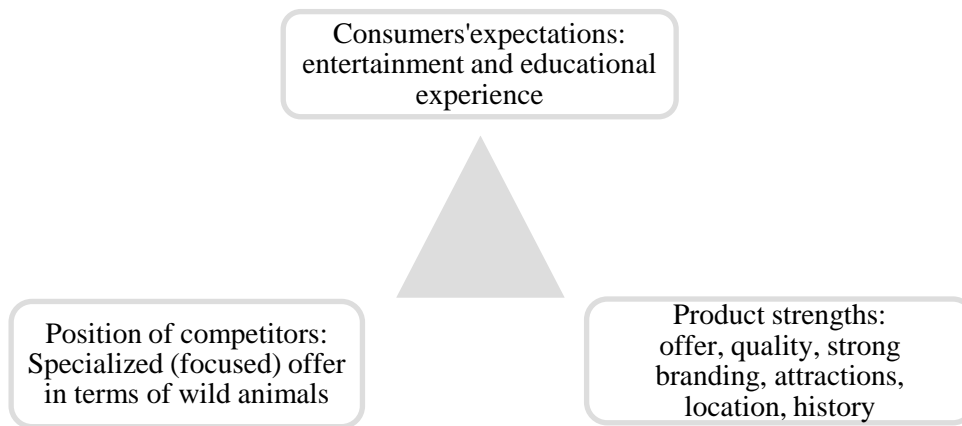
After the market is clearly segmented, it is possible to select a segment or series of segments for the organization to serve. The most important segments for the Lisbon Zoo to target are: families composed by parents and young children, larger groups of families with grandparents and school groups. The Lisbon Zoo should also attract the segments of: young groups of visitors and foreigner visitors. Another important target market the Lisbon Zoo has are the corporate sponsors. These are Business to Business targets and it will not be developed on the communication plan.

In this sense, it is possible to say that the Lisbon Zoo should target three main targets:

- Families looking to have a pleasant day and quality family time
  - Married couples;
  - Mean of two children;
  - Influencer of buying process is usually the mother;
  - Tendency to repeat visits (long time value potential)
- Tourists
  - Can be national or foreigner
  - Looking for leisure and also educational experience
- School groups
  - Programed by the professor at the beginning of the year
  - Looking for an educational experience also combined with entertainment
  - Tendency to repeat visits with other classes of students

#### **4.1.3. Positioning**

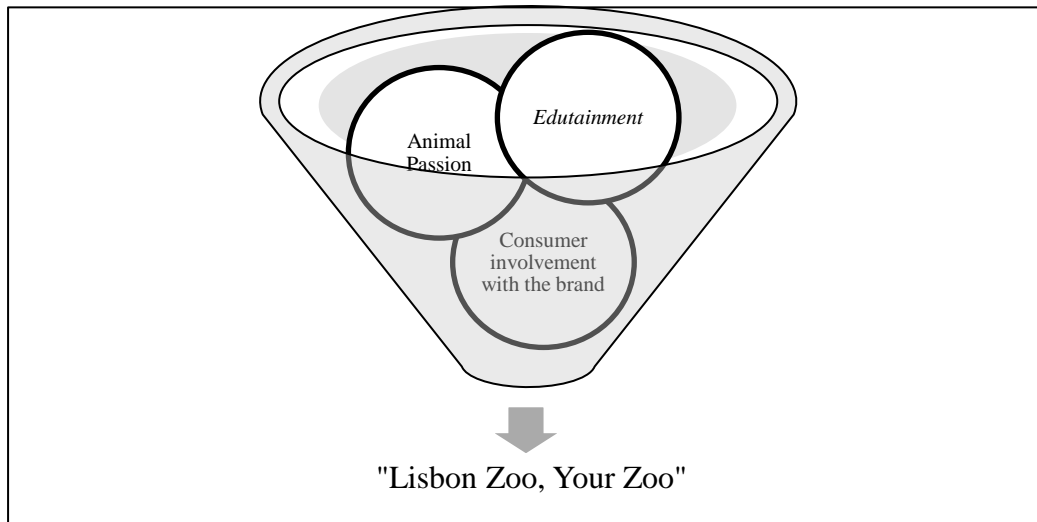
The positioning is the way a brand is seen. Positioning is based on identification (what type of market categories the organization wants the consumers to associate with the Lisbon Zoo) and differentiation (unique selling proposition that the organization wants the consumers to associate with the Lisbon Zoo). To define the positioning the brand positioning triangle must be taken into account:

**Figure 3 Brand Positioning Triangle**

Source: Own Elaboration

The Lisbon Zoo is identified by belonging to the zoological parks market. The differentiation of the Lisbon Zoo is due to its unique selling proposition. This unique selling proposition is defined by the zoo's history, location, number of different species, conservation programs, different attractions and services, animal passion, education and leisure components, amongst other factors.

The Lisbon Zoo should be perceived as an *edutainment* business. This means that the Zoo allies and must continue to combine the education with entertainment. The visitors should walk out the Lisbon Zoo carrying the memories of a good day and also the important message of conservation of species and of the environment. The positioning should also have as basis the animal passion and should make the visitors feel involved with the Zoo, since the Lisbon Zoo is characterized as being part of the feelings business. The feelings business is an emotional approach of business, where companies deal with emotions. This type of business is much more powerful than the transactions business, because it deals with consumer's emotions. In this sense, companies that operate on this industry must know how to customize the service and deal with people's emotions. Therefore, the positioning statement should be "Lisbon Zoo, Your Zoo".

**Figure 4 Brand Positioning Statement for the Lisbon Zoo and its basis concepts**

Source: Own elaboration

## 4.2 Operational Plan – Marketing Mix

The marketing mix is the operational part of a marketing plan. The marketing mix includes the Product (what the actual offering comprises), Price (the value exchanged for that offering), Place (also known as Distribution, the means of having the product offering available to the target audience) and Promotion (the means of communicating that offering to the target audience(s) and promotional mix).

### 4.2.1 Product

#### 4.2.1.1. Description

- **Offer**

The Lisbon Zoo has several “products” in its business venture. These are:

- Animals
- Attractions
- Services
- Educational center
- Other Experiences
- Facilities

## **Animals**

The Zoo is all about the dedication to its animals. Much of the marketing communications campaigns of the Lisbon Zoo feature wild animals that can be seen at the zoo and also new cubs that can also be found on their species enclosures.

According to the Lisbon Zoo's website, the zoo has one of the finest collections of animals of the world. The Lisbon Zoo has over 2.000 animals from 360 different species. The visitors can find 114 different species of mammals, 157 of birds, 56 reptiles and 5 amphibians and arthropods. The enclosures of the Lisbon Zoo are modern and respect the animal's welfare.

## **Attractions**

The Lisbon Zoo attractions include: dolphin's bay with dolphins and sea lions show (duration of 40 minutes), cable car, rainbow park, enchanted forest with birds in free flight show (30 minutes) and snakes and lizards show (20 minutes), sea-lion feeding show (20 minutes), pelicans feeding show (15 minutes), train, reptile habitat, amusement park Animax, education center and a small farm.

## **Services**

The Lisbon Zoo services include: visitor's support center, pet hotel, animals' graveyard, sponsorship/godfather programs, renting several spaces of the Zoo, support to students, and the offers of the pedagogic center.

## **Educational center**

These include: educative programs for schools, formation, free time activities program (ATL in Portuguese) and guided visits. The school educative programs of the Lisbon Zoo is recognized by the Education Ministry as having education utility, due to its important role on the environmental education for pre-school, basic school and high school. The ATL programs include: Eastern ATL, Christmas ATL, Summer ATL and thematic days during Easter and Christmas. The guided visits have the duration of 1h15 and allow the visitors to obtain deeper knowledge about the animals and the Lisbon Zoo's activities in terms of conservation of species and education. The offer of the educational center is complemented by a national school contest this year regarding the EAZA campaign about the southwest Asia.

## Other Experiences

These include: birthday parties, wild Saturdays and senior programs. The Zoo has several birthday party' programs packages, depending on the age and services included on the package. The parties include an offer of a thematic backpack for the birthday child. The wild Saturdays program include: thematic visit to learn more about different animal species and the opportunity to go visit a part of the Zoo's backstage. The senior programs include: visit to the backstage of some habitats to talk with the animal caretakers, thematic visit and the resolution of an enigma.

## Facilities

The Lisbon Zoo has many facilities that can be used for several purposes, such as: corporate events, private events, art galleries, lectures, amongst others. These facilities include: one auditorium with capacity for 100 persons, picnic park, tents and several other outdoor locations available to rent.

- **Brand**

**Type of Brand:** the Lisbon Zoo is an institutional brand since it corresponds to the organization's identity

### **Brand Identity characteristics:**

**Name:** the name is descriptive, since it corresponds to the organizations' activity and location.

**Tone of voice:** the Lisbon Zoo's Tone of Voice is direct, transparent, uses humor and is sincere

**Logo:** The logo is composed by a logotype and a Symbol. The Logo has a symbol of an elephant, one of the Lisbon Zoo's most characteristically and historical animals. People associate the elephant with the Lisbon Zoo, since it is the only Zoological park in Portugal to have this kind of animals. The logotype consists on the organizations name plus the country. The lettering is clear and stylish, using the combination of two fonts and colors.

**Figure 5 Lisbon Zoo Logo**



Source: [www.zoo.pt](http://www.zoo.pt)



Concerning the notoriety, the Lisbon Zoo's brand has a high notoriety in terms of the zoological market in Portugal. This is sustained by the research of both primary and secondary data.

