



GEORGIA AQUARIUM
at Pemberton Place



GEORGIA AQUARIUM

WHAT DOES THE AQUARIUM MEAN TO ...?



Area Economics



Events



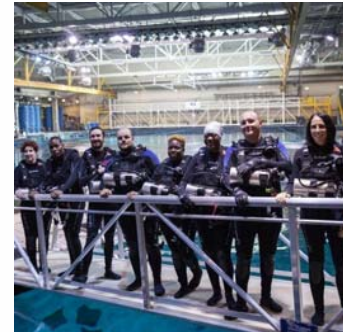
Aquatic Zoo



Therapeutic



Research &
Conservation



Military

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Georgia State University
November 16, 2016



Agenda

- History, Formation and Size
- Programs
 - » Military
 - » Animal
- Education
- Animal Care
- Research and Conservation
- Economic Impact



Pemberton Place 20 Plus Years Ago



A closer view of Pemberton Place looking south towards Baker Street in the early 1990s

Prior to the creation of Centennial Olympic Park, Pemberton Place was a jumble of old one and two story commercial buildings, many of which were in in bad condition



Preparation for Centennial Olympic Park

- The original plan for the Park included all of the Pemberton Place properties up to Ivan Allen Boulevard (in green), for funding reasons, it stopped at Baker Street
- As park construction occurred, The Coca-Cola Company cleared what became Pemberton Place for its Olympic Venue (in green)—known as Olympic City



Coca – Cola Company's Olympic City

- During the 1996 Summer Olympic Games eight acres of Pemberton Place was home to Olympic City which was Coca-Cola's sponsorship venue

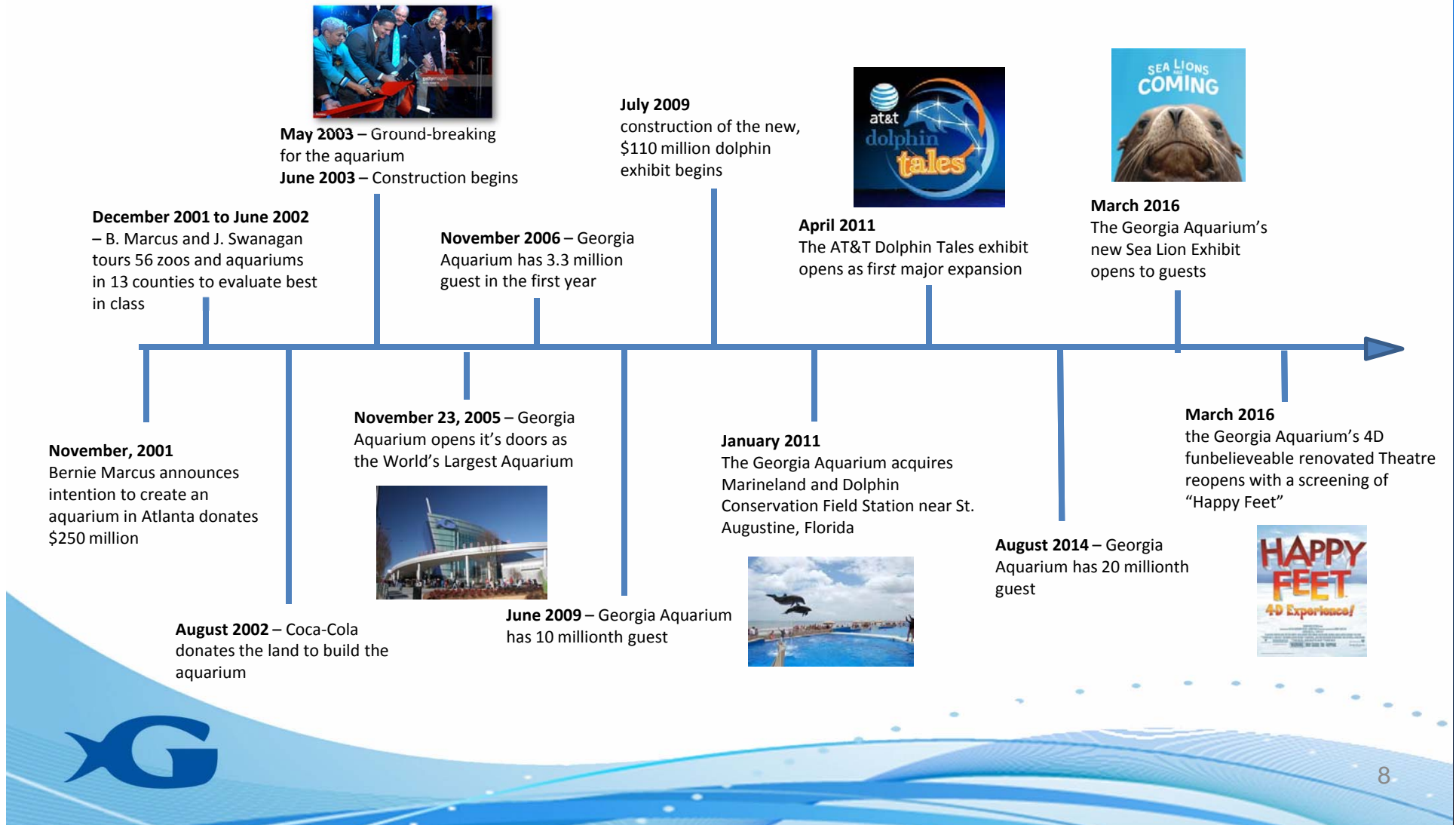


Centennial Olympic Park during the 1996 Olympics

Sponsor venues were located in the park and the Olympic Fountains became the iconic global image of the Park



Georgia Aquarium History





HOW BIG IS THE AQUARIUM?



How big is the Aquarium?

- Attracts over 2 million visitors a year, over 24 million since opening
- Largest attended venue in Atlanta (bigger than the Braves).
- Education attendance for the 2016 – 2017 school year will top 170,000 students.
- Event business will attract over 140,000 visitors.
- Military program will serve 2,262 veterans.
- Over 700 full time and part time employees.
- Over 1500 active volunteers, volunteering over 1.6 million hours since opening.
- Commissary (animal food preparation) prepares over 500,000 pounds of food annually.



