

To: Board of Management

From: Robin D. Hale  
Chief Operating Officer

Subject: **2016 ON-SITE VISITOR SURVEY RESULTS**

Date: 2017-02-22

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### **Summary:**

This report will provide a summary of the results from the 2016 On-site Visitor Survey fielded during the months of July and August.

### **Recommendations:**

**It is recommended that this report be received for information.**

### **Background:**

Guest Services has conducted the visitor satisfaction survey annually since 1996. The 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 keeper talks and shows, and site conditions. Guest Services staff executed the questionnaire and targeted for a 50/50 gender split and a cross-section of ages.

In 2016, a total of 797 surveys were completed over a 9-week period during the summer. To shorten the total time required to complete the survey, two sets of survey versions were produced. What used to be a 16-minute survey experience with in excess of 32 multi-part questions, with the two survey versions, we were able to reduce the total survey experience to a 12-minute process with each version containing 24 questions each.

### **Comments:**

Highlights of the 2016 visitor survey include:

- Overall, visitors are overwhelmingly satisfied with their visit, with 98.6% (99.4% in 2015) of respondents rating the Zoo as “good to excellent” value for their money – receiving an average rating of 4.5 on a scale of 1 to 5 (with 5 being excellent and 1 being poor).
- Further, 94.9% of respondents indicated that they would “likely/strongly” recommend the Zoo to a friend, receiving an average rating of 4.7 on a scale of 1

to 5 (with 5 being excellent). This is compared to 96.1% and an average rating of 4.7 for 2015.

- Family outing remains to be the highest response for what prompted a Zoo visit at 48.5% (58.0% in 2015); 19.9% responded with special event as the second highest response for what prompted a zoo visit (compared to 7.9% in 2015).
- 68.7% who were prompted for a Zoo visit due to special event/exhibit identified the giant panda and cubs as the main draw (compared to 54.5% in 2015).

Other noteworthy outcomes from the summer survey include:

- The Zoo continues to rely heavily on local market with Toronto/GTA representing 52.4% of total respondents and an additional 21.2% outside the GTA but within the Province (compared to 58.6% for Toronto/GTA and 22.4 for outside the GTA but within the Province in 2015).
- The primary zoo demographic is still young families with children under 12. 78.1% of respondents have at least one child in the group (a decrease from 2015 at 78.9%) and 51.9% indicated having two children or more in the group (compared to 53.1% in 2015). The average children count is 1.8 (1.8 in 2015). The average party size is 5.2 – an increase from the 4.5 average party size in 2015.
- Of the 68.4% (72.4% in 2015) of the respondents who have previously visited the Zoo, 23.0% of respondents have Zoo membership compared to 37.0% in 2015. Membership visitation represented 19.6% of the Zoo's attendance (21.5% in 2015).
- With 63.2% female respondents and consistent from previous years, women continue to be the key decision maker/influencers for a zoo visit at 40.1%, followed by children at 13.6%.
- Zoo visitation continues to be a day-long event with an average length of stay of 4.8 hours – an increase from 2015 at 4.6 hours.
- 44.3% (36.5% in 2015) of total respondents have advertising recall with 36.3% responding to a recollection of a panda mention (on tv, in the news, on buses, on subway, on shelters), 12.6% responding to a recollection of media (tv ad, radio and/or newspaper); and 9.3% responding to a recollection of ads on poles / light standard/ roadside highway / billboard.
- Word of mouth continues to be the most influential information source at 47.3% (compared to 40.2% in 2015). Word of mouth includes variations between verbal/email/text versus social media which includes Facebook, YouTube, Instagram and others. Mainstream media of television ad, accounting for 9.1% this year, used to account for 53.3% of responses to this question in 2012.
- There is an increase in food purchasing on site at 68.2% this year (compared to 59.4% in 2015).
- Visitor satisfaction with overall food experience, respondent gave a rating of 98.3% of “good to excellent” with an average rating of 4.5 out of 5 – an increase from 2015 with overall food experience satisfaction of 97.6% and an average rating of 4.3.
- Most visited attraction is the African Savanna with 80.4% of guests visiting, followed by the Tundra Trek with 77.7% of guests visiting and Gorilla Rainforest is in third place at 73.4% of guests visiting. Over 70% of guests surveyed

indicated having visited the Kid's Discovery Zone, African Rainforest Pavilion and Giant Panda Experience. In addition, over 60% of guests surveyed also indicated having visited African Penguin Exhibit, Americas Pavilion, Australasia Pavilion and Indo-Malaya Pavilion. The majority of special events/exhibits are rated highly with average scores of 4.5 and is consistent to the rating received in 2015.

- On a 5-point scale with 5 being strongly agree and 1 being strongly disagree – the Zoo rated 4.5 as a conservation education facility, 4.7 as a fun place to see animals, 4.6 as a place that saves and protects species and their habitats, 4.6 as a safe place to connect with wildlife from the around the world, 4.5 as a leader in wildlife conservation, and 4.5 as a Zoo-based conservation centre of excellence. These ratings are consistent from previous year's ratings.

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.

#### Wildlife Care:

- Take guest feedback and work on improving exhibits by continuing to build up on group numbers, where possible.
- 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 delivery of talk and possibly staff public speaking development.
- Provide signage in better communicating animal enrichment programs that are in place to ensure varying animal behavioural needs are met.

#### Marketing:

- Collected information 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, right geographic areas and determining the best advertising mediums to reach these audiences.
- It 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 and provides for best practices of any sponsorship program and help in justifying sponsor relationship agreements.
- Advertising and social media-related questions are great as these assets are typically included in some sponsor relationship deals and help prove their value.

#### Campaign Development:

- Demographic questions allow for cross-referencing 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:

- Take guest feedback and brainstorm with staff to discuss and identify 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.

Overall, the survey indicated that the Zoo continues to perform very well on key attributes. Collectively, all attributes averaged 4.4 on a scale of 1 to 5. The average rating is consistent with the average ratings received from previous years.

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R. D. Hale  
Chief Operating Officer

**List of Attachments:**  
2016 On-Site Visitor Survey Results