

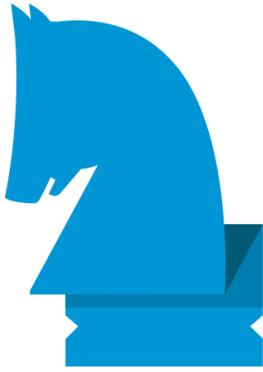


# BROADVIEW

S T R A T E G Y   G R O U P

The Broadview Report *on Public Affairs*  
August 2012 Edition  
Private Zoos and Aquaria

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## About The Broadview Report on Public Affairs:

The decision by Broadview Strategy Group to create a monthly report on public affairs and to commission public opinion research on a specific topic each month that is not related to client work is based on the principles of open and accessible information. We see daily how research is used by clients of ours and others to make decisions and felt it was important that the media and public had the similar access to information on key issues of the day.

The team at Broadview Strategy Group will faithfully prepare an edition of 'The Broadview Report' *on public affairs* each month on key topics of interest to the general public and will share those results with the media and the general public.

## Why Private Zoos and Aquaria?

Each month we will be happy to share with you the justification of topic selection after our internal brainstorming sessions and will always welcome other's suggestions on possible topics for future months.

This month we chose the topic of private zoos and aquaria as a high profile media investigation and extensive coverage about concerns at a particular private aquarium in Ontario demonstrated a strong public interest. While many have seen coverage of Marineland Canada for approximately two weeks preceding the August 27, 2012 release of this report, another story about a private aquarium in Toronto demonstrated ethical issues relating to animals in captivity is cause for public debate.

The Toronto based Ripley's Aquarium of Canada is reported to be facing opposition from animal rights activists after news broke that Ripley's Entertainment is capturing sand tiger sharks for their new aquarium set to open in Toronto in 2013.

Coverage of both Marineland and Ripley's Entertainment have prompted online petitions, each with thousands of signatures demanding action on these issues.



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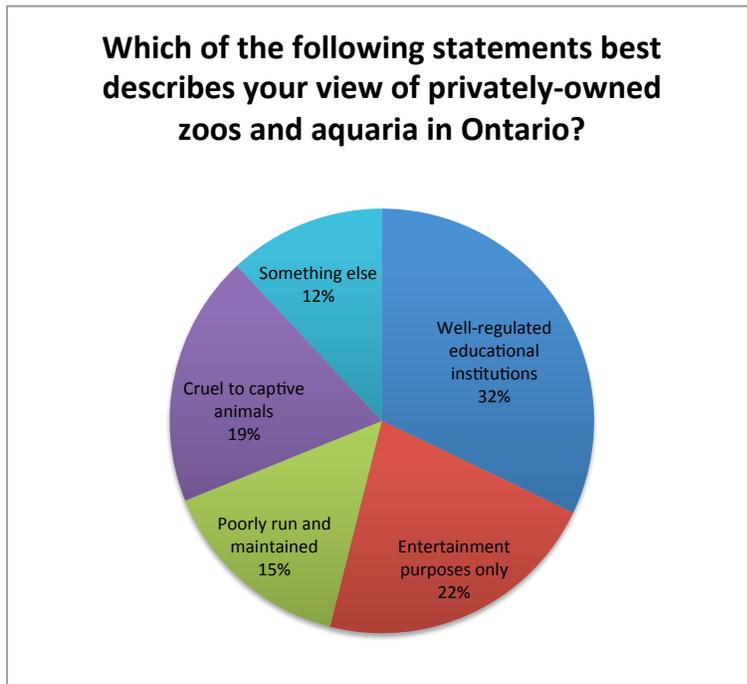
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## Research Methodology:

The poll was conducted by The Forum Poll™, among a randomly selected sample of 1029 Ontarians 18 years of age and older. The poll was conducted by Interactive Voice Response (IVR) and has a margin of error of plus or minus 3%, 19 out of 20 times

## Summary of Findings:

1) Which of the following statements best describes your view of privately owned zoos and aquaria in Ontario?



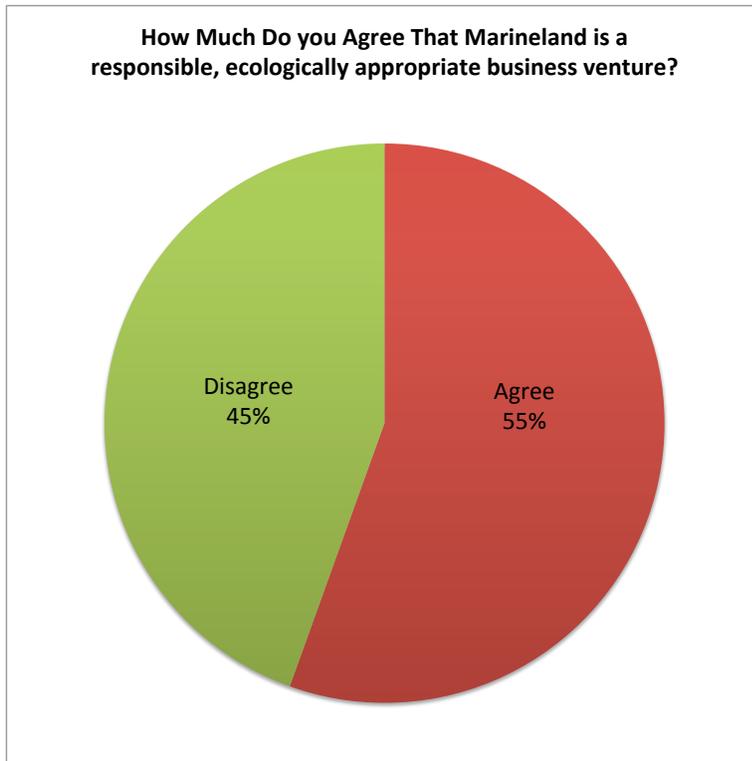
- 32% Well-regulated educational institutions
- 22% Entertainment purposes only
- 19% Cruel to captive animals
- 15% Poorly run and maintained
- 12% Something else



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2) How much do you agree that Marineland in Niagara is a responsible, ecologically appropriate business venture?



