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INDUSTRY INSIGHTS
REPORT

UK Zoo & Wildlife Attraction Benchmark Survey Report

PAGE
Five

Key Findings at a Glance

March 2026 Edition

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FOREWORD

As organisations across the zoo and wildlife attraction sector face increasing operational pressures and rising visitor expectations, the need for shared insight has never been greater. The Zoo & Wildlife Attraction Benchmark Survey was created to provide an industry-wide snapshot of the priorities, challenges and opportunities currently shaping UK zoos and wildlife attractions, based on direct input from those leading and managing them.

At n-gage.io, we work closely with attractions across the sector and regularly see common themes emerging around visitor engagement, commercial resilience, use of data and the need to deliver higher-quality experiences. This survey brings those themes together to help organisations understand how peers are responding, identify emerging trends and support more informed decision-making.

With the support of the industry, it's hoped this benchmark can become a regular study, building a clearer picture over time of how the sector continues to evolve.
I'd like to thank all those that participated.

Bryan Hoare
Founder and CEO
n-gage.io

n-gage.io

Prepared for participating organisations across the zoo and wildlife attraction sector, including stakeholders across the BIAZA network and commissioned by n-gage.io in February 2026.

Executive Summary

The Zoo and Wildlife Attraction Benchmark Survey 2026 provides a timely picture of the strategic priorities, operational pressures and future direction of the sector. Based on responses from 31 organisations, the findings show a sector that remains ambitious and mission-driven, but is operating in an increasingly demanding environment.

The headline story is clear. Wildlife attractions are no longer thinking only in terms of growing attendance. They are also thinking much more deliberately about how to improve yield, strengthen visitor loyalty, remove friction from the on-site experience and demonstrate broader organisational impact.

In practice, that means more focus on memberships, events, paid experiences, food and beverage, digital engagement and better visitor data.

At the same time, the sector is dealing with persistent structural pressures. Rising wage costs, increasing energy bills and weather volatility are creating a backdrop in which long-term planning has become more difficult. These are not short-term irritants. They are reshaping the economics of how zoos and wildlife attractions operate. For many organisations, this is forcing a transition from a traditional admissions-led model toward a broader, more diversified commercial model.

The survey also shows that the visitor journey still contains a number of avoidable pain points. Weather response, catering capacity, navigation and real-time information all emerged as recurring themes. These are not marginal issues. They affect satisfaction, dwell time, spend per head and the likelihood of repeat visitation. In other words, operational friction is now directly linked to commercial performance.

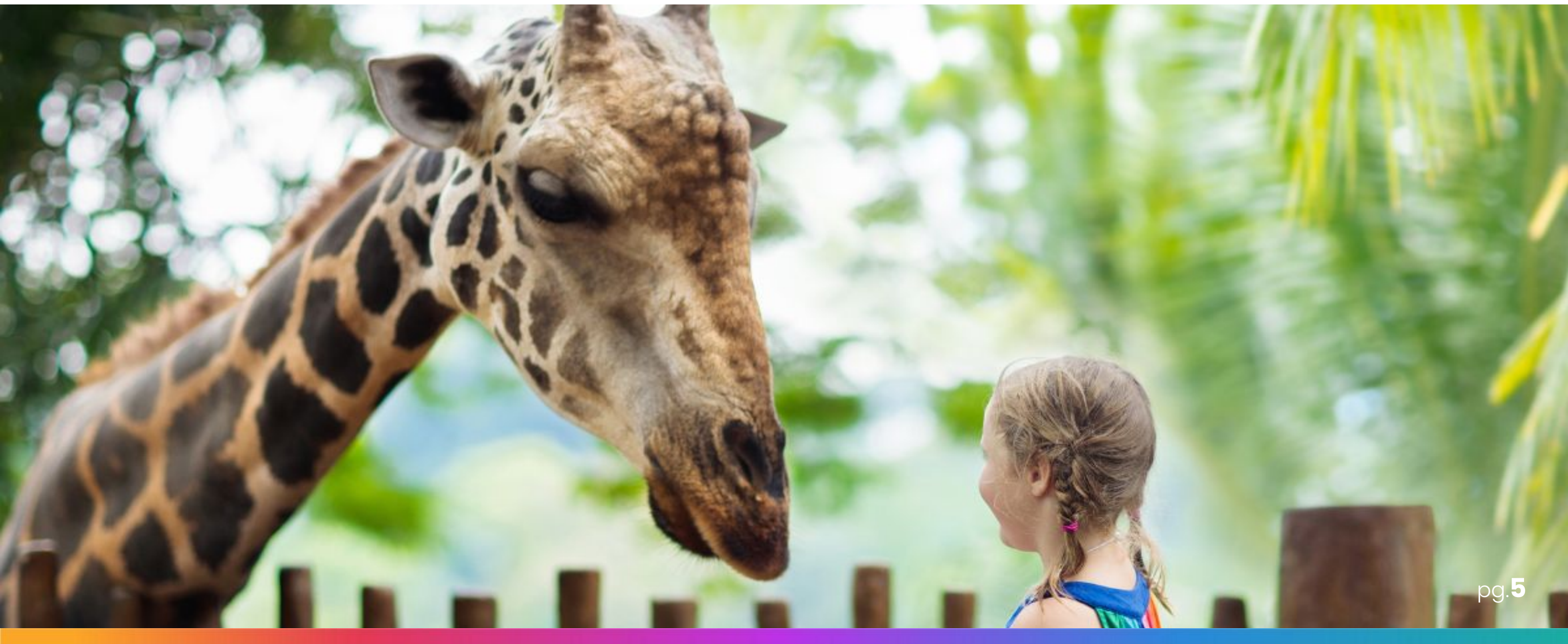
Commercial members of:

Key Findings at a Glance

1. Cost pressure is the dominant industry challenge: 26 of 29 organisations cite rising wage costs as the biggest operational pressure.
2. Revenue per visitor is now a strategic priority: 76% of organisations say increasing spend per head is critical or very important.
3. Visitor journey friction remains widespread: Weather resilience, F&B queues and wayfinding are the most common operational challenges.
4. Digital maturity remains limited: Only 3 organisations report fully integrated visitor systems.
5. Membership strategies are uneven across the sector: Member attendance ranges from under 10% to over 60%.
6. Events and experiences: These are emerging as growth drivers
7. Capacity not demand: Capacity is the main constraint on paid experiences

Digital capability remains mixed. Most respondents describe their current capability as functional but limited, and only a small minority describe their systems as fully integrated. This matters because the sector increasingly recognises the importance of joined-up visitor data, better segmentation, stronger post-visit engagement and more effective in-park communication. Yet many organisations still lack the internal skills, budget or system integration needed to deliver that consistently.

Looking ahead, the industry appears to be entering a period of pragmatic transformation. The organisations most likely to succeed over 2026 and beyond will be those that can combine conservation credibility and visitor appeal with stronger revenue diversification, better operational resilience and more intelligent use of data and digital tools.



Survey Methodology

The Zoo & Wildlife Attraction Benchmark Survey was conducted in January–February 2026 among organisations across the UK zoo and wildlife attraction sector.

31 organisations participated:

- Respondents represented attractions ranging from under 100,000 visitors to over 1 million
- Responses were primarily from senior leadership roles, including CEOs, marketing leaders and operations directors
- The survey included 30 structured questions covering strategy, operations, visitor experience, digital capability and sector outlook
- The results provide a representative snapshot of the current priorities and pressures across the UK zoo and wildlife attraction sector.

Many of the challenges reported by respondents are not merely tactical or short term.

Sector Context

Zoos, wildlife and safari parks and aquariums sit in a distinctive part of the visitor economy. They are not simply leisure attractions, nor are they solely conservation institutions. They combine public engagement, education, animal care, conservation delivery and commercial operation in a way few other sectors do.

That makes the operating model unusually complex. These organisations must maintain high standards of animal welfare and regulatory compliance while also delivering a compelling visitor experience, generating sufficient commercial return and responding to public expectations around sustainability, education and community value. In many cases they do this across large, outdoor, weather-sensitive estates with substantial infrastructure demands and highly seasonal visitor patterns. This context matters when interpreting the survey results.

Many of the challenges reported by respondents are not merely tactical or short term. They reflect the structure of the sector itself. Outdoor dependency creates weather exposure. Conservation and animal welfare obligations limit the extent to which costs can be flexed. Large sites create navigation and flow challenges. Small and mid-sized teams constrain the pace of innovation.

At the same time, sector expectations are rising. Visitors increasingly expect attractions to deliver not only a good day out, but also convenience, relevance, quality food and retail, digital support, clear communication and values-led experiences. Boards and leadership teams are under increasing pressure to show not only attendance and revenue, but also conservation outcomes, educational value, inclusion and public impact.

The benchmark survey shows a sector responding to all of this in real time.

Financial Pressures Are Dominating Strategic Thinking

Financial pressure is the clearest cross-cutting theme in the survey. When asked about the biggest pressures affecting their organisation in 2026, respondents overwhelmingly pointed to rising wage costs, energy costs and weather-related volatility.

Rising staff costs / wage pressure was cited by 26 of 29 respondents, making it by far the most widespread concern. This reflects the fact that wildlife attractions are people-intensive operations. From keepers and educators to catering teams, maintenance staff and visitor services teams, labour sits at the centre of the operating model. Wage inflation, labour shortages and broader employment cost increases are therefore having a significant impact on margins.

Rising utilities / energy costs was cited by 18 respondents. This is especially significant for attractions operating large estates, heated buildings, species-support systems, filtration, transport, catering and animal care infrastructure. Unlike some sectors, these costs are not easily avoided.

Weather volatility impacting trading days was cited by 16 respondents, underlining the financial exposure that comes with outdoor operations. For many sites, poor weather does not simply reduce admissions; it also reduces dwell time, suppresses secondary spend and can create staffing inefficiencies.

Declining discretionary spending was cited by 13 respondents, showing that macroeconomic pressure on households is also affecting sector confidence. Families are still visiting, but value sensitivity is rising, and attractions are having to work harder to justify spend and drive incremental revenue.

The result is that strategic thinking in the sector is increasingly shaped by a simple question: how can organisations maintain mission and quality while protecting financial resilience?

Revenue Per Visitor Is Becoming a Strategic Priority

One of the most important findings in the survey is the strength of focus on revenue per visitor. When asked how important this is in 2026, 24 of 31 respondents said it is either critical or very important, with a further 7 saying it is somewhat important. No respondent suggested that it was unimportant.
This is a significant signal. It suggests that the sector is recognising a structural reality: for many organisations, growth cannot come from admissions alone. There are limits to how far prices can be raised, and visitor number growth is often constrained by geography, market size, weather and physical capacity. As a result, improving the commercial value of each visit is becoming central.

This explains the strong interest in memberships, food and beverage, retail, events and paid experiences. It also helps explain why visitor journey friction now matters so much. If attractions want to grow spend per head, they need visitors to stay longer, move confidently through the site, know what is available and encounter fewer avoidable frustrations. Over 2026 and beyond, this focus on yield is likely to become even more pronounced. In practice, that means organisations will need to become more sophisticated in how they package experiences, merchandise value, communicate options and drive repeat value from existing audiences.

The Visitor Journey Still Contains Significant Friction

The survey makes clear that many organisations see the visitor journey as an area of unrealised opportunity. Respondents are not only concerned with attracting visitors; they are also increasingly focused on whether the visit itself is smooth, engaging and commercially effective.

The most common friction point identified was weather response / indoor capacity, cited by 19 respondents. That is highly revealing. It suggests that for many attractions, a significant part of the visitor experience remains vulnerable to external conditions.

Poor weather can make the site feel harder to navigate, reduce comfort and shorten length of stay. The second most common issue was food and beverage queues and capacity, cited by 12 respondents. This is especially important because catering is both an experience issue and a revenue issue. Slow service, poor peak-time capacity and queueing reduce visitor satisfaction while also limiting the commercial return from busy days.

Wayfinding and navigation was cited by 10 respondents, while real-time information, congestion and arrival and parking were all notable themes. Together, these findings suggest that many parks are still asking visitors to do too much work for themselves: understanding what is happening, where to go next and how best to use their time. This matters because today's visitors compare all leisure experiences against one another. A zoo is not being judged only against other zoos. It is being judged against the best experiences visitors have elsewhere.

Digital Capability Remains Functional but Limited

The sector appears to be digitally active, but not yet fully digitally mature. When asked to describe their current digital capability overall, 19 respondents selected functional but limited, 9 said strong but with gaps, 2 said outdated and 1 described capability as fragmented across multiple systems. This paints a picture of a sector that has adopted many core systems but has not yet fully connected them or used them strategically.

Most attractions now have some form of ticketing platform, email marketing capability and point-of-sale infrastructure.

A reasonable number also have membership systems, app-based tools or review platforms. But the survey suggests these often operate in silos rather than as a joined-up ecosystem.

This limits the ability to understand behaviour across the full visitor lifecycle: from pre-visit booking and planning, to in-park engagement, to post-visit follow-up and repeat conversion. It also hinders segmentation, personalisation and the ability to make better commercial decisions from shared data.

The implication is not that the sector lacks digital interest. Rather, it suggests that digital maturity is still emerging unevenly, and that many organisations have not yet had the resource or internal capability to move from isolated tools to integrated strategy.

Skills and Resources Are the Biggest Digital Barriers

The survey is particularly helpful in showing that the main barriers to digital progress are not ideological. They are practical. Respondents largely see value in digital platforms, but many feel constrained by capacity, skills and complexity.

The most commonly cited digital challenge was internal skills and capacity constraints, selected by 15 respondents. This suggests that even where systems are available, organisations often lack the people, time or specialist expertise needed to use them fully. This is followed closely by difficulty engaging visitors during their visit at 12 responses, over-reliance on third-party platforms at 10, cost or complexity of digital solutions at 10, and integration issues between systems at 9.

This pattern matters. It shows that the sector's digital challenge is not simply about buying better software. It is about making digital capability operationally manageable and strategically useful. If a platform is expensive, hard to integrate and difficult to resource internally, then adoption will remain partial even when the benefits are understood. For the sector over the next few years, the winners are likely to be solutions and approaches that reduce complexity rather than add to it.

Operational Constraints Are Limiting Strategic Execution

Many organisations have a clear idea of what they want to achieve, but less freedom to execute quickly. When asked about the biggest operational constraint to delivering their 2026 strategy, the most common answer was time and competing priorities, cited by 11 respondents.

That is a revealing response. It suggests that the sector is not short of ambition; it is short of bandwidth. Leadership teams are dealing with immediate operational realities while trying to make progress on longer-term commercial, digital and visitor-experience priorities.

Capital investment was the second most cited constraint at 10 responses, followed by staffing recruitment/retention at 6 and training / capability at 5. A smaller number pointed to site layout, tools and landlord or policy-related constraints.

Taken together, these results show that the main barriers to progress are structural and resourcing-related. Many attractions know what they need to improve, but are constrained by the pace at which they can fund, staff and operationalise those improvements.

That means progress across the sector is likely to be uneven. Some organisations will move quickly where investment, leadership alignment and systems allow. Others will progress more incrementally, focusing on practical gains rather than transformational change.

The Industry Outlook for 2026 and Beyond

The picture that emerges from the survey is not one of crisis, but of transition. The sector remains committed, purposeful and outward-looking. Yet the terms of success are changing.

Attendance growth still matters, but it is no longer sufficient on its own. Revenue diversification, visitor loyalty, operational efficiency and evidence of impact are all rising in importance. At the same time, expectations from visitors, boards, regulators and stakeholders continue to broaden.

Over 2026 and beyond, several shifts are likely to define sector performance:

The first is the move from **volume to value**. Attractions will place more emphasis on spend per head, premium experiences, memberships and events.

The second is the move from **static operations to more dynamic visitor management**. Better communication, improved navigation, real-time messaging and weather-adaptive planning will become more important.

The third is the move from **disconnected systems to connected insight.** Organisations that can join up ticketing, marketing, memberships, EPOS and engagement data will be better placed to make informed decisions.

The fourth is the move from **mission being assumed to mission being evidenced.** Conservation, education, accessibility and public value increasingly need to be demonstrated, not just asserted.

In this sense, the sector's future will be shaped less by any one dramatic change and more by its ability to make a series of connected improvements across commercial, operational and digital performance.

Summary

The Zoo and Wildlife Attraction Benchmark Survey 2026 shows a sector that is actively adapting to a more demanding environment.

Organisations remain deeply committed to their conservation and education missions, but they are increasingly aware that long-term sustainability depends on stronger commercial performance, better visitor engagement and more resilient operating models.

What stands out most is the maturity of the conversation. Respondents are not only thinking about visitor numbers. They are thinking about repeat behaviour, experience quality, spend opportunities, system integration, communication and impact measurement. That is a sign of a sector becoming more strategically sophisticated.

The challenge now is execution. Many of the right priorities are already visible. The opportunity for 2026 and beyond is to give organisations the tools, confidence, resources and sector support needed to act on them.