#### **4.2.1.2. Recommendations**

To enrich the Lisbon Zoo's offer, the following recommendations are proposed:

- Guided visits at night

During Spring and summer a new guided visit program can be introduced to the Lisbon Zoo's visitors: a guided visit during the night. This program allows the visitors to explore the Zoo's active nightlife, since the Zoo has many animals that are more active at night. In this sense, an educator from the pedagogical center would accompany a group of visitors in a thematic visit to the more nocturnal animals. To create an adventurous environment, the educator would lead the visitors with a torch-lit. the route would also have reinforced lightning at the level of the ground and higher when needed.

- Camping experience

In a further step, the night trips could include a sleepover experience: camping in the grounds, tours during night hours and early in the morning. The tents would be provided by the Lisbon Zoo or by the costumers and set on a wide open space. The guide that accompanied the visitors during the night trip would also sleep on a tend and lead the group on the morning tour (before the opening hour) to see the Zoo's dynamics before it opens, after a breakfast at the Zoo's cafeteria. After the night tour, while at camp, the participants will be offered a nigh snack including biscuits, hot tea, hot chocolate and other snacks. During this time they can discuss in group with the educator questions they have and opinions about the experience. This is a very special tour and sleepover experience and accordingly the price has to be set at premium. The participants would be presented with a merchandising product of the Zoo, a pillow with the Zoo's logo (which is offered on the moment of camp setting).

- Dolphin's interaction programs

The Lisbon Zoo has the infrastructures to create a dolphin's interaction program. If there is possible to select one or two dolphins exclusively for the interaction programs, after the proper dolphin's training for them to be prepared to these programs specifications, the animals could be transferred to the swimming pool behind the dolphin's bay. These interaction programs would be for a small group of participants at a time, to respect the

animals welfare, consistently with the Zoo's mission. The programs would start with a meeting with a caretaker for an educational speech about the dolphins and environmental education and explanation of rules and safety issues. After this brief meeting, the participants would change clothes to go to the pool. The interaction with the dolphins would also be accompanied by the caretaker. The caretaker would give more information about the animals while the participants could have a first contact with them and take an individual photo with the dolphin (by the FotoZoo). Then the participants would have the opportunity to swim with the dolphins in a set of prepared behaviors. The experience would end with a snack offered by the Lisbon Zoo. The participants could be accompanied by other visitors that would watch on a specific reserved area and meet back with them at the snack. The experience would include the photos and film made by the FotoZoo. Since this experience is very special and desired by the public, the price has to be accordingly set premium.

Since this program do not depend entirely on the Zoo's decision (the Zoo does not decide the number of animals they can have), this program will not be explored on the communication plan, like the night programs.

- Trainer for a day programs

The trainer for a day programs could be destined to different animal areas, like the marsupials or the pedagogical farm, but the one recommended is the marine mammals trainer for a day program, due to its popularity amongst the visitors and like it is done on other international zoos.

The trainer for a day program for marine mammals would allow the visitor to spend a day with the dolphins and sea lions and learn about their daily activities, have close contact with them and become familiar with the techniques used with each animal as well as interpret their movements and sounds. This is an opportunity for the visitors to learn to take care of these animals from the trainer's knowledge and experience. The visitor would follow the trainers in some of their daily tasks, using a Lisbon Zoo uniform, and have access to areas reserved for the caretakers of the Zoo. The program would include: Lisbon Zoo trainer's uniform, morning spent with the marine mammals trainers participating in some activities like preparing the food, feeding the animals and training sessions, lunch at the Lisbon Zoo's cafeteria, free visit to the Lisbon Zoo after the training, a certificate of participation and a picture from "FotoZoo" to remember the experience. The price of this program would have to be set at a

premium price, since it is an exclusive experience that can only be done in very small groups and it includes the uniform and the normal ticket to the park.

- New uses of facilities and spaces

The Lisbon Zoo has several facilities that can be used for different purposes to generate profit. There are spaces that can be used for lectures, corporate events, private events or art galleries, like it is mentioned above. Other possible use of space is to create an outdoor cinema on the location of a deactivated restaurant. This would create interest on the visitors from the Lisbon area, since outdoor cinemas are no longer common. This space could also host music concerts. Another possible new use of space is to use the swimming pool located behind the dolphin's bay as a public swimming pool with a lifeguard, during summer season. To access the swimming pool the visitors could pay an extra for the ticket.

- Feed the farm animals

The pedagogical farm could have a vending machine (picture 6) containing adequate food for each animal so that the visitors could buy at a symbolic price and feed the animals. This would satisfy the need for interaction that many visitors have and by having information about the risks of trying to feed the wild animals with the food they bring or find, this could disincentive the visitors to adopt incorrect actions near the wild animals (like it happens even with signs alerting otherwise). This practice is already done at other national zoos, like Zoo de Lagos, as it can be seen in the picture 6 below.

**Figure 6 “Feed the ducks” from Zoo de Lagos**



Source: Zoo de Lagos

- Corporate events

According to the literature review, a visit to the Zoo has benefic effects on workers efficiency. So it is pertinent for the Lisbon Zoo to emphasize a set of corporate events and programs,

like: reunions, brainstorming sessions, workshops and formation, lectures, product and service presentations, company parties and communication with the media, amongst others.

## 4.2.2 Price

### 4.2.2.1. Description

Since the Lisbon Zoo is not at the beginning of its “product” lifecycle, the price strategy is determined in terms of price competition or non-price competition. The price competition strategy is the one where the company competes based on the price equal or lower than the competition. The type of price strategy that the Lisbon Zoo follows is the non-price competition. This strategy is when the organization differentiates its offer from the competition focusing not on the price but on other factors of its offer. There are a set of variables the Zoo must consider to set the price range: competitive pricing with other key attractions, focus on a whole day experience, operational costs, types of targets, school groups visits, amongst others.

The price range of the Lisbon Zoo is presented on the following table:

**Table 19 Ticket Price of the Lisbon Zoo**

<b>Visitors</b>	<b>Price</b>
<b>Children (less than 2 years old)</b>	Free
<b>Children (from 3 to 11 years old)</b>	€ 12,50
<b>Adult (from 12 to 64 years old)</b>	€ 18,00
<b>Senior (more than 65 years old)</b>	€ 14,00
<b>Groups with more than 15 visitors</b>	€ 16,00

Source: adapted from [www.zoo.pt](http://www.zoo.pt)

These tickets include entry for the park, all shows and attractions with the exception of the zoo train (that is paid separately).

The prices for the school groups are the following: 8,00€ for preschool (with one ticket for educator free for each 5 students) and 10,50€ for school ticket (with one ticket for professor free for each 10 students). The school prices include the entry for the Zoo and educational programs that go from preschool to high school. The guided tours have a price of 3,00€ for adults and free for children with less than 11 years old. There are also several partnerships (like it is mentioned previously) that provide discounts for the visitors.

#### **4.2.2.2. Recommendations**

Considering the research done previously, the target market considered for the project is considered to be price sensitive. The economic factors like the crisis and reduction of the buying power by the families has made consumers to spend less of their income on non-basic expenses. The primary research done by the questionnaire survey also shows that the respondents that have never visited the Lisbon Zoo consider the ticket price to be expensive.

Considering these facts, it is recommended to use seasonality to alter the price. During the high season the price could remain inalterable and during the low season the price could suffer a reduction between 5% and 15%. This would decrease the effect of seasonality on the number of visits, therefore making the ticket sale profits more even during the year.

Another recommendation is to segment the children's prices to 3 groups instead of 2. This proposition consists on adding one category to the pricing table. For children with ages between 3 and 11 years old the price would remain 12,50€ and for children with ages between 12 to 18 years old the new price would be 15,00€. With this alteration, the adult age group would change for between 19 and 64 years old.

#### **4.2.3 Place**

##### **4.2.3.1. Description**

The physical location of the zoo, as well as the placement of the Zoo shops throughout the zoo, is very important variables in the Zoo's business performance.

The Lisbon Zoo has a privileged location at the heart of the city of Lisbon, with great accessibility. All main public transportations give access to the Zoo. There is even a subway station called "Jardim Zoológico".

The Lisbon Zoo's layout has been improving and transforming into a modern Zoo, that combines the traditional with new developments and technology to create a park that has well defined areas, habitats with natural barriers and more space for the animals and also spaces for leisure and picnic areas. The environmental enrichment techniques are also evidenced with the waterfalls present in some habitats, logs and ropes for animals to balance and other physical evidences create a natural and pleasant atmosphere both for the animals and visitors.

The positioning of the Zoo shops is also strategic. There is one shop located at the exit of the dolphin's bay, the "bay shop" and another located at the exit of the park. These locations incentives the buying of a souvenir, after a pleasant experience, as a symbol of the day spent at the Zoo. The positioning of these gift shops has been carefully thought. The places they are positioned in ensure maximum coverage in an effort to incentive visitors to stop and think about buying and hopefully end up spending money in these shops. In order to exit the Zoo the visitors pass right next to the bigger shop and, like it was seen by the questionnaires, must visitors buy a souvenir for themselves, to offer or even both.

The restaurants are mainly positioned at the entry of the Lisbon Zoo, in the area that it is not paid. This is a very good strategy because in this way the restaurants can receive costumers that are not paying visitors. Many locals are used to go stroll at that area that has a nice lake and even some animals and these can also consume at the restaurants and coffee shops. The visitors can also go to these restaurants area, since they can leave and enter the zoo as many times as they like at that day.