- Over 10 million gallons of water, over 100 habitats and over 10,000 animals
- Correll Center for aquatic animal health is one of the largest in the world.
- Building is over 660,000 square feet
- Seven World Famous Galleries



Ocean Voyager



- Marquee Animals
 - Whale Sharks
 - Manta Rays
- 6.3M Gallon tank almost the size of a football field
- Habitat for swimming and immersions
- Research programs around Whale Sharks and Manta Rays



Cold Water Quest



- Marquee Animals
 - Beluga Whales
 - African Penguins
 - Sea Otters
- Research programs around
 - Belugas
 - African Penguins



Tropical Diver



- Marque exhibits is one of the largest Coral Reefs
- Research program centered around Coral Reef Restoration



River Scout



- Centered around fresh water exhibit
- Research programs around sea turtles



Dolphin Celebration



- Marque animals - dolphins
- The Dolphin Conservation Field Station
- Greg Bossart is a leader in dolphin research “One Ocean One Health”
- Dolphin Research – HERA Project



Aquanaut Adventure



- Sponsored education admissions
- Education programs and workshops for all ages
- Classrooms inside the aquarium
- School program with Centennial Academy



SunTrust Pier 225



- Marque animals are the Sea Lions
- Conservation efforts around standard Sea lion



So much more than entertainment:



Gift from Bernie Marcus
Not for profit 501c3 organization



Committed to Education for future generations



Global leader in Research and Conservation



Attachment through Programs:

To create memories for a lifetime



Swim & Dive



Penguins
Interactive



Military
Programs



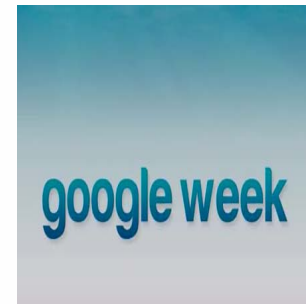
Education



Beluga
Interactive



See Otter
Interactive



Google
Week



Animal Programs - Journey with Gentle Giants



- Takes place in Ocean Voyager
 - 6.3 million gallon tank – size of a football field
 - Allows for guest to swim with the animals to get the attachment to their beauty
 - Once in a lifetime experience



Military Programs



- The Veterans Immersion Program for disabled veterans
- Over 2200 veterans life to date have been through this program
- Therapeutic and healing



Military Programs



“My world is always overstimulated by the sounds and movements that take place in everyday life. When in the water that world of chaos slips away ...this was extremely calming and peaceful as the world slipped away. My take away is that there is a place in this world where one can find peace”

“This event has the ability to change how you feel and perceive things very quickly. I was able to mentally and emotionally get away from life outside the tank. I could see beauty in my life and believe that feelings can pass.”



Animal Interactives



- Create an attachment to want to help
- Engage to a whole new level
- Educate
- Conserve/Conservation
 - Plastics, Styrofoam/Rubber Tires
- Immerse in the connection
- Inspire to “care” and take action
- Attention to a new level, new connection



How Georgia Aquarium Gives Back through Education



Education at Georgia Aquarium: Goals

1. Provide authentic learning experiences oriented around **STEAM** that awaken the curiosities of our students
2. Foster **partnerships** with stakeholders including teachers, parents, nonprofit and business leaders, and school districts
3. Serve as an **accessible resource** to our community
4. **Equip educators** with the knowledge, skills, and best practices to translate contemporary environmental concepts into meaningful learning moments



STEAM at Georgia Aquarium

- All educational programming delivered through the lens of STEAM
 - Over 20 opportunities to showcase how experts at Georgia Aquarium leverage STEAM in their work on a daily basis and that there are 200 unique STEAM careers pathways at the Georgia Aquarium!
 - Exhibits day
 - Programming & curricular materials align to state and national learning standards
 - Georgia Aquarium supports special events including Georgia STEM Day and Atlanta Science Festival



STEAM at Georgia Aquarium

- **New this year:** STEAM Forward video series
 - Collaboration between Georgia Aquarium and Georgia-Pacific to goes behind-the-scenes to highlight the variety of STEAM career pathways that exist within our organizations
 - **Free** educational video series designed for middle school students
 - Why?
 - Directly responds to one of the most important questions a student can ask: **Why am I learning this?**
 - Increases **proficiency** in STEAM subjects by reinforcing the content being learned in the classroom
 - **Inspires** students to study STEAM subjects in school and pursue STEAM careers

georgiaaquarium.org/STEAMForward



PRESENTED BY



STEAM Forward



Partnerships: Community as Classroom

- Centennial Academy

- Students in grades 1-5 at Centennial Academy come to “school” every day at Georgia Aquarium
- Re-imagines what the “classroom” can look like through a truly experiential learning environment
- Teachers from Centennial Academy collaborate with Georgia Aquarium educators to craft units around things like chemistry and measurement, marine ecosystems, and human impact on the environment
- Serves as a local model for how schools could think about using Georgia Aquarium as a resource
- Serves as a national model for how schools could think about leveraging community partners as a part of the classroom



Centennial Academy and Georgia Aquarium, together, we are bringing real life to real learning and real learning to real life. And that is the point.

- Carol Santos, Head of School and Executive Director, Centennial Academy

Partnerships: Field Trip Days sponsored by Google



- Georgia Aquarium hosting second annual Field Trip Days sponsored by Google November 14-18
- Google provides generous gift that allows us to cover the cost of admission, transportation, and lunch for 3,600 students across Georgia
 - Allows us to reach schools outside of Metro Atlanta that otherwise would not be able to afford the cost of transportation
- This year the program will ...
 - Serve middle school students in over 30 schools and 17 school districts across the state
 - Provide interactive experiences around STEAM career pathways



Partnerships: Field Trip Days sponsored by Google



We're really in the business of opening students' eyes to the art of the possible. They come to the Aquarium and see worlds and careers they never knew existed. That's life changing. That's a future veterinarian, chemist, biologist or engineer that otherwise would not have been born.

- Kristyn Tumbleson, Director of Education



Accessibility: Sponsored Education Admissions

Georgia Aquarium offers a Sponsored Education Admissions (SEA) program to ensure that diverse audiences, regardless of economic status, have an opportunity to participate in our unique educational experiences at no cost. We are able to provide this gift to Title I schools and non-profit organizations operating in Georgia thanks to private charitable donations from generous corporations, foundations and individuals.

