2017 Fort Worth Botanic Garden

Special Analysis of 1,600 Visitors





Prepared by: Highland Market Research, LLC



Index

Introduction	page 2
Survey Highlights	page 2-3
Recommendations	page 3
Visitor Attendance	pages 4-7
Visitor Experience	pages 7-8
Evaluation of Potential Impact of an Admission Fee	pages 9-11
Comparative Admission Analysis	page 12
Potential Economic Impact	page 13
Respondent Demographics	pages 14-15
Highland Market Research, LLC	page 16

Introduction

120,705 Japanese Garden admission tickets sold

31,267 Conservatory admission tickets sold

182,468 Other people visited the Botanic Garden

334,440 Total projected visitors from January 1, 2017 – December 31, 2017

\$10,223,831 Total projected economic impact

Survey Highlights

The Fort Worth Botanic Garden has basically free admission for 90% of the attraction. Currently, the only admission fee is for the Japanese Garden. There also will be an admission fee for the Conservatory when it re-opens after extensive repairs. This year-long survey was designed to explore the potential impact of a general admission fee for the Botanic Garden, including the Japanese Garden and Conservatory, as well as the general garden. To accomplish this goal, 1,600 visitors were interviewed during 2017, with 400 in each of the four quarters.

- ❖ Visiting the Fort Worth Botanic Garden is a social event, with four out of five people attending with family/friends or attending a meeting or scheduled event.
- * Two out of three people were visiting the Botanic Garden for the first time.
- ❖ About a third of the people live in Fort Worth and another third live in other Fort Worth/Dallas Metro Area Cities. The rest come from other areas of Texas, other states, or other countries.
- ❖ Three out of five people were visiting only the general garden areas, and most of the people do not seem to be well informed about all of the other attractions such as the Japanese Garden and Conservatory.
- ❖ There also seems to be little participation in other Botanic Garden events such as Concerts in the Garden, Butterflies in the Garden, lunch at the Garden Restaurant or purchasing of Botanic Garden souvenirs.
- ❖ Most visitors planned to spend 2.5 hours or less at the Botanic Garden.
- ❖ Almost all of the visitors have attended Fort Worth attractions that charge admission as well as attending free attractions.

- ❖ Visitors have exceptionally favorable attitudes toward the Fort Worth Botanic Garden. Three out of five said it exceeded their expectations and two out of five said it met their expectations. Only two out of the 1,600 visitors said it failed to meet their expectations.
- ❖ Half of the visitors who said the Botanic Garden exceeded or met their expectations said they felt people would be just a likely to visit, or only slightly less likely, to visit the Botanic Garden.
- ❖ Based on comparative analyses of similar attractions in Fort Worth, other Texas cities, and in other states, the Botanic Garden makes a major economic contribution to the Fort Worth.

Recommendations

The results of this research project suggest that an admission fee of \$10 for adults and \$5 for children and senior citizens would be a viable strategy for the Fort Worth Botanic Garden. This is based on several observations, including:

- ❖ The extremely favorable attitudes toward the Botanic Garden.
- ❖ The fact that almost all of the visitors already attend other attractions in Fort Worth with paid admission.
- ❖ The admission to the Japanese Garden and Conservatory as a "bonus" with a paid admission to the Botanic Garden.
- ❖ The potential for increased promotion of other Botanic Garden events such as Concerts in the Garden and Butterflies in the Garden.
- The benefits of becoming a participating garden in the American Horticultural Society 2018 Reciprocal Admissions Program (RAP) should be heavily promoted if an admission fee program is instituted. There are 320 gardens, arboreta, and conservatories that are participating in the American Horticultural Society 2018 Reciprocal Admissions Program (RAP). This program offers free admission to all of the parks. However, "some gardens included in the RAP Directory have no benefits to reciprocate because they are already free to the public and do not have a membership base (*including the Fort Worth Botanic Garden*). These gardens help to preserve and maintain the Reciprocal Admissions Program through their contribution but they do not share a reciprocal relationship with any of the other gardens listed." http://ahsgardening.org/gardening-programs/rap
- ❖ As part of its ongoing marketing program, the Fort Worth Botanic Garden should continue to aggressively promote its membership program, emphasizing the "free" admission to all of the Botanic Garden attractions.
- Special promotional programs targeting African Americans should be developed since this demographic appears to be under-represented in attendance.

