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STAFF REPORT

To: Board of Management

From: Robin D. Hale
Chief Operating Officer

Subject: 2014 VISITOR SURVEY REPORT

Date: 2015-01-14

Summary:

This report will provide the Board of Management with a summary of the results from the 2014 On-site Visitor Satisfaction Surveys fielded during the year. The report will also attempt to demonstrate how the survey results are used by operating areas to improve their services.

Recommendation:

It is recommended that this report be received for information.

Background:

The Visitor Survey has been repeated each summer since 1996. The research objective is to measure overall customer satisfaction and value with the Zoo visit. The survey evaluates a number of attributes including customer service, food and retail, animal exhibitry, signage and wayfinding, animal demonstrations and site conditions. Guest Services staff executed the questionnaire and targeted for a 50/50 gender split and a cross-section of ages.

In 2014, a total of 813 surveys were completed over a 9-week period during the summer. In addition, 3 seasonal mini-surveys were completed during Winter, Spring and Fall; with a total of 100 surveys completed for each seasonal survey.

Comments/Discussions:

Highlights of the 2014 summer survey include:

- Overall, visitors are overwhelmingly satisfied with their visit, with 98.6% of respondents rating the Zoo as “good to excellent” value for their money – receiving an average rating of 4.56 on a scale of 1 to 5 (with 5 being excellent).
- Further, 97.1% of respondents indicated that they would “likely/strongly” recommend the Zoo to a friend, receiving an average rating of 4.70 on a scale of 1 to 5 (with 5 being excellent).
- Family outing remains to be the highest prompted response for Zoo visit at 58.2%; 18.0% responded with special event as the secondary highest prompt for a zoo visit.
- 88.0% who were prompted for a Zoo visit due to special event/exhibit identified the giant panda as the main draw.

Other noteworthy outcomes from the summer survey include:

- The Zoo continues to rely heavily on local market with Toronto/GTA representing 58.0% of total respondents and an additional 24.6% outside the GTA but within the Province.
- The primary zoo demographic is still young families with children under 12. 79.0% of respondents have at least one child in the group and 53.2% indicated having two children or more in the group. The average party size in 2014 is 5.14.
- Of the 72.1% of the respondents who have previously visited the Zoo, 30.0% of respondents have Zoo membership compared to 26.8% in 2013. Up to September 30, 2014, membership visitation represented 20.6% of the Zoo's attendance (18.9% in 2013 up to same time period).
- With 64.1% female respondents and consistent from previous years, women continue to be the key decision maker/influencers for a zoo visit, followed by children.
- Zoo visitation continues to be a day-long event with an average length of stay of 4.56 hours – a slight increase from 2013 at 4.54 hours.
- 33.6% (55.7% in 2013) of total respondents have advertising recall with 45.3% responding to a recollection of a panda mention (on TV, in the news, on buses, on subway, on shelters), 19.5% responding to a recollection of the ads on poles / light standard/ roadside highway / billboard; and 19.5% responding to a recollection on media (TV, radio, newspaper).
- Word of mouth has taken over the mainstream media of television as the most influential information source at 35.0% (compared to 25.6% in 2013 and 5.0% in 2012). TV ad, accounting for 10.3% this year, used to account for 53.3% of responses to this question in 2012 (51.3% in 2011).
- 69.4% of respondents have visited the Zoo's website with a satisfaction rating of 98.2% of good to excellent. 61.2% of those who visited the site have used it to plan their day at the Zoo.
- Food purchasing on site dropped to 54.7% in 2014 (compared to 62.6% in 2013). However, 2014 level is more consistent with typical guest purchasing behavior from previous years (ranging from 52.0% - 54.7%).
- Visitor satisfaction with overall food experience, respondent gave a rating of 94.8% of “good to excellent” with an average rating of 4.05.
- Over 89% of guests surveyed indicated having visited the Giant Panda Experience; over 70% indicated having visited the African Savanna, Tundra Trek, Gorilla Rainforest, African Rainforest pavilion and Indo-Malaya pavilion. In addition, over 50% indicated having visited Australasia pavilion, Americas pavilion, African Penguin exhibit, Great Barrier Reef and Malayan Woods pavilion. The majority of special events/exhibits are rated highly with average scores of 4.50 on a scale of 1 to 5 reflecting “very good” and “excellent”.
- The Zoo rated 4.57 as a conservation education facility, 4.73 as a fun place to see animals, 4.73 as a safe place to connect with wildlife from the around the world, and 4.56 as a leader in wildlife conservation. These ratings are an increase from prior year's ratings.

Guest feedback from each seasonal mini survey supports the outcome from the summer survey with the following exceptions:

- Length of stay vary depending on the season. Winter survey showed average length of stay at 3.73 hours. This rate increases slightly in the Spring with an average length of stay of 3.77 hours, and an expected decrease in the Fall to 3.49 hours. (Summer visit showed an average length of stay of 4.56 hours.
- Food purchasing on-site showed some fluctuations between each season. 52% surveyed in the Winter purchased food on-site compared to 59% in the Spring and 49% in the Fall. (Food purchasing in the summer showed 54.7% surveyed purchased food on-site.)
- Overall satisfaction – winter survey showed 97% rated the Zoo as offering "good to excellent" value with an average rating of 4.51 (on a 5-point scale). Spring survey showed 99% of respondents providing the same rating with an average rating of 4.42. Fall survey showed same 99% rating with an average rating of 4.60. (Overall satisfaction rating during the summer survey showed 98.6% of respondents rating the Zoo as "good to excellent" value for their money with an average rating of 4.56.)

<u>Use of the Survey Results</u>

In addition to measuring the overall customer satisfaction and value placed on each Zoo visit, the survey also provides critical information to support various management strategies, practices and offers. Some examples of how the survey is used are as follows:

Wildlife Care:

- Uses guest feedback to improve exhibits by continuing to build up on the size of animal groups, where possible.
- Affects the use of signage to better communicate why animals behave the way they do – why some animals can't always be seen active? Why some animals are naturally shy? Why some animals need inordinate amount of sleep?
- Use keeper talks attendance and ratings to identify continuation of activity; ways of improving the delivery of talks and staff training in presentations.
- Will provide signage in better communicating animal enrichment programs that are in place to ensure varying animal behavioural needs are met.

Marketing:

- Collected information to assist in the preparation of briefs for the Zoo's advertising agency, as well as media buying agencies, ensuring maximized advertising and production budgets targeting the right demographics and geographic areas, and determining the best advertising mediums to reach these audiences.
- The data also assists in determining where the Zoo should be concentrating its efforts, particularly as it applies to social media and utilization of our website and Facebook pages.
- It provides us with insight into what motivates guests to visit the Zoo and key influencers.

Business Development:

- Demographic questions ensure the Zoo audience matches our target group.
- Sponsorship-related questions are the foundation for developing best practices in any sponsorship program and help in justifying sponsor relationship agreements.
- Advertising and social media-related questions are useful as these assets are typically included in some sponsor relationship deals and help prove their value.

Campaign Development:

- Demographic questions allow for cross-referencing the visitor demographic with donor demographic from Statistics Canada and within our own existing donor database.
- General donation related questions assist in setting strategy and selecting offers that appeal to our known demographic target group and sub-groups.

Corporate Planning / Human Resources:

- From a strategic perspective, the survey provides many indicators that help to determine how we are delivering on the Strategic Plan (e.g. Are we getting our conservation mandate across and is there a change over time on how guests perceive the Zoo?)
- Economic impact type questions demonstrate strong audience knowledge and support credibility for the Zoo.
- From a staff development perspective, understanding where best to focus training funds.