#### **4.2.3.2. Recommendations**

The main recommendations about the Placement variable of the marketing mix are:

- Develop the on-line sales channel. Nowadays consumers are used to purchasing on-line tickets for concerts, trips and other activities as well as products. To have an on-line sales channel is essential to stimulate the buying decision. On-line buyers can be motivated to impulsively buy the ticket with special on-line promotions and discounts and also special conditions (not having to wait in line to buy the ticket). The ticket bought on-line could be sent to the consumers smartphone so that the process is ecofriendly and environmental conscious. This is consistent with the Lisbon Zoo's values.
- Create more partnerships with particular entities, with more hotels that have different segment targets of consumers, to attract more tourists, namely foreigner tourists that ask for touristic information at the hotels where they are staying; airline companies (besides the travel agencies partnerships already done by the Lisbon Zoo), also with the same objective and also with organizations that sell experiences on-line, like Odisseias. This could create interest on the consumers that are looking for programs to do on their free time and usually consult this kind of websites to plan their holydays or days off work.

## **4.2.4 Promotion**

### **4.2.4.1. Description**

#### **Communication Goals**

The most common communication goals observed are:

- To attract visitors and make the consumer return to the Lisbon Zoo more often;
- To communicate the newborns and attract visitors to see them before they grow;
- To communicate specific conservation campaigns undertaken by the zoo and/or international associations;
- To raise notoriety.

#### **Communication target**

The targeted audiences of the Lisbon Zoo marketing department are mainly:

- General public, in specific, families
- Schools
- Corporate sponsors

The general public are the main source of revenue of the Lisbon Zoo, since the profit comes almost exclusively from the tickets sold. These public audience are mainly families and the communication is to incentive the family visit to the Zoo. Schools are also an important audience for the Lisbon Zoo. The pedagogical center communicates with all the teachers that have previously done any educational program with their class at the Zoo. The communication with these teachers is usually done at the beginning of the school year, so that the teachers are able to plan the visit when they are planning the academic year. Finally the corporate sponsors are also an important audience, although this communication is not so visible, due to its business to business characteristics. Like it was said before, this marketing plan will not focus on this kind of audience but on the general public, due to the project constrains and limitations.

#### **Communication Strategy**

The Lisbon Zoo focus on two communication strategies: pull and profile. The pull communication strategy is to attract consumers and focus on above the line communications to construct the brand image and notoriety. The profile strategy is a communication strategy

that has as focus the organization and its relations with all stakeholders. It is also about company branding and has impact on reputation.

### **Communication actions**

Some of the most recent advertising campaigns performed by the Lisbon Zoo are:

- “Leve as suas pequenas “feras” ao Jardim Zoológico”

The advertising campaign “take your little “beasts” to the Zoo to get to know ours” had a television spot, outdoors that are still placed at several places around the Lisbon area and a radio spot.

- “125º Aniversário do Zoo”

This advertising campaign for the 125º Lisbon Zoo’s birthday has as slogan “Come find out the new Zoological Garden from always”. The “ambassadors” of this campaign were the primates, the elephants and the animals from the reptile house. The channels for this campaign were: television spot, billboard, outdoor and radio spot.

- “Em pequenos são sempre mais giros”

This advertising campaign had the objective to incentive the consumers to visit the Lisbon Zoo and see the new cubs, before they grew up. This campaign had as “ambassadors” the white tiger cubs and the white rhino cub. The channels for this campaign were also: television spot, radio spot, mupi and outdoor.

Other important communication tools are the corporation’s website and educational blog. Also essential to the promotion of the Lisbon Zoo is the sale of its merchandise. The Lisbon Zoo has a good range of merchandise products for the visitors to buy as souvenirs. Other forms of communication privileged by the Lisbon Zoo are the organization’s website and newsletter.

#### **4.2.4.2. Communication Recommendations – Communication Plan**

- **Goal Definition**

The main goals of this communication plan are divided into two categories:

- Behavioural Goals
  - Attract visitors to the Lisbon Zoo



- Attract visitors that have not visited the Lisbon Zoo in a long period of time
- Increase frequency of visit to the Lisbon Zoo
- Attract visitors to the Lisbon Zoo's new night programs
- Increase number of educational programs participations
- Increase number of Zoo animals sponsorships
- **Cognitive Goals**
  - Increase Lisbon Zoo's notoriety
  - Increase awareness of educational programs
  - Make visitors feel more involved with the Lisbon Zoo (positioning statement: Lisbon Zoo, Your Zoo")
  - Increase awareness of the improvements of the Zoo to the visitors that have not went to the Zoo in a long time

- **Communication Audiences**

According to the targeting defined previously and the communication objectives for this communication plan, the communication audience selected is:

- Families looking to have a pleasant day and quality family time
- Tourists (national and foreigner)
- Young groups of friends
- School groups

- **Communication Messages**

The proposed communication messages are defined according to the communication goals and audiences. The intended messages aim to communicate the brand Lisbon Zoo as a close and emotional linked brand not only to the animals but also to its visitors. The messages shown on this communication plan have the objective to make the consumers feel involved with the Lisbon Zoo.

The communication messages should be direct, of immediate perception by the receiver of the message and have all the necessary information. The objective of the message should be clear. The consumer should understand the objective, either if it is to stimulate visitors to come to the Zoo or an awareness campaign about an educational program or sponsorship program. The emotional side must always be present, since the zoological market is also an emotional

or feelings business. The emotional side is important to motivate the audience to visit the Zoo and adopt the behaviors established on the communications objectives.

The next table shows examples of specific communication messages to the different audience targets:

**Table 20 Communication Messages**

<b>Target Audience</b>	<b>Specific Communication Messages</b>
<b>Families</b>	“Lisbon Zoo, Your Zoo”
<b>National Tourists</b>	“Lisbon Zoo, Your Zoo”, “The Zoo is different, come find out”
<b>International Tourists</b>	“Lisbon Zoo, passion for animals!”, “Lisbon Zoo, Wildlife at the City”
<b>Young groups of friends</b>	“Lisbon Zoo, Your Zoo”
<b>School groups</b>	“Where education roars!”

Source: Own elaboration

- **Tone of Voice**

The tone of voice for the present communication plan is: friendly, relaxed, fun, informal, close, simple and direct.

- **Action plan**

Traditionally, the communication actions are divided into two categories: above the line and below the line. The above the line communication is done through the form of publicity. This publicity is done on the media channels. The below the line communication is the one done off the media channels. This communication is done through the channels: direct marketing, public relations, sales promotions and sales force. But by the Integrated Marketing Communications (IMC), there is no line.

The IMC is an audience driven strategy that combines all means to communicate. The goal is to generate short-term financial returns and build long-term brand value. In this sense, the recommended communication actions for this communication plan are:

➤ “More space for the big ones” Campaign

Figure 7 Example of a Mupi for the “More space for the big ones” campaign



Source: Adapted from Zooh Zürich

**Channel:** mupis located at the metropolitan Lisbon area; on-line advertising

**Goals:** attract visitors to the Lisbon Zoo, attract visitors that have not went to the Lisbon Zoo in a long time, raise awareness about the improvements of the Zoo’s animal habitats

**Main target audience:** National tourists, families

**Communication messages:**

- “More space for the big ones”
- “The zoo is different, come find out”
- “Come see the new and improved wild animal habitats at your own Lisbon Zoo from always”

➤ Value for money Campaign - “Come see the real ones”

Figure 8 Example of an ad for the “Come see the real ones” campaign



Source: Adapted from the internet

**Channels:** printed ads on press (magazines target to women); on-line advertising

**Goals:** attract visitors to the Lisbon Zoo

**Main target audience:** Families (attract the decision influencer on the families, usually the mother)

**Communication messages:**

- “Come see the real ones”
- The message to pass is that the value for money of going to the Lisbon Zoo is much higher than a stuffed animal toy and also cheaper
- 

➤ **“A whole new zoo emerging in the city” Campaign**

**Figure 9** Example of an ad for the “A whole new zoo emerging in the city” campaign



Source: adapted from Biopark, Valencia

**Channels:** mupis and printed ads on the floor around the Lisbon city area with QR code redirecting to the Lisbon Zoo’s website

**Goals:** attract visitors to the Lisbon Zoo that have not visited the Lisbon Zoo in a long period of time, increase awareness of the improvements of the Zoo to the visitors that have not went to the Zoo in a long time

**Main target audience:** Families, national and international tourists, young visitors

**Communication messages:**

- “A whole new zoo emerging in the city”
- “Wildlife at the heart of Lisbon”
- “Lisbon Zoo, passion for animals!”

➤ “Lisbon Zoo, Wildlife at the City” Campaign

Figure 10 Example of an ad for the “Lisbon Zoo, Wildlife at the City” campaign



Source: Adapted from Perth Zoo

**Channels:** printed ads on buses around the Lisbon city area

**Goals:** attract visitors to the Lisbon Zoo, make visitors feel more involved with the Lisbon Zoo

**Main target audience:** Families, national and international tourists, young visitors

**Communication messages:**

- “Lisbon Zoo, Wildlife at the City”
- “Lisbon Zoo, your zoo, always with you”

➤ “Come see them, without bars” Campaign

Figure 11 Example of an ad for the “Come see them, without bars” campaign



Source: Adapted from Zoo Safari

**Channels:** printed ads on the floor, located at some Lisbon crosswalks

**Goals:** attract visitors to the Lisbon Zoo that have went to the Zoo in a long time

**Main target audience:** Families, national and international tourists, young visitors

**Communication messages:**

- “Come see the Lions, without bars “
- “The Zoo is different, come find out”
- “Lisbon Zoo, Your Zoo “
- “Lisbon Zoo, passion for animals!”