Visitor Attendance

Table 1. Projected 2017 Attendance

	Q1	Q2	Q3	Q4	Total
Japanese Garden ticket sales	32,216	40,571	20,791	27,127	120,705
Conservatory ticket sales*	8,788	10,454	8,564	3,461	31,267
Sub total	41,004	51,025	29,355	30,588	151,972
Other - general garden areas	33,821	60,383	56,730	31,534	182,468
Total	74,825	111,408	86,085	62,122	334,440

^{*}Due to pending repair issues, the Conservatory was closed for visitors in 2017. As the 2016 data included the Butterflies in the Garden event, it was determined that using 2015 data would be most comparable to 2017. This analysis includes Conservatory admission ticket sales from 2015.

Visitors are most likely to visit the Botanical Garden with friends or family members, especially during the first quarter (January-March).

Table 2. Please tell us your reason for visiting the Garden today.

	Q1	Q2	Q3	Q4	Total
Visiting with friends/family	70.4%	61.0%	58.6%	51.3%	60.3%
Visiting by myself	12.8%	11.1%	18.5%	18.8%	15.3%
Meeting/scheduled event	6.0%	19.1%	16.0%	21.8%	15.7%
In town on vacation	8.0%	7.7%	5.9%	8.1%	7.4%
Other	2.8%	1.1%	1.0%	0.0%	1.2%
	100%	100%	100%	100%	100%

Almost two out of five visitors live in Fort Worth and about a third of them live in other DFW Metro Areas. A fifth of them live in Texas outside of the DFW Metro Area and one out of 15 live in other states or countries (Table 3 on the following page).

Table 3. Please tell us where you live.

	Q1	Q2	Q3	Q4	Total
Fort Worth	35.5%	25.7%	50.5%	42.1%	38.5%
DFW Metro Area	37.6%	38.7%	31.4%	36.0%	35.9%
Texas (outside of DFW Metro Area)	21.2%	22.5%	14.8%	18.3%	19.2%
Out of state/foreign country	5.8%	13.1%	3.3%	3.6%	6.5%
	100%	100%	100%	100%	100%

Two out of three visitors said this was their first visit to the Botanical Garden. This was consistent throughout all four quarters.

Table 4. Is this your first visit to the Botanic Garden?

	Q1	Q2	Q3	Q4	Total
Yes	65.4%	67.8%	64.9%	70.1%	67.1%
No	34.6%	31.3%	34.9%	29.9%	32.7%
Not sure	0.0%	0.9%	0.2%	0.0%	0.3%
	100%	100%	100%	100%	100%

If individuals indicated that it was not their first time to visit the Botanic Garden, they were then asked how many times in the past twelve months they had visited. They averaged 6.95 times.

Table 5. If this is not your first visit, how many times have you visited within the last 12 months?

	Q1	Q2	Q3	Q4	Total
How many visits?	6.76	8.43	6.64	5.95	6.95

As illustrated in Table 6 on the following page, visitors during the first and second quarters were more likely to go to the Japanese Garden while those during the third and fourth quarters were much more likely to visit only the general areas. For the entire year, three out of five people were visiting only the general areas.

Table 6. What areas within the Garden to you plan on visiting today?

	Q1	Q2	Q3	Q4	Total
General areas only	45.2%	54.2%	65.9%	76.7%	60.5%
Japanese Garden	43.1%	43.8%	27.4%	22.5%	34.2%
Conservatory	11.7%	2.0%	6.7%	0.8%	5.3%
	100%	100%	100%	100%	100%

Only about one visitor out of five has ever visited the Butterflies in the Garden event.

Table 7. Have you ever visited the Butterflies in the Garden event?

	Q1	Q2	Q3	Q4	Total
No	86.5%	75.8%	84.4%	79.7%	81.6%
Yes	12.5%	23.5%	15.4%	19.8%	17.8%
Not sure	1.0%	0.7%	0.2%	0.5%	0.6%
	100%	100%	100%	100%	100%

Even fewer visitors (about one out of ten) have ever attended a Concerts in the Garden event.