Facilities & Services:

- Use guest feedback and brainstorm with staff to identify and discuss how the information received can be used to improve the visitor experience and future survey results, specifically with washrooms and signage/wayfinding, receiving the two lowest ranked attributes from the survey.

Conclusion:

Overall, the survey indicated that the Zoo continues to perform very well on key attributes with an average rating between "very good to excellent" range (4 or better on a 5-point scale). The top ranked attributes are "gorilla ropes course" (4.78), "volunteer helpfulness" (4.74) and “employee helpfulness” (4.71). The data is also helpful in clarifying and directing any required improvements to ensure that we continue to meet and exceed visitor expectations.

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R. D. Hale
Chief Operating Officer

Attachment:

2014 Summer Survey Results & Analysis

TORONTO ZOO
2014 ON-SITE VISITOR SURVEY RESULTS

Methodology

Guest Services seasonal staff completed 813 visitor surveys between July and August 2014. Visitors were selected randomly and could include regular visitors, members, and tour groups. By gender, the goal was to poll both males and females equally. Respondents were intercepted and surveyed upon exit.

Statistical Accuracy

The accuracy of responses to a statistical survey depends on a variety of factors, including the sampling design (selection of respondents on a random basis), sample size and ease of survey comprehension and clarity. Given that other factors are consistent, accuracy of responses to a particular question vary with the number of similar responses to that question (i.e. similar responses from larger number of visitors are more reliable than from smaller portions of the survey sample).

The term 'confidence level' is used to indicate that the survey results are expected to re-occur when a survey is conducted under similar conditions. Working at a 95% confidence level, for example, the Zoo survey responses would be expected to fall within the following ranges, 19 times out of 20, (that is 95 times out of 100):

Survey Response Level	Confidence Range	Expected Results
50.0%	+/- 3.5%	46.5 % - 53.5%
25.0%	+/- 3.0%	22.0% - 28.0%
10.0%	+/- 2.1%	7.9% - 12.1%

Using the chart above, one interprets the survey results as follows. If 50% of the sample responds yes to a question, then one would reasonably expect that between 46% and 54% of all visitors would respond in a similar way, 19 times out of 20. The use of confidence ranges is practical in two ways. First, if two responses to a question fall within the overlapping range of statistical confidence for that level (i.e. 23% and 27% would overlap), then one can consider these results to be statistically the same. Second, if the responses do not fall within a confidence range, then one can conclude that the results are statistically different and would likely be different in a second survey, 19 times out of 20.

These two points allow one to determine when the results may represent a trend that is occurring from one year to the next, or when the similarity in results is merely a reflection of random sampling and not statistically significant. One final point to keep in mind when interpreting results from previous years is the sample size conducted for each year, as follows:

2014 = 813	2013 = 821	2012 = 849	2011 = 793
2010 = 809	2009 = 819	2008 = 800	2007 = 801

The consistency in results from one year to the next increases our assurance when interpreting results.

RESULTS AND ANALYSIS

1. Gender.

Of the 813 respondents, there were 521 (64.1%) female respondents (508 or 61.9% in 2013) and 292 (35.9%) male respondents (313 or 38.1% in 2013).

2. Where is your group from?

In 2014, with the use of the Admits point-of-sale system, the postal code survey is fielded at all admission transactions processed. Guest Services staff are prompted by the system to ask for the first 3 characters of the Canadian visitor's postal code in alpha-numeric-alpha format, ie., L1E, M4G, K1A, H3L, etc. For non-Canadian guests, responses are tracked by either USA or INTERNATIONAL. Throughout the year, there are a total of 112,268 collected data, with 6,364 (5.7%) un-useable, for a net sample size of 105,904.

%	**2014**	2013	2012	2011	2010	2009
Toronto	**27.6**	26.8	27.3	29.5	27.9	28.6
GTA	**30.4**	27.6	27.7	28.8	31.1	29.8
Ontario	**24.6**	29.0	27.4	28.2	26.2	28.7
Total Ontario%	**82.6**	83.4	82.4	86.5	85.2	87.1
Other Canada	**6.8**	6.5	5.2	3.9	4.8	4.5
US	**4.9**	5.2	6.6	4.4	4.7	3.5
International	**5.7**	4.9	5.7	5.2	5.3	4.9
Total	**100**	100	100	100	100	100

Attendance to the Zoo is still highly local with 58.0% from the Toronto/GTA, a slight increase from 2013 at 54.4%. Total Ontario visitors remain relatively consistent accounting for 82.6% (83.4% in 2013) of total attendance.

3. Economic impact for out of town guest spending. *(first asked in 2011)*

a) Did you travel more than 40km from your home to visit the Zoo?

%	**2014**	2013	2012	2011
Yes	**54.6**	53.8	51.9	49.8
No	**45.4**	46.2	48.1	50.2
Total	**100**	100	100	100

b) Are you staying overnight in the Greater Toronto area as part of your trip to the Zoo?

49.1% of those who travelled more than 40km from home indicated to be staying overnight as part of their Zoo trip.

%	**2014**	2013	2012	2011
Yes	**49.1**	43.7	45.6	42.5
No	**50.9**	56.3	54.4	57.5
Total	**100**	100	100	100

c) In total, how many nights will you be staying on this current trip?

92.7% of those who indicated staying overnight plan to stay two or more nights on this trip (90.2% in 2013).

%	**2014**	2013	2012	2011
One	7.3	9.8	10.5	14.9
Two-Three	**32.6**	32.1	38.8	26.2
Four-Five	**26.6**	18.7	15.4	20.2
More than Five	**33.5**	39.4	35.3	36.9
Not Stated	0	0	0	1.8
Total	**100**	100	100	100

d) In which of the following are you staying?

%	**2014**	2013	2012	2011
Private Home	37.0	44.0	31.2	42.2
Hotel/Motel/B&B	56.6	49.7	60.9	51.8
Other	6.4	6.2	7.9	4.2
Not Stated	0	0	0	1.8
Total	**100**	100	100	100

e) How important was Toronto Zoo in your decision to visit the Greater Toronto area on this trip?

76.2% (77.8% in 2013) of respondents gave a rating of "4 or 5" importance of the Toronto Zoo in their decision to visit the GTA with an average rating of 4.11 (4.23 in 2013) on a scale of 1-5.

%	**2014**	2013	2012	2011
5 – Main Reason	**55.5**	57.9	42.5	57.6
4	**20.7**	19.9	11.4	18.2
3	11.3	10.2	6.8	9.6
2	2.5	1.5	2.6	3.0
1 – No Influence	9.3	7.6	7.4	7.4
Not Stated	0.7	3.0	29.2	4.2
Total	**100**	100	100	100
Average Rating	**4.11**	4.23	4.12	4.21

4. Which of the following best describes your ethnic background? *(first asked in 2013)*

Ethnicity %	2014	2013
African	1.2	1.8
Asian - Chinese – 8.5% - Japanese – 1.5% - Korean – 0.7% - Other Asian – 9.6%	**20.3**	20.0
Middle Eastern	4.1	3.1
Western European	9.0	12.5
Eastern European	4.6	3.3
North American	**54.5**	46.7
Caribbean	3.8	4.2
Central American	0.5	0.5
South American	1.2	2.1
Oceanic	0.5	0.5
Prefer not to Answer	0.3	5.3
Total	**100**	100

5. Including yourself, how many are in your group today?

A family of 4 makes up the typical group size with 28.3% responses.