By the numbers:

- Georgia Aquarium has welcomed **over 1,000,000 students** since 2005
- 250,000 of those students, or **one out of every four**, has been sponsored
- This year, Georgia Aquarium will sponsor **over 75,000 students**, which equals nearly **one million dollars in fiscal support** from Georgia Aquarium and the community



georgiaaquarium.org/SupportSEA



Equipping Educators: Professional Development

- Georgia Aquarium's professional development opportunities are designed to immerse teachers in **hands-on learning experiences** so they can connect their own students to the wonders of the aquatic world
 - Since 2005, we have worked with over **1,700 teachers** from across Georgia and the southeast which translates into **700,000 students** who have been impacted by our programs
- Topics vary year to year based on teacher feedback and needs, and can be at Georgia Aquarium or out in the field with our partners. Experiences have included ...
 - Exploring the Deep Ocean with NOAA
 - Ocean Inspiring the Arts
 - Explore Georgia
 - Build Your Own Remote Operated Vehicle
 - Rivers to Reefs
 - Creeks to Coast



Animal Care



Correll Center for Aquatic Animal Health



Correll Center for Aquatic Animal Health

- Aquarium's state-of-the-art animal health facility, research and conservation activities, and the partnership with the University of Georgia Veterinary School are part of the programs hosted through the Correll Center for Aquatic Animal Health.
- Correll Center's 10,500 square foot space
- surgery suite with scrub room
- pathology room
- medical records room with technician office space
- water quality lab
- diagnostic lab
- treatment space.
- digital radiography
- digital ultrasound
- digital endoscopy/laparoscopy
- gas and water-borne anesthesia systems
- steam and gas instrument sterilization
- compound and stereo microscopes with digital cameras
- digital medical records system.



Hospital and Lab Facilities

- Veterinary Diagnostic and Water Quality Laboratory
- Veterinary Pharmacy
- Ultra-Low Freezer Room
- Medical Records Room/
Technician Offices
- Treatment Room (Hospital)
- Avian Intensive Care Room (Hospital)
- Small Mammal Intensive Care Room (Hospital)
- Surgical Suite
- Equipment Storage Room
- Necropsy Room



Hospital and Lab Facilities

- **Animal Training and Enrichment**
- **Animal Diets and Nutrition**
 - carried out by a full time, on-staff nutritionist, nutrition technicians, biologists and volunteers. These operations ensure the best quality diets for the animals in our care, while maintaining the highest standard of food safety
- **Comprehensive nutrition program within Georgia Aquarium provides**
 - Operations management
 - Clinical nutrition
 - Nutrition education
 - Applied and basic nutrition research



Hospital and Lab Facilities

- Georgia Aquarium commissary handles enormous amounts of seafood and fish-based seafood items including:
 - 47,000 lbs. (21,319 kg) of suberba and pacifica krill
 - 125,000 lbs. (56,700 kg) of capelincomprehens
 - 12,000 lbs. (5,443 kg) of pellets, flakes, gels/gruels



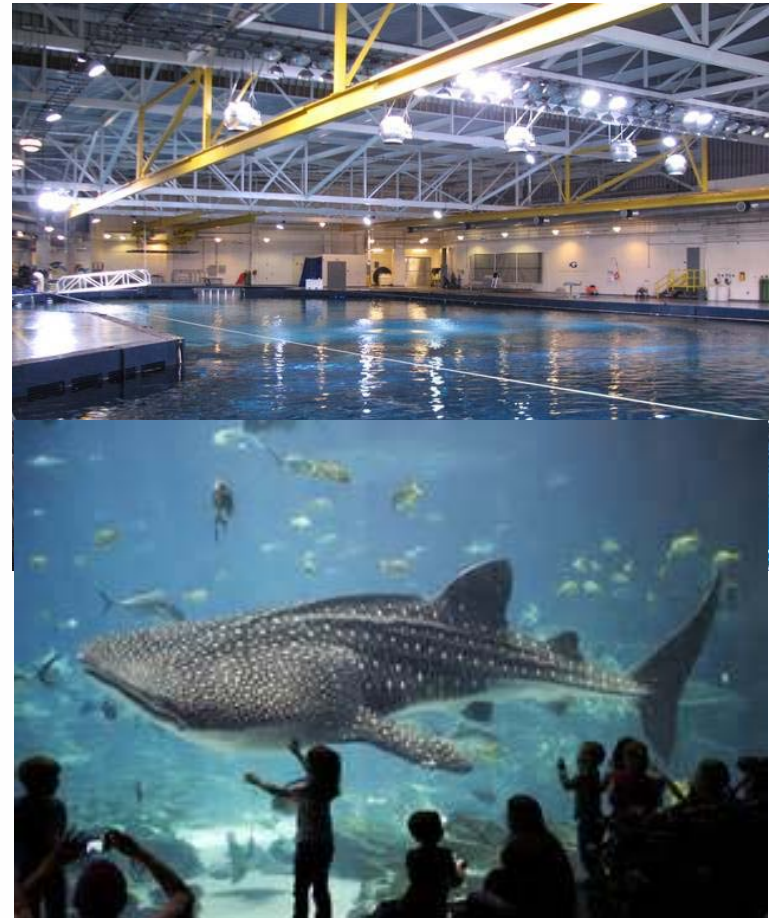
Life Support Systems

- With more than 10 million gallons of water in more than 60 habitats, Georgia Aquarium possesses the largest and most technologically advanced pump and filtration system in an aquarium. The Aquarium's life support equipment is highly automated and controlled by a state-of-the-art system that can make 150 million decisions per second through a network of 24 computers. Each minute, over 170,000 gallons of water are filtered at the Aquarium.
- Life Support Systems staff are on the premises 24-hours-a-day to guarantee all systems run at peak performance around the clock. Aquarium laboratory staff test the water quality twice daily to ensure its at the safest standards possible for all the animals.



Ocean Voyager

- Ocean Voyager Built by The Home Depot operates as a stand-alone system, as are all exhibits at Georgia Aquarium. This means they are closed loop filtration systems and are not connected to each other or open to any other natural source of sea water. All water in Ocean Voyager can be completely filtered within 60 minutes.