Table 8. Have you ever attended a Concerts in the Garden event?

	Q1	Q2	Q3	Q4	Total
No	86.5%	87.4%	94.9%	86.8%	88.9%
Yes	12.5%	12.0%	5.1%	12.2%	10.5%
Not sure	1.0%	0.6%	0.0%	1.0%	0.7%
	100%	100%	100%	100%	100%

About one visitor in six said they planned on dining at the Garden Restaurant.

Table 9. Do you plan on dining at the Garden Restaurant during your visit today?

	Q1	Q2	Q3	Q4	Total
No	71.7%	82.6%	84.6%	79.7%	79.7%
Yes	24.6%	15.7%	8.1%	13.2%	15.4%
Not sure	3.8%	1.7%	7.3%	7.1%	5.0%
	100%	100%	100%	100%	100%

Visitor Experience

More than two out of three visitors planned to stay at the Botanic 2.5 hours or less.

Table 10. How long do you plan to stay at the Botanic Garden today?

	Q1	Q2	Q3	Q4	Total
Less than 1 hour	13.0%	6.3%	25.5%	22.3%	16.8%
Between 1 hour and 2.5 hours	47.4%	47.3%	57.0%	57.4%	52.3%
Between 2.5 and 5 hours	32.3%	41.0%	15.4%	18.8%	26.9%
Spending a full day	7.3%	5.4%	2.4%	1.5%	4.2%
	100%	100%	100%	100%	100%

Only about one visitor out of seven planned to purchase souvenirs while at the Botanic Garden.

Table 11. Do you plan on purchasing any souvenirs during your visit today?

	Q1	Q2	Q3	Q4	Total
No	67.2%	83.2%	76.3%	83.2%	77.5%
Yes	22.3%	11.4%	15.0%	9.6%	14.6%
Not sure	10.5%	5.4%	8.7%	7.2%	8.0%
	100%	100%	100%	100%	100%

Almost all the visitors have gone to Fort Worth attractions which charge admission. The Fort Worth Zoo is the most popular attraction, with more than a third of the visitors having gone there.

Table 12. Which of the following Fort Worth attractions have you visited?

	Q1	Q2	Q3	Q4	Total
Fort Worth Zoo	36.3%	31.9%	37.0%	33.7%	34.7%
FW Museum of Science & History	20.7%	15.0%	23.0%	18.1%	19.2%
Modern Art Museum	17.4%	16.3%	16.4%	14.8%	16.2%
Nature Center	9.7%	13.8%	8.6%	13.4%	11.4%
National Cowgirl Hall of Fame	8.7%	8.1%	6.6%	6.9%	7.6%
Log Cabin Village	5.6%	9.6%	5.0%	10.8%	7.8%
None of the above	1.6%	5.3%	3.4%	2.3%	3.2%
	100%	100%	100%	100%	100%

Fewer than one visitor out of ten has an annual or season pass to any of the Fort Worth attractions with paid admission.

Table 13. Do you have an annual/season pass to any of the above mentioned Fort Worth attractions?

	Q1	Q2	Q3	Q4	Total
No	89.1%	93.9%	92.2%	85.0%	90.1%
Yes	9.4%	4.9%	6.7%	14.0%	8.8%
Not sure	1.5%	1.2%	1.1%	1.0%	1.2%
	100%	100%	100%	100%	100%

Almost all of the visitors have gone to Fort Worth attractions which do not have admission fees. The Fort Worth Stockyards is by far the most popular destination.

Table 14. Which of the following Fort Worth attractions have you visited?

	Q1	Q2	Q3	Q4	Total
Fort Worth Stockyards	39.6%	36.1%	42.2%	48.2%	41.5%
Amon Carter Museum of American Art	26.0%	22.2%	23.3%	16.3%	22.0%
Fort Worth Water Gardens	23.9%	28.7%	24.5%	27.1%	26.1%
Botanical Research Institute of Texas (BRIT)	5.4%	6.2%	4.0%	5.7%	5.3%
None of the above	5.1%	6.8%	6.0%	2.7%	5.2%
	100%	100%	100%	100%	100%

Evaluation of Potential Impact of an Admission Fee

About half of the visitors said they think people would come to the Botanic Garden just as often or somewhat less often if there was a \$10 admission fee.