Party size %	2014	2013	2012	2011	2010	2009
One	1.2	1.3	1.3	1.4	3.0	32.0
Two	12.5	14.9	13.8	13.5	15.6	17.0
Three	20.9	17.3	22.1	22.3	27.6	16.7
Four	**28.3**	28.6	28.2	25.0	24.2	13.2
Five	15.1	12.1	13.4	15.8	12.7	9.6
Six or More	21.2	25.2	21.0	21.7	16.8	11.1
Not Stated	0.8	0.6	0.2	0.3	0.1	0.4
Total	**100**	100	100	100	100	100
Average party size	**5.14**	5.23	5.05	4.83	4.49	3.28

6. How many adults are there in your group?

Just under half of the respondents indicated having two adults in the group – as to be expected with the Zoo's target market group of young families with children.

Number of Adults %	2014	2013	2012	2011	2010	2009
One	13.9	12.2	13.8	13.0	19.9	40.9
Two	**46.4**	49.1	51.9	49.3	49.1	25.9
Three	14.3	14.1	14.1	15.5	15.0	21.4
Four or More	23.9	24.0	19.9	21.8	16.0	11.8
Not Stated	1.5	0.6	0.2	0.4	0.1	
Total	**100**	100	100	100	100	100
Average adult count	**3.02**	3.10	2.96	2.82	2.48	2.26

The 30-49 age range continues to be the most dominant for adults visiting the Zoo with 52.0% of adult party members falling within this range (49.2% in 2013).

Age Range %	**2014**	2013	2012	2011	2010	2009
18-21	10.1	9.5	10.5	10.1	9.4	11.7
22-29	13.1	17.3	14.6	14.4	17.0	15.0
30-49	**52.0**	49.2	53.3	51.9	50.9	50.3
50-64	16.7	14.3	14.5	14.9	14.7	15.8
65+	8.1	9.6	7.2	8.7	8.0	7.2
Total	**100**	100	100	100	100	100

7. How many children are there in your group?

79% of respondents have at least one child in the group. 270 out of 813 respondents (or 33.2%) indicated having two children in the group.

# of Children %	**2014**	2013	2012	2011	2010	2009
No Children	20.8	21.2	21.3	20.3	24.1	58.2
One	**24.4**	21.5	22.6	25.0	25.1	16.0
Two	**33.2**	34.0	33.5	33.9	28.7	15.5
Three	**10.8**	11.6	11.2	10.8	11.4	5.7
Four or More	**9.2**	11.1	11.2	9.6	10.7	4.6
Not Stated	1.6	0.6	0.2	0.4	0.1	
Total	**100**	100	100	100	100	100
Average children count	**1.83**	2.14	2.09	2.01	2.01	1.01

The age of children continues to reflect families with young kids with 82.3% under the age of 13 (84.6% in 2013).

Age of Children %	**2014**	2013	2012	2011	2010	2009
Under 3	**24.8**	26.5				
Under 4			32.6	34.5	33.0	33.6
3-12	**57.5**	58.1				
4-12			52.1	52.0	54.4	50.4
13-17	17.7	15.4	15.3	13.5	12.6	16.0
Total	**100**	100	100	100	100	100

8. What is your household income?

	2014	2013	2012	2011	2010	2009
Under $35,000	2.5	2.1	1.8	1.9	1.6	4.4
$35,000 - $50,000	3.2	3.4	3.1	3.7	2.6	9.4
$50,001 - $75,000	6.4	7.3	9.7	6.9	7.8	11.6
$75,001 - $100,000	8.6	9.3	11.2	7.4	5.2	14.7
Over $100,000	14.2	12.2	10.7	11.0	6.7	14.5
Declined	65.1	65.8	63.6	69.1	76.1	45.4
Total	**100**	100	100	100	100	100

9. Other than today, have you ever visited the Zoo before?

For 2014, 72.1% of visitors (586 out of 813 surveyed) indicated that they have visited the Zoo before. Of previous attendees, over 41.1% visited within the previous 12 months.

Ever visited %	**2014**	2013	2012	2011	2010	2009
Yes	**72.1**	77.7	78.1	75.5	78.4	77.3
No	27.9	22.3	21.9	24.5	21.6	22.7
Total	**100**	100	100	100	100	100

Last visit %	**2014**	2013	2012	2011	2010	2009
<1 year ago	**41.1**	42.5	46.3	49.1	53.0	43.3
1-3 years ago	24.9	23.2	23.5	20.7	19.4	19.6
More than 3 years ago	29.4	30.1	26.2	23.5	24.6	30.5
Don’t remember	4.6	4.2	3.9	6.7	3.0	6.6
Total	**100**	100	100	100	100	100

10. Of those who have visited the Zoo previously-Do you have a Toronto Zoo Membership?

Of the 72.1% of the respondents who have previously visited the Zoo, 30.0% (or 175 out of 813) have a membership. For 2014, membership visitation represents roughly 20.6% (up to Sep30) of the Zoo's attendance (18.9% in 2013).

Member %	**2014**	2013	2012	2011	2010	2009
Yes	**30.0**	26.8	32.9	32.7	38.3	30.3
No	70.0	73.2	67.1	67.3	61.7	69.7
Total	**100**	100	100	100	100	100

11. What would persuade you to be a Zoo Member?

Of the 72.1% of the respondents who have previously visited the Zoo, 70.0% (or 411 out of 813) don’t have a membership and provided the following top responses for not being a Zoo member:

%	**2014**	2013
Live too far / don’t live in the area / if I lived closer	**36.3**	33.8
Nothing / not interested	14.5	21.5
Lower prices / cheaper / if it didn’t cost so much	7.3	12.6
No kids / kids are grown / if kids were older	9.4	7.1
Don’t come often / would not use it enough	6.6	6.3
More benefits / better family benefits / if transferable	3.5	5.0
I’m considering it / I might	3.7	3.2
Don’t have enough time / too busy	1.9	1.8
Other / Not stated	16.9	8.7
Total	**100**	100

12. What other attractions have you visited and plan to visit this year? *(last asked in 2012, fielded in alternating years)*

Not surprisingly, the attractions that Zoo visitors indicated they have visited and plan to visit typically share the same demographic target as the Zoo and have a high kid/family appeal – such as Ripley's Aquarium, Canada's Wonderland and CN Tower.

%	**2014**	2012	2010	2009
African Lion Safari	5.7	8.6	8.3	7.0
AGO	3.8	5.4	6.1	5.6
Casa Loma	5.6	6.4	6.4	6.2
CN Tower	**12.9**	11.6	11.6	10.5
Marineland	4.9	7.8	9.4	7.2
Ontario Place		4.2	9.9	9.7
Ontario Science Centre	8.9	12.6	11.9	10.5
Paramount Canada's Wonderland	**11.8**	12.9	11.3	12.6
Royal Ontario Museum	8.1	10.9	9.6	8.9
Ripley's Aquarium ***(opened 2013)***	**16.9**			
TORONTO ZOO	14.3	11.6	11.8	16.8
Other	2.9	2.9	1.6	2.2
None mentioned	4.1	5.2	2.3	2.8
Total	**100**	100	100	100

Ripley's Aquarium, opened in the Fall, 2013, is the newest attraction available in the City that the Zoo is competing with for the public's interest and disposable income.

13. Who in your group first suggested coming to the Zoo?

With 64.1% female respondents and consistent from previous years, women continue to be the most important decision-makers regarding family outings. The next most influential are children/grandchildren.