Research and Conservation



Dolphins

- Bottlenose dolphin Health and Environmental Risk Assessment (HERA)
- A multidisciplinary and multi-institutional health based study
- 2003-2016, over 325 dolphins captured and examined in Indian River Lagoon (IRL), FL and Charleston , SC
- 59 peer-reviewed scientific publications from 2003-2016
- GAI research has proven that dolphins act as sentinels of change in the ocean environment that could impact human health
- First study to examine potential shared environmental exposure to mercury between human and dolphin populations in the same geographical region of Florida



Georgia Aquarium Conservation Field Station

- Since 2008
- Marineland, Florida
- Member of the National Marine Fisheries Service Marine Mammal Stranding Network
 - Allows CFS to partner with a variety of government agencies and non-profit institutions
- Provides field assistance, necropsy support, sample collection, and processing
- Semi-annual photo ID survey along Florida's east coast
- Community outreach
- School camps



Whale Sharks

- Global initiative
 - Mexico, St. Helena, Galapagos Islands, Indonesia
- Studying life cycle of world's largest fish
 - Satellite and behavioral tagging
 - Photographic Identification
- In-house behavioral study
- 1st genomic mapping of a whale shark done with tissue from one of our original whale sharks



Coral

- Since 2010, Georgia Aquarium has been working in partnership with the Coral Restoration Foundation (CRF) in the Upper Florida Keys to help restore staghorn and elkhorn corals.
- In August 2016, Georgia Aquarium researchers retrieved coral gametes from the annual spawning and brought them back to the research lab in hopes of producing coral polyps.



Other Research and Conservation Projects



Research and Conservation

- **Beluga Whales**

- Alaska Sea Life Center led project
- Health assessments in Bristol Bay, Alaska

- **African Penguins**

- Animal care and veterinary assistance
- Financial sponsorship to SANCCOB (South African Foundation for the Conservation of Coastal Birds)

- **Manta Rays**

- Tracking migration through NE Florida
- Genetic sampling

- **Southern Sting Rays**

- Partnership with Guy Harvey Ocean Foundation
- Health Assessments on Sting Ray City population

- **Sea Turtles**

- Migration studies in Dominica
- Nutritional studies at Georgia Sea Turtle Center

- **Sea Lions**

- Animal care and veterinary assistance with recent mass strandings along Pacific coast

- **Sand Tiger Sharks**

- Health Assessments on wild population in Delaware

- **Manatees**

- Collaboration with Sea to Shore Alliance and Georgia Department of Natural Resources
- Health assessments of Georgia population around Cumberland Island



Research and Conservation By the Numbers

- Members of the Aquarium's research team have participated in nearly 100 funded research projects and authored more than 130 peer-reviewed publications and conference presentations.
- Georgia Aquarium researchers have deployed over 100 satellite tags on at least 6 different types of animals
- CFS staff has assisted with over 500 marine animal strandings including manatees, dolphins, turtles, small toothed whales, and a southern right whale. 97 bottlenose dolphins during 2013-2015 UME.
- CFS staff has reached 449 classrooms in northeast Florida, effectively reaching over 12,500 students with messaging about conservation in their own backyard



Research and Conservation Partners





ECONOMIC IMPACT



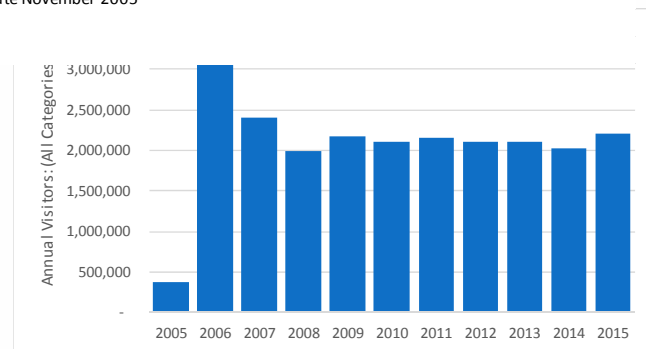
Attendance Trends at the Georgia Aquarium

- The Georgia Aquarium had its peak attendance of 3.2 million visitors in 2006—its first full year of operation.
- Since 2007, attendance at the Georgia Aquarium has been between 2.0 and 2.4 million visitors annually with 24 million visitors since opening.
- General admissions account for the bulk of all visitors—88% in 2015, with educational visitors accounting for 7% of admissions and special event attendees 5% of all admissions.
- Attendance is projected to grow in 2016 with the opening of the new Sea Lion Exhibit

ATTENDANCE AT THE GEORGIA AQUARIUM 2009-2015					
Year	General Admissions	Educational Admissions	Total Admissions	Event Attendees	Total Attendance
2005*	370,253	-	370,253	122	370,375
2006	3,191,352	-	3,191,352	107	3,191,459
2007	2,406,678	1,397	2,408,075	-	2,408,075
2008	1,947,450	23,539	1,970,989	21,925	1,992,914
2009	1,953,740	105,467	2,059,207	121,407	2,180,614
2010	1,894,632	97,641	1,992,273	119,093	2,111,366
2011	1,888,113	142,804	2,030,917	128,848	2,159,765
2012	1,846,776	154,568	2,001,344	111,439	2,112,783
2013	1,850,221	127,626	1,977,847	124,159	2,102,006
2014	1,790,502	139,191	1,929,693	102,899	2,032,592
2015	1,948,783	156,079	2,104,862	106,012	2,210,874

* The Aquarium opened late November 2005

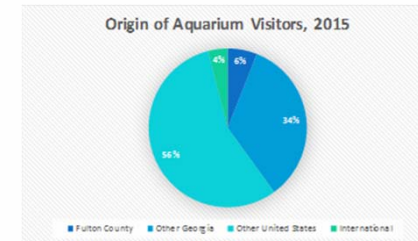
Source: Georgia Aquarium



Aquarium Visitor Characteristics

Visitor data for the Georgia Aquarium provides a detailed look at the characteristics of its visitors:

- Origin—40% of the visitors to the Aquarium come from Georgia, **56% from the other 49 states and 4% are international visitors**
 - Estimated 67% of total visitors are from outside Metro Atlanta
- **64% are first-time visitors**
- Repeat visitors come about once a year
- 2.8 hours is the average length of stay
- 76% rate the experience excellent—64% likely to return
- Half of visitors purchase food and beverages and buy something in the gift shop
- The Georgia Aquarium compares favorably with its peers on all key metrics surveyed



GEORGIA AQUARIUM VISITOR CHARACTERISTICS, 2015			
Origin of Visitors	2015	Benchmark*	
Fulton County	6%		
Other Georgia	34%		
Other United States	56%		
International	4%		
First Time Visitors to Aquarium	64%	58%	
Repeat Visitors Number of Annual Visits	1.05	1.8	
Top Reason to Visit: Entertainment	35%	56%	
Average Length of Stay (hours)	2.8	2.5	
Percentage Rating Experience Excellent	76%	78%	
Percent of Visitors Likely to Return	64%		
Heard About the Aquarium from Word of Mouth	50%	47%	
Purchased Food or Beverage	46%	39%	
Purchased in Gift Shop	47%	40%	