Table 15. Several Fort Worth attractions – including the Zoo, the Museum of Science and History, the National Cowgirl Museum, the Modern Art Museum, and the Log Cabin Village – charge a general admission fee, averaging about \$10 for Adults and \$5 for children. There is no general admission fee for the Botanic Garden, but there is a fee for visiting the Japanese Garden, the Conservatory and special exhibits.

If there was a general admission fee to the Botanic Garden of approximately \$10 (including Japanese Garden & the Conservatory), do you think people would come here much less often, somewhat less often, or just as often?

	Q1	Q2	Q3	Q4	Total
Just as often	40.2%	6.6%	11.2%	5.1%	15.8%
Somewhat less often	27.8%	26.5%	55.8%	30.5%	35.2%
Much less often	21.2%	51.5%	28.8%	56.3%	39.5%
Not sure	10.9%	15.4%	4.2%	8.1%	9.7%
	100%	100%	100%	100%	100%

Only about one visitor out of 13 said they have a Fort Worth Botanic Garden membership.

Table 16. Do you currently have a Fort Worth Botanic Garden membership?

	Q1	Q2	Q3	Q4	Total
No	89.0%	92.6%	93.1%	90.4%	91.3%
Yes	10.0%	5.7%	5.7%	9.1%	7.6%
Not sure	1.0%	1.7%	1.2%	0.5%	1.1%
	100%	100%	100%	100%	100%

About one visitor out of ten said they would be interested in purchasing an annual pass to the Fort Worth Botanic Garden at a cost of \$75 to \$90. However, another one out of five said they were not sure, for a total of three out of ten who might consider an annual pass (Table 17).

Table 17. If there was a general admission fee to the Botanic Garden, do you think you would be interested in purchasing an annual pass (approximately \$75-\$90)?

	Q1	Q2	Q3	Q4	Total
No	55.1%	75.8%	71.4%	77.2%	69.9%
Yes	25.1%	4.3%	7.1%	6.6%	10.8%
Not sure	19.8%	19.9%	21.5%	16.2%	19.4%
	100%	100%	100%	100%	100%

Visitors have very favorable attitudes toward the Fort Worth Botanic Garden, with three out of five saying it exceeded their expectations and almost all of the rest saying it met their expectations. Fewer than one visitor out of 100 said it did not meet their expectations.

Table 18. How well did the Botanic Garden meet your expectations during your visit today? Exceeded expectations, met expectations or did not meet expectations?

	Q1	Q2	Q3	Q4	Total
Exceeded expectations	71.4%	52.1%	64.1%	55.8%	60.9%
Met expectations	28.6%	47.6%	35.9%	44.2%	39.1%
Did not meet expectations	0.0%	0.3%	0.0%	0.0%	0.1%
	100%	100%	100%	100%	100%

Expectations of the potential effect of an admission fee on attendance to the Botanic Garden indicates that the favorable attitudes toward the Botanic Garden, should result in modest decreases in attendance.

Table 19. Relationship of evaluations of the Botanic Garden and expected effect of an admission fee.

	Exceeded Expectations	Met Expectations	Totals
Just as often	17.8%	12.5%	15.2%
Somewhat less often	35.2%	34.2%	34.7%
Total	52.9%	46.7%	49.8%
Much less often	38.8%	41.2%	40.0%
Not sure	8.3%	12.1%	10.2%

People who were visiting the Botanic Garden for the first time and those who had visited before are almost identical in expectations about the potential effect of an admission fee and frequency of attending.

Table 20. Relationship of previous visits and expected effect of an admission fee.

	Previously Visited	First Visit
Just as often	16.9%	13.2%
Somewhat less often	33.0%	34.7%
Total	49.9%	47.9%
Much less often	37.3%	38.1%
Not sure	12.8%	14.1%



Comparative Admission Analysis

An analysis of admission ticket prices for other botanical gardens and selected Fort Worth attractions suggest that a \$10 admission fee would be reasonable for the Fort Worth Botanic Garden. The average admission for 15 attractions is \$13.76 for adults and \$59.20 for an individual membership.