Decision maker %	**2014**	2013	2012	2011	2010	2009
Respondent	**50.1**	44.8	50.8	46.5	47.5	45.4
Spouse	13.0	10.8	11.3	16.5	14.1	14.5
Grandparent	0.6	2.4	1.2	1.4	1.2	1.8
Child/Grandchild	**19.1**	20.0	20.7	16.1	20.3	17.2
Friend	6.9	6.9	6.0	6.4	7.4	7.6
Girlfriend	1.0	2.1	1.3	1.9	0.9	1.8
Boyfriend	0.9	0.9	0.6	0.4	0.2	0.4
Other	8.4	12.1	8.1	10.7	8.4	11.2
Organized Group						5.2
No response	0.0	0.0	0.0	0.0	0.0	0.1
Total	**100**	100	100	100	100	100

14. What prompted your visit today?

Family outing, as in previous years, remains to be the highest prompted response for Zoo visit.

%	**2014**	2013	2012	2011	2010	2009
Special event	**18.0**	31.3	8.3	2.5	2.9	4.2
Special exhibit				7.0	4.2	9.0
Family outing	**58.2**	47.5	67.1	65.4	66.9	61.6
Favourite animal	9.4	10.8	8.8	12.1	6.2	4.7
Outdoor park setting	2.3	1.6	4.3	3.9	4.8	2.2
Organized group	4.6	3.1	4.4	2.4	2.8	5.5
Other – holiday/visitors	0.7	0.3	0.8	0.2	1.7	1.1
Other – CityPASS	1.3	0.5	0.8	1.3	0.8	0.6
Other – weather	1.4	0.5	1.4	0.7	0.6	2.7
Other	4.1	4.3	4.1	4.4	8.8	8.5
Not stated	0.0		0.1	0.1	0.1	
Total	**100**	100	100	100	100	100

15. Which event or exhibit prompted your visit?

For those who were prompted to visit the Zoo due to a special event/exhibit – Giant pandas were the main draw, followed by Splash Island.

%	**2014**	2013	2012	2011	2010	2009
Giant Panda Exhibit	**88.0**	86.2				
White Lions			38.3			
Polar Bear Cub			27.7			
African Penguin Exhibit				48.6		
Sharks at Stingray Bay			7.4	16.2	33.8	62.2
Great Barrier Reef					2.8	4.9
Discovery Zone		1.5		2.9	1.4	0.7
Splash Island	**5.1**	4.2	14.9	11.4	32.4	4.2
Kids Zoo	0.6	1.8		2.9	2.8	0.7
Waterside Animal Shows	0.6	1.2		1.0	1.4	
Tundra Trek	1.9	4.8		8.6	14.1	23.0
Other	3.8	0.3	9.6	8.6	9.9	3.5
Not stated			2.1		1.4	0.7
Total	**100**	100	100	100	100	100

16. How long was your visit today?

For 2014, approximately 82.9% of respondents spent 3 or more hours at the Zoo (80.7% in 2013). A Zoo visit continues to be a day-long event with an average length of stay of 4.56 hours.

Length of stay %	**2014**	2013	2012	2011	2010	2009
2 hours or less	3.2	3.0	3.2	1.4	12.2	10.6
Over 2 to 3 hours	13.3	16.3	29.7	12.5	22.1	17.0
Over 3 to 4 hours	**30.1**	27.5	28.3	30.0	25.3	24.9

Over 4 to 5 hours	**28.4**	26.6	20.3	30.3	21.9	23.3
Over 5 to 6 hours	**16.5**	17.8	12.1	18.8	12.7	16.1
Over 6 hours	**7.9**	8.8	6.5	7.1	5.4	7.8
Not stated	0.6				0.4	0.3
Total	100	100	100	100	100	100
Average stay	**4.56**	4.54	4.17	4.62	4.05	4.25

17. When do you plan to return to the Zoo? (first asked in 2013)

30.3% of respondents indicated a plan to return to the Zoo within 6 months and 29.8% indicated a plan to return to the Zoo after 1-year.

%	**2014**	2013
Within 6 months	**30.3**	31.1
Within 12 months	11.1	16.4
After 1 Year	**29.8**	26.8
After 3 Years	16.4	15.6
Not Returning	8.4	7.1
Don't Know/Not Stated	4.2	3.0
Total	**100**	100

18. Do you recall any external advertising about Toronto Zoo this year?

33.6% (273 out of 813) of total respondents have advertising recall with 45.3% responding to a recollection of panda exhibit or any panda-mention in the media or on TTC and bus shelters; 19.5% responding to a recollection of ads on poles/light standards/billboards and 19.5% responding to a recollection of media (tv ad, radio, newspaper).

Advertising recall %	**2014**	2013	2012	2011	2010	2009
Yes	33.6	55.7	39.8	33.7	31.4	42.4
No	66.4	44.3	60.2	66.3	68.6	57.6
Total	**100**	100	100	100	100	100

Comments %	**2014**
Panda mentions – on tv, in the news, on buses, on subway, on shelters	**45.3**
Ads on Poles / light standards / roadside/ highway / billboard	**19.5**
Media (tv, radio, newspaper)	**19.5**
Membership, Member magazine, newsletter, emails	5.5
Website, Facebook, Social media, internet	4.0
Other specific animals – giraffe, lion, tiger	1.5
Magazines	1.5
Animals, posters, FREE child coupon, zoo logo, 40th anniversary, CityPASS, Mandarin, don't recall	3.2
	100

19. Which information sources were most influential in your decision to visit today?

Of respondents aware of advertising, there is a continuing trend of word of mouth as the most influential information source at 35.0% (25.6% in 2013) over mainstream media of television ad at 10.3% (18.9% in 2013).

Information source %	**2014**	2013	2012	2011	2010	2009
Word of mouth	**35.0**	25.6	5.0	7.1	5.2	5.8
Newspaper Ad	5.3	6.4	10.4	6.4	7.2	8.5
Flyer/insert	1.6	2.5	2.1	3.7	6.2	4.8
Television Ad	**10.3**	18.9	53.3	51.3	36.6	41.3
Cinema Ad					0.7	0.2
Ethnic Media	0.3	1.1				
Radio Ad	1.2	7.6	3.8	4.9	9.5	7.2
Brochure or Guidebook	0.9	1.5	1.2	1.1	2.0	2.1
Magazine	1.2	2.7	1.5	3.0	2.9	2.8
Television show	1.3	3.1	7.1	4.5	6.2	6.2
Tourist Publication	2.5	2.0	0.9	2.2	5.2	1.6
Zoo Website	5.9	7.3	5.6	5.6	8.8	10.1
Promotions/Discounts	1.3	2.7	1.5	1.5	2.6	2.1
Other	4.3	4.8	5.9	5.2	4.2	4.4
Not stated	28.9	13.9	1.8	3.4	2.6	2.8
Total	**100**	100	100	100	100	100

20. A) Can you identify which companies are sponsors of the Zoo? *(first asked in 2013)*

At first mention, Mandarin is the most identified sponsor of the Zoo at 25.0%, followed closely by Coca-Cola at 19.1%. For total mention, Mandarin is also the most identified sponsor of the Zoo at 26.1%, followed by Pizza Pizza at 20.9%.

	First mention %		**Total mention %**	
	2014	2013	**2014**	2013
Canon	2.3	3.5	3.0	5.1
Coca-Cola	**19.1**	20.5	18.4	19.8
Federal Express	7.1	4.6	8.0	8.2
Mandarin	**25.0**	20.1	**26.1**	22.2
Pizza Pizza	14.0	13.9	**20.9**	19.3
Financial institutions, Media, Government		3.1		3.6
Other	3.4	1.3	4.2	1.3
None Mentioned	29.0	33.0	19.4	20.5
	100	100	**100**	100

B) Knowing that a company or brand is a sponsor of the Toronto Zoo, how likely are you to support/purchase their product or services?