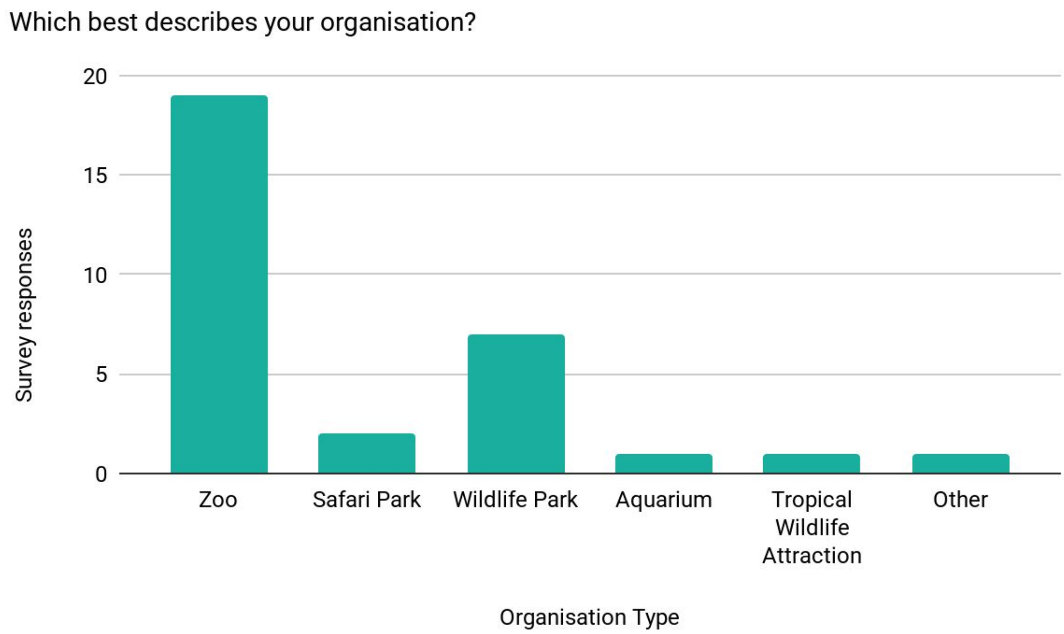
Detailed Survey Findings by Question

1. Which best describes your organisation?

The largest group of respondents identified their organisation as a zoo or wildlife park, representing the majority of the sector profile captured in the survey. A smaller number described their organisation as a safari park, while a limited number identified as aquariums or hybrid wildlife attractions that combine animal collections with other visitor experiences.

This distribution broadly reflects the structure of the UK sector represented through the British and Irish Association of Zoos and Aquariums (BIAZA) network, where traditional zoos and wildlife parks make up the largest proportion of organisations, alongside a smaller number of specialist attraction types.
The mix of organisational types is important when interpreting the wider survey findings. Safari parks, aquariums and mixed wildlife attractions often operate different visitor journey models, site layouts and seasonal patterns compared with traditional walking zoos or wildlife parks. For example, safari parks may rely more heavily on drive-through experiences, while aquariums typically operate in indoor environments with greater weather resilience.

Despite these operational differences, the responses throughout the survey suggest that organisations across these categories are facing many of the same strategic challenges. Cost pressures, visitor expectations, revenue diversification and the need for stronger visitor engagement are themes that cut across all attraction types, reinforcing the shared challenges currently shaping the sector.



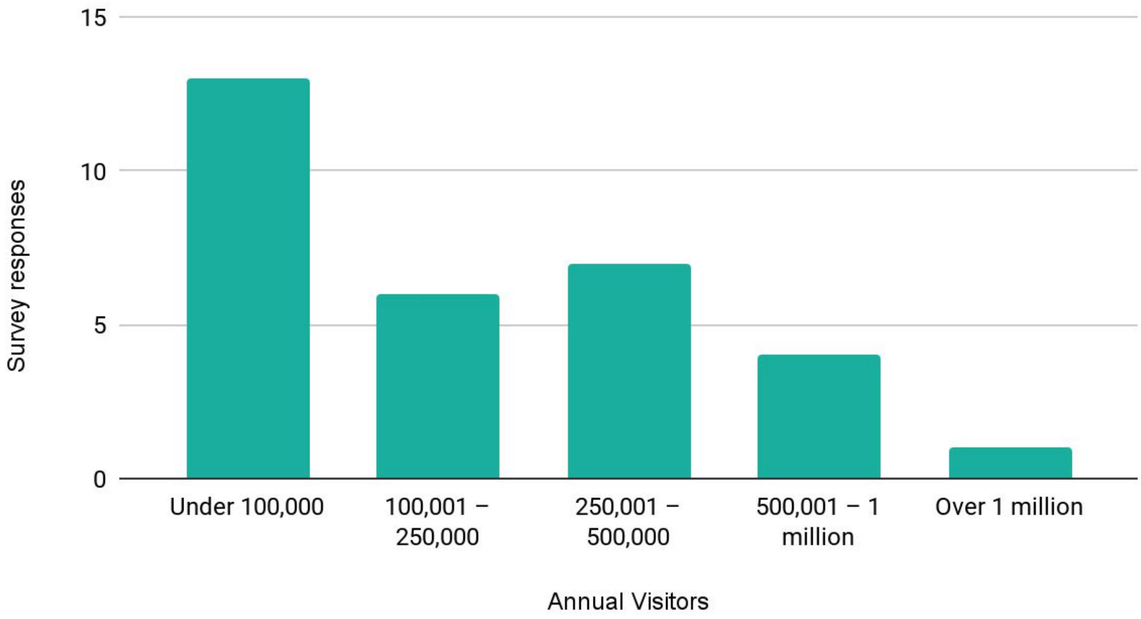
2. Approximate annual visitor numbers (pre-2026 average)

The respondent base spans a broad cross-section of the sector. 13 of the 29 respondents reported annual attendance of under 100,000 visitors, making this the largest single group in the survey. A further 6 reported 100,001–250,000, 7 reported 250,001–500,000, 4 reported 500,001–1 million, and 1 reported over 1 million.

This distribution is important because it shows that the findings are not driven only by large flagship institutions. They reflect a sector in which smaller and mid-sized operators make up the majority of the respondent base. This gives the survey a useful grounding in the realities of regional and independent attractions, many of which operate with relatively lean teams and tighter investment capacity.

It also means that some of the findings, particularly around capacity, digital capability and operational bandwidth, should be read in the context of organisations that may not have large in-house departments or major capital programmes behind them.

Approximate annual visitor numbers (pre-2026 average)

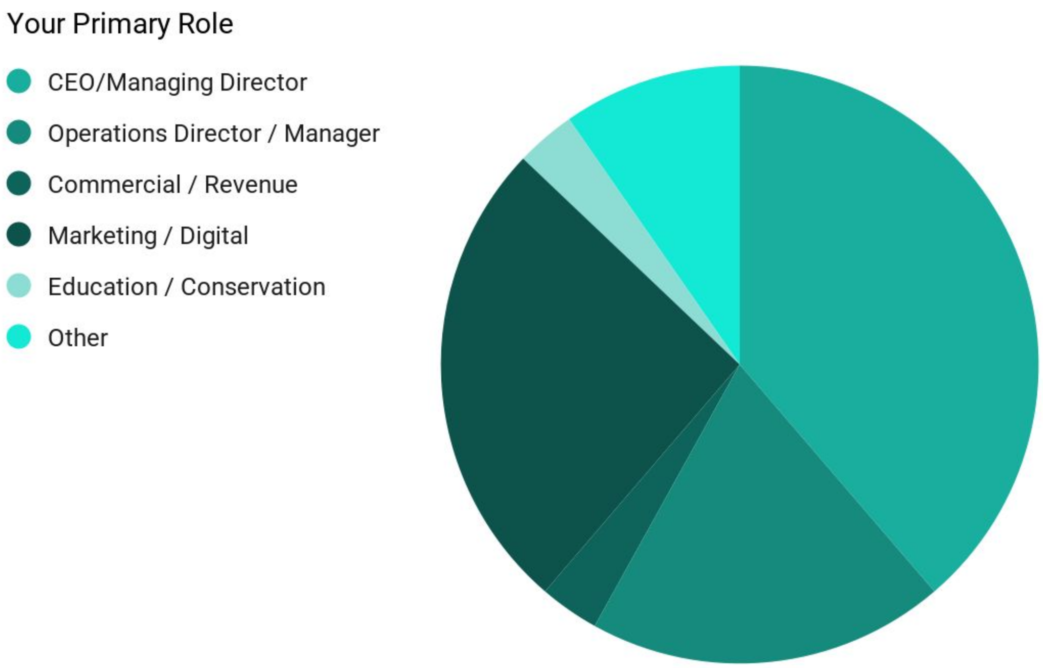


3. Your primary role

The survey drew heavily from senior decision-makers. 12 respondents identified as CEO/Managing Director, 8 as Marketing / Digital, 6 as Operations Director / Operations Manager, with the remaining respondents spanning commercial, conservation, education and other senior roles.

This matters because the survey captures not only frontline operational challenges but also leadership-level priorities. In effect, it reflects how the sector is being thought about strategically, not just how it is being experienced day to day.

The strong representation from CEOs and senior functional heads also helps explain the emphasis on whole-organisation themes such as revenue per visitor, operational resilience, system integration and impact measurement.



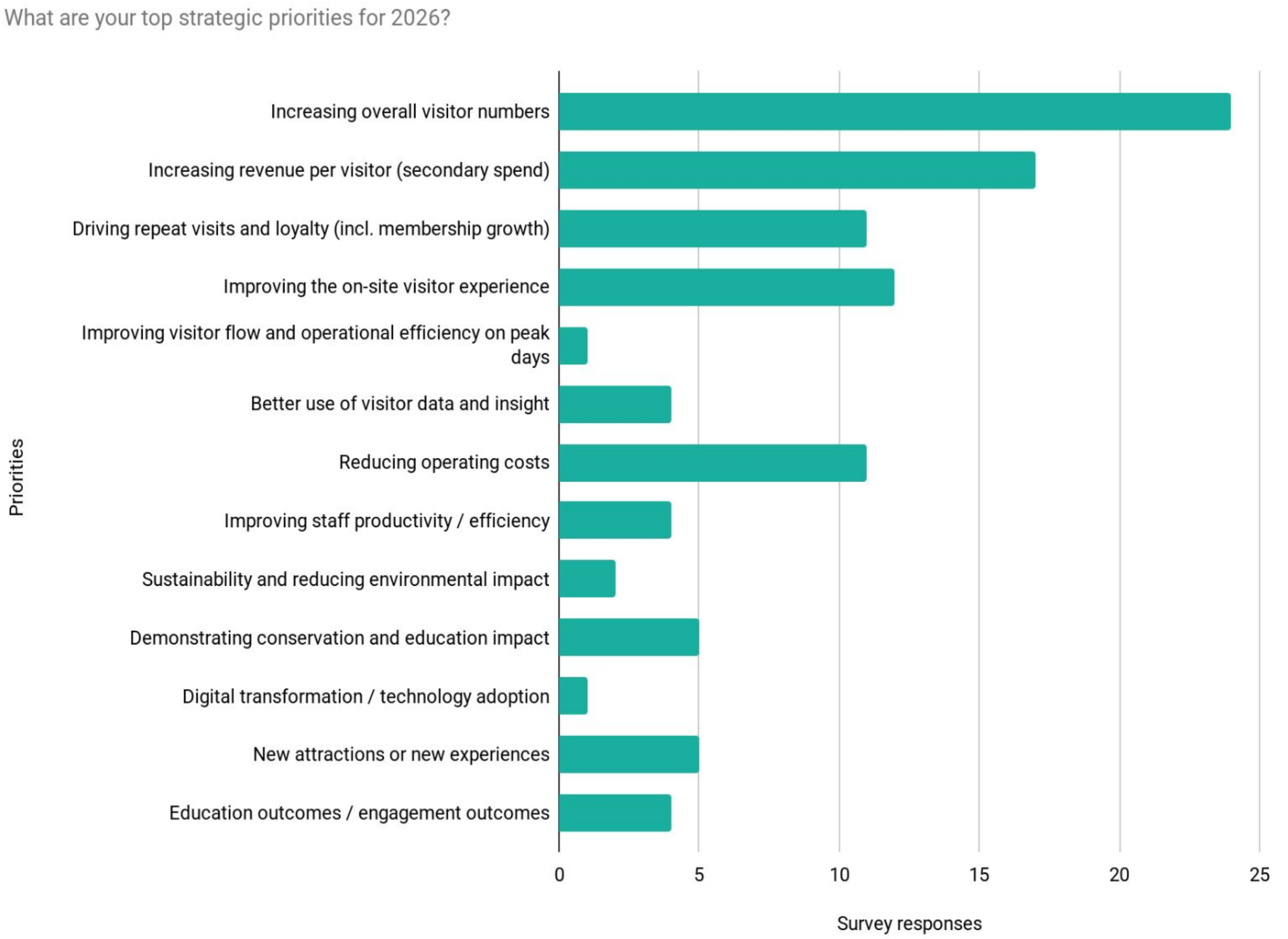
4. What are your top strategic priorities for 2026?

This question reveals the sector's most immediate ambitions. The most commonly selected priority was increasing overall visitor numbers, chosen by 24 respondents. That remains the dominant objective across the industry.

However, the next tier of responses shows the sector's priorities are becoming more nuanced. Increasing revenue per visitor was selected by 17 respondents, improving the on-site visitor experience by 12, and driving repeat visits and loyalty by 11 which was also the same number that selected reducing operating costs.

This combination is significant. It suggests that organisations are no longer treating visitor growth as the only route to sustainability. Instead, many are thinking in terms of a broader performance model in which attendance, yield, loyalty and efficiency all matter.

A smaller but notable group also selected demonstrating conservation and education impact, new attractions or new experiences, better use of visitor data and improving staff productivity. These responses indicate that organisations are trying to balance mission, innovation and operational improvement rather than viewing them as separate agendas.



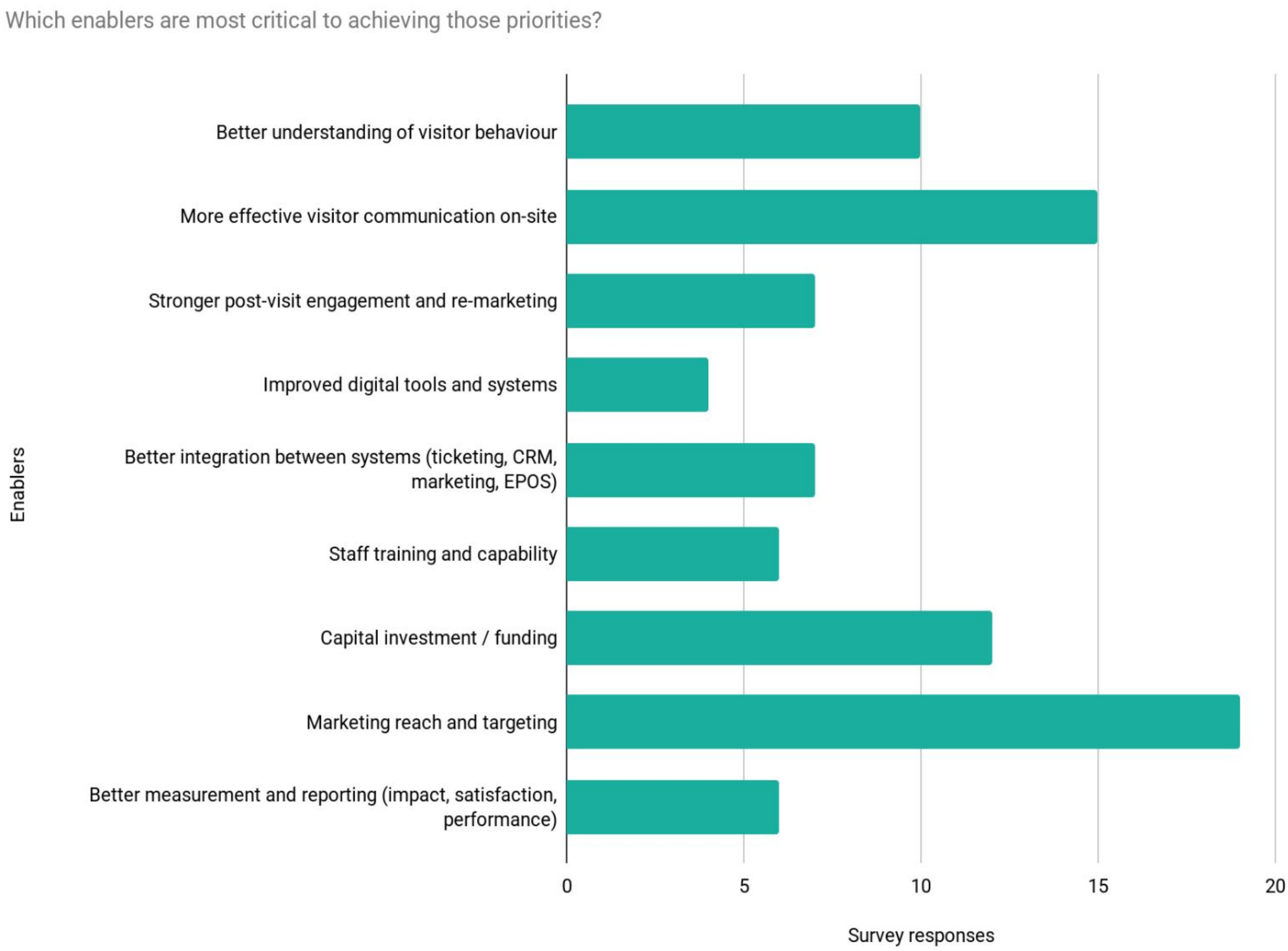
5. Which enablers are most critical to achieving those priorities?