➤ **“Nothing replaces the zoo. Lisbon Zoo, Your Zoo” Campaign**

**Figure 12 Example 1 of an ad for the “Nothing replaces the zoo. Lisbon Zoo, Your Zoo” campaign**



Source: Own Elaboration

**Figure 13 Example 2 of an ad for the “Nothing replaces the zoo. Lisbon Zoo, Your Zoo” campaign**



Source: Adapted from Calgary Zoo

**Channels:** Outdoors and mupis around the Lisbon city area with QR code redirecting to the Lisbon Zoo’s website, on-line advertising



**Goals:** attract visitors to the Lisbon Zoo, increase frequency of visit to the Lisbon Zoo, make visitors feel more involved with the Lisbon Zoo

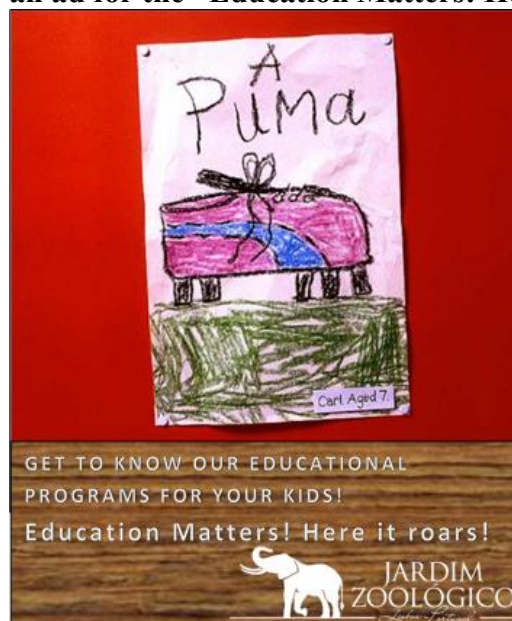
**Main target audience:** Families, national and international tourists, young visitors

**Communication messages:**

- “Nothing replaces the zoo. Lisbon Zoo, Your Zoo “
- “Lisbon Zoo, passion for animals!”

➤ **“Education Matters! Here it roars!” Campaign**

**Figure 14** Example of an ad for the “Education Matters! Here it roars!” campaign



Source: Adapted from Banham Zoo

**Channels:** printed ads on magazines, on-line advertising

**Goals:** Raise awareness about the Lisbon's Zoo's educational programs, increase number of educational programs participations

**Main target audience:** Families

**Communication messages:**

- “Education Matters! Here it roars! “
- “Get to know our educational programs for your kids”

➤ **Communication actions for proposed product programs:**

**Zoo at night Campaign:** “Come see the Zoo at night, if you dare!”

**Figure 15** Example of an ad for the “Come see the Zoo at night, if you dare!” campaign



Source: Adapted from the internet

**Channels:** outdoors around the Lisbon city area, on-line advertising

**Goals:** attract visitors to the Lisbon Zoo new night guided visit program

**Main target audience:** young visitors, national and international tourists, families

**Communication messages:**

- “Come see the Zoo at night, if you dare”

### “Bring the slippers, the camp is set” Campaign

**Figure 16** Example of an ad for the “Bring the slippers, the camp is set” campaign



Source: Adapted from the internet



**Channels:** outdoors around the Lisbon city area with QR code redirecting to Lisbon Zoo’s webpage with detailed information about the experience, on-line advertising

**Goals:** attract visitors to the Lisbon Zoo new camping experience

**Main target audience:** young visitors, families, national and international tourists

**Communication messages:**

- “Bring the slippers, the camp is set”
- “Lisbon Zoo, your Zoo”

➔ **Seasons’ holidays specific ads campaigns**

Campaigns for specific special days and holidays, like: Christmas, mother’s day, father’s day and valentine’s day.

**Figure 17 Eg. of a Valentine’s day ad**



Source: Adapted from Kolner Zoo

**Figure 18 Eg. of a Christmas ad**



Source: Own Elaboration

**Channels:** on-line advertising and printed ads on magazines that are targeted for the segments the Lisbon Zoo is communicating with (specific magazines targeted for a women, men and young target)

**Goals:** attract visitors to the Lisbon Zoo on specific season’s holidays and special days, make visitors feel more involved with the Lisbon Zoo

**Main target audience:** families, young visitors, national tourists

➤ **New cubs specific ads campaigns**

These campaigns are specific for when there is a new cub presented for the public to see. Because of the specificity of these campaigns and since the communication plan is for the year of 2014, this item will not appear on the chronogram, due to the unpredictability of when there will be newborns and of which species.

**Figure 19 Example of a new cub campaign ad**



Source: Adapted from Monarto Zoo

**Channels:** mupis, printed ads or on-line advertising

**Goals:** attract visitors to the Lisbon Zoo to see the new cubs when they are presented to the public

**Main target audience:** families, young visitors, national tourists

➤ **Cinema Spot – “come see the Zoo at night, if you dare!”**

**Channels:** Cinema spot of 30 seconds that will be applied in some movie theaters (partnership with Zon Lusomundo Cinemas)

**Goals:** attract visitors to the Lisbon Zoo new night guided visit program

**Main target audience:** young visitors, national and international tourists, families

**Communication messages:**

- “Come see the Zoo at night, if you dare”

### ➔ **Wild Animal Parade**

**Description:** the Wild Animal Parade event is inspired by the CowParade, an international public art exposition that has been done in several main cities across the world. The Wild Animal Parade will consist on an exposition of several different wild animal sculptures, all of them representing animals that can be found at the Lisbon Zoo. The sculptures are done in fiberglass, in a partnership with the company Guliver that will produce them. Then, there will be asked for local and national artists and public figures to decorate the sculptures. These sculptures will then be displayed at several cities of Portugal, beginning with Lisbon at the Liberty Avenue (like the CowParade) after that the Wild Animal Parade will travel across the country. The cities that will receive this event will be: Porto, Aveiro, Guimarães, Coimbra, Évora and Faro. One of the wild animal's sculpture will be decorated by children at the Zoo's ATL and other will be left blank so that the public can leave a message or a drawing at that sculpture. This event will attract media attention and at the last day of the event (when the statues return to Lisbon), the media will be invited as well the artists and public figures that participated on the decoration of the animals. On the last day there will be an auction to sell the sculptures and all the revenue will revert to conservation campaigns which the Lisbon Zoo is involved in.

**Goals:** attract visitors to the Lisbon Zoo, raise Lisbon Zoo's notoriety, make visitors feel more involved with the Lisbon Zoo

**Main target audience:** national tourists, international tourists, young visitors, families

### ➔ **Website**

In the on-line channel communications, the website layout could be improved to be more user-friendly. The newsletter could also be sent with more often news and contests. A special newsletter could be constructed specifically to the parents of the children that had participated on the Zoo's educational programs, to keep in touch with the segment of consumers and give information about other educational programs and general Zoo news to the parents. These newsletters should be sent on a regular basis and reinforced on the weeks before the children's school holidays. The website will also be the primordial platform to communicate in a more detailed way about the Lisbon Zoo's new programs: guided visit at night, camping experience and trainer for a day experience. This online channel could include a forum for visitors to communicate directly between them. This direct marketing tool would allow for the

visitors to express their opinions and thoughts about the Zoo and also would allow the Lisbon Zoo to keep in touch with the consumers in an informal way,

On the website there could be a web live zoo broadcasting. This consists on transmitting on-line live videos of several spots and habitats at the Lisbon Zoo through a set of cameras placed at selected locations 24h a day. The videos are placed at the website at almost real time. The website visitors can do a virtual tour to the Lisbon Zoo. This will raise curiosity to visit the Lisbon Zoo and also to explore the website and in this way raise awareness of the Lisbon Zoo's offer.

### ➤ Social Media

Create and develop an official Facebook fan page for the Lisbon Zoo. This page has to be interactive and there has to be one person responsible to update the page frequently and respond to the fans questions and suggestions post. Regular contests could be done through this social media channel as well through the website.

A suggestion for a contest using social media is to ask for the fans to send funny pictures of their pet animals and the one most voted (with “likes” at the Lisbon Zoo Facebook page) wins a ticket for the Lisbon Zoo. These kind of contests could also apply to season holyday's, like Christmas, mother's day, father's day, valentine's day and so on. Another contest could be done during the summer and the prize could be a free staying at the Pet Hotel for the winner's pet, during the winner's own holidays.

The social media presence could also be reinforced in other channels, like: Twitter, YouTube, Flickr, amongst others.

### ➤ Social Media Ad

**Figure 20 creating a banner ad for Facebook channel**



Source: Adapted from Facebook

**Channels:** Facebook banner ads (redirects to Lisbon Zoo’s webpage)

**Goals:** attract visitors to the Lisbon Zoo

**Main target audience:** young visitors, families, national tourists

**Communication messages:**

- “Why not today?”
- “Lisbon Zoo, your Zoo”

➔ **Smartphone App**

Functions of the Lisbon Zoo’s free application for smartphones:

**Figure 21 Examples of Smartphone App: Gaming (game from Zoo’s website) and GPS**

General information to plan the visit;

- Possibility of buying tickets through the app;
- Create a to do list of the Zoo’s activities you want to do during the visit, so you won’t forget anything;
- Information about all the animals with curious and fun facts about them;
- Map of the Zoo with link to GPS to allow the visitors to know where they are at that exact moment and with a search function that will show a path to any habitat or attraction they search (like the car GPS);
- Possibility to link with social networks to share with friends their experience;
- Zoo games included.



Source: Own elaboration, adaptation from Zoo’s website

➔ **Improve Search Engine Mechanism**

This action is to include specific promotions and news on Google AdWords. This advertising tool, by Google Search Engine, is very useful to communicate with the persons that are

searching for words related with the Lisbon Zoo. The AdWords, located in the right column of the webpage already shows general information of the Lisbon Zoo and its website, but could also include the on-line advertising campaigns shown above.