Likelihood to support/purchase %	Much More Likely (5)	More Likely (4)	No Change (3)	Less Likely (2)	Much Less Likely (1)	Not Stated	AVE
Canon	2.8	10.1	80.6	1.7	2.6	2.2	3.09
Coca-Cola	10.1	17.5	69.7	0.9	1.6	0.2	3.34
Federal Express	2.4	12.5	79.1	2.5	3.3	0.2	3.08
Mandarin	7.3	17.0	72.2	1.4	1.8	0.3	3.27
Pizza Pizza	12.1	17.8	68.4	1.0	0.7	0.0	3.39

21. A) Have you ever visited the Zoo's website?

69.4% have visited the Zoo's website with a satisfaction rating of 98.2% of good to excellent. Of those who visited the site, 61.2% have used it to plan their day at the Zoo, a rising trend from previous years.

%	**2014**	2013	2012	2011	2010	2009
Yes	**69.4**	70.6	65.8	61.7	68.9	67.2
No	30.6	29.4	34.2	38.3	31.1	32.6
Not stated					0.0	0.2
	100	100	100	100	100	100

B) What is your overall satisfaction of the website?

%	**2014**	2013	2012	2011	2010	2009
Excellent	**33.3**	22.6	38.1	38.0	38.8	39.5
Very Good	**49.1**	53.1	48.5	43.7	42.9	41.1
Good	**15.8**	22.1	11.1	15.7	16.9	15.1
Below Average	0.9	0.7	1.4	1.8	0.9	1.5
Poor	0.4	0.9	0.7	0.8	0.5	1.6
Not Stated	0.5	0.7	0.2		0.0	1.3
Total / Average	**4.15**	3.97	4.22	4.16	4.18	4.17

C) Did you use the website to plan your day?

%	**2014**	2013	2012	2011	2010	2009
Yes	**61.2**	58.1	55.1	49.7	49.0	49.6
No	38.8	41.9	44.9	50.3	51.0	49.8
Not stated					0.0	0.6
	100	100	100	100	100	100

22. A) Are you aware that the Zoo has a Facebook page? *(first asked in 2013)*

Facebook awareness%	2014	2013
Yes	18.0	21.8
No	82.0	78.2
Not stated		
	100	100

B) If yes, are you a follower of the Zoo on Facebook?

Facebook follower%	2014	2013
Yes	40.4	27.9
No	59.6	72.1
Not stated		
	100	100

C) As Facebook follower, what is your overall satisfaction of the Zoo's Facebook page?

Overall satisfaction%	2014	2013
Excellent	24.7	22.0
Very Good	30.8	50.0
Good	24.7	20.0
Below Average	0.7	6.0
Poor	0.0	2.0
Not stated	19.2	
Total / Average	**3.98**	3.84

23. Did you purchase any food while you were here today?

Food purchasing on site dropped to 54.7% in 2014 (compared to 62.6% in 2013). However, 2014 level is more consistent with typical guest purchasing behavior from previous years (ranging from 52.0% - 54.7%).

%	2014	2013	2012	2011	2010	2009
Yes	**54.7**	62.6	54.4	52.0	50.4	54.7
No	18.7	15.7	19.3	23.5	25.5	24.7
Brought Food	26.6	21.7	26.3	24.5	24.1	20.5
	100	100	100	100	100	100

24. Specifically, what food outlets did you eat at today?

Pizza Pizza (Africa) tops the list of food outlets visited by our guests, followed closely by Peacock Café (Front Entrance) and Beavertails (Front Entrance Courtyard and Polar Bear).

Food outlet %	**2014**	2013	2012
Coyote Jack's (Caribou Café)	8.5	12.9	10.8
Coyote Jack's (Africa)	7.2	5.2	13.2
Pizza Pizza (Twiga Duka)	3.5	2.1	1.3
Pizza Pizza (Africa)	**15.0**	10.9	12.1
On the Go / PizzaPizza (Caribou Café)	3.3	6.6	
Polar Patio (Tundra Trek)	3.5	4.1	4.9
Simba Safari Lodge (African Savanna)	10.9	8.7	11.5
Peacock Café (Front Entrance)	**13.7**	12.4	13.8
Beavertails (Polar Bears/Front Entrance)	**13.0**	14.8	9.3
Savanna Snack Bar	1.5		
Twiga Snack Bar (Giraffes)		0.4	1.7
Mandarin (Giant Panda Experience)	4.1	5.2	
Other Food Huts or Carts	15.8	16.7	21.4
Total	**100**	100	100

25. How satisfied were you with the <u>food</u>?

Overall, visitor satisfaction with food continues to be very favorable with 90.5% giving a rating of "good to excellent" with an average rating of 4.02.

%	**2014**	2013	2012	2011	2010	2009
Excellent	**37.6**	32.8	39.1	27.8	31.6	35.9
Very Good	**33.2**	34.9	32.9	42.3	36.6	35.7
Good	**19.7**	25.2	19.7	23.6	27.3	22.6
Below Average	3.5	5.3	4.5	5.0	3.4	4.3
Poor	3.1	1.7	3.0	1.1	1.1	0.9
Not Stated	2.9		0.8	0.2	0.0	0.6
Total / Average	**4.02**	3.92	4.01	3.91	3.94	4.02

26. How satisfied were you with the <u>food service staff?</u>

Overall, visitor satisfaction with food service staff continues to be very favorable with 96.7% giving a rating of "good to excellent" with an average rating of 4.18.

%	**2014**	2013	2012	2011	2010	2009
Excellent	**42.5**	34.5	44.2	33.8	36.8	41.1
Very Good	**37.4**	40.6	36.9	39.5	37.2	34.4
Good	**16.8**	21.3	14.2	23.4	22.6	20.9
Below Average	2.4	2.7	2.0	2.0	1.8	1.7
Poor	0.9	0.6	1.4	0.4	1.6	1.1
Not stated	0.0	0.4	1.2	0.9	0.0	0.9
Total / Average	**4.18**	4.06	4.22	4.05	4.06	4.14

27. How satisfied were you with the overall <u>speed of service?</u> ***(first asked in 2008)***

Visitor satisfaction with speed of service is favorable with respondents giving a rating of 95.1% of "good to excellent" with an average rating of 4.11.

%	**2014**	2013	2012	2011	2010	2009
Excellent	**42.0**	36.8	43.8	29.1	37.2	43.2
Very Good	**33.8**	34.5	35.9	41.0	39.3	27.3
Good	**19.3**	20.7	13.2	22.3	20.1	22.6
Below Average	3.1	5.3	3.2	4.1	2.3	3.0
Poor	1.8	2.7	2.6	3.0	0.9	3.0
Not stated	0.0		1.2	0.5	0.2	0.9
Total / Average	**4.11**	3.98	4.16	3.89	4.10	4.06

28. How satisfied were you with the overall <u>cleanliness of the area?</u> ***(first asked in 2009)***

Visitor satisfaction with overall cleanliness of the area is favorable with respondents giving a rating of 97.0% of "good to excellent" with an average rating of 4.21.