* Comparable data for eight Aquariums

Source: Morey Group, "Visitor Survey Report, Fall 2015"





Georgia Aquarium Economic Impact Analysis

IMPACTS FROM CONSTRUCTION

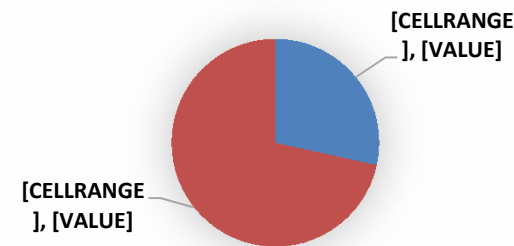


Development Around the Georgia Aquarium

- Since the opening of the Georgia Aquarium in 2005 there has been \$1.25 billion of new investment in the Centennial Park Area, with an additional \$136.4 million in the pipeline—a total of **\$1.74 billion in total new investment**
- The investment of over \$495 million in the Aquarium and its 3 expansions has helped support nearly \$1.25 billion in additional private and public investment in the immediate vicinity
- Every **\$1 invested** in the Aquarium has help to stimulate **\$2.50 of additional private and public investment to the area**

Totals exclude Mercedes-Benz Stadium and the Atlanta Streetcar, proposed improvements to Philips Arena or the GWCC Convention Hotel

Investment in Centennial Park Area since 2005

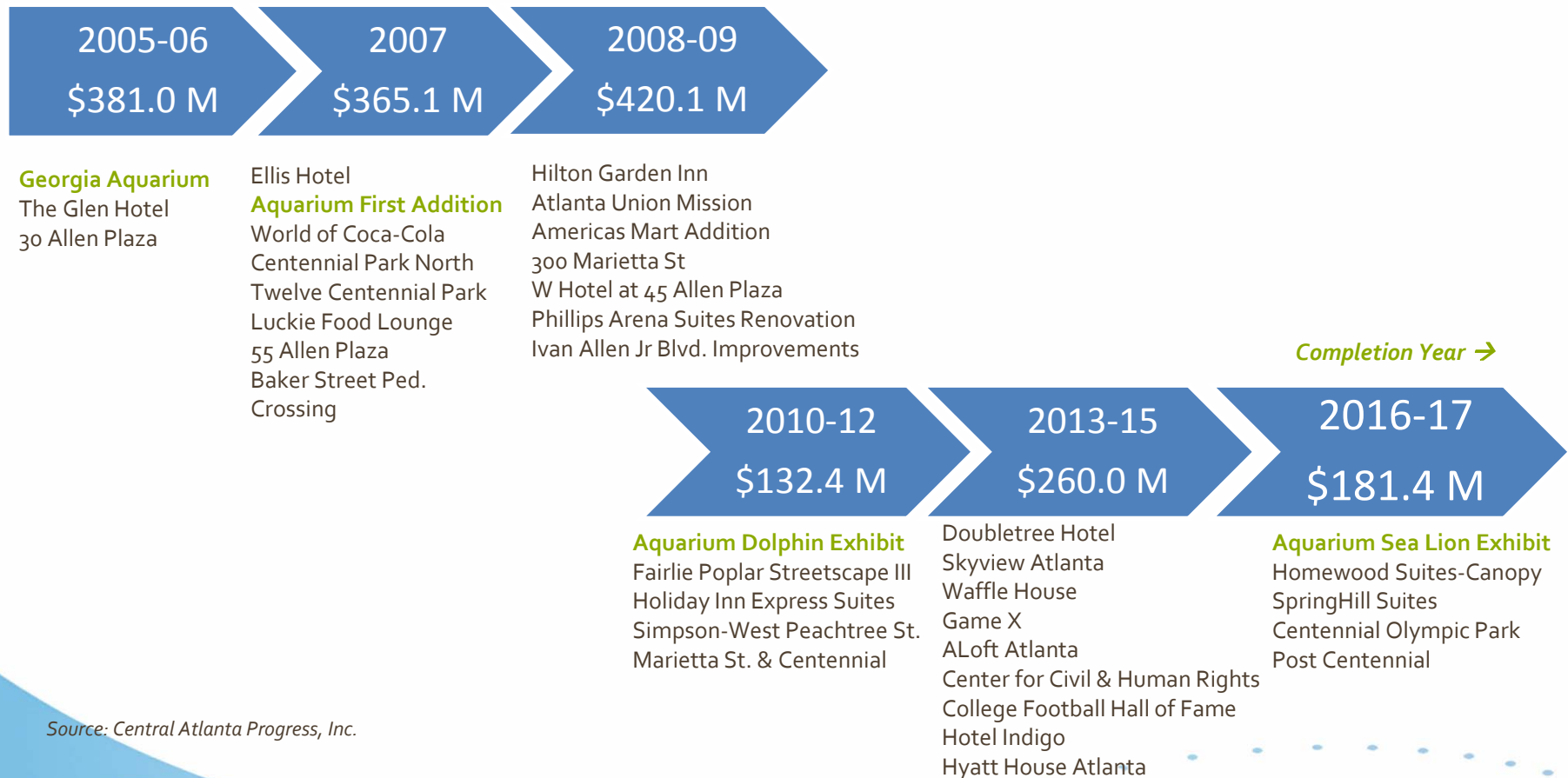


INVESTMENT IN THE CENTENNIAL PARK AREA SINCE 2005 INCLUDES PROJECTS UNDER CONSTRUCTION	
Existing/Completed Development	\$Mil
Georgia Aquarium + Expansions	\$495.0
Hotels	\$422.7
Other Attractions/Institutional	\$371.9
Residential	\$152.6
Entertainment and Restaurants	\$18.4
Commercial Space	\$114.0
City Capital Improvements	\$29.0
Development Pipeline (2016-17)	\$136.4
Total Investment Since 2005	\$1,740.0

Sources: Central Atlanta Progress, Inc./BAG



New Development Timeline - COP Tourist District



Source: Central Atlanta Progress, Inc.