➔ **Merchandising**

A new line of merchandising could be introduced at the Zoo shops: the “I Love Lisbon Zoo” clothing line. This line could also be extended to stationary and other goods.

**Figure 22 Example of new line of clothing “I Love Lisbon Zoo”**



Source: Own elaboration

➔ **Sugar packages Sponsorship campaign**

**Figure 23 Examples of sugar packages**



Source: Own Elaboration

**Channels:** Partnership with the company Nicola to produce and distribute merchandising through the HORECA channel

**Goals:** raise awareness about the sponsorship/godfather programs, increase number of Zoo animals sponsorships, make visitors feel more involved with the Lisbon Zoo

**Main target audience:** young visitors, families, national tourists

**Communication messages:**

- “Someday I will be the godfathers of a wild animal. Today’s the day”



### ➔ School Campaign

At the beginning of school year, besides communicating with the teachers, several flyers containing the Lisbon Zoo's general information and educational programs specific details could be delivered at several schools from primary school to high school to communicate with the students. This campaign could repeat near the holidays (Eastern, Christmas, Summer) so that the children and students be aware of the educational programs they can do during the holidays. These holidays periods have been established with specific reference to the target market (families) because it is a time that children are always looking for something fun to do and parents are trying to find something to occupy the children's free time.

- **Chronograph of the Communication Actions**

The scheduling of the previous communication action is defined according to each action objectives and characteristics and also according to seasonality. The chronograph presented is for the year of 2014. The communication actions' planning is displayed on the following chronograph:

**Table 21 Chronograph of the Lisbon Zoo's Communication actions during 2014**

Actions	Jan	Feb	Ma	Apr	Ma	Jun	Jul	Au	Sep	Oct	No	Dec	Budget
"More space for the big ones"	■	■	■										60.000€
"Come see the real ones"		■							■	■			13.110€
"A whole new zoo emerging in the city"		■	■	■									60.000€
"Lisbon Zoo, Wildlife at the City"									■	■	■	■	26.530€
"Come see them, without bars"	■	■	■	■	■								16.810€
"Nothing replaces the zoo"							■	■	■	■	■	■	120.000€
"Education Matters! Here it roars!"			■						■				6.340€
"Come see the zoo at night, if you dare!"				■	■	■	■	■	■				28.550€
"Bring the slippers, the camp is set"							■	■	■				17.130€
Season' holidays campaigns		■	■	■	■							■	22.840€
Cinema						■	■	■					54.945€
Wild Animal Parade									■	■	■		N/A
Website (updates, web live broadcasting)	■	■	■	■	■	■	■	■	■	■	■	■	N/A
Social Media (ads, contests, updates)	■	■	■	■	■	■	■	■	■	■	■	■	350€
Smartphone App (launch)				■									N/A
Improve Search Engine Mechanism	■												N/A
Merchandising (launch)			■										820€
Sugar packages Sponsorship			■	■	■	■	■	■	■	■			N/A
School Campaigns				■		■			■			■	265,98€

Source: Own Elaboration

Observations: the “More space for the big ones” and “A whole new zoo emerging in the city” campaigns refer to 100 Mupis in the metropolitan area of Lisbon. The “Come see the real ones” is an ad for the magazine *Activa* (1/2 page ad). The “Lisbon Zoo, Wildlife at the City” refers to 425 prints on sides of buses. The price for the “Come see them, without bars” campaign is adapted from impact outdoors prices. The “Education Matters! Here it roars!” campaign is for the magazine *Active* (1/4 page ad).

The budget is a provisory set of values that can be changed in negotiations with the partners. To some prices there it has to be added the IVA (*Imposto sobre Valor Acrescentado*). Some campaigns present N/A, which means that either the price is non-applicable or that the price was not possible to obtain. Some campaigns are done exclusively by the marketing department and do not need a specified budget. The total amount of the potential budget is 427.690,98€.

- **Monitories and Evaluation**

Each of the previous communication actions must be regularly evaluated and monitored in terms of communication efficiency and goals achievement. The measure tools to evaluate and monitor differ according to each action specific characteristics, but some of the main measurement tools to use are:

- Number of visitors, (monitor variance);
- Number of participants on educational programs;
- Number of participants on new night programs;
- Number of webpage visitors;
- Social media participation by consumers (page views, comments, “likes”, shares, number of fans);
- Number of downloads of Lisbon Zoo’s smartphone application;
- Sales of new merchandising;
- Number of participants on Wild Animals Parade final event and auction.



## Chapter 7 – Conclusions

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### 7.1. Conclusions

The objective of this project thesis was to conduct a marketing plan with the development of an operational plan. The operational plan has a temporal horizon of one year to implement on the year of 2014. To achieve this objective, several actions had to be made: study the market (macro and micro environment), study the competition, understand the consumer behavior, study the company, identify the company's main strengths and weaknesses, identify the market's main opportunities and threats, decide on strategic options, create an efficient marketing operational plan and develop a communication plan for 2014 with specification and budgeting for each action.

To achieve these objectives it was conducted a literature review to gather scientific and relevant information on the subjects of marketing planning, non-profit organizations, leisure sector and zoological markets. The conceptual and theoretical approach led to a set of important conclusions that allowed to create hypothesis to test and questions to develop a research on primary and secondary data.

The next part of this thesis consists on the study conducted to complement the previous analysis and to provide basis to the undertaking of decisions done on the implementation proposal. For that, the methodology focused in the collection of primary and secondary data from several sources. The primary data was collected through the use of structured questionnaires to potential consumers and in-depth interviews to Zoo workers to have an inside perspective. The secondary data had several national and international sources and it was enriched with the participation on a Lisbon Zoo's educational workshop.

The questionnaires analysis showed that most respondents prefer to visit the Lisbon Zoo accompanied by their spouse or boyfriend/girlfriend and children, grandchildren or other kids and they visit the Zoo mainly for entertainment purposes. The weekends and summer or spring are the preferred periods to visit the Lisbon Zoo. When planning the visit, most of the respondents see general information on the website. Concerning the perceptions about the Lisbon Zoo, the visitors give higher classification to the Zoo's attractions/shows and concern about conservation and animal welfare. The respondents have general knowledge about the Lisbon Zoo's educational programs, mainly about the guided visits and Zoo's ATL, but most

of them have never participated in any program. Most of the visitors would like to obtain information about the Zoo's news by newsletter or through the Zoo's website. The respondents who have never visited the Lisbon Zoo point the geographical distance as major impediment to the visit and consider the price to be expensive. These respondents would like to receive the Zoo's news through several communication channels, being the most preferred the newsletter. The statistical analysis of the questionnaires also allowed to conclude that the lack of motivation to visit the Lisbon Zoo depends on age, gender and having children. The variables age and entertainment motives of visit are related while age and educational motives of visit are not.

The main conclusions to retain from the interviews are that the Zoo's critical success factors referred are mainly linked to the Zoo's history, animal collection and conservation of species concern. The main consumer profiles are families and schools. The Lisbon Zoo's activity is conditioned by the weather conditions. The education is an important variable of the Zoo's activity and it has to be in constant change and adaptation to new realities.

The market, in a macro environment analysis, is characterized by the economic recession, the reduction of buying power of the families and several social, political and technological modifications. In terms of the zoological market, the number of visitors started to decrease in 2010. Lisbon receives the majority of visitors of museums, zoological gardens, botanical gardens and aquariums. The number of foreigner visitors to these kind of attractions is unstable, although it is considered as a segment of the Zoo's consumers. The country's region that has a higher number of visitors of museums, zoological and botanical gardens and aquariums included in school groups is the north of Portugal, followed by Lisbon. School groups are a very important group of consumers in the zoological market, since one of the objectives of the zoo lies in the education for the conservation of species. It is also important to highlight that the number of school groups that go to zoological and botanical gardens and aquariums is substantial minor when compared to the school groups that go to museums. In this sense, it is important to communicate to schools the offers in terms of pedagogical programs the Lisbon Zoo has. The number of zoological gardens has remain stable in the past few years. The number of goods (or assets concerning physical evidences) in zoological gardens, botanical gardens and aquariums in Portugal has increased in the past few years.

The Lisbon Zoo's direct competitors are: Zoological gardens, Wildlife parks and Aquariums. There are also other indirect competitors that can be substitute offer of entertainment and

educational attraction. It is important to monitor their activities, in order to have clear market knowledge.

The consumer profile of the zoological market has changed in the past years. Visitors used to expect only the animal recreation and interaction with wild animals, but nowadays visitors are more exigent. The visitors expect an entertainment experience but also educational. The expectations in terms of information provided, animals enclosures' conditions, animal welfare and concerns about conservation of species are now higher. The visitors also expect diverse offer of services and special programs, namely for special dates like birthdays and holidays. The visitors are also more price sensitive, due to the economic crisis.

The market's main opportunities found on this project thesis are linked to the attraction of new segments of consumers due to the consumer's changing habits, new attractions with new shows or special programs for example, new uses of space and new strategic alliances. The main market weaknesses are the economic crisis, other substitute offer (in terms of Zoos, other attractions or other touristic destinations), climate alterations and changes in taxes and laws. The market's critical success factors are: notoriety, product, offer, animal welfare and conservation concern, history and location.

The implementation proposal of this project started with the strategic options definitions. The segmentation of the Lisbon Zoo's consumers led to the definition of three main target markets: families looking to have a pleasant day and quality family time, tourists and school groups. In terms of positioning, the Lisbon Zoo should be perceived as an *edutainment* business. This means an alliance and balance between education and entertainment. Another basis for the Lisbon Zoo's positioning is the passion for animals. Considering this, the positioning statement defined for the Lisbon Zoo is "Lisbon Zoo, Your Zoo".