%	**2014**	2013	2012	2011	2010	2009
Excellent	**45.6**	33.2	47.7	35.8	41.3	44.3
Very Good	**34.1**	40.4	39.1	43.0	39.7	35.9
Good	**17.3**	21.6	9.7	19.5	17.6	16.8
Below Average	2.2	3.4	1.8	1.3	0.9	0.9
Poor	0.8	0.9	0.4	0.4	0.5	1.1
Not stated	0.0	0.4	1.2			1.0
Total / Average	**4.21**	4.02	4.33	4.12	4.21	4.23

29. How satisfied were you with the <u>overall food experience?</u> ***(first asked in 2008)***

Visitor satisfaction with overall food experience, respondent gave a rating of 94.8% of "good to excellent" with an average rating of 4.05.

%	**2014**	2013	2012	2011	2010	2009
Excellent	**36.5**	31.7	38.7	29.9	30.2	36.6
Very Good	**37.8**	41.9	42.2	43.4	40.2	35.7
Good	**20.5**	21.8	14.0	23.4	25.1	24.5
Below Average	3.5	2.7	2.4	2.4	2.7	1.5
Poor	1.3	0.8	1.2	0.2	0.9	0.2
Not stated	0.4	1.1	1.4	0.7	0.9	1.5
Average	**4.05**	4.02	4.16	4.01	3.97	4.09

30. Volunteered comments by those who purchased food.

Comments %	**2014**	2013
Too expensive / pricy	**24.7**	24.6
Good / Very good / Great	**26.5**	18.9
Poor quality / cold / not fresh	**13.0**	11.5
Need more variety / more selection	10.5	10.7
Tables are not clean / clear the tables	1.2	9.8
Friendly / efficient / very fast / quick service	6.8	7.5
Slow / slow service / long wait / long lines	6.2	6.6
Need more seating	1.2	2.5
Need more staff / appear rushed / rude	1.9	2.5
Other mentions	8.0	5.4
Total	**100**	100

31. Exhibits, events and/or attractions attended today.

Over 70% of guests surveyed indicated having visited the Giant Panda Experience, African Savanna, Tundra Trek, Gorilla Rainforest, African Rainforest Pavilion and Indo-Malaya Pavilion. In addition, over 50% of guests surveyed also indicated having visited Australasia Pavilion, Americas Pavilion, African Penguin Exhibit, Great Barrier Reef, and Malayan Woods Pavilion.

%	**2014**	2013	2012	2011	2010	2009
Giant Panda Experience	**89.2**	82.7				
White lions			78.6			
Polar bear cub			72.9			
African Penguin Exhibit	69.5	63.5	68.9	75.4		
Sharks at Stingray Bay			34.3	45.4	42.9	49.1
Tundra Trek	**81.5**	72.0	64.5	70.0	66.6	40.8
Great Barrier Reef	56.1	55.7	43.3	53.6	48.1	49.5
Gorilla Rainforest	**81.5**	69.4	67.7	74.8	54.9	64.2
African Savanna	**85.6**	81.9	82.2	86.6	63.4	73.1
Kangaroo Walk-thru				40.4	32.8	40.2
Kid's Discovery Zone	47.2	52.1	45.6	54.6	54.8	48.0
Splash Island	26.1	26.9	31.2	38.2	40.0	28.6
Kids Zoo	33.5	31.9	32.2	37.5	36.5	35.0
Animal Show	13.7	13.4	8.4	16.3	10.0	13.9
Drum Cafe					7.0	
Wetlands Kiosk	16.9	23.9	18.3	22.8	22.5	23.4
African Rainforest Pav.	**77.4**	71.3	72.6	80.5	54.6	72.4
Americas Pavilion	64.9	63.8	55.8	64.8	60.0	60.9
Australasia Pavilion	60.3	65.9	53.7	63.1	54.9	57.5
Indo-Malaya Pavilion	**72.9**	67.1	68.4	69.2	58.2	61.5
Malayan Woods Pavilion	56.7	55.1	56.7	60.9	45.5	52.6

32. How satisfied overall were you with the exhibit and/or attraction? (5 point scale with 5 being excellent and 1 being poor)

The majority of special events/exhibits are rated highly with average scores of **4.50** on a scale of 1 to 5 reflecting "very good" and "excellent".

	2014	2013	2012	2011	2010	2009
Giant Panda Experience	4.55	4.39				
White Lions			4.49			
Polar Bear Cub			4.60			
African Penguin Exhibit	4.46	4.44	4.51	4.58		
Sharks at Stingray Bay			4.59	4.58	4.52	4.51
Tundra Trek	4.52	4.36	4.41	4.51	4.50	4.51
Great Barrier Reef	4.30	4.27	4.39	4.37	4.42	4.33
Gorilla Rainforest	4.58	4.41	4.49	4.48	4.42	4.40
African Savanna	4.59	4.45	4.54	4.53	4.43	4.39
Kangaroo Walk-thru				4.42	4.31	4.37
Kid's Discovery Zone	4.60	4.39	4.61	4.66	4.52	4.48
Splash Island	4.66	4.52	4.68	4.70	4.65	4.57
Kids Zoo	4.62	4.45	4.55	4.58	4.58	4.51
Animal Show	4.63	4.38	4.51	4.58	4.47	4.39
Drum Café					4.46	
Africa Pavilion	4.52	4.30	4.48	4.46	4.43	4.46
Americas Pavilion	4.36	4.27	4.43	4.34	4.40	4.34
Australasia Pavilion	4.38	4.27	4.37	4.35	4.42	4.37
Indo-Malaya Pavilion	4.49	4.30	4.44	4.40	4.48	4.38
Malayan Woods Pavilion	4.41	4.30	4.42	4.40	4.42	4.34
Wetlands Kiosk	4.41	4.10	4.11	4.10	4.45	4.26
Average rating	**4.50**	4.35	4.48	4.47	4.46	4.41

33. What you liked about the events, exhibits and/or attractions?

The top four responses for visitors liked about the events, exhibits and/or attractions they attended are:

- Giant pandas
- Informative, educational, good presentation
- Reflected natural habitat/environment
- Animals, animals walking around/active, variety of animals

34. How the events, exhibits and/or attractions could be improved?

The top four responses visitors expressed how events, exhibits and/or attractions could be improved are:

- More animals, get closer, keep in own environment
- More info, better maps, better directions, better signage
- More space, more viewing space, better viewing area
- Some animals sleeping/not active, not on display, areas are empty

35. Did you attend any Meet the Keeper talks/feedings? (asked in alternating years)

Of all guests surveyed, 20.0% attended at least one Meet the Keeper talk/feeding. This is a slight increase over the last four years. The most frequently attended Meet the Keeper Talk is the polar bear keeper talk followed by the gorilla talk. The %age identified below is based out of the total 813 respondents:

%	2014	2012	2010	2009
Did not attend any:	**80.0**	82.6	82.1	84.4
Attended	**20.0**	17.4	17.9	15.6
Siberian Tiger			1.1	1.0
Polar Bear	**6.4**	6.0	4.0	1.6
Komodo Dragon	1.1	0.2	0.5	0.5
Orangutan	1.2	1.3	0.9	1.3
Grizzly Bear	0.5	0.9	0.5	1.5
Otter (feeding)	0.1	0.7	0.4	0.6
Snake	1.1	0.6	0.9	0.7
Gorilla	**3.6**	2.1	1.6	3.7
African Penguin	2.0	3.2		
Lake Malawi (feeding)	0.1	0.1	0.0	0.1
Indian Rhino	1.4	0.8	0.5	0.6
Elephant		2.6	7.3	3.2
White Rhino	0.7	0.6	0.6	0.4
Cheetah	2.1	1.4	1.1	1.3
Lion	1.7	2.1	1.5	2.0
Giraffe	**3.4**	0.4	1.6	1.8
Hippos	1.7	1.5	0.6	0.9
Special Keeper talks (Courtyard Stage)			0.0	0.2
Giant Panda Experience	1.1			
Sharks at Stingray Bay		0.5	0.9	2.2

36. How would you rate the keeper talks? (5 point scale with 5 being excellent and 1 being poor)

20.0% (163 out of 813) respondents attended at least one Meet the Keeper Talk (17.4% in 2012). The majority of keeper talks are rated highly with most scores above 4.0 reflecting "very good" and "excellent". Keeper talks are an important way to connect further with our visitors and a key contributor to a visitor's overall satisfaction. In 2014, the highest rated keeper talks are the Otter, Giant Panda Experience and White Rhino. Other highly rated keeper talks include the Orangutan, Grizzly Bear, Polar Bear and Indian Rhino.