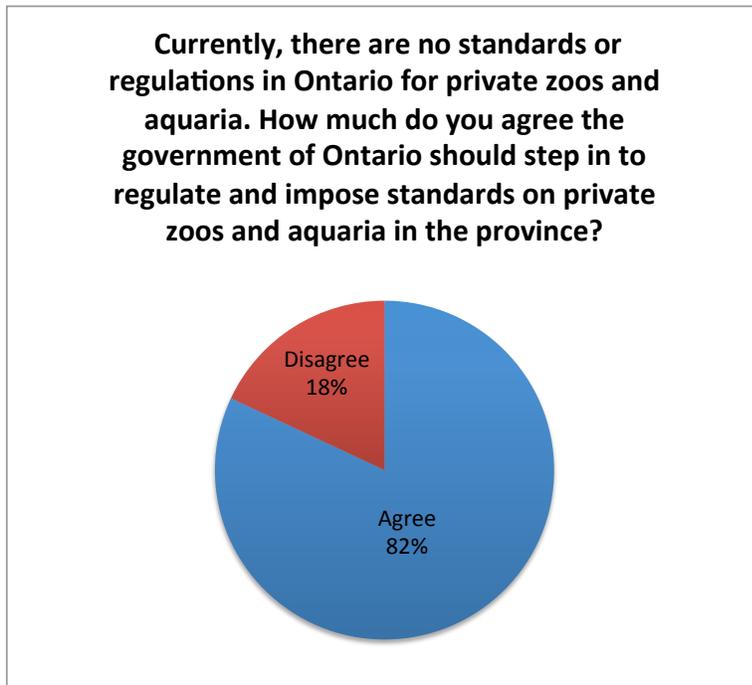
- 22% Agree Strongly
- 34% Agree
- 24% Disagree
- 20% Disagree Strongly



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3) Currently, there are no standards or regulations in Ontario for private zoos and aquaria. How much do you agree the government of Ontario should step in to regulate and impose standards on private zoos and aquaria in the province?



- 55% Agree Strongly
- 27% Agree
- 11% Disagree
- 7% Disagree Strongly



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## Analysis:

Considerable media interest in Marineland's animal welfare practices and the efforts being undertaken by Ripley's Entertainment to secure Sand Tiger Sharks have elevated the issue of private zoos and aquaria to a degree of public awareness unseen in some time. In doing so, there has been a demonstrated public interest in seeing the government take action to protect animals that serve as the 'attractions' or 'anchors' of these business ventures.

Almost a third of people (32%) believe that privately owned zoos and aquaria are well regulated educational institutions, which demonstrates a certain level of public confidence in them. With (22%) believing that privately owned zoos and aquaria are for entertainment purposes only, it suggests that at least 54% of the general public believes there is some public purpose to the existence of private zoos or aquaria in Ontario.

What is more concerning and perhaps most important for the private zoo and aquaria industry to recognize is that 19% of people believe that these facilities are cruel to the captive animals and a further 15% of the public believes that private zoos and aquaria are poorly run and maintained. With 34% of people holding a very serious negative view of private zoos and aquaria and an additional 12% reporting that they believe something other than any of the four statements previously mentioned, there still are serious concerns the industry needs to overcome in Ontario.

82% of people support the Government of Ontario regulating private zoos and aquaria, which is likely a positive step forward for the industry as increased confidence in privately owned zoos and aquaria should help address the concerns of those who believe these facilities are cruel to the animals kept in captivity and those who believe they are poorly run and maintained. Increased government regulation may help shore up the educational benefits people see private zoos and aquaria providing, which in turn could help make these facilities more popular as well.

The research for this report was done at a difficult time for Marineland Canada, and as a public relations firm, it was interesting for us to review the strength of what, until recently, had been an almost exclusively positively covered brand for many years.



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Marineland has been in business for fifty years and had literally generations to build a loyal following and strong marketing campaigns to keep people coming back.

Media interviews with Marineland visitors during the week preceding the publication of this report suggested that there was a mixed opinion of Marineland. Our poll re-enforced that message with a split in public opinion on whether Marineland is a responsible and ecologically appropriate business venture.

On the surface 55% of respondents agreed that Marineland was, while 45% disagreed. The numbers get far more interesting however when you look at the intensity of the opinions held by the public. While there is an overall gap of 10% favouring Marineland, when one compares those who strongly agree (22%) that Marineland is a responsible, ecologically appropriate business, with those who strongly disagree (20%) there is just a two percent difference, which suggests that the issue is somewhat polarized.

The results do demonstrate a brand resiliency, although the brand has likely has been damaged to a degree, it is still in a position to recover.

What will prove important for Marineland and the industry as a whole, will be how they and others respond to the types of allegations former Marineland employees made about conditions.

There isn't an industry in the world that would welcome increased government regulation, but in the case of private zoos and aquaria in Ontario, increased regulation, providing the industry plays a proactive role in developing those regulations, could prove to be the impetus behind a renewed interest and patronization of these facilities in Ontario.