The strongest response here was marketing reach and targeting, selected 19 times. This indicates that many organisations still see audience growth and conversion as closely tied to their ability to reach the right people effectively.

The second most cited enabler was more effective visitor communication on-site, with 15 selections. This is a particularly important result because it links strategic ambition directly to the in-park experience. It suggests that many organisations now recognise that commercial and engagement outcomes are shaped not only by pre-visit marketing, but by what happens once the visitor is through the gate.

Other key enablers included capital investment / funding with 12 responses and better understanding of visitor behaviour with 10, followed by stronger post-visit engagement, better reporting and measurement, staff training and capability, and better integration between systems.

Together, these responses show that achieving growth in 2026 is not just a marketing challenge. It is also a communications challenge, a data challenge and an investment challenge.

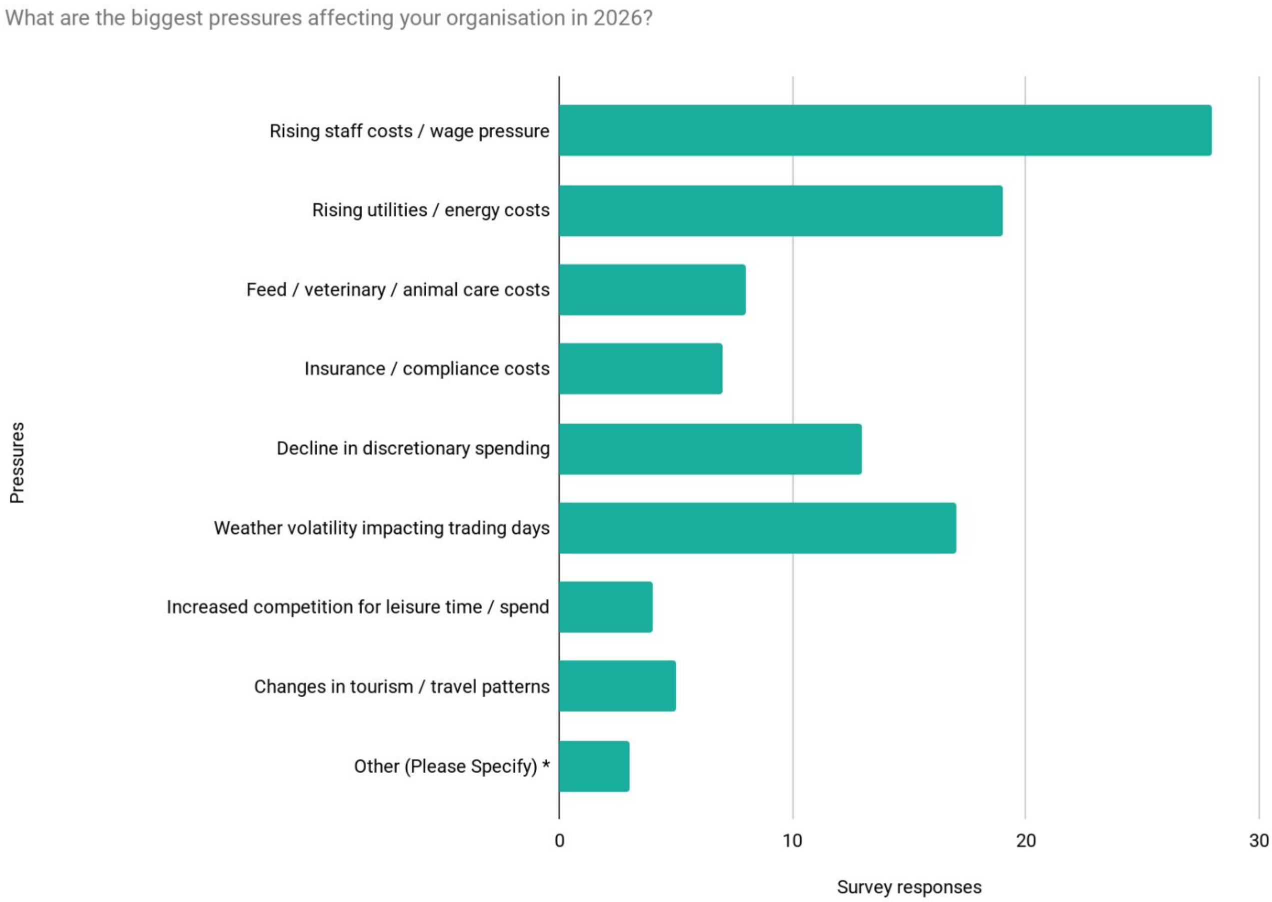


6. What are the biggest pressures affecting your organisation in 2026?

The responses clearly relate to organisational pressures. The dominant pressure was rising staff costs / wage pressure, selected by 28 respondents. No other pressure came close, underlining just how central labour cost inflation is to the current operating environment.

This was followed by rising utilities / energy costs at 19, weather volatility impacting trading days at 17, and decline in discretionary spending at 13. A smaller but still meaningful group cited feed / veterinary / animal care costs, insurance / compliance costs, competition for leisure spend and changes in tourism patterns. The open comments reinforce this picture. One respondent noted that "all costs [are] rising and no money to invest in improvements," while another pointed to business rates revaluation and implementation.

The wider context is that zoos and wildlife attractions often carry cost bases that are relatively inflexible. Animal care, compliance and estate maintenance cannot easily be cut without consequence. That makes commercial adaptation more important.



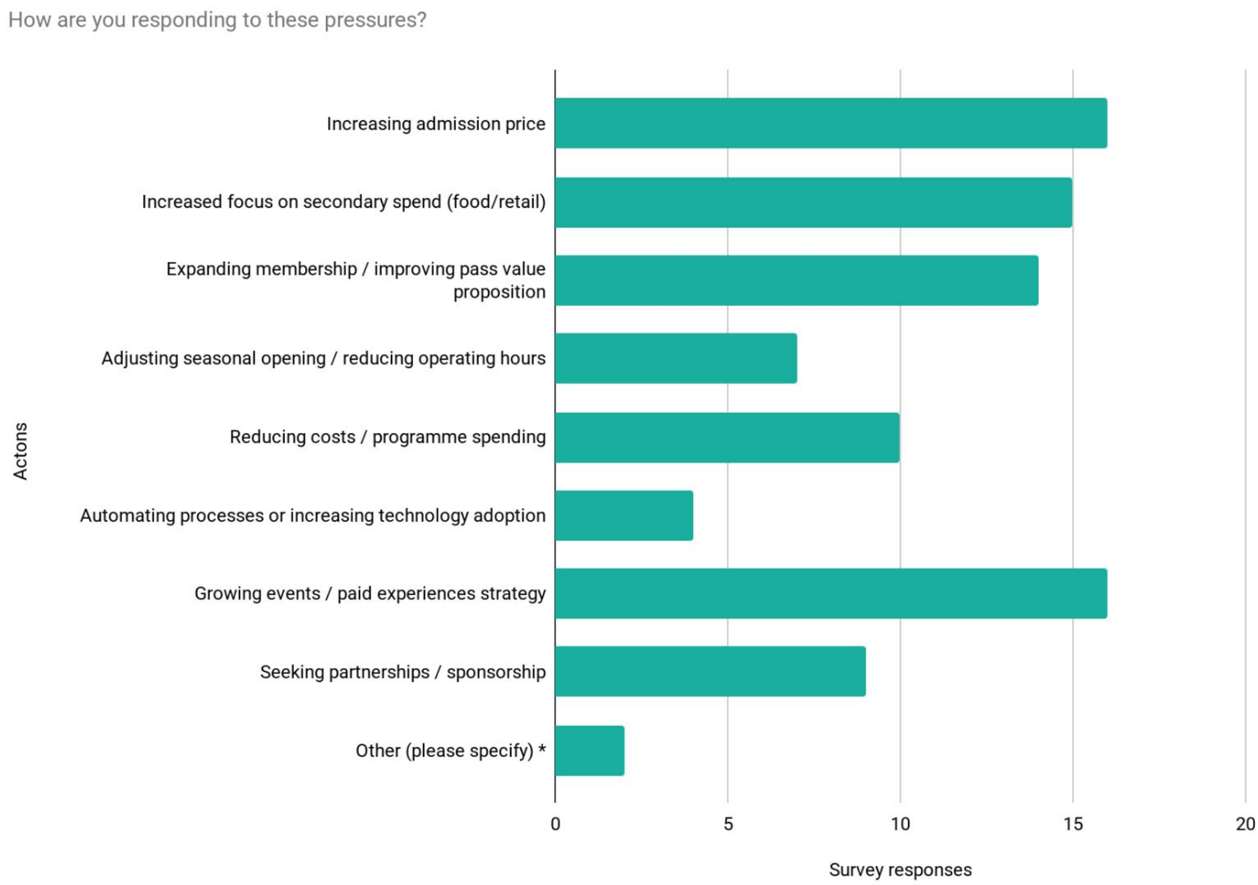
* Other Responses:
1: Needed to tick more than three...!
2: All costs rising and no money to invest in improvements
3: Commercial rates revaluation and implementation

7. How are you responding to these pressures?

The most common responses were increasing admission price, and growing events / paid experiences strategy selected by 16 respondents. Close behind were and increased focus on secondary spend, selected 15 times, followed by expanding membership / improving pass value proposition at 14.

This is an important pattern. It shows that organisations are responding to pressure through a mixture of pricing, yield management and value extension rather than relying on a single lever. Some are also pursuing cost reduction, partnerships / sponsorship, adjusted seasonal opening, and a smaller number are looking at automation or technology adoption.

The open comments add useful nuance. One respondent noted that they are employing a marketing/social media person, reflecting how basic capability additions can still be strategic in smaller organisations.

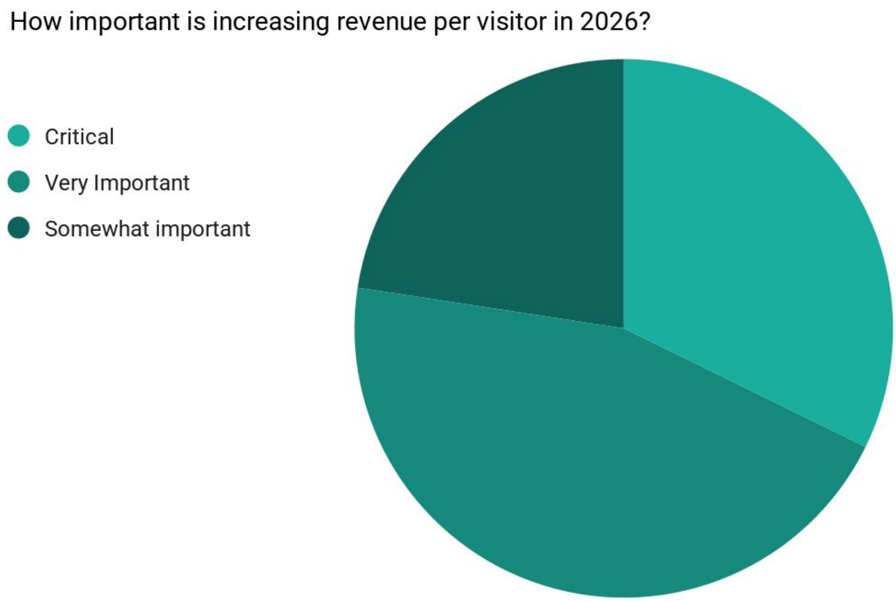


* Other Responses:
1: Confidential response that could not be anonymised
2: Employing a marketing/social media person.

8. How important is increasing revenue per visitor in 2026?

This question confirms the centrality of yield. 10 respondents said this is critical, 14 said very important, and 7 said somewhat important. No respondent placed it below that.

That consensus suggests the sector has largely accepted that spend per head is now a core strategic metric. The implication is that attractions will increasingly need to look at how the entire visit is designed commercially: not in an overly transactional way, but in a way that allows visitors to discover, enjoy and spend on the things that enhance their day.

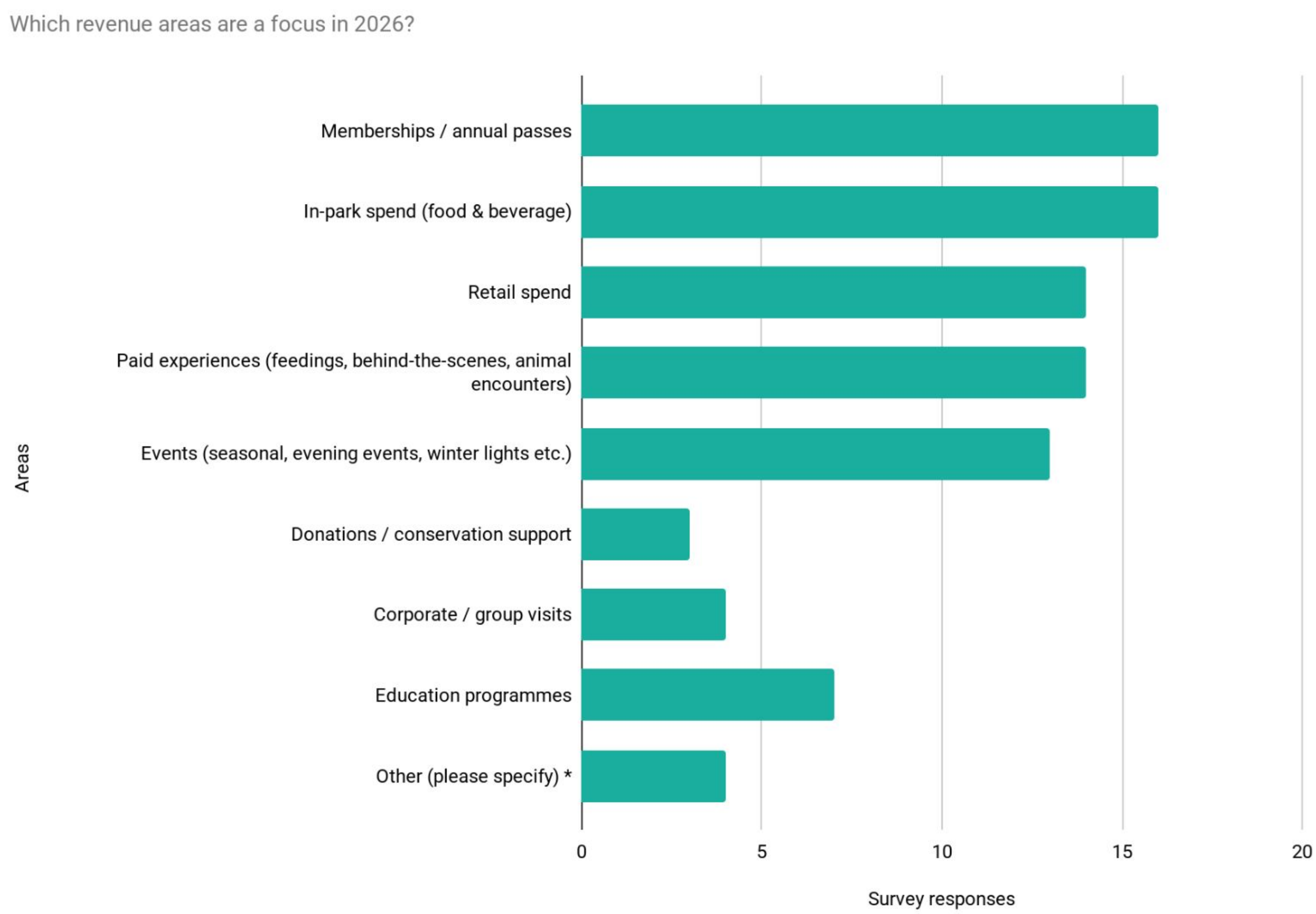


9. Which revenue areas are a focus in 2026?

There is no single dominant revenue stream. Instead, the sector is pursuing a balanced mix. Memberships and annual passes and in-park spend (food & beverage) were each selected by 16 respondents. Paid experiences and retail at 14, and events at 13.

This indicates that most operators are not looking for one silver bullet. They are building a broader commercial portfolio. Education programmes, corporate/group visits, donations and other revenue lines were less frequently selected, but still meaningful for some operators.