Keeper talk	2014	2012	2010	2009
Siberian Tiger			4.22	4.00
Polar Bear	4.73	4.69	4.25	4.62
Komodo Dragon	4.67	5.00	4.75	4.25
Orangutan	4.80	4.64	4.86	4.45
Grizzly Bear	4.75	4.88	5.00	4.42

Otter	**5.00**	5.00	4.67	4.60
Snake	4.67	4.40	4.86	4.50
Gorilla	4.72	4.06	4.38	4.67
African Penguin	4.69	4.48		
Lake Malawi (feeding)	3.00	4.00		5.00
Indian Rhino	4.73	4.71	5.00	4.60
Elephant		4.18	4.61	4.62
White Rhino	**4.83**	4.40	4.80	4.67
Cheetah	4.47	4.33	4.56	4.82
White Lion	4.71	4.50		
Lion			4.67	4.06
Giraffe	4.68	4.67	4.46	4.73
Hippos	4.64	4.62	5.00	
Special Keeper Talks (Courtyard)				5.00
Giant Panda Experience	**4.89**			
Sharks at Stingray Bay		4.75	4.86	4.72

WHAT did you like about the Meet the Keeper talks/feedings?

- Informative/educational; learned about specific animals/birds
- Interesting/entertaining
- Knowledgeable/professional
- Animals more active/moved about more/were closer
- The feedings
- Enjoyed Questions and Answers
- Watching the interactions with animals; friendly/pleasant; certificates/buttons; liked it/kids loved it; liked everything

HOW could the Meet the Keeper talks/feedings be improved?

- More/longer shows; more often, throughout the day, better times
- Sound qualify/couldn't hear well, needs a microphone, better sound equipment
- Keepers should speak more clearly/slowly
- Difficult to see/more viewing space, better visibility
- Announce times/advertise times/upcoming events, be on time
- More interaction with the animals/more audience interaction
- Provide more info/talk about the animals, more discussions
- Change the talks regularly / daily, more variety, feeding and talk
- NO improvements, everything was great

37. On a 5 point scale with 5 being strongly agree and 1 being strongly disagree - how would you rate the Toronto Zoo as:

	2014	**2013**	**2011**
A conservation education facility	4.57	4.42	4.40
A fun place to see animals	4.73	4.67	4.19
A safe place to connect with wildlife from around the world	4.73	4.64	4.58
A leader in wildlife conservation	4.56	4.42	4.37

On a 5 point scale with 5 being strongly agree and 1 being strongly disagree – the Zoo rated 4.57 as a conservation education facility, 4.73 as a fun place to see animals, 4.73 as a safe place to connect with wildlife from around the world, and 4.56 as a leader in wildlife conservation. These ratings are an increase from previous year's ratings.

WHAT did you learn that stands out the most from your visit today?

- Mention of giant pandas: about pandas, panda info, pandas eating, sleeping, pandas cover their eyes when they don't want to fight, pandas breeding habits, panda numbers are declining
- Mention of other animals: about animals, new animals, about polar bears, birds, giraffes, gorilla, rhinos, camels, about endangered animals, about speed of animals (cheetah, cougar, ostrich)
- Zoo related: great place for family, size of the zoo, lots of walking, very large, animals are well taken care of, money is spent on food and health
- About bamboo, amount used by pandas, bamboo flowers

HOW and WHERE did you learn this?

- At the panda exhibit (signs, interpretive centre)
- Information, story boards at the exhibit
- Keeper talks /the zoo keeper
- On the Zoomobile

38. How would you rate the following "attributes"?

The average ratings have increased generally for all key attributes. Overall the research indicates that the Zoo continues to perform very well on key attributes with an average rating between "very good to excellent" range. The top ranked attributes are "gorilla ropes course", "volunteer helpfulness" and "employee helpfulness", with average ratings of 4.78, 4.74, and 4.71 respectively. The lowest ranked attributes are "washrooms" and "signage/wayfinding" with an average rating of 4.18 and 4.20, respectively.

%	Excellent (5)	Very Good (4)	Good (3)	Below Average (2)	Poor (1)	Average Rating
Value for Money 2014	46.3	36.4	13.9	2.2	1.2	4.24
Value for Money 2013	39.1	33.5	21.0	5.3	1.1	4.04
Value for Money 2012	46.7	36.1	13.4	2.6	1.2	4.24
Having fun/Entertainment 2014	69.9	23.7	5.6	0.5	0.3	4.62
Having fun/Entertainment 2013	61.5	30.8	6.3	1.1	0.2	4.52
Having fun/Entertainment 2012	65.3	28.4	5.5	0.7	0.1	4.58
Educational Value 2014	67.0	24.8	6.0	1.9	0.3	4.56
Educational Value 2013	57.2	32.3	9.4	1.0	0.1	4.45
Educational Value 2012	55.7	30.9	11.6	1.7	0.1	4.40
Cleanliness 2014	65.5	27.4	6.2	0.9	0.1	4.57
Cleanliness 2013	51.3	36.3	9.9	1.8	0.6	4.36
Cleanliness 2012	63.7	30.2	5.1	0.8	0.1	4.57
Animal Exhibits 2014	67.7	27.2	4.3	0.4	0.4	4.62
Animal Exhibits 2013	57.2	35.0	6.9	0.6	0.2	4.48