Georgia Aquarium Economic Impact Analysis

IMPACTS ON TOURISM VISITATION



Activities in Downtown COP Tourism District

- The Aquarium is the anchor of the state's largest tourism district.
- With approximately 2.2 million annual visitors it is the most visited attraction in the district by far.
- It serves as a key attractor in the area and through CityPASS and other promotions benefits other attractions in the area
- Over 9.4 million tickets to attractions and events are sold annually in the district, with the Aquarium accounting for 23% of all tickets sold.
- Total attendance at all venues in the district **annually exceeds 12.9 million visitors**

TOURISM ACTIVITIES IN DOWNTOWN COP TOURIST DISTRICT	
Attractions	
Georgia Aquarium	2,210,874
World of Coca-Cola	1,100,000
College Football Hall of Fame	200,000
Center for Civil and Human Rights	250,000
Children's Museum of Atlanta	198,000
CNN Studio Tour	300,000
Conventions	
Georgia World Congress Center	862,069
Georgia Dome-General Meetings	36,963
America's Mart	456,000
Sporting Events	
Georgia Dome Spectator Events	1,388,427
Atlanta Hawks	413,234
Atlanta Dream	98,000
Concerts, Plays, Festivals	
Philips Arena	1,600,000
Rialto Center for the Arts/Theatrical Outfit	81,000
Events at Centennial Olympic Park	
Ice Skating Rink	40,000
Public Georgia Marathon	40,000
Shaky Knees Festival	54,000
Sweetwater 420 Fest	60,000
Parks	
Centennial Olympic Park -general visitation	3,500,000
Ticketed Events	9,388,567
Total Attendance	12,888,567



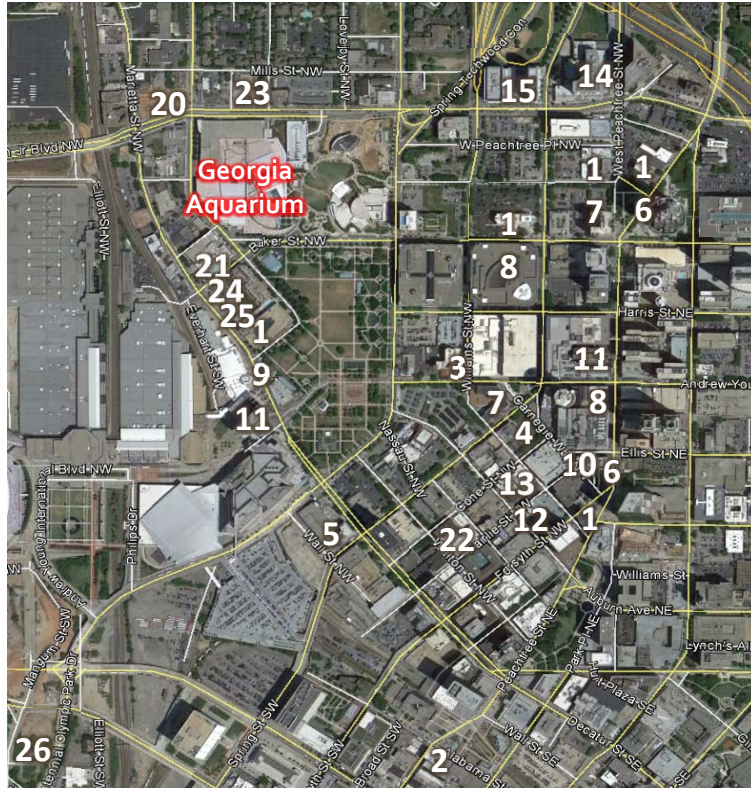
Georgia Aquarium Anchors CityPASS in Atlanta

- 383,843 visitors to the Georgia Aquarium used City Pass in the past three years (about 6% of all visitors)
- On average CityPASS users visited four attractions — **97% of the time including the Georgia Aquarium**
- Of the 1.4 million visits to the seven CityPASS attractions in the past three years, 26% were to the Georgia Aquarium—the highest number among the seven attractions
- As the anchor attraction, the Georgia Aquarium helps drive demand to other attractions in CityPASS.
- Demographics of CityPASS Purchasers:
 - 98% stay at least one night in Atlanta region, 76% staying in hotels
 - 4 days—average length of stay
 - 90% are here as visitors/leisure travelers
 - 75% are from outside GA
 - 7% are international visitors
 - Half are traveling with children
 - 90% have at least some college education
 - Dominant Age group—25-54 78%
 - Distributed across all income groups

Source: CityPASS, Inc.



Hotels in the Downtown Centennial Park Tourist District



- | | |
|--------------------------------|---|
| 1. Residence Inn Atlanta | 15. W Atlanta Downtown |
| 2. Fairfield Inn & Suites | 16. Hyatt Place |
| 3. Holiday Inn | 17. Best Western Plus Inn |
| 4. Hampton Inn & Suites | 18. Aloft Atlanta |
| 5. Glenn Hotel | 19. Embassy Suites |
| 6. Ellis Hotel | 20. Hyatt House Atlanta |
| 7. DoubleTree Atlanta | 21. Hilton Garden Inn |
| 8. Westin Peachtree Plaza | 22. Home 2 Suites (Open 4/30/16) |
| 9. Omni Hotel | 23. SpringHill Suites (Summer 2016) |
| 10. Courtyard Atlanta | 24. Homewood Suites by Hilton (Planned) |
| 11. Hotel Indigo | 25. Canopy by Hilton (Planned) |
| 12. Quality Hotel | 26. Hard Rock Hotel (Planned) |
| 13. Holiday Inn Express Suites | |
| 14. Twelve Centennial Park | |

- The Georgia Aquarium is at the center of the Centennial **Olympic** Park hotel district in Downtown Atlanta—with 26 existing and planned properties offering nearly 6,000 rooms



Downtown/COP Tourist District Hotel

Performance: 2000-15

- Market supply growth was stronger before 2005 compared to 2006 through 2015 (partially in anticipation of the Aquarium coming and favorable economic conditions). However, growth in demand has been stronger between 2006 and 2015 compared to 2000 & 2005.
- Despite the dip in 2008/2009 during the Great Recession, market occupancy levels reached new highs beginning with 2006, (strong Katrina impact), and again in 2014 and 2015, reaching 73% by 2015.
- Growth in occupied rooms** increased by more than 382,000 room nights from 2006 to 2015—an increase of **38% over the period**.
- Growth in Room Revenue increased from \$137 million in 2006 to \$212 million by 2015.**
- Growth in RevPAR and Room Revenue is much stronger between 2006 and 2015 compared to 2000 and 2005.
- Downtown Conventions were up considerably in 2005-2006 period with damage from Hurricane Katrina closing down New Orleans bookings (Aug 2005).
- The Aquarium has helped Downtown become a tourist destination—with the combination of hotel rooms, restaurants, walkable/safe environment and other attractions creating the overall package.