The open "other" responses are interesting because they point to additional models such as ticket sales emphasis, external funding for conservation work, gift aid potential and broader diversification beyond usual channels. These responses show that revenue thinking is expanding beyond traditional attraction categories.



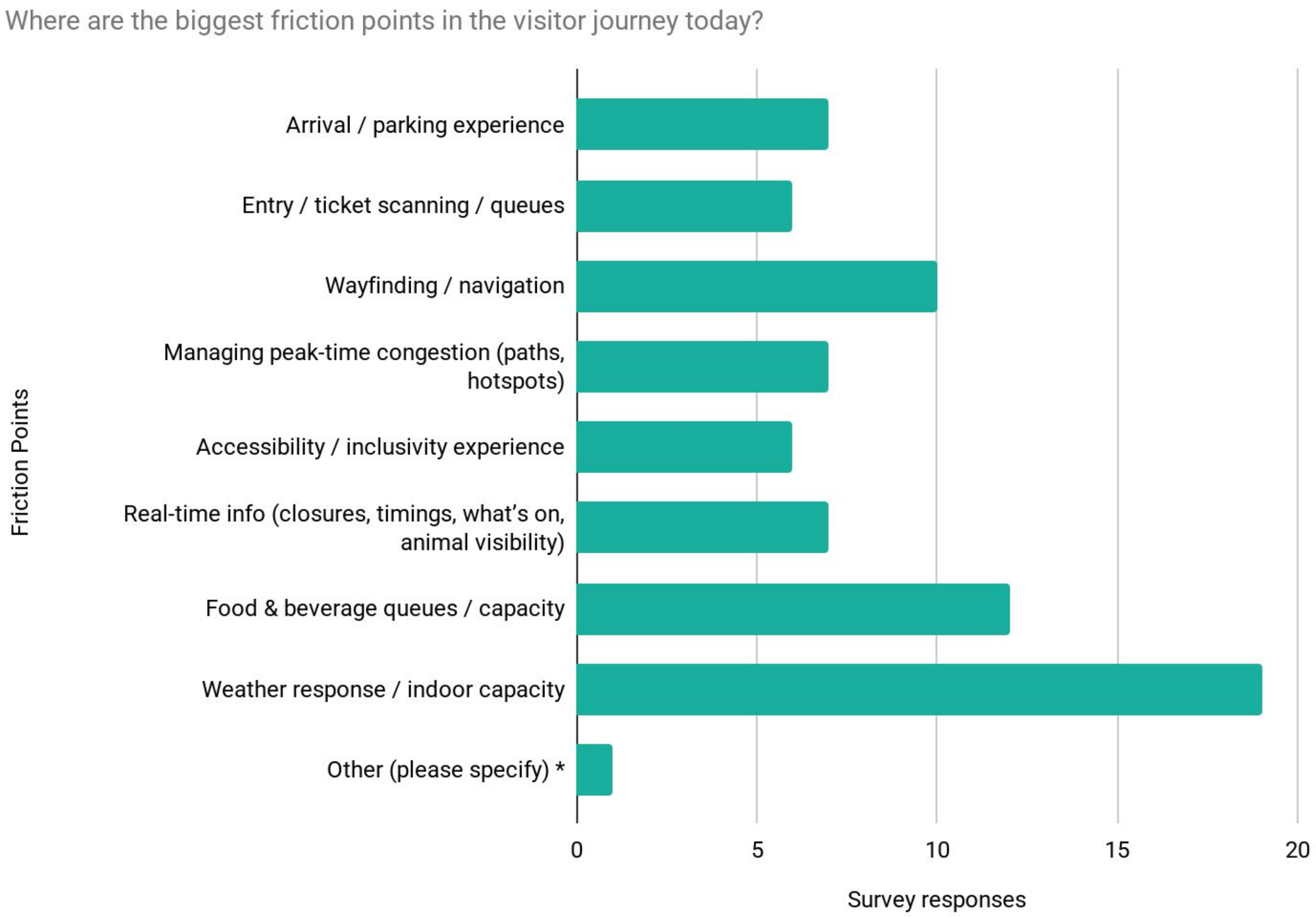
* Other Responses:
1: Ticket sales
2: External funding for conservation work
3: Gift Aid if we become a charity and it's uptake.
4: Diversifying revenue beyond usual channels.

10. Where are the biggest friction points in the visitor journey today?

The strongest theme was weather response and indoor capacity, selected by 19 respondents. This is the clearest operational issue in the entire visitor-journey section and reflects the reality that outdoor attractions remain highly exposed to weather conditions.

The next most cited friction point was food & beverage queues and capacity at 12, followed by wayfinding and navigation at 10 Arrival and parking, real-time information and managing peak-time congestion were each cited 7 times.

This suggests that the visitor journey is often weakest at moments of transition or uncertainty: arriving, deciding where to go, understanding what is happening and accessing services during busy periods. One additional open response referenced "curb appeal," hinting that for some organisations the experience challenge begins even before entry.



* Other Responses:
1: Curb Appeal

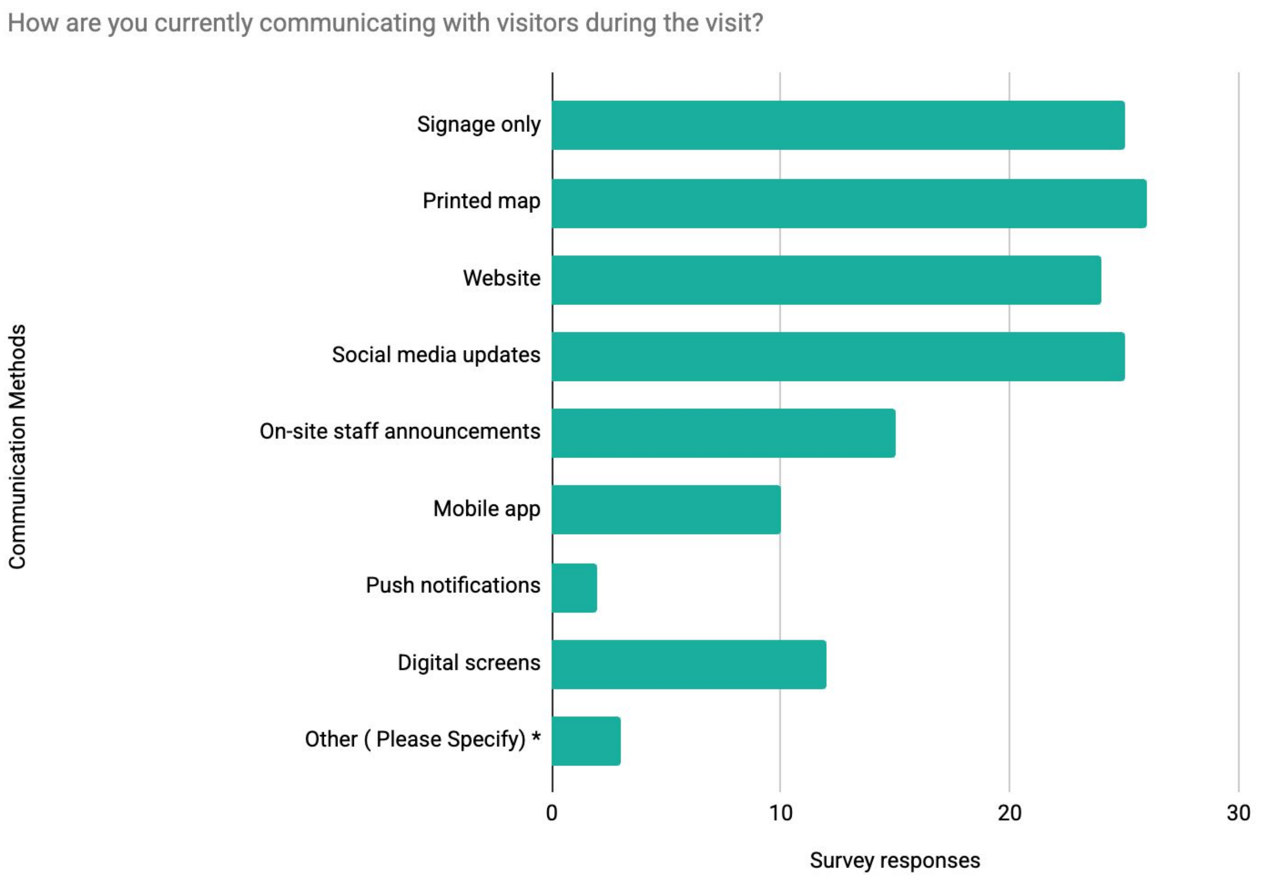
11. How are you currently communicating with visitors during the visit?

The current in-park communications mix remains heavily weighted toward traditional tools. Printed maps were selected by 26 respondents, signage by 25, social media updates by 25, and the website by 24.

More direct live channels are less widespread. On-site staff announcements were used by 15 respondents, digital screens by 12, mobile apps by 10, and push notifications by just 2.

This is one of the survey's most revealing findings. It shows that although many attractions are communicating in multiple ways, the actual tools used during the visit often remain relatively static. Social media and websites are being used, but these are not always ideal channels for contextual, real-time on-site guidance.

The open responses point to QR code links, guide books and face-to-face communication. These are useful supplements, but they also reinforce the patchwork nature of many current communication approaches.

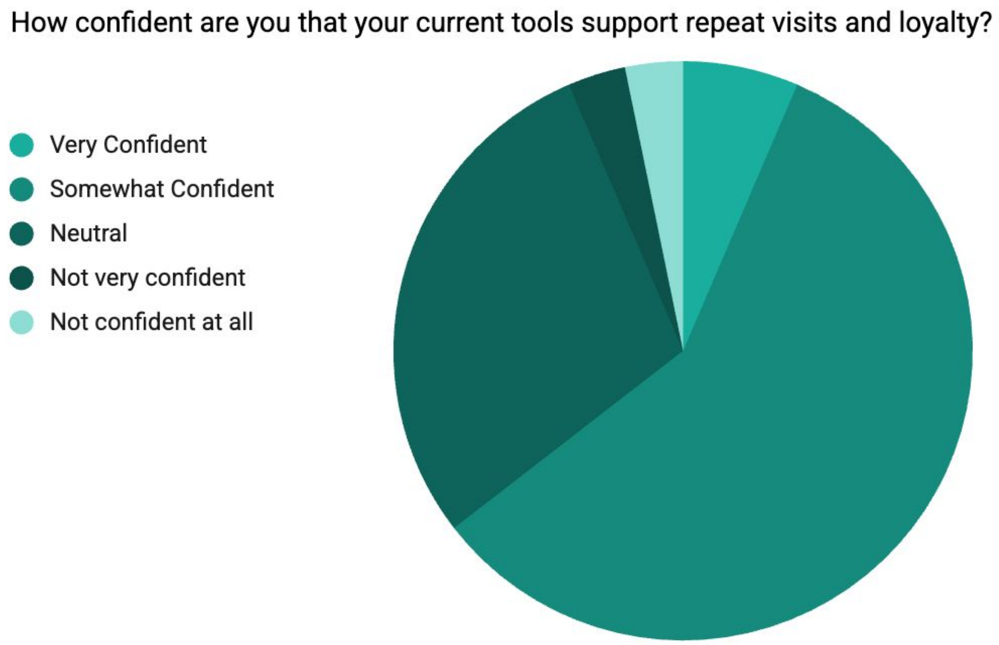


* Other Responses:
1: QR code links
2: Guide Book
3: We are small and personal so communicate face to face (but not to all visitors so its not consistent)

12. How confident are you that your current tools support repeat visits and loyalty?

Confidence is moderate rather than strong. 18 respondents said they were somewhat confident, 9 were neutral, 2 were very confident, and 2 combined were either not very confident or not confident at all.

This suggests that most organisations feel they have something in place, but not enough to describe it as a major strength. In practical terms, the sector appears to believe it can support loyalty to a degree, but not yet in a highly developed or data-driven way.

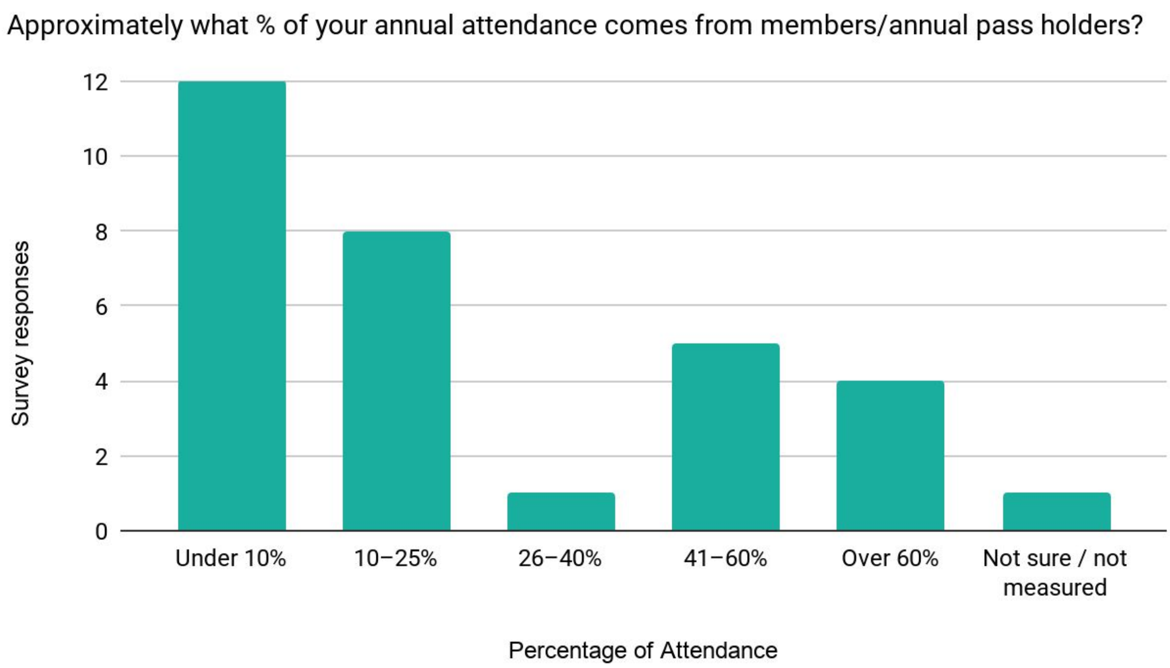


13. Approximately what percentage of annual attendance comes from members or annual pass holders?

Membership dependence varies considerably. The largest group, 12 respondents, said members account for under 10% of annual attendance. A further 8 said 10–25%. At the other end of the spectrum, 5 said 41–60% and another 4 said over 60%.

This is important because it shows there is no single membership model across the sector. For some attractions, membership is still relatively small. For others, it is central to the operating model.

That variation is likely to reflect geography, catchment, organisational history, local audience behaviour and the attractiveness of the proposition itself. It also means that benchmarks around loyalty need to be interpreted carefully rather than assumed to apply equally to all operators.

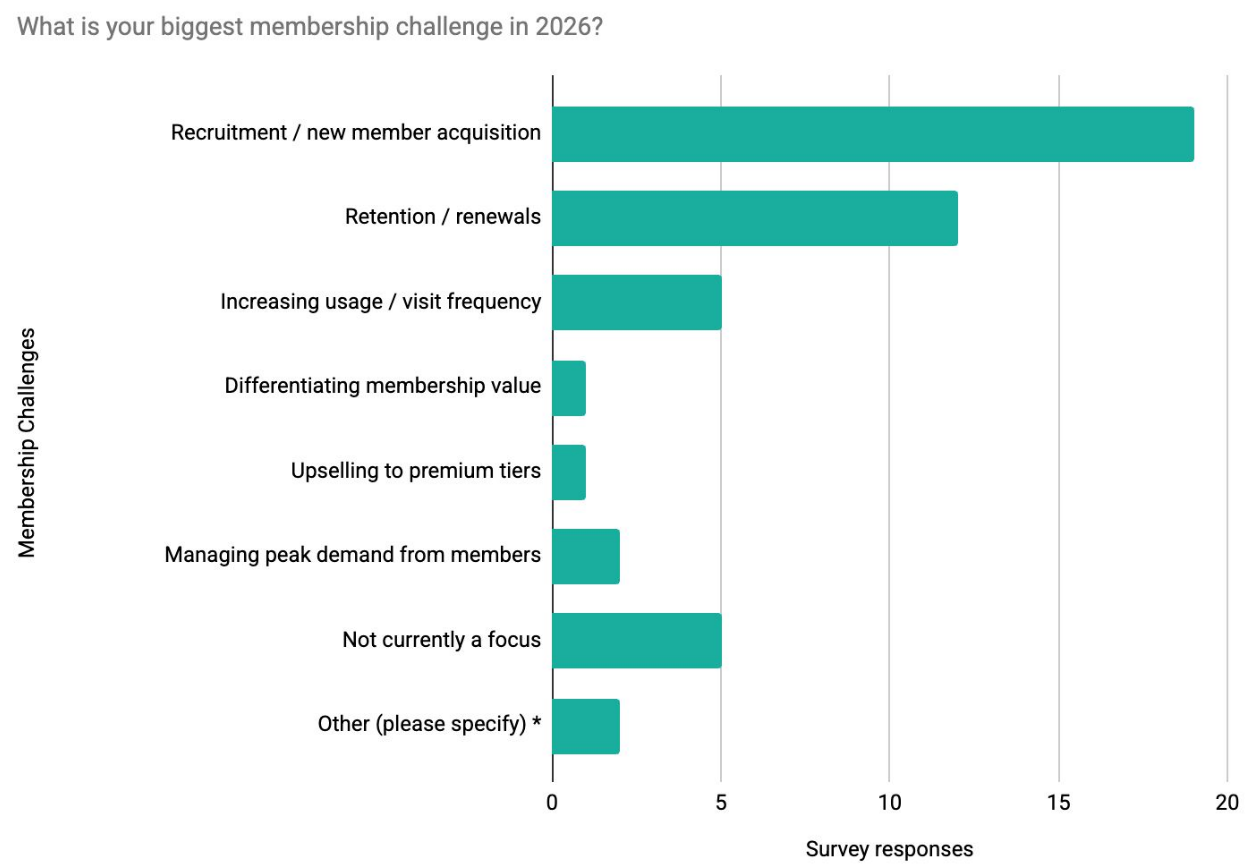


14. What is your biggest membership challenge in 2026?

The top challenge was recruitment / new member acquisition, selected by 19 respondents. This was followed by retention / renewals at 12. Smaller numbers cited increasing usage / visit frequency, managing peak demand, differentiating membership value and upselling to premium tiers.