%	Excellent (5)	Very Good (4)	Good (3)	Below Average (2)	Poor (1)	Average Rating
Animal Exhibits 2012	60.9	31.2	6.9	0.8	0.1	4.52
Variety of Exhibits 2014	70.6	24.9	4.1	0.2	0.1	4.66
Variety of Exhibits 2013	62.7	30.4	6.7	0.2	0.0	4.56
Variety of Exhibits 2012	68.4	25.0	5.7	0.8	0.1	4.61
Grounds & Landscaping 2014	68.0	26.9	3.9	1.1	0.1	4.62
Grounds & Landscaping 2013	56.7	31.8	10.1	1.1	0.4	4.43
Grounds & Landscaping 2012	62.7	30.9	5.6	0.6	0.2	4.55
Signage/Wayfinding/Site Map 2014	47.1	32.5	15.2	3.9	1.4	4.20
Signage/Wayfinding/Site Map 2013	39.1	32.5	19.0	7.0	2.5	3.99
Signage/Wayfinding/Site Map 2012	49.3	30.5	14.1	4.6	1.5	4.22
Graphics/Animal Exhibit Signs 2014	49.3	34.1	12.8	2.9	0.9	4.28
Graphics/Animal Exhibit Signs 2013	44.9	36.7	14.2	3.2	1.0	4.21
Graphics/Animal Exhibit Signs 2012	51.2	34.6	10.9	2.7	0.5	4.33
Visitors Guide – Site Map 2014	55.1	29.0	12.9	2.2	0.9	4.35
Visitors Guide – Site Map 2013	45.0	32.9	14.5	5.4	2.2	4.13
Visitors Guide 2012	58.7	27.9	8.5	4.1	0.8	4.39
Employee Helpfulness 2014	75.2	21.9	2.4	0.2	0.3	4.71
Employee Helpfulness 2013	64.3	29.0	6.5	0.1	0.0	4.57
Employee Helpfulness 2012	66.1	29.7	3.5	0.6	0.2	4.61
Volunteer Helpfulness 2014	76.8	20.8	1.9	0.2	0.2	4.74
Volunteer Helpfulness 2013	64.1	27.4	7.9	0.6	0.0	4.55
Volunteer Helpfulness 2012	66.6	29.5	3.6	0.2	0.0	4.63
Retail Gift Shops 2014	53.9	29.7	14.0	1.5	1.0	4.34
Retail Gift Shops 2013	45.0	32.2	18.6	3.2	1.1	4.17
Retail Gift Shops 2012	47.2	35.5	13.3	3.3	0.7	4.25
Zoomobile 2014	70.8	20.7	5.6	3.0	0.0	4.59
Zoomobile 2013	64.2	25.2	7.8	1.6	1.2	4.50
Zoomobile 2012	68.4	23.8	6.2	0.6	0.9	4.58
Tundra Air Ride (New 2014)	68.3	26.8	2.4	2.4	0.0	4.61
Gorilla ropes course 2014	82.0	14.0	4.0	0.0	0.0	4.78
Gorilla ropes course 2013	58.5	25.5	13.8	2.1	0.0	4.40
Gorilla ropes course 2012	63.4	25.7	7.9	2.0	1.0	4.49
Conservation Carousel 2014	71.8	22.3	5.0	0.5	0.5	4.64
Conservation Carousel 2013	60.0	27.5	10.8	1.3	0.4	4.45
Conservation Carousel 2012	64.4	28.1	3.7	3.0	0.7	4.52
Pony Rides 2014	73.3	17.8	4.4	4.4	0.0	4.60
Pony Rides 2013	42.5	32.5	20.0	5.0	0.0	4.13
Pony Rides 2012	62.2	31.1	6.7	0.0	0.0	4.56
Camel Rides 2014	70.2	21.1	8.8	0.0	0.0	4.61
Camel Rides 2013	51.4	33.3	11.7	3.6	0.0	4.32
Camel Rides 2012	62.1	25.0	11.2	0.9	0.9	4.47
Admission Process 2014	65.7	25.5	6.8	1.8	0.3	4.55
Admission Process 2013	53.5	32.5	10.6	2.3	1.1	4.35
Admission Process 2012	55.1	29.9	11.4	2.8	0.9	4.35
Washrooms 2014	44.5	35.5	15.3	3.5	1.3	4.18
Washrooms 2013	28.3	35.3	26.2	7.2	3.0	3.79

%	Excellent (5)	Very Good (4)	Good (3)	Below Average (2)	Poor (1)	Average Rating
Washrooms 2012	42.7	37.9	13.2	4.8	1.4	4.16
Picnic Areas 2014	52.6	40.7	6.2	0.4	0.0	4.46
Picnic Areas 2013	42.9	38.8	16.5	1.4	0.4	4.22
Picnic Areas 2012	57.5	35.7	6.5	0.4	0.0	4.50
Green Practices 2014	58.2	37.3	4.2	0.3	0.0	4.53
Green Practices 2013	46.0	39.0	14.2	0.7	0.2	4.30
Green Practices 2012	67.9	27.0	4.9	0.2	0.0	4.63
Learned something new 2014	59.0	30.0	9.7	1.0	0.4	4.46
Learned something new 2013	44.0	42.9	10.7	2.4	0.0	4.29
Learned something new 2012	79.7	16.9	3.4	0.0	0.0	4.76

39. What was your most memorable experience?

When asked to provide their most memorable experience of their visit, 71.5% identified “animals” as their response with the Giant Pandas and Polar Bears receiving the top two highest mentions.

Memorable experience	**2014**	2013	2012	2011	2010	2009
Animals	**71.5**	76.0	73.6	69.1	64.8	69.5
-Giant Pandas	**30.5**	39.2				
-White Lions / Lions	3.7	4.3	14.2			
-Penguins	3.0	5.6	7.8	17.9		
-Polar bears/cubs	**11.4**	10.2	19.8	14.3	17.4	12.2
-Orangutan	1.0	2.9	3.4	3.4	2.3	3.3
-Gorilla	8.4	4.3	3.3	3.7	5.8	7.0
-Giraffe	3.8	3.4	5.7	3.5	3.3	2.8
-Tigers	2.3	2.9	2.7	1.8	2.8	3.8
-Elephants		3.4	3.2	4.4	5.8	5.7
-Monkeys/Spider monkeys	1.2	1.8	1.3	2.8	0.5	3.5
-Animals/seeing the animals up close	4.4	2.8	3.5	3.9	3.6	3.7
Sharks at Stingray Bay exhibit			9.3	12.9	14.6	22.7
Splash Island	5.7	3.0	8.4	6.0	10.3	4.3
Carousel/Camel/pony rides	2.9	4.4	3.6	2.5	3.2	2.0
Zoomobile	3.6	3.9	2.6	3.3	3.0	2.9
Watching the children/their faces being with Children/grand children	10.1	6.7	7.7	3.1	4.9	6.1
Having fun / Being there	2.3	1.5	1.8	1.9	2.2	2.8

40. Overall, how satisfied are you with your visit today?

98.6% (99% in 2013) of respondents rated the Zoo as offering “good to excellent” value, receiving an average rating of 4.56.

%	**2014**	2013	2012	2011	2010	2009
Excellent	**63.0**	50.2	55.2	52.8	53.2	54.9
Very Good	**30.9**	41.9	37.5	40.6	37.7	36.8
Good	**4.7**	6.9	6.0	5.5	8.7	6.7
Below Average	0.9	0.7	0.9	0.5	0.2	1.0
Poor	0.1	0.1	0.1	0.1	0.2	0.1
Not stated	0.4	0.1	0.2	0.5	0	0.5
Total	**100**	100	100	100	100	100
Average rating	**4.56**	4.41	4.47	4.46	4.43	4.46

41. Would you recommend the Zoo to a friend?

97.1% of respondents indicated that they would “likely/strongly” recommend the Zoo to a friend with an average rating of 4.70.

%	**2014**	2013	2012	2011	2010	2009
Strongly	**73.2**	64.4	69.7	70.2	72.3	73.1
Likely	**23.9**	30.0	26.9	25.6	25.2	22.1
Neutral	2.1	4.4	2.5	3.0	1.4	2.9
Not Likely	0.6	0.6	0.2	0.4	0.5	0.6
Discourage	0.1	0.5	0.5	0.4	0.2	0.6
Not stated	0.1	0.1	0.2	0.4	0.4	0.6
Total	**100**	100	100	100	100	100
Average rating	**4.70**	4.57	4.66	4.66	4.69	4.68
Top 2 box rating (Likely-Strongly)	**97.1**	94.4	96.6	95.8	97.5	95.2

42. The Toronto Zoo is currently preparing a strategic plan. What do you think should be the priorities of the Toronto Zoo in the next five years?

71.3% (580 out of 813) provided feedback on the Zoo's priorities in the next five years with a total of 802 mentions. These were provided to the consultants and incorporated into the Strategic Plan Report.