Downtown Atlanta Lodging Market- Select Properties - Historical Performance						
Year	Available Room Nights	Occupied Rooms	Occupancy Rate	Average Daily Rate	RevPAR	Room Revenue
2000	3,642	828,758	62%	\$ 124	\$ 78	\$ 103,041,949
2001	3,642	768,490	58%	\$ 125	\$ 72	\$ 96,052,244
2002	3,642	771,285	58%	\$ 124	\$ 72	\$ 95,318,411
2003	3,642	754,568	57%	\$ 117	\$ 66	\$ 88,035,175
2004	4,242	901,478	58%	\$ 119	\$ 69	\$ 107,148,705
2005	4,234	963,424	62%	\$ 125	\$ 78	\$ 120,459,948
2006	4,187	1,002,405	66%	\$ 137	\$ 90	\$ 137,326,280
2007	4,228	989,059	64%	\$ 149	\$ 95	\$ 146,982,017
2008	4,595	950,555	57%	\$ 150	\$ 85	\$ 142,410,202
2009	4,873	924,374	52%	\$ 141	\$ 73	\$ 130,081,318
2010	4,886	1,065,252	60%	\$ 141	\$ 84	\$ 149,813,853
2011	5,178	1,138,828	60%	\$ 133	\$ 80	\$ 151,586,437
2012	5,112	1,139,256	61%	\$ 144	\$ 88	\$ 163,574,948
2013	4,933	1,128,299	63%	\$ 149	\$ 93	\$ 167,804,173
2014	5,026	1,251,242	68%	\$ 148	\$ 101	\$ 184,842,160
2015E	5,227	1,384,127	73%	\$ 153	\$ 111	\$ 211,969,998
CAGR						
2000 to 2005	3.1%	3.1%		0.1%	0.1%	3.2%
2006 to 2015E	2.5%	3.7%		1.2%	2.4%	4.9%
2000 to 2015E	2.4%	3.5%		1.4%	2.4%	4.9%

Source: STR. Note: 2015E based on YTD data through November



Hoteliers' Comments on how the Georgia Aquarium Impacts their Operations

- The **Georgia Aquarium helped Downtown become a tourist destination by providing a major new attraction and a compelling reason to go.** It is a key building block along with the new hotel rooms, restaurants, walkable/safe environment and other attractions that are part of the package attracting tourists and visitors to the area.
- The Georgia Aquarium helps produce room nights in slower seasons (August and December) and on weekends and holidays, which benefits the hotels in the area during traditionally slow periods.
- The hotel rate that is allocated to the Aquarium Package is based on Best Available Rate, which is generally the highest rate offered by the hotel for the time period.
- The Georgia Aquarium has been primarily a family attraction, but is expanding its targeted marketing efforts to attract commercial and group guests.
- The Georgia Aquarium has an attractive meeting venue which brings groups to downtown for banquets and special events.





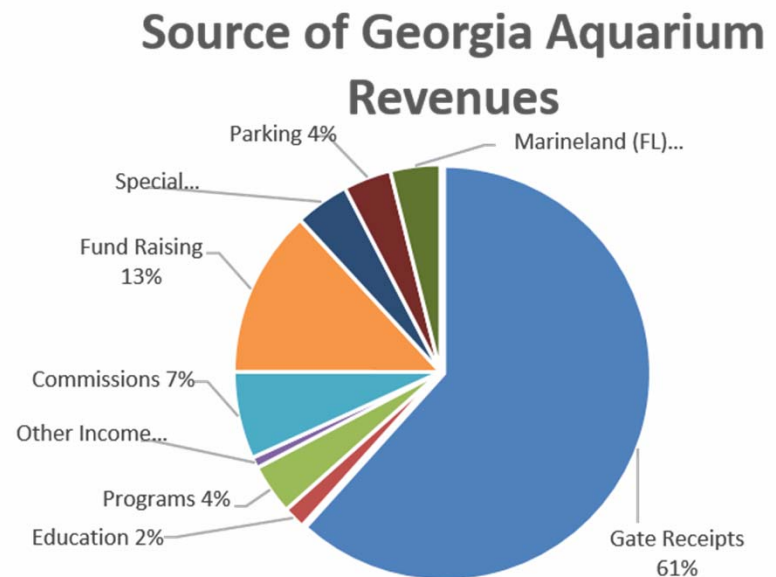
Georgia Aquarium Economic Impact Analysis

IMPACTS FROM AQUARIUM OPERATIONS



Annual Impacts from Operations - Revenues

- Of the Aquarium's total 2015 Atlanta revenues of \$86.8 M, it is estimated that:
 - Roughly **\$46.1 million** (53%) is likely to have come from visitors living **outside of Georgia**
 - \$54.4 million in total was generated from outside of the Metro Atlanta Region
- It is estimated third-party vendors, suppliers and concession operators generated \$19.6 M in total income in 2015 from operating the café, from merchandise sales and special events
 - A portion of that income was paid in commissions to the Aquarium
- Including income earned by third parties, **direct revenue generated at the Georgia Aquarium are likely exceed \$100 million per year**



How Aquarium Revenue is Spent

- Based on the Aquarium's 2015 Actual operating costs of \$63.9 Million:
 - Roughly **41% went to payroll**, payroll taxes, employee benefits, training & related personnel expenses
 - Direct payroll approached **\$21.4 million**
 - Supported 700 direct jobs (54% full time) in Atlanta
 - Direct payroll has been growing at a 4% annual rate since 2011 and is projected to exceed \$25.3 M in 2016
- Non personnel costs also benefit the Atlanta Economy such as:
 - Purchased services
 - Legal, accounting, insurance & other professional services
 - Marketing activities
 - Equipment, furnishings, equipment, utilities
 - Repairs & maintenance, etc.