This pattern suggests that many organisations are still trying to grow the size of their member base rather than simply optimising an already mature scheme. At the same time, the retention result indicates that growth alone is not enough; keeping members engaged and renewing is equally important.

The open responses add useful edge cases. One respondent does not currently have a membership scheme. Another described already having high membership take-up relative to population, but limited scope to grow secondary spend in a way that remains operationally viable.

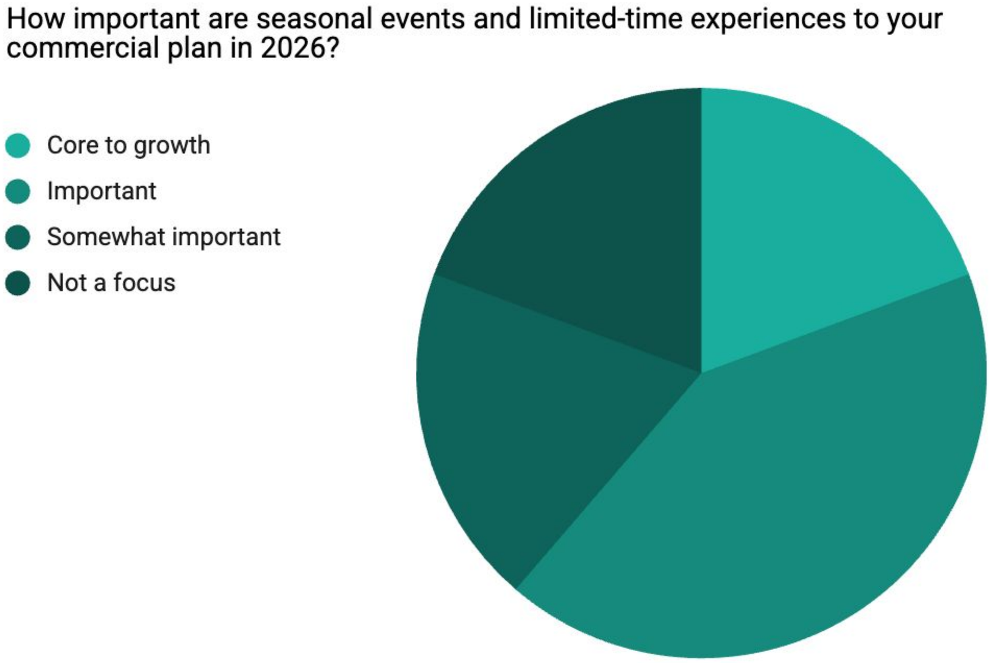


* Other Responses:
1: We don't have a membership scheme
2: Confidential response that could not be anonymised

15. How important are seasonal events and limited-time experiences to your commercial plan in 2026?

Events are clearly important, though not universally central. 6 respondents described them as core to growth, 13 said important, 6 said somewhat important, and 6 said not a focus.

This spread is interesting because it suggests events are moving from optional add-on to strategic pillar for many, but not all, organisations. For some attractions, events are becoming essential to season extension, revenue diversification and repeat engagement. For others, they may still be limited by operational model, audience profile, site constraints or mission priorities.

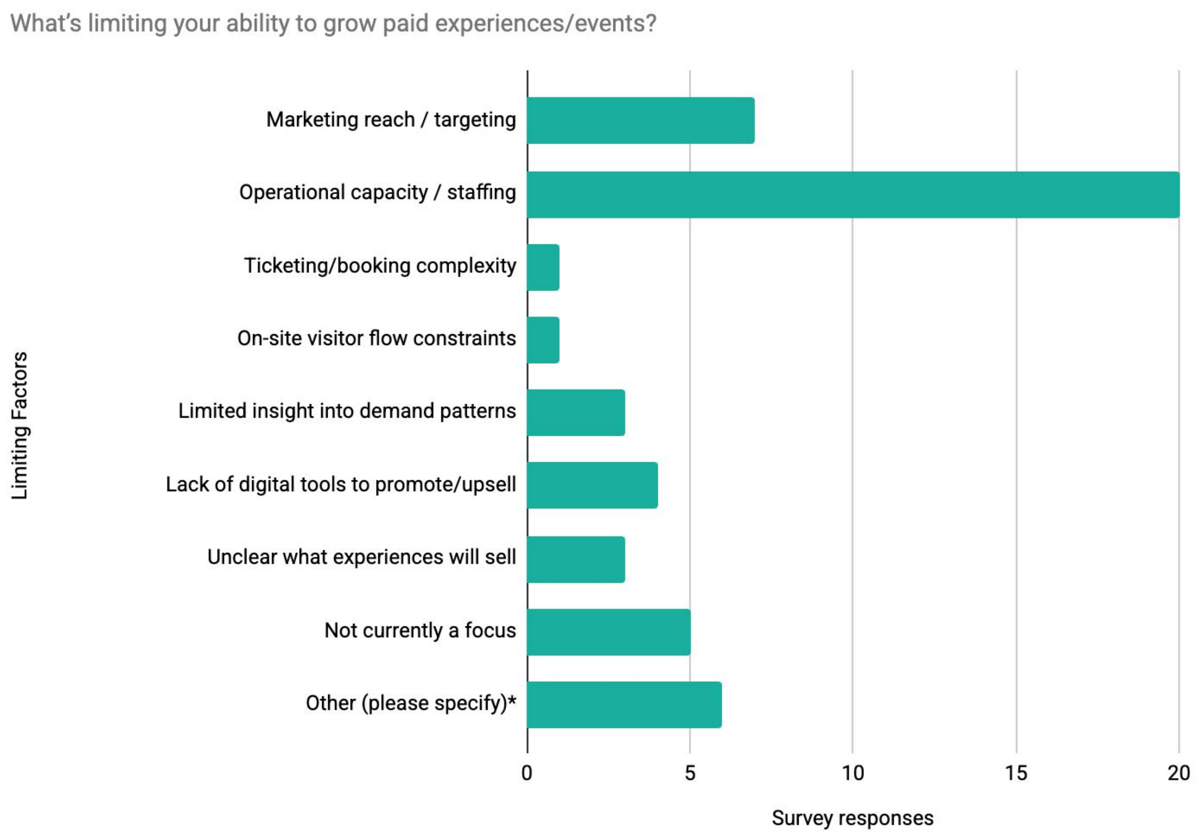


16. What is limiting your ability to grow paid experiences and events?

The dominant answer was operational capacity / staffing, cited by 20 respondents. This makes it one of the clearest constraints in the entire survey and shows that demand-side opportunity is often secondary to delivery-side reality.

Other notable barriers included marketing reach / targeting at 7, not currently a focus at 5, unclear what experiences will sell, limited insight into demand patterns, and lack of digital tools to promote or upsell.

The open responses are especially instructive. They reference the need to prioritise experiences, constraints around space and staffing, animal welfare considerations, legislation, early-stage event development and landlord-related issues. This reinforces the point that paid experiences in wildlife attractions are not like standard event products elsewhere. They must be carefully balanced against welfare, compliance and operational practicality.

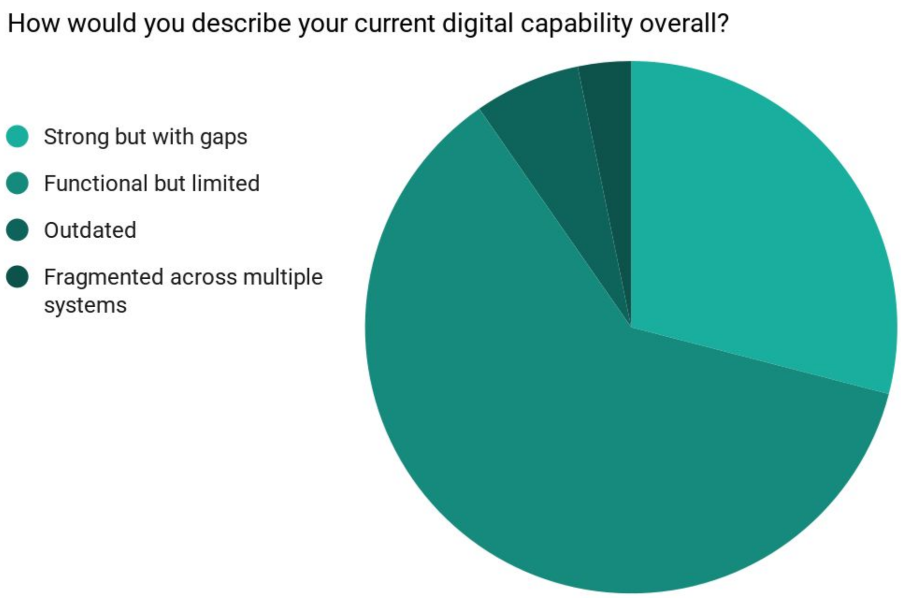


* Other Responses:
1: Need to prioritise and agree increase in experiences
2: Staffing, space and impact on animals
3: Animal welfare is an important part of experiences, so we limit the number we run per week
4: Zoo legislation and animal welfare - keeping balance of interactive experiences and welfare of the animals we care for
5: Just starting to launch more events
6: Conflict of interest with landlord.

17. How would you describe your current digital capability overall?

As noted earlier, the sector's self-assessment is mostly cautious. 19 respondents said functional but limited, while 9 said strong but with gaps. Only 3 respondents in total described their current state as either outdated or fragmented.

That distribution suggests the baseline is not poor, but that many organisations do not yet feel digitally mature. The sector seems to have passed the point of being largely analogue, but has not yet reached a point of high confidence in integrated, strategic digital capability.

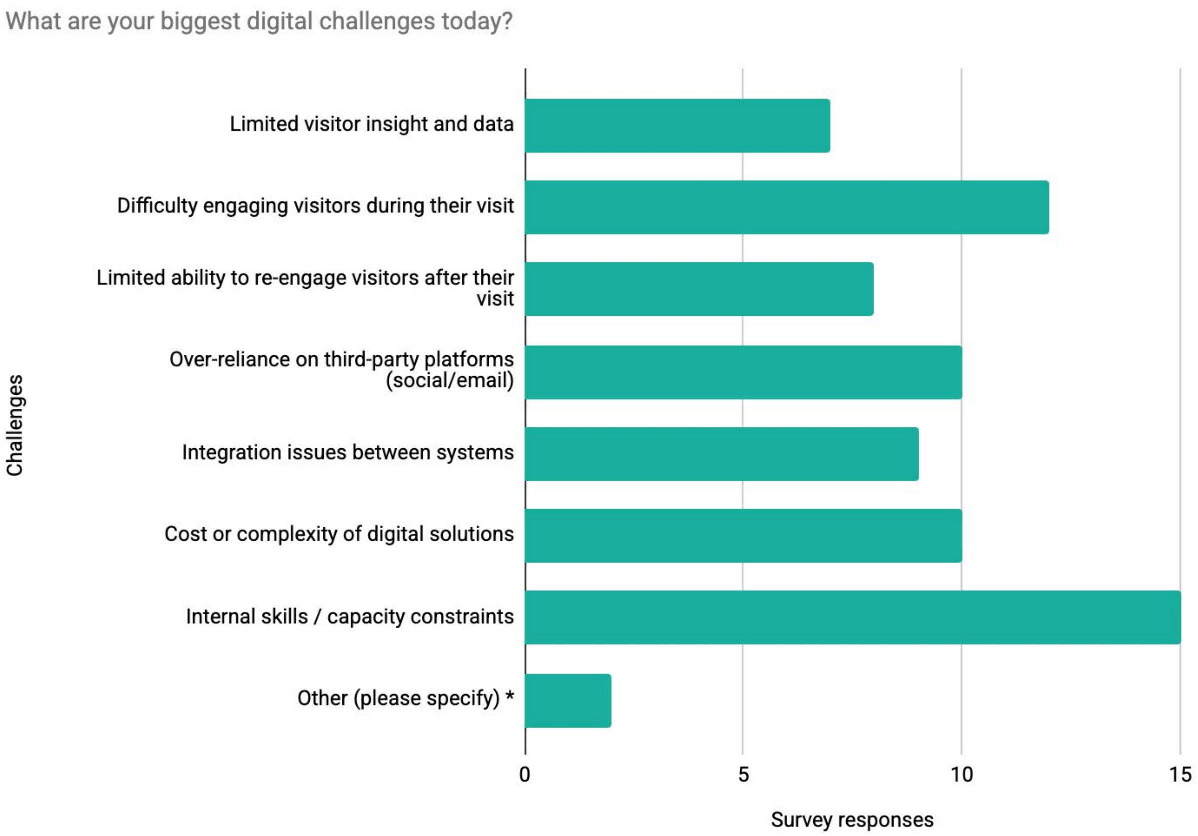


18. What are your biggest digital challenges today?

The top challenge was internal skills / capacity constraints, cited by 15 respondents. This was followed closely by difficulty engaging visitors during their visit at 12, over-reliance on third-party platforms at 10, and cost or complexity of digital solutions also at 10, and integration issues between systems at 9.

Some respondents also selected limited visitor insight and data and limited ability to re-engage visitors after their visit. The open "other" response referenced a "high humidity display area," presumably a site-specific technical limitation.

Overall, this shows that digital friction in the sector exists both before and after implementation. Even where tools exist, organisations may struggle to resource them, integrate them or use them meaningfully across the visitor lifecycle.

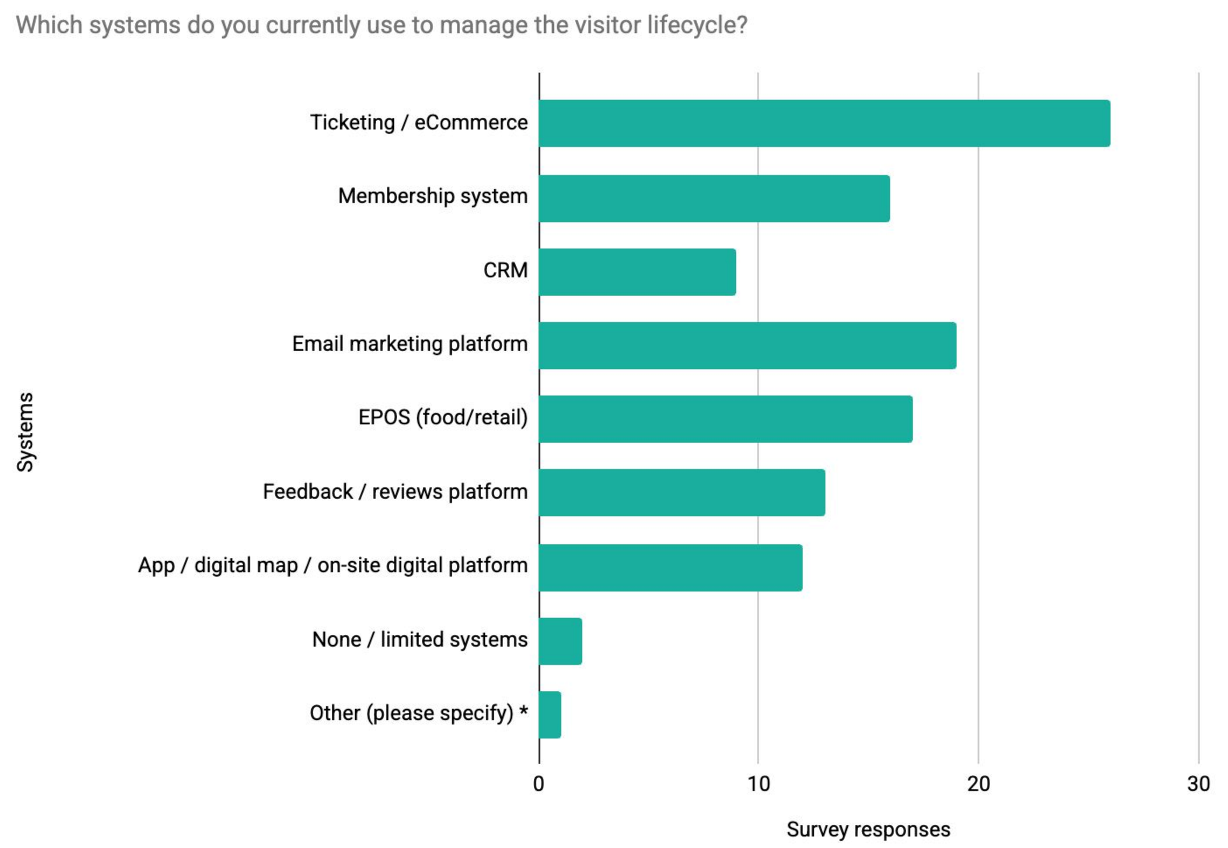


* Other Responses:
1 & 2: High humidity display area

19. Which systems do you currently use to manage the visitor lifecycle?

The sector has broad adoption of core platforms. Ticketing / eCommerce is used by 26 respondents, making it near universal. Email marketing is used by 19, EPOS by 17, membership systems by 16, feedback/reviews platforms by 13, and apps or digital maps / on-site digital platforms by 12. CRM was selected by 9.