The operational plan of this project consisted on the development of the marketing-mix. The main product recommendations were to create new programs and experiences that will attract new visitors and also engage new uses of facilities and space. In terms of price, the main recommendations were to create a seasonality effect on the price and also to segment the children's price and create a new category. The recommendations for the place were to develop the on-line sales channel and the partnerships with particular entities. For the communication it was proposed a communication plan for the year 2014 with the main goals of attracting visitor to the Lisbon Zoo, increase frequency of visits to the Lisbon Zoo, increase

number of Zoo animals sponsorships, make consumer feel more involved with the Zoo and increase awareness of the improvements of the Zoo spaces and of the educational programs. The tone of voice for the communication plan was: friendly, relaxed, fun, informal, close, simple and direct. After the specification of each communication' actions and campaigns, there was defined a potential budget and also monitories and evaluation for those actions.

## **7.2. Project Contribution**

The present project thesis intended to develop a marketing plan for the Lisbon Zoo with an operational plan with the temporal horizon of one year. The project sought to contribute for the development of theoretical knowledge about the concepts of marketing planning applied to the zoological market.

The Lisbon Zoo has presently a well-defined marketing department and good implemented marketing practices. In this sense, the present project intends to provide some implementation proposals to the direction board of the Lisbon Zoo in terms of marketing strategic options and consequent operational actions. The implementation proposals had as basis the research on the concepts above mentioned and also the perceptions of potential consumers. The Zoo should continue to develop good marketing practices and communicate the message of the Zoo's positioning as a center for conservation, reproduction and reintroduction of endangered species and also a place for visitors to enjoy a good day and walk out carrying good memories and also the conservational message of the construction of a better world.

## **7.3. Project Limitations**

The development of this thesis had several limitations. At the beginning of the research, it was clear that there is few scientific papers on the subject of zoological parks, which conditioned the literature review.

In terms of the collection of data, several time and financial constraints limited the number of questionnaires that were possible to apply. The sampling method chosen was also conditioned by time and financial limitations, so it was not possible to use a random sampling method. It was made an effort for the sample to be as most representative of the universe and the target population as possible, but the limited time and financial limitations did not allowed to reach

the reference for the sample dimension. The number of respondents only allowed the answers to be indicative and not representative of the universe. These limitations also affected to the definition and number of hypothesis to test in the statistical analysis of the questionnaires and consequent bivariate tests applied. The staff interviews were also conditioned by time factors and the availability of the staff, even though it was always showed sympathy and will to collaborate with the thesis development.

Another limitation to the study was the difficulty to obtain secondary market data for the zoological market. Several data was collected from INE, but these information included also museums, botanical gardens and aquariums. The consumer behavior data was also limited.

In terms of the communication plan, due to time limitations, it was not possible to develop an action plan for the corporate sponsors, which are one segment of the communications target. The communication to schools could also be more developed. Other limitation is the data for the communication budget. Due to time constrains there was not possible to contact with all agencies and companies that could provide specific budgets for each action and so the values were mainly from secondary research. A more profound research on this point could provide a more representative budget for the communication plan.

#### **7.4. Suggestions for future research projects**

A suggestion for future research is to conduct a new primary data research with a new set of questionnaires done outside the Lisbon Zoo or even to visitors inside the Lisbon Zoo. This research could be applied at different seasons of the year to understand the variations in visitors opinions about the Lisbon Zoo. An inferential statistical analysis would allow to validate or not the hypothesis created for this research.

Another future research that could be conducted would be to create different kinds of marketing plans for the Lisbon Zoo: for the company, for the product, of the marketing-mix or for specific operations. A line of research would be to develop on of the proposed new programs or experiences. For example, a full development and implementation proposal for the guided visits at night experience. Another line of research would be to focus the implementation proposal to a communication plan for the Lisbon Zoo, with specific communication objectives.

Another proposed research is to study the relation between the communication tools and consumer behavior. It could be tested, for example, if the web live broadcast at the organizations website would influence the opinion of the users in terms of the Lisbon Zoo's image. The study of effects of several communication actions on consumer behaviors could also be tested.

*I am in favor of animal rights as well as human rights. That is the way of a whole human being.*

Abraham Lincoln

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## Appendices

**Appendix 1 – Questionnaire Structure****Survey about the Lisbon Zoo – Master thesis ISCTE**

I am a student of the Marketing Master program of the ISCTE Business School and I am currently finishing my master thesis. The thesis consist on a marketing plan for the Lisbon Zoo. For that I am collecting opinions about the Lisbon Zoo. The purpose of this questionnaire is to understand the notoriety and thoughts that visitors have about Zoo. Responses will be treated confidentially and anonymously. Your collaboration is essential for the conclusion of my thesis. Thank you for your availability and participation. The questionnaire takes around 5 min to complete.

**Demographics**

**Gender** M  F

**Age group**

<18  18 – 25  26 – 35  36 – 45  46 – 55  56 – 65  >66

**Place of residence** \_\_\_\_\_

**Occupation** \_\_\_\_\_

**Qualifications**

Less than the ninth grade  Ninth grade  High School  College

**Do you have children?** Yes  No  **Number** \_\_\_\_\_ **Ages** \_\_\_\_\_

**Consumption habits**

1. **Have you visited the Lisbon Zoo?** Yes  No

*If your answer is **no**, go to page 4*

2. **When was the last time that you have visited the Lisbon Zoo?**

Less than one year ago  Between 1 and 3 years ago  over 3 years ago

3. **How often do you visit the Lisbon Zoo?**

More than once a year  Once a year

Sometimes  Rarely

4. **With whom do you usually visit the Lisbon Zoo?**

Children, grandchildren or other kids  Other relatives

Friends  Spouse or boyfriend/girlfriend  Other, whom? \_\_\_\_\_

**5. Why do you visit the Lisbon Zoo?**

Entertainment  Education  Other, what? \_\_\_\_\_

**6. Do you usually plan your visit to the Lisbon Zoo?**

I see website for general information  I look for opinions from other visitors   
 I print the map, schedules of shows and other information from the website   
 I plan on only the date and time  I do not plan the visit

**7. Which week days do you prefer to visit the Lisbon Zoo?**

Monday to Friday  Weekends

**8. Which season do you prefer to visit the Lisbon Zoo?**

Summer  Autumn  Winter  Spring

**9. Do you usually buy souvenirs at the Zoo shop?**

Yes, to me  Yes, to offer  Both   
 No  Why? \_\_\_\_\_

**Perceptions about the Lisbon Zoo**

**10. How do you classify the Lisbon Zoo in terms of the following variables:**

1 – bad, 2 – average, 3 – good, 4 – very good, 5 – excellent

	Do not know/do not answer	1	2	3	4	5
Animal enclosures (habitats)						
Concern about conservation and animal welfare						
Attractions/shows						
Services and treatment (Visitor support center, sympathy and information providing)						
Leisure spaces and picnic park						
Restaurants and coffee shops						
Amusement Park Animax						
Zoo's merchandising (Zoo Shops)						
Communication/Advertising						
Website						

11. Do you recall any of these advertising campaigns from Lisbon Zoo? (television spots, billboards or radio spots)

“Feras à solta no aeroporto de Lisboa”



“Leve as suas pequenas “feras” ao Zoo”



“125º Aniversário do Zoo”



“Em pequenos são sempre mais giros”  None



12. The Lisbon Zoo carries out several environmental enrichment practices (which aim to preserve the natural wild behaviors). Were you able to observe that at your visit(s)?

Physical, eg. logs and ropes for the animals to swing  Sensorial, eg. waterfall sound

Cognitive, eg. Puzzles  Social, eg. interaction between species

Feeding, eg. hidden food or difficult to access  None

13. Do you have knowledge about the Lisbon Zoo’s educational programs?

Guided visits  Birthday parties  Wild Saturdays

Zoo’s ATL  None

14. Have you ever participated in any of the previous programs?

Yes  No  A relative  Who? \_\_\_\_\_

15. How would you like to obtain information about the Lisbon Zoo news?

Lisbon Zoo’s website  Newsletter  Magazines, newspapers  Television

Outdoors and billboards  E-mail  Other, what? \_\_\_\_\_

**Thank you for your collaboration! Your questionnaire ended!**

**If you answered no...**

**2. Why have you never visited the Lisbon Zoo?**

Geographical distance       Lack of time       Never had interest to

Other, what? \_\_\_\_\_

**3. How do you consider the ticket price (18,00€)?**

Adequate       Expensive       Cheap

If you answered expensive or cheap, how much would you consider adequate? \_\_\_\_\_

**4. Do you intend to visit the Lisbon Zoo?**

Yes       No

**5. Do you intend to visit it this year?**

Yes       No

**6. How would you like to obtain information about the Lisbon Zoo news?**

Lisbon Zoo's website       Newsletter       Magazines, newspapers       Television

Outdoors and billboards       E-mail       Other, what? \_\_\_\_\_

**Thank you for your collaboration!**

## Appendix 2 – Questionnaires Analysis

## 2.1. Sample Characterization

**Table 22 Distribution of frequencies and percentage for the variable Gender**

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid Male	58	46,4	46,4	46,4
Valid Female	67	53,6	53,6	100,0
Total	125	100,0	100,0	

**Table 23 Distribution of frequencies and percentage for the variable Age**

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid <18	4	3,2	3,2	3,2
Valid 18-25	14	11,2	11,2	14,4
Valid 26-35	49	39,2	39,2	53,6
Valid 36-45	36	28,8	28,8	82,4
Valid 46-55	11	8,8	8,8	91,2
Valid 56-65	5	4,0	4,0	95,2
Valid >=66	6	4,8	4,8	100,0
Total	125	100,0	100,0	