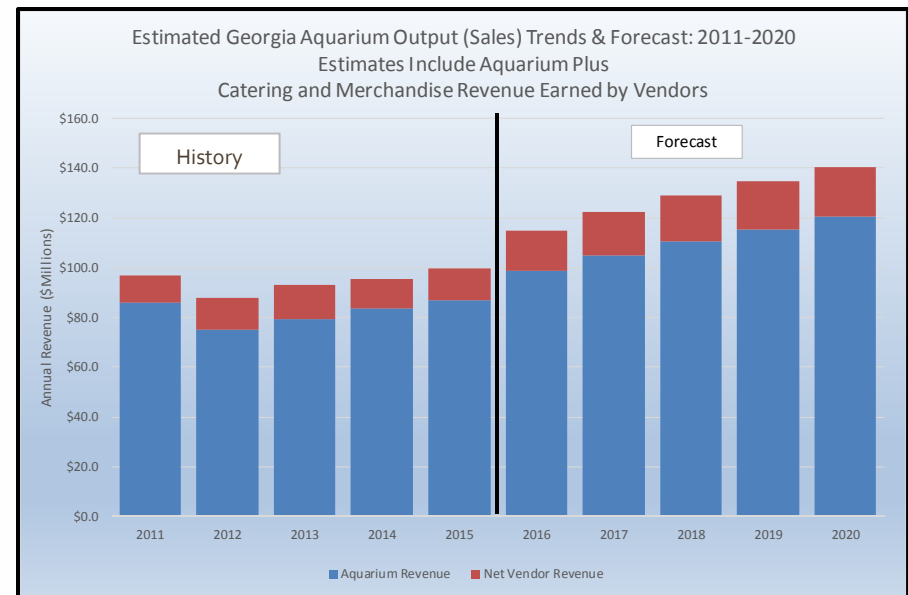
	2015	% of
AQUARIUM EXPENSES (\$Mil)	Estimate	Total
Personnel	\$26.4	29.3%
Services & Professional Fees	\$5.3	5.9%
Advertising	\$6.5	7.2%
Maint., Equipment & Supplies	\$10.2	11.3%
Communications & Utilities	\$6.5	7.2%
Insurance	\$1.2	1.3%
Animal Aquisition/Research	\$5.9	6.5%
Fundraising, Program & Event Costs	\$1.7	1.9%
Memberships, Travel & Other	\$4.6	5.2%
Replacement Reserve/Interest	\$21.7	24.1%
Total Revenues	\$90.2	100.0%

Source: Georgia Aquarium



Aquarium Revenue Forecast

- Including both the Aquarium and its commission operators – combined revenues are projected to approach \$115 M in 2016 and grow to **\$140.5 M by 2020**
 - Revenues are forecast to grow by 7% per year





Georgia Aquarium Economic Impact Analysis

REGIONAL AND STATEWIDE IMPACTS



Summary Findings: Employment

- Georgia Aquarium's economic impacts stretch far past its location in Centennial Olympic Park. From 2003-2015, economic activity produced by the Georgia Aquarium resulted in the following impacts:
 - **Annual Permanent Employment** – The Georgia Aquarium directly supported a total of **2,046** jobs throughout the state of Georgia in 2015 including the Aquarium's business operations (**37%**), construction spending (**16%**) and on-site spending by Aquarium visitors and attendees (**47%** jobs), on food, merchandise and special events, etc.
 - **Multiplier Effects** – of the permanent jobs attributable to the Aquarium (statewide) in 2015, it is estimated that **1,088 (53%)** are direct, **428 (21%)** are indirect and **530 (26%)** are induced
 - **Job Impacts by Location** – of the permanent jobs attributable to the Aquarium (statewide) in 2015, it is estimated that **73% are located in Atlanta/Fulton County**, **28%** are located throughout the rest of the Metro Atlanta Region and **2.1%** are located elsewhere in Georgia
 - **Construction Employment** – Spending on the Aquarium's initial construction and 3 subsequent expansions has supported a cumulative total **11,165** construction-related jobs since 2003
 - A construction-related job is defined as one job for one year that is created as a result of construction spending
 - **Tourism Impacts** – Although not attributable to the Aquarium alone, out of region visitors in 2015 supported an additional **5,192** jobs statewide while visiting Atlanta - for such things as lodging, entertainment, travel and other related off-site expenses.



Summary Findings – Economic Impacts

- **Cumulative Impacts** – from 2003-2015, total economic activity produced by the Georgia Aquarium resulted in the following impacts:
 - **Personal Income** – An additional **\$2.3B** in personal income was generated of which, **47%** was earned by residents of Atlanta and Fulton County, **51%** by residents of other Metro-Atlanta Counties and **2.6%** by residents of the rest of Georgia
 - **Productivity** – A **\$1.9B increase in GDP** to the state of Georgia with **21%** of that impact attributable to the Facility's construction and later expansions, **36%** attributable to the Aquarium's business operations and **43%** to total spending by on-site visitors since its opening
 - **Output** – Generating over **\$3.0B in total production** over the same period
- **2015 Impact of Tourism Spending**
 - Although not attributable to the Aquarium alone, out of region visitors to the Aquarium in 2015 generated enormous benefits to the Georgia economy including **\$688M in total Output**, a **\$430M addition to State GDP** and **\$522M increase in Personal Income**
- **Real Estate Impacts**
 - Including the facility's addition to the value of the region's "Capital Stock" the Aquarium's cumulative economic impacts have created total demand for new construction of housing and commercial real estate totaling **\$1.1B for non-residential** and **\$2.2B for new residential construction**





Georgia Aquarium Economic Impact Analysis

PUBLIC REVENUE IMPACTS



State and Local Fiscal Impacts

- Aquarium Sales and Employee taxes generated an estimated \$3.4 million in local revenues and \$4.6 million in state sales and income taxes
- Total fiscal impact of nearly **\$8.1 million in 2015**

Public Revenue Impacts	
Local Taxes	
Atlanta/Fulton Co. Sales Taxes (LOST, Sewer)	\$ 1,788,146
Atlanta/Fulton County Schools (ESPLOST)	\$ 894,073
MARTA	\$ 752,870
Subtotal	\$ 3,435,090
State Taxes	
State Sales Tax (4%)	\$ 3,576,293
State Income Tax	\$ 1,056,897
Subtotal	\$ 4,633,190
TOTAL DIRECT STATE & LOCAL TAXES:	\$ 8,068,279



Georgia Aquarium is many things:

- Key in developing the Centennial Olympic Park District.
- Key to the largest Aquarium in the America's to do great aquatic work.
- Key to being much more than entertainment.
- Key to our healing and therapeutic military programs.
- Key to educating, connecting, attaching, conserving and inspiring guests to care for these animals.
- Key to an education program that focuses on sponsored education and a program that gives back.
- Key to the best animal care in the world.
- Key to being a global leader in research and conservation.
- Key to local, area and state economic impacts.





GEORGIA AQUARIUM
at Pemberton Place



GEORGIA AQUARIUM