Table 21. Admission Ticket Prices for Comparable Visitor Attractions

	Adult	Senior Citizen	Children	Member- ship	Parking
Fort Worth Zoo	\$14.00	\$10.00	\$10.00	\$52.00	\$5.00
The Modern Art Museum, Fort Worth	\$10.00	\$4.00	\$0.00	\$75.00	\$5.00
Fort Worth Museum of Science and History	\$15.00	\$15.00	\$12.00	\$75.00	\$5.00
Dallas Arboretum	\$15.00	\$12.00	\$10.00	\$92.00	\$15.00
San Antonio Botanical Garden	\$12.00	\$10.00	\$9.00	\$50.00	?
Boerner Botanical Gardens, Milwaukee	\$5.50	\$4.50	\$4.50	\$35.00	?
Huntsville (Alabama) Botanical Garden	\$14.00	\$12.00	\$9.00	\$50.00	?
Cleveland Botanical Garden	\$12.00	\$12.00	\$8.00	\$65.00	\$8.00
Missouri Botanical Garden	\$12.00	\$12.00	\$0.00	\$50.00	\$0.00
Atlanta Botanica1 Garden	\$21.95	\$21.95	\$15.95	\$75.00	\$15.00
Desert Botanical Garden, Phoenix	\$24.95	\$24.95	\$12.95	\$79.00	\$0.00
Cincinnati Zoo and Botanical Garden	\$16.00	\$16.00	\$12.00	\$55.00	\$10.00
Garvan Woodland Gardens, Hot Springs	\$15.00	\$15.00	\$5.00	\$55.00	\$0.00
Pittsburgh Botanic Garden	\$9.00	\$8.00	\$6.00	\$35.00	?
Green Bay Botanical Gardens	\$10.00	\$8.00	\$8.00	\$45.00	\$0.00
Average	\$13.76	\$12.36	\$8.16	\$59.20	\$5.73

Potential Economic Impact

The Fort Worth Botanic Garden has a major impact on the Fort Worth economy. Based on an analysis of similar attractions in Texas and other states, the average visitor spends \$30.57. Using this average, the Fort Worth Botanic Garden generates \$10,223,831 a year in visitor spending.

Table 22. Projected Economic Impact

	Visitor Spending	Attendance	Per Person
Dallas Arboretum	\$20,100,000	1,096,000	\$18.00
St. Louis Botanic Garden	\$47,000,000	900,000	\$52.00
Atlanta Botanic Garden	\$10,000,000	425,000	\$24.00
Desert Botanical Garden, Phoenix	\$13,000,000	630,000	\$21.00
Cincinnati Zoo and Botanic Garden	\$60,400,000	1,440,000	\$42.00
Garvan Woodland Gardens, Hot Springs	\$3,904,092	138,478	\$28.00
Green Bay Botanical Gardens	\$2,709,082	92,000	\$29.00
Totals	\$157,113,174	4,721,478	\$33.00
Averages	\$22,444,739	674,497	\$30.57
Fort Worth Botanic Garden	\$10,223,831	334,440	\$30.57

Respondent Demographics

- Respondents were randomly selected to represent all of the people visiting the Botanic Garden, based on observation. They included men, women, young adults, senior citizens and represented various ethnic groups, etc. Only one person was interviewed from any group attending the show.
- Interviewers used hand-held computers to conduct the interviews. This ensured that all skip patterns were automatically made and eliminated the potential for errors which might result from entering the data from paper questionnaires.
- All interviews were included in the analysis. Interviews were conducted in various areas of
 the facility on every day of the week to represent all types of events and attendees.
 Interviewing was conducted during morning, afternoon, and evening time periods.

Women are more likely than men to visit the Fort Worth Botanic Garden.

Table 23. Gender

	Q1	Q2	Q3	Q4	Total
Female	74.2%	70.1%	76.5%	69.0%	72.5%
Male	25.8%	29.9%	23.5%	31.0%	27.6%
	100%	100%	100%	100%	100%

Visitors are most likely to be married.

Table 24. Which of the following best describes your marital status?