Only 2 respondents selected none / limited systems, which suggests that most organisations have at least some digital infrastructure in place. The question is less whether systems exist, and more whether they are connected and fully utilised.

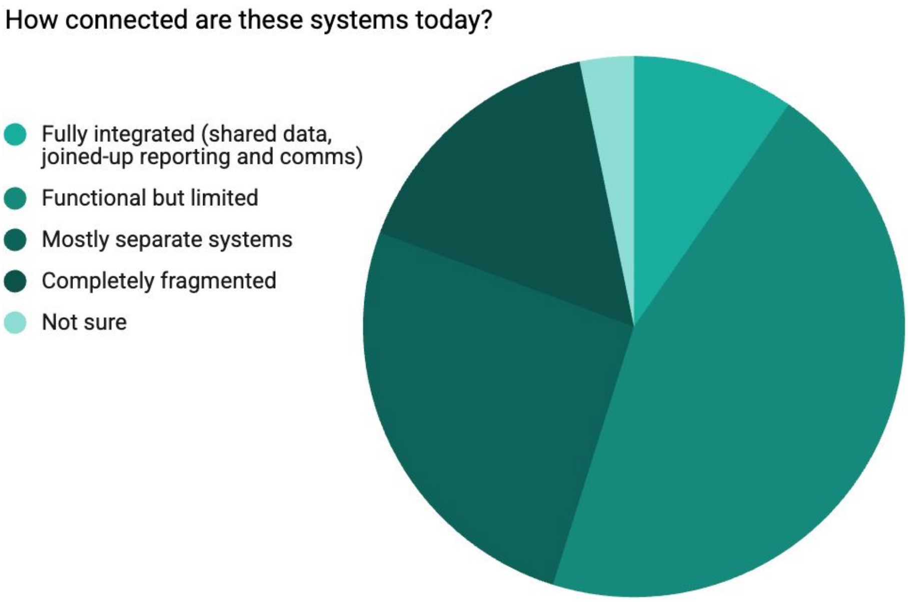


* Other Responses:
1: Market research

20. How connected are these systems today?

This is one of the clearest indicators of digital maturity. 14 respondents described their systems as partially integrated, 6 as mostly separate, 5 as completely fragmented, and only 3 as fully integrated.
That means only a small minority of organisations believe they have a genuinely joined-up system environment with shared data, reporting and communications. For the majority, system connection remains partial or weak.

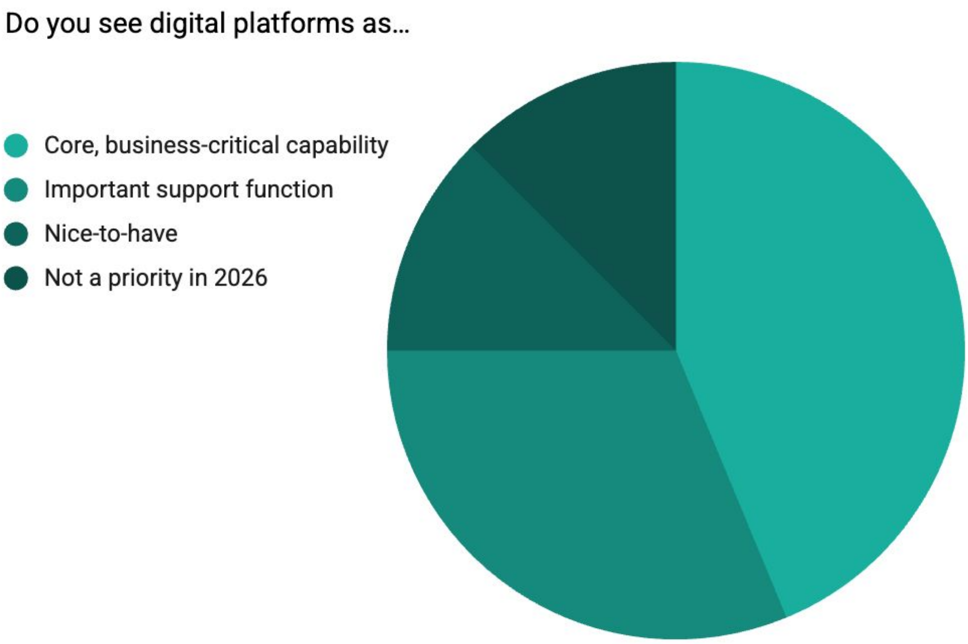
This helps explain many of the other responses around segmentation, insight, loyalty and re-engagement. If systems are not connected, organisations cannot easily build a complete and actionable picture of visitor behaviour.



21. Do you see digital platforms as...

This question reveals strong strategic intent. 14 respondents see digital platforms as core, business-critical capability, while 10 view them as an important support function. Only a minority described them as nice-to-have or not a priority in 2026.

The implication is that most of the sector does not dismiss digital. The challenge is less about buy-in and more about execution. Organisations generally understand that digital capability matters; they are just at different stages of making it operationally effective.

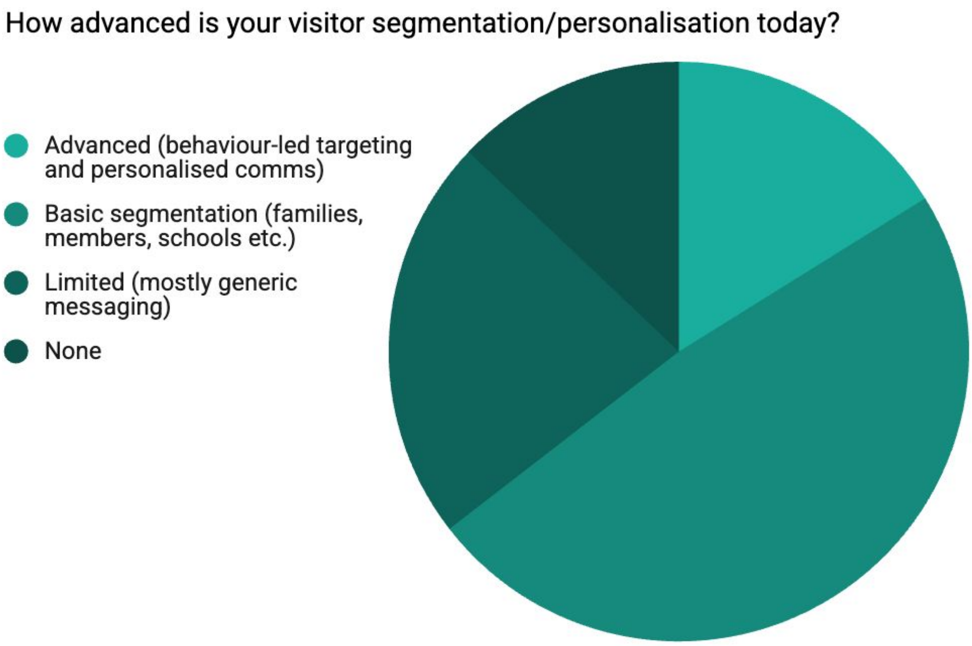


22. How advanced is your visitor segmentation and personalisation today?

The most common answer was basic segmentation, selected by 15 respondents. 7 said their current state is limited, with mostly generic messaging, while only 5 described their approach as advanced and behaviour-led.

This suggests that the sector has made some progress beyond one-size-fits-all communication, but that advanced personalisation remains relatively rare. Many organisations can segment by broad groups such as families, schools or members, but fewer appear able to respond dynamically to behaviour, preferences or visit history.

That gap represents both a challenge and an opportunity, particularly as organisations seek to improve repeat visits, upsell experiences and communicate more effectively across the visitor lifecycle.

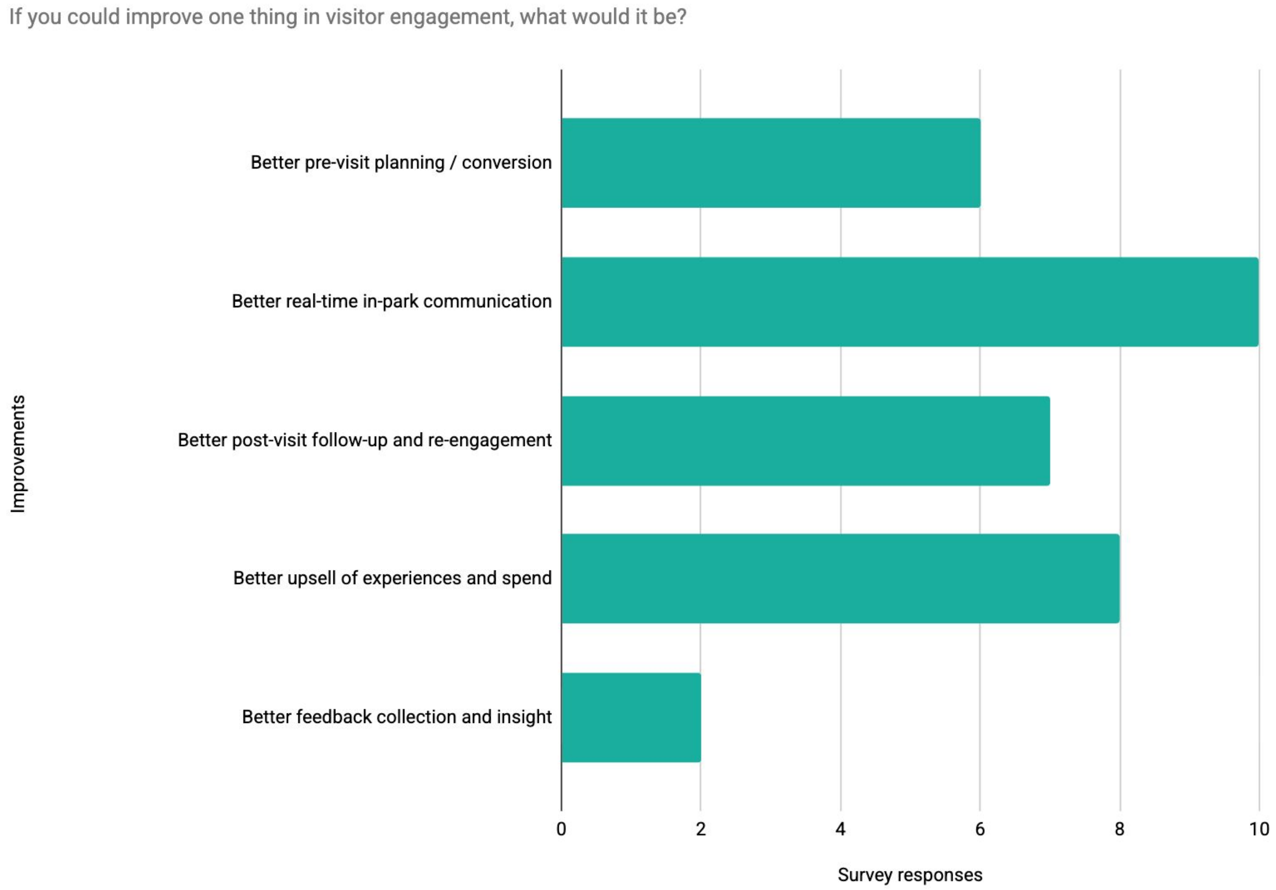


23. If you could improve one thing in visitor engagement, what would it be?

The most common answer was better real-time in-park communication, selected 10 times. This is a highly significant finding because it echoes the earlier visitor-journey and enabler questions. It reinforces the idea that many attractions now see live, contextual communication during the visit as a major opportunity area.

The next most common answer was better upsell of experiences and spend at 8, followed by better post-visit follow-up and re-engagement at 7 and better pre-visit planning / conversion at 6.

Together, these responses point to a more sophisticated understanding of engagement: it is no longer seen as just marketing before the visit. Operators are increasingly thinking about engagement before, during and after the visit as a connected journey.

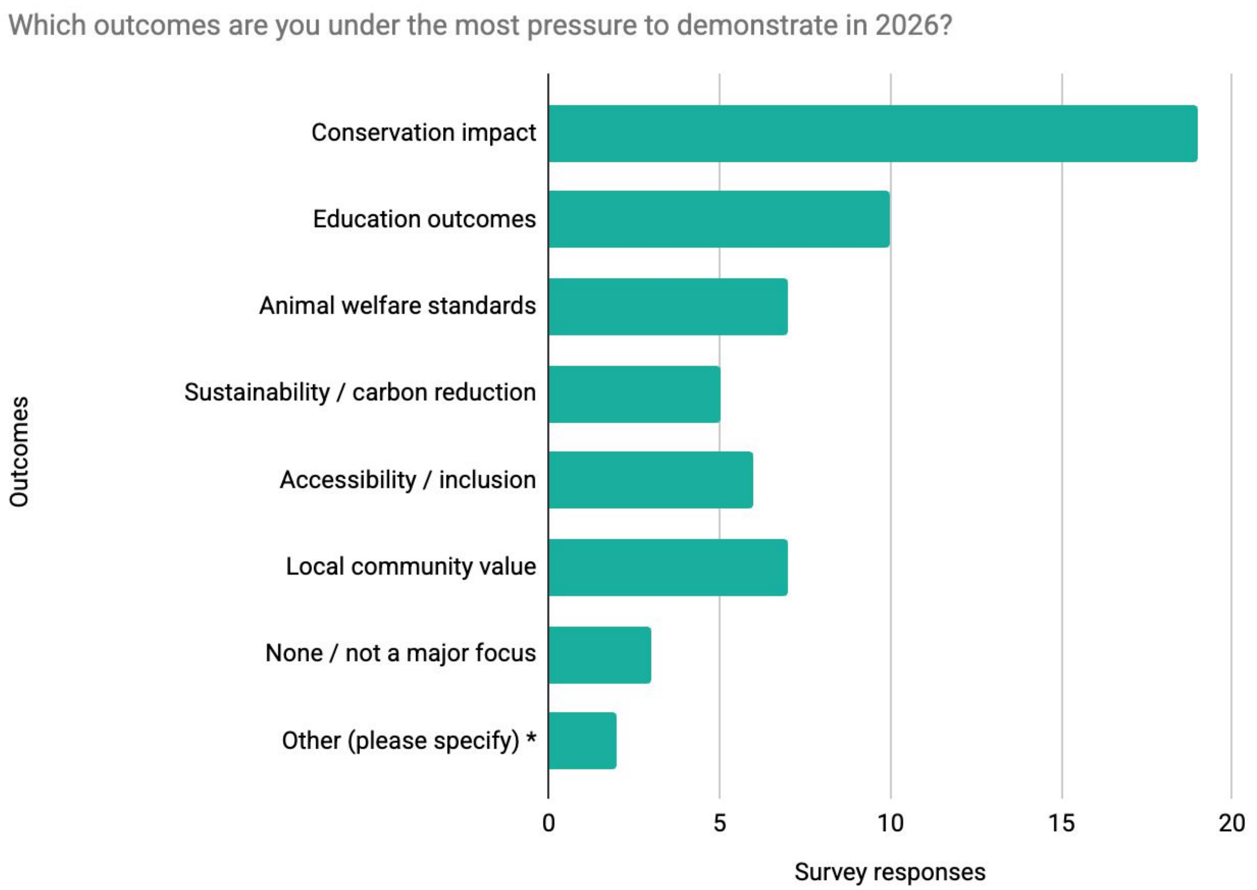


24. Which outcomes are you under the most pressure to demonstrate in 2026?

The strongest pressure is around conservation impact, selected by 19 respondents. This is a notable result because it shows that mission-based accountability remains highly important across the sector, even as commercial pressures intensify.