**Table 24 Distribution of frequencies and percentage for the variable Place of residence**

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid Alcochete	2	1,6	1,6	1,6
Valid Almada	11	8,8	8,8	10,4
Valid Alverca	2	1,6	1,6	12,0
Valid Amadora	7	5,6	5,6	17,6
Valid Braga	2	1,6	1,6	19,2
Valid Brasil - SP	2	1,6	1,6	20,8
Valid Cacém	5	4,0	4,0	24,8
Valid Camarate	1	,8	,8	25,6
Valid Caneças	1	,8	,8	26,4
Valid Cascais	1	,8	,8	27,2
Valid Coimbra	2	1,6	1,6	28,8
Valid Costa da Caparica	2	1,6	1,6	30,4
Valid Ericeira	1	,8	,8	31,2
Valid Faro	2	1,6	1,6	32,8
Valid Fogueteiro	1	,8	,8	33,6
Valid Lisbon	31	24,8	24,8	58,4
Valid Loures	3	2,4	2,4	60,8
Valid Mafra	4	3,2	3,2	64,0
Valid Malveira	4	3,2	3,2	67,2
Valid Massamá	3	2,4	2,4	69,6
Valid Montijo	2	1,6	1,6	71,2
Valid Odivelas	7	5,6	5,6	76,8
Valid Parede	2	1,6	1,6	78,4
Valid Portalegre	1	,8	,8	79,2
Valid Porto	4	3,2	3,2	82,4
Valid Póvoa de Santo Adrião	1	,8	,8	83,2
Valid Sacavém	1	,8	,8	84,0
Valid Santo António dos Cavaleiros	1	,8	,8	84,8
Valid Seixal	3	2,4	2,4	87,2
Valid Sesimbra	1	,8	,8	88,0
Valid Setúbal	2	1,6	1,6	89,6
Valid Sintra	3	2,4	2,4	92,0

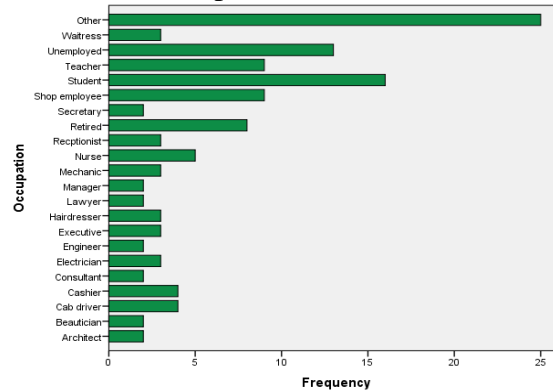


Torres Vedras	6	4,8	4,8	96,8
UK - London	2	1,6	1,6	98,4
Vila Franca de Xira	2	1,6	1,6	100,0
Total	125	100,0	100,0	

**Table 25 Distribution of frequencies and percentage for the variable Occupation**

	Frequency	Percent	Valid Percent	Cumulative Percent
Account Manager	1	,8	,8	,8
Accountant	1	,8	,8	1,6
Architect	2	1,6	1,6	3,2
Beautician	2	1,6	1,6	4,8
Bus Driver	1	,8	,8	5,6
Cab driver	4	3,2	3,2	8,8
Cashier	4	3,2	3,2	12,0
Coffee shop employee	1	,8	,8	12,8
Consultant	2	1,6	1,6	14,4
Cook	1	,8	,8	15,2
Dentist	1	,8	,8	16,0
Driver	1	,8	,8	16,8
Economist	1	,8	,8	17,6
Electrician	3	2,4	2,4	20,0
Engineer	2	1,6	1,6	21,6
Executive	3	2,4	2,4	24,0
Hairdresser	3	2,4	2,4	26,4
Housewife	1	,8	,8	27,2
Instructor	1	,8	,8	28,0
Janitor	1	,8	,8	28,8
Jeweler	1	,8	,8	29,6
Journalist	1	,8	,8	30,4
Kindergarten teacher	1	,8	,8	31,2
Valid Lawyer	2	1,6	1,6	32,8
Manager	2	1,6	1,6	34,4
Mechanic	3	2,4	2,4	36,8
Medical Doctor	1	,8	,8	37,6
Nurse	5	4,0	4,0	41,6
Nutritionist	1	,8	,8	42,4
Paramedic	1	,8	,8	43,2
Pharmacist	1	,8	,8	44,0
Photographer	1	,8	,8	44,8
Plumber	1	,8	,8	45,6
Policeman	1	,8	,8	46,4
Product manager	1	,8	,8	47,2
Receptionist	3	2,4	2,4	49,6
Retired	8	6,4	6,4	56,0
Salesman	1	,8	,8	56,8
Saleswoman	1	,8	,8	57,6
Secretary	2	1,6	1,6	59,2
Shop employee	9	7,2	7,2	66,4
Student	16	12,8	12,8	79,2
Teacher	9	7,2	7,2	86,4
Unemployed	13	10,4	10,4	96,8
Waiter	1	,8	,8	97,6
Waitress	3	2,4	2,4	100,0
Total	125	100,0	100,0	

**Chart 30 – Occupation Variable Distribution**



**Table 26 Distribution of frequencies and percentage for the variable Qualifications**

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid Less than Ninth grade	8	6,4	6,4	6,4
Valid Ninth grade	27	21,6	21,6	28,0
Valid High School	29	23,2	23,2	51,2
Valid College	61	48,8	48,8	100,0
Total	125	100,0	100,0	

**Table 27 Distribution of frequencies and percentage for the variable *Do you have children?***

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid No	32	25,6	25,6	25,6
Valid Yes	93	74,4	74,4	100,0
Total	125	100,0	100,0	

**Table 28 Distribution of frequencies and percentage for the variable Number of Children**

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid 1	38	11,3	40,9	40,9
Valid 2	44	13,1	47,3	88,2
Valid 3	11	3,3	11,8	100,0
Total	93	27,6	100,0	

**2.2. Consumption habits**

**Table 29 Distribution of frequencies and percentage for the variable *Have you visited the Lisbon Zoo?***

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid No	21	16,8	16,8	16,8
Valid Yes	104	83,2	83,2	100,0
Total	125	100,0	100,0	

**Table 30 Distribution of frequencies and percentage for the variable *When was the last time that you have visited the Lisbon Zoo?***

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid Less than 1 year	37	29,6	35,6	35,6
Valid Between 1 and 3 years	37	29,6	35,6	71,2
Valid More than 3 years	30	24,0	28,8	100,0
Total	104	83,2	100,0	

**Table 31 Distribution of frequencies and percentage for the variable *How often do you visit the Lisbon Zoo?***

	Frequency	Percent	Valid Percent	Cumulative Percent
Rarely	11	8,8	10,6	10,6
Sometimes	57	45,6	54,8	65,4
Valid Once a year	30	24,0	28,8	94,2
More than once a year	6	4,8	5,8	100,0
Total	104	83,2	100,0	

**Table 32 Distribution of frequencies and percentage for the variable *Which week days you prefer to visit the Lisbon Zoo?***

	Frequency	Percent	Valid Percent	Cumulative Percent
Monday to Friday	25	20,0	24,0	24,0
Valid Weekends	79	63,2	76,0	100,0
Total	104	83,2	100,0	

**Table 33 Distribution of frequencies and percentage for the variable *Which season of the year do you prefer to visit the Lisbon Zoo?***

	Frequency	Percent	Valid Percent	Cumulative Percent
Summer	50	14,8	48,1	48,1
Autumn	11	3,3	10,6	58,7
Valid Winter	4	1,2	3,8	62,5
Spring	39	11,6	37,5	100,0
Total	104	30,9	100,0	

**Table 34 Distribution of frequencies and percentage for the variable *Do you usually buy souvenirs at the Zoo Shop?***

	Frequency	Percent	Valid Percent	Cumulative Percent
No	34	27,2	32,7	32,7
Yes, for myself	13	10,4	12,5	45,2
Valid Yes, to offer	28	22,4	26,9	72,1
Both	29	23,2	27,9	100,0
Total	104	83,2	100,0	

### 2.3. Perceptions about the Lisbon Zoo

**Table 35 Distribution of frequencies and percentage for the variable *How do you classify the Lisbon Zoo in terms of the following variables?***

	Do not know/do not answer	Bad	Average	Good	Very good	Excellent
	%	%	%	%	%	%
Animal enclosures (habitats)	.0	.0	.0	19.2	57.7	23.1
Concern about conservation and animal welfare	.0	.0	.0	10.6	61.5	27.9
Attractions/shows	.0	.0	.0	16.3	49.0	34.6
Services and treatmente	.0	.0	.0	25.2	59.2	15.5
Leisure spaces and picnic park	.0	.0	7.7	26.9	50.0	15.4
Restaurants and coffee shops	.0	.0	1.9	25.0	51.9	21.2
Amusement Park Animax	2.9	.0	.0	14.4	62.5	20.2
Zoo's merchandising (Zoo Shops)	.0	.0	1.9	26.9	61.5	9.6
Communication/Advertising	1.9	1.9	7.7	45.2	40.4	2.9
Website	15.4	8.7	34.6	38.5	2.9	.0

## 2.4. Survey for the respondents that have never visited the Lisbon Zoo

**Table 36 Distribution of frequencies and percentage for the variable *Why have you never visited the Lisbon Zoo?***

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Geographical distance	12	9,6	57,1
	Lack of time	9	7,2	42,9
	Total	21	16,8	100,0