	Q1	Q2	Q3	Q4	Total
Married	69.2%	66.3%	66.7%	65.0%	66.8%
Single	25.1%	30.5%	27.7%	23.9%	26.8%
Divorced or separated	2.0%	1.7%	2.8%	8.6%	3.8%
Widowed	3.5%	0.9%	2.6%	2.0%	2.3%
Declined	0.3%	0.6%	0.2%	0.5%	0.4%
	100%	100%	100%	100%	100%

People 26 to 49 years of age are most likely to visit the Fort Worth Botanic Garden.

Table 25. Which of the following categories best describes your age?

	Q1	Q2	Q3	Q4	Total
Under 25	7.8%	12.3%	13.8%	7.1%	10.3%
26-49	67.2%	65.5%	56.2%	65.0%	63.5%
50 - 64	17.5%	18.5%	24.1%	23.9%	21.0%
65 or older	7.3%	2.8%	5.9%	3.9%	5.0%
Declined	0.3%	0.9%	0.0%	0.1%	0.3%
	100%	100%	100%	100%	100%

Visitors are most likely to report an average household income of more than \$50,000.

Table 26. Would you mind telling me which of the following categories best describes your family's annual household income?

	Q1	Q2	Q3	Q4	Total
\$0 - \$25,000	4.5%	2.6%	8.5%	1.5%	4.3%
\$26,000 - \$50,000	21.1%	14.5%	19.9%	13.7%	17.3%
\$51,000 - \$100,000	48.6%	44.7%	47.1%	40.6%	45.3%
More than \$100,000	23.8%	34.5%	14.2%	22.8%	23.8%
Declined	2.0%	3.7%	10.3%	21.4%	9.4%
	100%	100%	100%	100%	100%

Black/African Americans appear to be under-represented in attendance. Latest demographics show 18.9% of the Fort Worth population is African American, but only 9.3% of the visitors were in that category.

Table 27. Recorded by Interviewer Observation

	Q1	Q2	Q3	Q4	Total
White/Caucasian	71.4%	66.1%	61.3%	62.9%	65.4%
Hispanic/Latino	15.3%	20.8%	16.8%	14.7%	16.9%
Black/African American	6.0%	8.0%	13.6%	9.6%	9.3%
Asian	6.3%	4.0%	6.1%	11.2%	6.9%
Other	1.0%	1.1%	2.2%	1.6%	1.5%
	100%	100%	100%	100%	100%

Highland Market Research, LLC

Angie Highland, President and CEO, has an extensive background in market research, including economic impact analysis specializing in the Texas Events Trust Fund and the Texas Major Events Reimbursement Fund. She has designed and conducted numerous market research projects over the past several years.

Angie was on the staff of the City of Fort Worth for ten years prior to joining Grotta Marketing Research, LLC as partner and Chief Operating Officer in 2014, where she worked closely with Dr. Gerald Grotta. She has now opened her own market research firm located in Fort Worth, Texas, specializing in economic impact analysis. Angie was a Hatton W. Sumners Scholar and has her Master's Degree in Public Administration from the University of North Texas. In 2014 she was selected as one of the *Top 40 Under 40* in Fort Worth by the Fort Worth Business Press.

While working as COO of Grotta Marketing Research, and now with her own firm, Angie has completed research and consulting projects for a variety of local, national and international clients including:

- ➤ The City of Fort Worth, Texas
- ➤ American Paint Horse Association
- ➤ City of Amarillo, Texas
- ➤ Arabian Horse Association Region 9
- ➤ Van Cliburn International Piano Competition
- > Appaloosa Horse Club
- ➤ American Quarter Horse Association
- ➤ VOA North Texas Shootout
- Fort Worth Stock Show & Rodeo
- ➤ National Cutting Horse Association
- ➤ National High School Rodeo Association
- ➤ Amarillo-Potter Events Venue District
- ➤ The Reichert Celebration
- ➤ Appaloosa Horse Club
- Texas Motor Speedway
- ➤ United States Team Penning Association
- ➤ National Reined Cow Horse Association
- Working Ranch Cowboys Association
- Fort Worth Botanic Garden
- ➤ Tri-State Fair and Exposition