Other key outcomes include education outcomes at 10, animal welfare standards and local community value at 7, accessibility / inclusion at 6 and sustainability / carbon reduction at 5.

The open responses added public engagement and completing zoo developments. Altogether, this suggests the sector is increasingly being asked to evidence a broad set of outcomes that extend well beyond attendance and revenue.



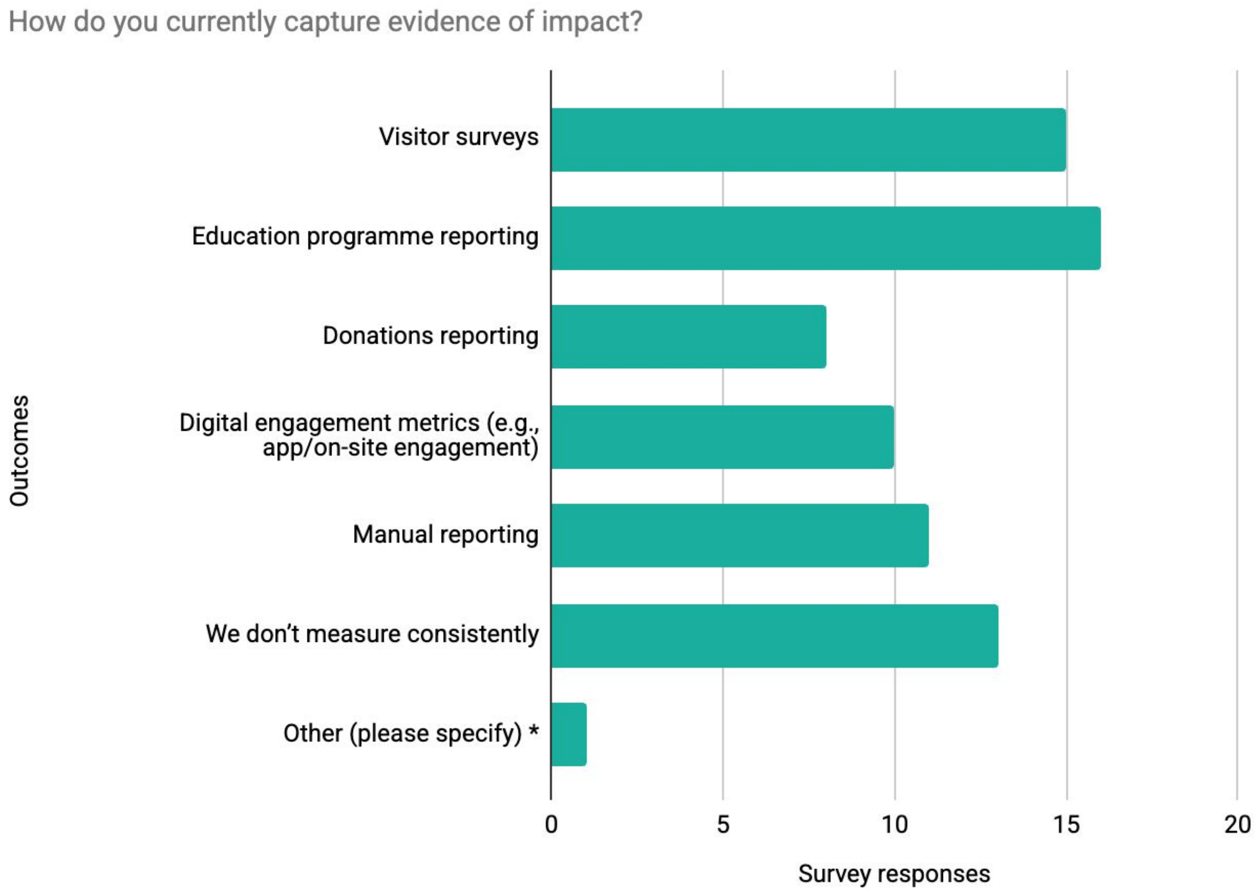
* Other Responses:
1: Public engagement
2: Completing the zoo developments

25. How do you currently capture evidence of impact?

The most common methods were education programme reporting at 16 and visitor surveys at 15. Manual reporting was selected by 11, digital engagement metrics by 10, and donations reporting by 9.

However, the standout figure here may be that 13 respondents said we don't measure consistently. That is an important finding. It shows that while there is pressure to demonstrate impact, the sector's measurement infrastructure is not yet keeping pace.

This gap between accountability pressure and measurement consistency is likely to become more important over time, especially as funders, boards, partners and public stakeholders increasingly expect evidence-based reporting.



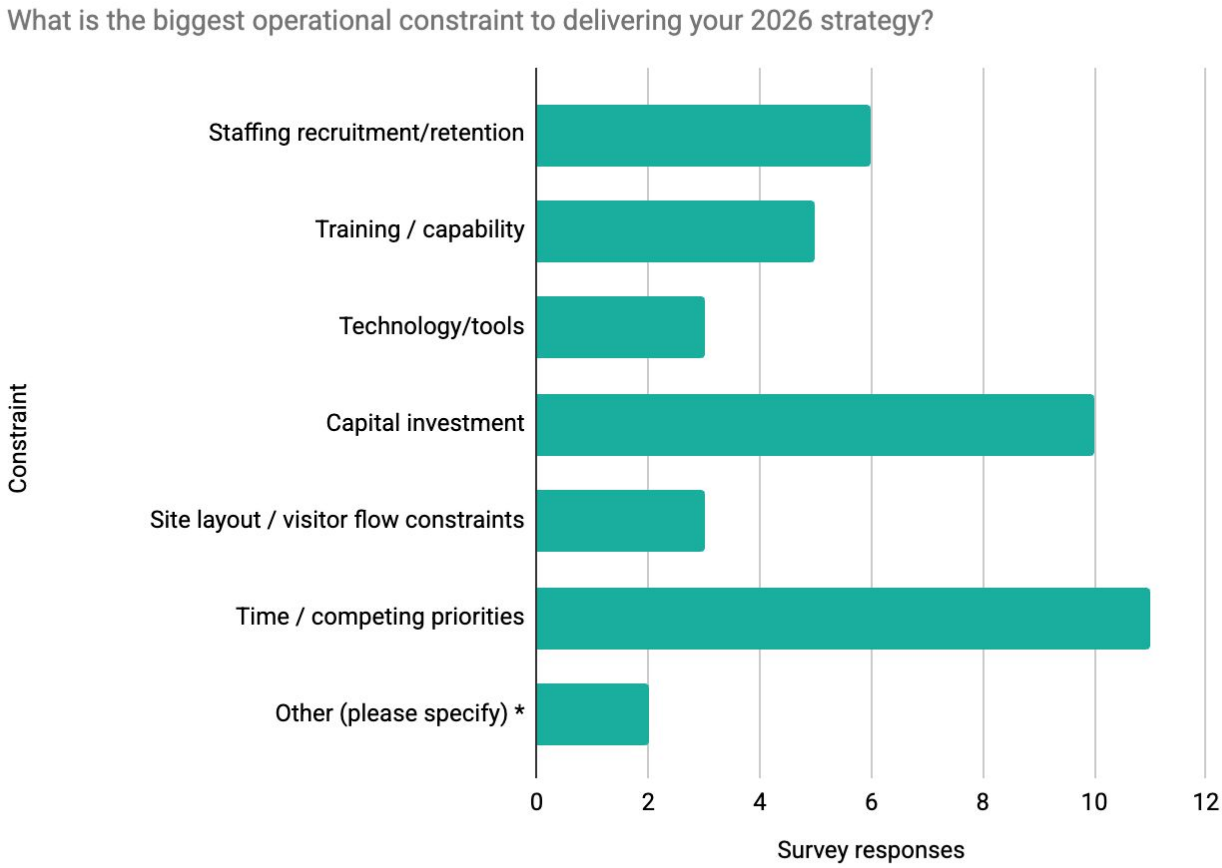
* Other Responses:
1: No response completed

26. What is the biggest operational constraint to delivering your 2026 strategy?

The most common answer was time / competing priorities, selected by 11 respondents, followed by capital investment at 10, staffing recruitment / retention at 6 and training / capability at 5.

A smaller number selected site layout / visitor flow constraints and technology/tools, while open comments referred to landlord constraints and uncertainty around government policy, taxes and wage-related cost increases.

This question is especially important because it shows that even where organisations know their priorities, they often lack the space, funds or people to move at the pace they would like.



* Other Responses:
1: Constraints of landlord
2: The uncertainty of current government policy as it affects our ability to be a profitable business...increased taxes, enforced wage rises, etc..makes investment much more unlikely.

27. By the end of 2026, what would success look like for your organisation?

This was a free-text question, and while each response was individual, several strong themes emerged. Most definitions of success centred on one or more of the following: higher visitor numbers, increased spend per head, meeting or exceeding revenue targets, successful delivery of new developments or experiences, improved visitor experience, and stronger financial performance or surplus. Some answers were optimistic and growth-oriented, such as achieving revenue and visitation KPIs or embedding a new strategy. Others were more blunt, with one respondent simply answering “still operating” and another “profit.” That range is revealing. It shows that while some organisations are focused on strategic expansion, others are thinking first about basic sustainability.

Taken together, these responses confirm that “success” in 2026 is being interpreted through a mix of commercial, experiential and organisational resilience lenses.

By the end of 2026, what would “success” look like for your organisation?
Not to lose money
Financially sustainable, resilient zoo model.
A steady growth in visitor numbers, hitting our visitor number and revenue targets
Increased visitor numbers and spend per head
Increase in visitor numbers on 2025. Continued reduction in negative feedback.
Still operating
Reaching or indeed exceeding the required visitation KPI, revenue KPI and successfully embedding the updated strategy into the current 3 to 5 year plan.
Zoo developments completed, several new seasonal events offered, fully integrated use of the app to upsell and increase in revenue and visitor numbers.
Operational surplus
Great Visitor experience.
Increase in numbers
Profit
Growth on membership, increased attendance and new developments implemented for improved visitor experience
Over budget on both commercial and conservation goals
Higher footfall, increased revenue, effective marketing, reduced bureaucracy
Maintained visitation levels and increased financial stability
An increase on visitor numbers and satisfaction on feedback
We have secured a large treasury bid, to enable out masterplan and site development.
Healthy Animals, Happy Staff
Open my new expansion and events all go well after the investments and increase footfall.
Developing a new area of the Zoo. Having a marketing person to assist with workload.
YOY growth EBITDA. Steps forward in technology, capex projects and organisational structure.
To have increased our visitor numbers to more than 300,000 visitors.
Increased footfall and in-park spend.
Maintaining worthwhile profitability
Generating significant surplus by minimising spend and maximising revenue
Improved targeting and pre / post visit communications
Beat 2025 footfall numbers
5% increase in footfall, income and retained surpluses
Increased NPS and beating 2025's record visitor numbers and revenue
Strong visitor numbers (Over 250k) / rev - with a high-quality experience.

28. What will be the biggest challenge facing UK zoos, wildlife and safari parks in 2026?

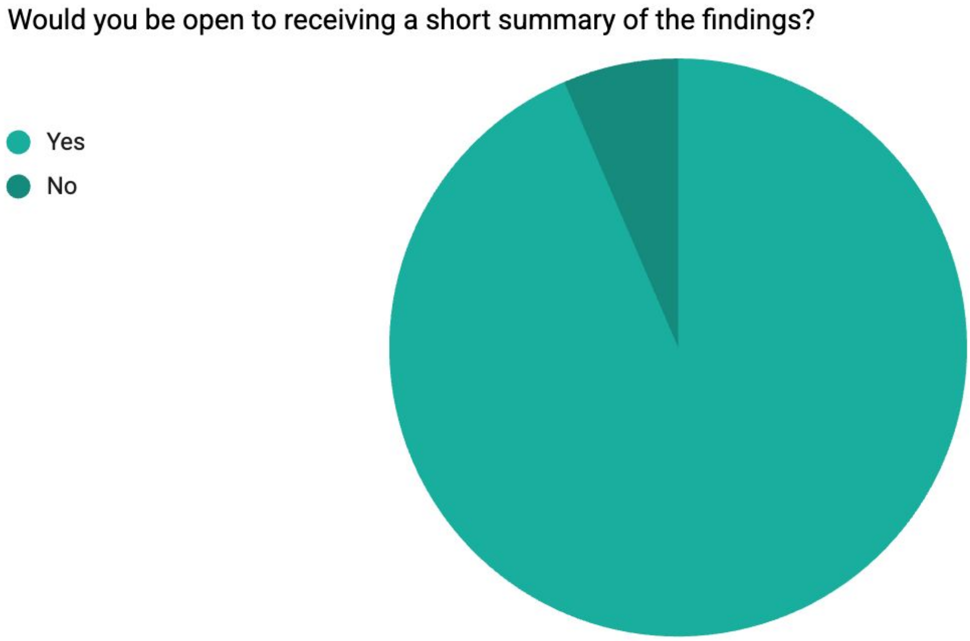
This was also a free-text question, and the responses were highly consistent in theme even where wording differed. The most common ideas were rising costs, labour costs, regulation and compliance, weather volatility, competition for leisure spend, and broader financial insecurity. Several respondents explicitly referenced new or forthcoming legislation, taxation and wage pressure. Others highlighted the challenge of competing with alternative leisure offers or dealing with extreme weather patterns. One noted that very good summer weather can actually reduce visitation by pulling people toward beaches and outdoor alternatives. These responses show that the sector perceives its biggest challenge not as a single issue, but as the cumulative effect of cost, regulation, competition and environmental unpredictability.

What will be the biggest challenge facing UK zoos, wildlife parks and safari parks in 2026?
Reduction in visitors
Increased operating cost base and navigating the challenges of how visitors/supporters selectively choose to spend disposable income
Strong competition and weather. Bad weather means people don't come out and really good weather in Summer we lose people to the beach
Future Financial insecurity
increasing costs associated with new legislation.
Labour costs and increased regulations
Not based in the UK
Visitor numbers, increased business costs
Cost of living crisis, employment costs and weather patterns
Working towards the new legislation due to come into force April 2027
Holiday cost of hotels
Labour costs and taxes
Investment required to keep visitor interest and engagement along with rising costs and uncertainty of economic climate.
Poor consumer market
Bureaucracy and costs
Finances
Increase of paperwork and tighter regulations
Costs Vs rising standards. Everything is more expensive, majority of people have less and less disposable income, new standards are coming in and BIAZA members also have to pass accreditation. The standards bars has never been higher, and expenses have never been more.
Compliance and cost of living
Increased costs (Staff and Utilities as main ones) and reduced secondary spend from customers.
Getting people through the door mainly.
Lack of government support. But from a commercial perspective, not enough value and understanding of the sector (marketing) within the industry.
Due to the high cost of living, I believe challenges will include growing visitor numbers and secondary spend.
Cost of living, increased competition, weather.
Facing up to increases in costs that are industry sector specific and way ahead of overall inflation, facing up to ever more onerous Zoo licencing impositions.
Increasing costs in a world with low consumer confidence
Cost of living crisis impact on visitor spend
Rising cost of living
Continued pressure on family discretionary spend (cost of living crisis)
Increased payroll costs, increased utilities and recruitment
Rising operational costs, development constraints and the cost of living crisis.

29. Would you be open to receiving a short summary of the findings?

This question is useful as a proxy for engagement with the benchmark itself. 29 respondents said yes and only 2 said no. That indicates very strong interest in sector-wide learning and benchmarking insight.

This matters because it suggests organisations are not only willing to share views, but also keen to understand how peers are responding to similar pressures.