**Table 37 Distribution of frequencies and percentage for the variable *How do you consider the price of entry?***

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Cheap	2	1,6	9,5
	Adequate	3	2,4	14,3
	Expensive	16	12,8	76,2
	Total	21	16,8	100,0

**Table 38 Distribution of frequencies and percentage for the variable *How much do you consider to be adequate for the ticket price?***

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid	10,00	5	4,0	27,8
	12,00	3	2,4	16,7
	13,00	2	1,6	11,1
	15,00	6	4,8	33,3
	20,00	1	,8	5,6
	25,00	1	,8	5,6
	Total	18	14,4	100,0

**Table 39 Distribution of frequencies and percentage for the variable *Do you intend to visit the Lisbon Zoo?***

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid	No	1	,3	4,8
	Yes	20	5,9	95,2
	Total	21	6,2	100,0

**Table 40 Distribution of frequencies and percentage for the variable *Do you intend to visit it this year?***

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid	No	8	2,4	38,1
	Yes	13	3,9	61,9
	Total	21	6,2	100,0

## 2.5 Bivariate Analysis

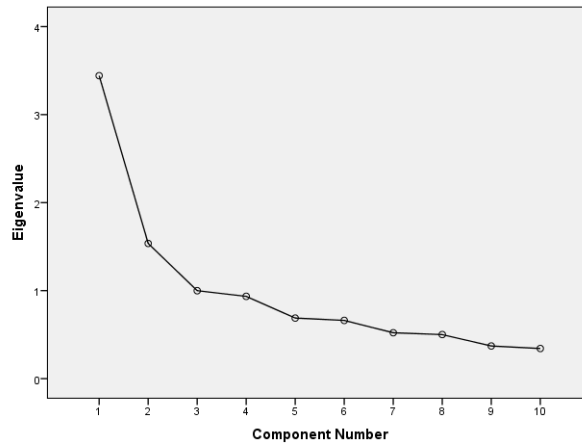
**Table 41 KMO and Bartlett's Test**

Kaiser-Meyer-Olkin Measure of Sampling Adequacy.		,781
Approx. Chi-Square		206,950
Bartlett's Test of Sphericity	df	45
	Sig.	,000

**Table 42 PCA Total Variance Explained**

Component	Initial Eigenvalues			Extraction Sums of Squared Loadings			Rotation Sums of Squared Loadings		
	Total	% of Variance	Cumulative %	Total	% of Variance	Cumulative %	Total	% of Variance	Cumulative %
1	3,442	34,424	34,424	3,442	34,424	34,424	2,035	20,352	20,352
2	1,536	15,364	49,788	1,536	15,364	49,788	1,892	18,923	39,275
3	1,000	9,996	59,784	1,000	9,996	59,784	1,548	15,480	54,754
4	,935	9,351	69,135	,935	9,351	69,135	1,438	14,381	69,135
5	,688	6,883	76,018						
6	,662	6,617	82,635						
7	,522	5,218	87,853						
8	,501	5,007	92,860						
9	,371	3,713	96,573						
10	,343	3,427	100,000						

**Chart 31 – Scree Plot**



**Table 43 Principal Components interpretation**

	Variables	Name of the Principal Component	Consistency of the principal components according to Cronbach's alpha coefficients
PC1	Animal enclosures (habitats) Concern about conservation and animal welfare	Animals and conservation aspects	Acceptable
PC2	Restaurants and coffee shops Amusement Park Animax Services and treatment	Services	Questionable
PC3	Website Communication/Advertising	Communication	Poor
PC4	Attractions/shows Zoo's merchandising (Zoo Shops) Leisure spaces and picnic park	Attractions and leisure aspects	Poor

**Appendix 3 – Interviews Structure for the Lisbon Zoo’s employees**

1 - What do you consider to be the CSF (critical success factors) of the Lisbon Zoo?

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2 - What do you consider to be the main consumer profiles of the zoo?

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3 - What is the weight of the schools in total consumer? (eg in the Zoo of St. Ignatius is 40%)

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4 - Number of visitors per year? (Lisbon Oceanarium says it has about 1 million)

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5 - Who do you think are the main competitors of the zoo?

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6 - Do you consider that seasonality affects the functioning of the Zoo? How does the Zoo adapt to that?

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7 - What areas do you consider that can be developed in the zoo? (either in terms of product, services, animals, public, amongst).

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Appendix 4 – Communication Actions Budget

Figure 24 Facebook advertising price

**facebook**

Campanha, fixação de preços e horário

Moeda da conta: EUR  
País da conta: Portugal  
Fuso horário da conta: Europe/Lisbon

Campanha e orçamento

Nome da campanha nova: Lebon Zoo...Gostos da Página-US-18-65  
Orçamento da campanha: 350,00 EUR

Horário da campanha:

Início: 4/24/2013 9:53 am  
Fim: 6/30/2013 9:53 am

Optimização: A tua licitação vai ser otimizada para obter mais gostos na tua Página  
Fixação de preços: Um determinado valor vai ser-te cobrado sempre que alguém vir o teu anúncio ou a tua história patrocinada (CPC)

Rever anúncio

Figure 25 Moop Price Table 2013

**moop MULTIMÉDIA OUTDOORS PORTUGAL**

**TABELA DE PREÇOS 2013**

**MUPIS - Redes Nacionais**

Rede	Preço	Preço
Nacional 100	100	100,00 €
Nacional 100	100	100,00 €
Nacional 100	100	100,00 €
Nacional 100	100	100,00 €

**MUPIS - Redes Locais**

Rede	Preço	Preço
Local 100	100	100,00 €
Local 100	100	100,00 €
Local 100	100	100,00 €

**MUPIS - Redes Consumos (Dobra Voz)**

Rede	Preço	Preço
Local 100	100	100,00 €
Local 100	100	100,00 €

**MUPIS - Faces Isoladas**

Rede	Preço	Preço
Local 100	100	100,00 €
Local 100	100	100,00 €

**BILBOARDS**

Rede	Preço	Preço
Local 100	100	100,00 €
Local 100	100	100,00 €

**TRANSPORTES/ CENTROS COMERCIAIS**

Rede	Preço	Preço
Local 100	100	100,00 €
Local 100	100	100,00 €

**INTEGRAS**

Rede	Preço	Preço
Local 100	100	100,00 €
Local 100	100	100,00 €

**AUTOCARROS**

Rede	Preço	Preço
Local 100	100	100,00 €
Local 100	100	100,00 €

**IMPACT OUTDOOR**

Rede	Preço	Preço
Local 100	100	100,00 €
Local 100	100	100,00 €

**FLASHES**

Rede	Preço	Preço
Local 100	100	100,00 €
Local 100	100	100,00 €

**SANCAS/TORNQUETES**

Rede	Preço	Preço
Local 100	100	100,00 €
Local 100	100	100,00 €

Figure 26 Activa Advertising Prices 2012

**ACTIVA**

**TABELA DE PUBLICIDADE 2012 ADVERTISING RATES**

**DIMENSÕES (dimensões em mm)**

Corte em: 225x275

Margem de corte: 10

Margem de corte: 10

**Observações Nota:**

Localização: 17% (inclui frete) + 30%

Localização: 17% (inclui frete) + 10%

Página Dupla Double Page Spread	10.300 €	1/2 Página 1/2 Page	3.600 €
Dupla de Anúncios Opening CRS	13.225 €	1/4 Página 1/4 Page	3.170 €
1ª Dupla 1/2 Page	11.900 €	Rede 1/2 Page	3.600 €
2ª Dupla 1/2 Page	11.500 €	Rede 1/2 Page	3.250 €
3ª Dupla 1/2 Page	11.350 €	Rede 1/2 Page	3.250 €
4ª Dupla 1/2 Page	11.200 €	Rede 1/2 Page	3.250 €
5ª Dupla 1/2 Page	11.250 €	Rede 1/2 Page	3.250 €
10ª Dupla 1/2 Page	6.700 €	Rede 1/2 Page	3.250 €
Página Impar 1/2 Page	6.100 €	Rede 1/2 Page	3.250 €
1ª Impar 1/2 Page	6.950 €	Rede 1/2 Page	3.250 €
2ª Impar 1/2 Page	6.500 €	Rede 1/2 Page	3.250 €
3ª Impar 1/2 Page	6.350 €	Rede 1/2 Page	3.250 €
4ª Impar 1/2 Page	6.200 €	Rede 1/2 Page	3.250 €
5ª Impar 1/2 Page	6.050 €	Rede 1/2 Page	3.250 €
10ª Impar 1/2 Page	4.700 €	Rede 1/2 Page	3.250 €
Half Even Page 1/2 Page	4.370 €	Rede 1/2 Page	3.250 €

Figure 27 Logiprint prices

**logiprint**

www.logiprint.pt

Inicio Impressões Letreiro T-Shirts Carimbos Bolo

1 Selecionar Folhetos/Flyer

2 Carregar/enviar dados

3 Encomendar online

**Imprimir proposta**

Tamanho: até 480 x 680

Impressão: A/4 a cores frente e verso

Papel: 80g/m² Offset branco

Tratamento: Dobra paralela simples

Edição: 2500

Aplicação de laminação: sem

Patrocinio: não

Preço: líquido 265.98 EUR (sem IVA)

bruto 316.52 EUR (incl. IVA)

**Encomendar amostra**

Quer encomendar uma amostra de cor computadorizada para 85,00 EUR?

Ser-lhe-á enviado antecipadamente para poder ver o resultado da impressão antes de imprimir:

Não

Sim (+95,00 EUR)

**Transferir dados**

Selecione o percurso de transferência para os seus dados:

carregar pela internet (até max. 80 MB)

enviar como CD por correio

CONTINUAR >>>