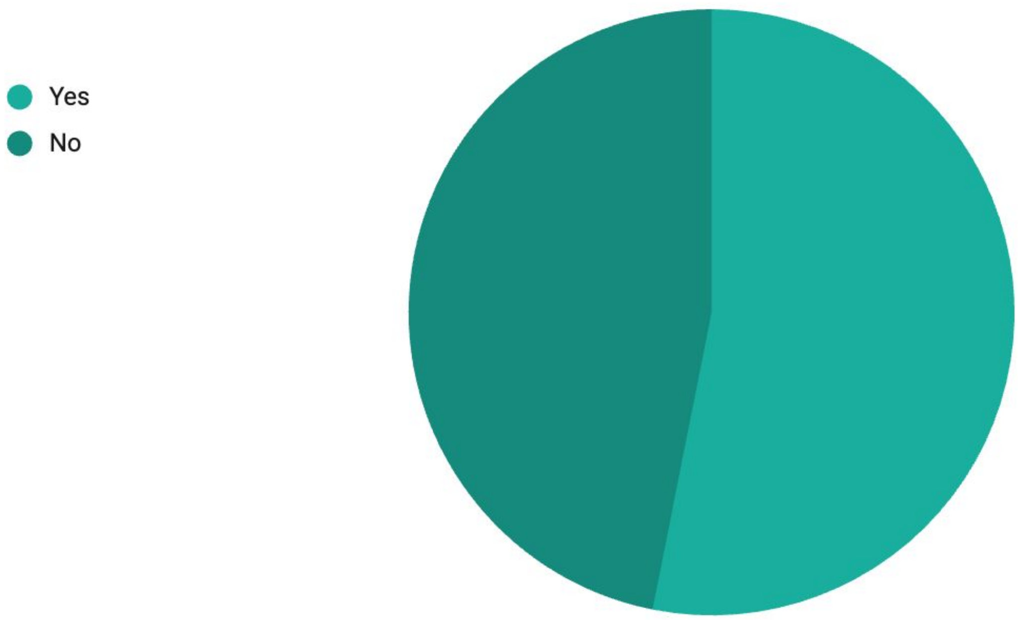


30. Would you be open to a short follow-up conversation to discuss sector insights?

Responses here were more mixed, but still encouraging. Based on the recorded values, 17 respondents selected yes and 15 selected no. The broad takeaway is that a substantial portion of respondents are open to continued dialogue.

This demonstrates there is a real appetite for follow-up engagement, especially where the conversation offers practical sector insight. For wider industry stakeholders, this points to an opportunity to continue the discussion through roundtables, webinars, conference sessions or targeted follow-up conversations.

Would you be open to a short follow-up conversation to discuss sector insights?



Further Context to the Overall Findings

What makes these findings particularly important is that they do not point to a sector facing one isolated issue. Instead, they show a sector experiencing multiple overlapping pressures at the same time, while also trying to modernise its operating model. That combination is significant.

For many years, zoos and wildlife attractions could often rely on a relatively familiar formula: attract visitors during peak seasons, maintain steady school and family demand, and support the wider mission through admissions, catering, retail and occasional fundraising. That model has not disappeared, but it is clearly under strain. The survey suggests that many organisations now feel they are operating in a much less forgiving environment, where margins are tighter, visitor expectations are higher and performance depends on a broader set of capabilities than before.

One of the clearest contextual themes behind the findings is that the sector is becoming more exposed to the same pressures affecting the wider visitor economy, while still carrying responsibilities that are unique to zoological organisations. In a typical leisure business, costs can sometimes be cut quickly in response to difficult trading conditions. In zoos and wildlife attractions, that flexibility is often far more limited. Animal welfare, conservation responsibilities, regulatory compliance, specialist staffing needs and estate maintenance all create a cost base that is not easily reduced without consequence. That means the commercial side of the operation has to work harder to absorb pressure elsewhere in the business.

This helps explain why the survey shows such strong interest in revenue per visitor, memberships, events and paid experiences. These are not simply growth ideas or nice-to-have innovations.

In many cases, they are becoming essential mechanisms for protecting organisational resilience. The sector appears to be moving away from a mindset in which admissions growth alone is expected to solve financial pressure.

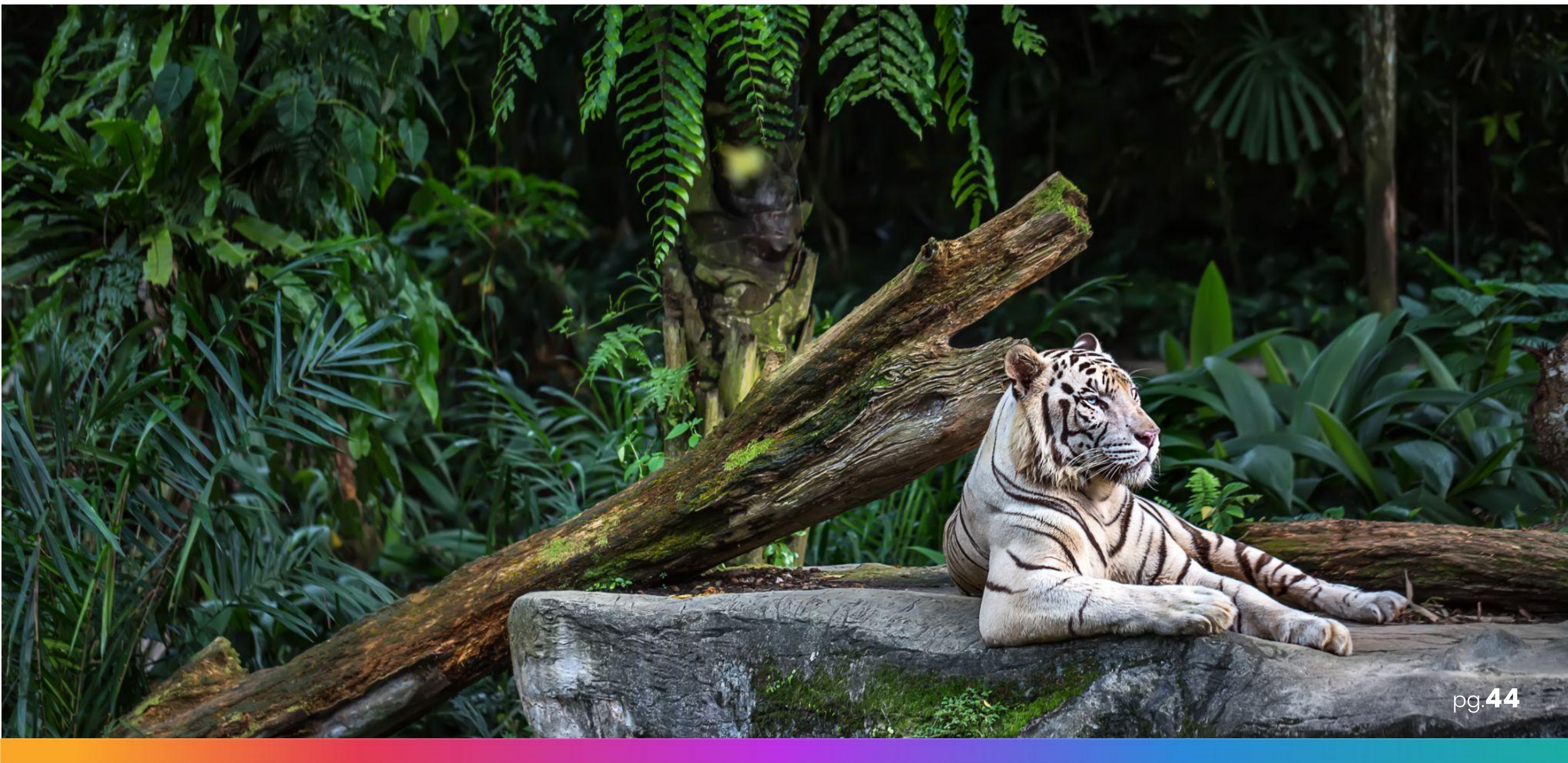
In its place is a more sophisticated understanding that sustainable performance depends on a better-balanced revenue model, one that spreads value across more parts of the visitor journey.

The findings also need to be viewed in the context of changing public expectations. Visitors increasingly expect attractions to deliver more than access to a site and a collection. They expect a well-managed, high-quality day out with clear information, convenient navigation, appealing food and drink, digital support where useful, and experiences that feel worth their time and money. At the same time, they also expect authenticity, purpose and visible commitment to conservation, education and animal welfare. That combination raises the bar considerably. It means wildlife attractions are now operating in a space where the standards of hospitality, retail, entertainment and public engagement increasingly sit alongside the standards of conservation and care.

This is why some of the survey's more practical findings, such as friction around queues, navigation, indoor capacity and real-time communication, matter so much. These may appear operational on the surface, but they are really part of a larger competitive picture. When visitors encounter avoidable friction, the result is not just inconvenience. It affects their perception of value, their likelihood to spend, their willingness to recommend the attraction and their motivation to return. In that sense, experience design is no longer separate from commercial strategy. The two are now closely linked.

Another important contextual point is that the survey reflects a sector in which digital ambition is ahead of digital capacity. Most respondents do not appear resistant to digital tools. On the contrary, many clearly understand the need for better communication, stronger loyalty, improved segmentation and more connected systems. The challenge is that these ambitions are often running up against organisational realities: small teams, legacy systems, budget limitations and competing priorities.

This suggests that the sector's digital gap is not primarily one of awareness. It is one of implementation. That distinction is important because it means future progress is likely to depend less on convincing organisations that digital matters, and more on making solutions easier to adopt, easier to resource and easier to integrate into day-to-day operations.



The findings around impact measurement also deserve wider context. The fact that conservation impact emerged so strongly, alongside education, animal welfare, accessibility and community value, shows that the sector is operating under increasingly broad expectations of accountability.

Zoos and wildlife attractions are not only being judged on whether they attract visitors or generate revenue. They are also being asked to demonstrate public value more clearly. That is likely to intensify over time. Boards, funders, local authorities, partners, members and the public increasingly want evidence, not just intent.

The survey suggests that many organisations recognise this, but do not yet have consistent measurement frameworks in place. This creates a growing gap between what the sector is expected to prove and what many organisations are currently equipped to evidence systematically.

There is also a broader structural context behind the variation in responses. The survey includes organisations of very different scales, catchments and operating models. A smaller regional wildlife park with under 100,000 annual visitors will inevitably experience digital investment, staffing pressure, memberships and events very differently from a major destination attracting more than half a million visitors a year. That means the findings should not be read as if every organisation is facing the same challenge in exactly the same way.

What the survey shows, more usefully, is a common direction of travel. The pressures are widely shared, even if their intensity varies. The strategic response is also becoming more aligned, even if each organisation will move at its own pace.

Taken together, the survey suggests that the sector is at a point of strategic convergence. Different organisations may be starting from different positions, but many are arriving at similar conclusions. They need stronger yield, better repeat visitation, more resilient operations, better connected data, clearer visitor communication and stronger evidence of impact. That is a meaningful shift. It indicates that the sector is not just reacting tactically to short-term pressure. It is beginning to reframe what good performance looks like.

In that respect, the findings are encouraging as well as cautionary. They show a sector that is under pressure, but also one that is thinking seriously about adaptation. The language of the responses suggests increasing commercial maturity, greater awareness of visitor lifecycle management and a more joined-up understanding of the relationship between mission, experience and revenue. That is a strong foundation for the years ahead.

Final Industry Implications

Taken as a whole, the survey points to five broad implications for the sector over 2026 and beyond.

First, commercial sustainability will increasingly depend on diversified revenue, not just admissions. Memberships, events, food and beverage, retail and paid experiences are now part of the mainstream strategic conversation.

Second, visitor experience quality is becoming inseparable from commercial performance. Friction around weather, navigation, congestion and catering is no longer just operational inconvenience; it directly shapes dwell time, spend and loyalty.

Third, digital maturity will increasingly separate leaders from laggards. The biggest gap is not access to tools, but the ability to connect them, resource them and use them across the full visitor lifecycle.

Fourth, evidence of impact will become more important. Conservation, education, accessibility and public value are clearly under pressure to be demonstrated more effectively.

Fifth, the pace of change will be constrained by capacity. Time, investment and staffing remain major barriers, which means the sector will need practical, scalable improvements rather than over-engineered solutions.

The overall picture is of a sector that understands where it needs to go. The next challenge is making that journey achievable.

Technology Enablement and the Case for More Connected Visitor Engagement

One of the clearest messages from this survey is that many of the sector's current challenges are not isolated problems. They are connected. Difficulties with navigation, food and beverage capacity, repeat visitation, in-park communication, secondary spend, visitor insight and impact measurement all sit within the same wider issue: many attractions still lack a sufficiently joined-up way to manage the visitor journey from pre-visit planning through to post-visit engagement.

For that reason, one of the most credible strategic responses for the years ahead is not simply to invest in more technology for its own sake, but to consider the value of a more integrated visitor engagement ecosystem. For zoos and wildlife attractions, this means moving beyond disconnected tools and towards software and digital infrastructure that can help operators communicate with visitors more effectively, understand behaviour more clearly and create more value across the full lifecycle of a visit.

The argument for this is practical rather than aspirational. If an attraction is trying to improve revenue per visitor, it helps to have better visibility of how guests move through the site, what they engage with and where spend opportunities are being missed. If the goal is to reduce friction during the visit, then real-time communication, interactive mapping, timely prompts and clearer on-site guidance can all help visitors make better use of their time.

If loyalty and repeat visitation are a priority, then membership communication, personalised follow-up and better segmentation become increasingly important.

If the organisation is under pressure to evidence impact, then stronger digital touchpoints can also support better data capture, reporting and interpretation.

In this sense, the role of technology is not to replace the physical experience of a zoo or wildlife park. It is to support it more intelligently. Wildlife attractions are, by their nature, place-based and experience-led. The visit itself remains the heart of the offer. But digital tools can help that experience feel more coherent, responsive and commercially effective. They can help bridge the gap between what the operator wants the visitor journey to be and what the visitor actually experiences on the day.

A connected approach to visitor technology can support the sector in several ways.

First, it can improve in-park communication and wayfinding, which emerged strongly in the survey. Mobile-first maps, live schedules, location-aware prompts and updates about talks, feeds, temporary changes or quieter routes can make large and complex sites easier to navigate. This is particularly valuable in outdoor attractions where weather, animal visibility and changing visitor flow can all affect the day in real time.

Second, it can support commercial performance without making the experience feel overly transactional. Well-designed digital engagement can surface food and beverage options, promote paid experiences, encourage retail discovery or highlight seasonal activities at the right moment. Done well, this is less about aggressive upselling and more about helping visitors discover value that they might otherwise miss.

Third, it can strengthen membership and loyalty strategies. Many attractions in the survey identified recruitment, retention and repeat usage as membership challenges. Connected systems can help by making it easier to present the value of membership, track engagement, communicate relevant benefits and maintain a stronger relationship with members between visits.

Fourth, it can improve operational responsiveness. Attractions dealing with queue pressure, congestion, weather disruption or changing programme schedules benefit from tools that allow teams to communicate quickly and consistently. This can reduce pressure on frontline staff, improve visitor confidence and help spread demand more effectively across the site.

Fifth, it can contribute to better insight and reporting. One of the most persistent issues in the survey was the lack of integrated data. Where ticketing, membership, on-site engagement and post-visit communications can be connected more effectively, attractions gain a clearer picture of visitor behaviour. That in turn can support better planning, more informed investment decisions and stronger evidence of both commercial and mission-related outcomes.

For the sector, the key consideration is not whether every attraction needs a large, complex digital transformation programme. In many cases, that would be unrealistic. The more credible argument is that attractions should assess whether their current systems and processes are helping them respond to the challenges identified in this report, or whether those systems are now becoming part of the constraint.

The most useful technology in this context is likely to share a number of characteristics. It should be practical for lean teams to manage. It should integrate sensibly with existing systems rather than requiring a complete reset. It should improve the visitor experience rather than adding friction. It should provide operators with better data and control. And it should be flexible enough to support the specific realities of zoos and wildlife attractions, including weather sensitivity, large outdoor sites, dynamic daily programming and the importance of conservation storytelling.

That last point matters. Wildlife attractions are not generic leisure venues. Any digital platform or visitor engagement system used in this sector needs to respect the balance between visitor enjoyment, operational practicality and institutional purpose.

The strongest solutions will be those that support not only commerce and convenience, but also interpretation, education and meaningful connection with the organisation's mission.

Seen in this light, the case for adopting software and technology similar to the kind now emerging in the attraction sector is not primarily about innovation for its own sake. It is about building a more resilient, more responsive and more informed operating model.

For attractions facing the pressures identified in this survey, that may become less of an optional enhancement and more of a strategic enabler over the next several years.

As the sector continues to evolve, the attractions most likely to benefit will be those that treat technology not as a separate workstream, but as part of a wider effort to create better experiences, stronger loyalty, improved operational control and more sustainable long-term performance.

About the Survey

The Zoo & Wildlife Attraction Benchmark Survey was commissioned by n-gage.io, a SaaS technology platform supporting the visitor attraction, hospitality and destination tourism industry globally.

The aim of the survey is to support knowledge-sharing across the sector by identifying common challenges, emerging trends and areas for collaboration.
Future editions of the survey will continue to build a benchmark dataset to support industry insight.

CONCLUSION

Thank you to everyone across the zoo and wildlife attraction sector who contributed to this first benchmark survey.

The strong response highlights both the shared challenges organisations are facing, from rising costs and changing visitor expectations to the need for stronger revenue models and clearer evidence of impact, and the commitment across the industry to adapt and improve.

One of the aims of this survey was to provide a wider view beyond individual organisations, helping the sector better understand common priorities and opportunities for collaboration. With continued support, it is hoped this can become an annual benchmark, building a clearer picture over time of how the sector is evolving and providing valuable insight to help inform future decision-making.

Bryan Hoare
Founder & CEO
n-gage.io

n-gage.io

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