TORONTO ZOO
2017 ON-SITE VISITOR SURVEY RESULTS

Methodology

Guest Services seasonal staff completed 664 visitor surveys between July and August 2017. Visitors were selected randomly and included 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:

2017 = 664	2016 = 797	2015 = 800	2014 = 813
2013 = 821	2012 = 849	2011 = 793	2010 = 809

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

RESULTS AND ANALYSIS

1. Gender.

Of the 664 respondents, there were 407 (61.3%) female respondents (504 or 63.2% in 2016) and 257 (38.7%) male respondents (293 or 36.8% in 2016).

2. Where is your group from?

Using the Admits point-of-sale system to field the postal code survey for all admission transactions processed, attendance to the Zoo is still highly local with 52.5% from the Toronto/GTA (52.4% in 2016). Total Ontario visitors was consistent with the previous year at 74.2% (73.6% in 2016) of total surveyed. US and International visitors continue to be steady with 2016 and higher than previous years to that at 8.3% and 11.3% (compared to 8.8% and 11.5% in 2016). There were a total of 152,611 collected data from January 1 – September 30 (140,549 collected data for the same period in 2016), with 13,127 or 8.6% un-useable data consisting of 10,487 declined and 2,640 un-useable data (compared to 12,433 or 8.8% declines consisting of 8,863 declines and 3,570 un-useable data in 2016), for a net sample size of 139,484 (128,116 in 2016).

%	**2017***	2016	2015	2014	2013
Toronto	**23.6**	25.8	26.9	27.6	26.8
GTA	**28.9**	26.6	31.7	30.4	27.6
Ontario	**21.7**	21.2	22.4	24.6	29.0
Sub-total Ontario%	**74.2**	73.6	81.0	82.6	83.4
Other Canada	**6.2**	6.1	4.6	6.8	6.5
US	**8.3**	8.8	6.4	4.9	5.2
International	**11.3**	11.5	8.0	5.7	4.9
Total	**100**	100	100	100	100

*Includes data collected from January 1 to September 30, 2017

The bulk of the collected survey was during the months of July and August, representing 94,445 or 61.9% of collected data.

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

A family of 4 makes up the typical group size with 25.8% of all responses – a slight increase from 2016 at 24.3%. There is a decrease in average party size of 4.7 (compared to 5.2 in 2016).

Party size %	**2017**	2016	2015	2014	2013
One	3.6	1.3	1.6	1.2	1.3
Two	15.7	14.7	16.5	12.5	14.9
Three	20.5	20.5	21.5	20.9	17.3
Four	**25.8**	**24.3**	26.8	28.3	28.6
Five	12.8	17.2	14.1	15.1	12.1
Six or More	21.4	22.1	19.5	21.2	25.2
Not Stated	0.2			0.8	0.6
Total	**100**	**100**	100	100	100
Average party size	**4.7**	**5.2**	4.5	5.1	5.2

4. 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 %	2017	2016	2015	2014	2013
One	16.7	14.7	18.6	13.9	12.2
Two	**44.4**	46.8	46.6	46.4	49.1
Three	16.6	14.4	14.1	14.3	14.1
Four or More	21.9	23.4	20.1	23.9	24.0
Not Stated	0.4	0.6	0.6	1.5	0.6
Total	**100**	100	100	100	100
Average adult count	**2.7**	2.8	2.7	3.0	3.1

The adult age range categories for the survey were changed in 2017 to better align with the quarterly guest satisfaction survey conducted in partnership with the other G5 attractions. The 35-44 age range was the most dominant for adults visiting the Zoo with 33.0% of adult party members falling within this range (30-49 age range, 48.8% in 2016).

Age Range %	2017	2016	2015	2014	2013
18-24	12.5				
18-21		8.3	9.0	10.1	9.5
25-34	19.7				
22-29		18.4	15.2	13.1	17.3
35-44	**33.0**				
30-49		48.8	49.3	52.0	49.2
45-54	16.5				
50-64		16.0	16.9	16.7	14.3
55-64	9.3				
65+	9.0	8.4	9.6	8.1	9.6
Total	**100**	100	100	100	100

5. How many children are there in your group?

73.4% of respondents have at least one child in the group (a decrease from 2016 at 77.7%). 198 out of 664 respondents (or 29.8%) indicated having two children in the group. The average children count is **1.98.**

# of Children %	2017	2016	2015	2014	2013
No Children	26.4	21.8	21.1	20.8	21.2
One	**22.6**	26.0	25.8	24.4	21.5
Two	**29.8**	29.9	30.9	33.2	34.0
Three	**10.4**	11.5	11.8	10.8	11.6
Four or More	**10.6**	10.3	10.4	9.2	11.1
Not Stated	0.2	0.5	0.0	1.6	0.6
Total	**100**	100	100	100	100
Average children count	**2.0**	1.8	1.8	1.8	2.1

The age of children continues to reflect families with young kids with 81.0% under the age of 13 (84.4% in 2016).

Age of Children %	2017	2016	2015	2014	2013
Under 3	**24.2**	28.2	22.2	24.8	26.5
3-12	**56.8**	56.2	62.8	57.5	58.1
13-17	19.0	15.6	15.0	17.7	15.4
Total	**100**	100	100	100	100

6. Did you drive to get to the Zoo?

Drive to Zoo%	2017	2016
Yes	**83.7**	85.9
No	16.3	14.1
Total	**100**	100

7. How long did it take you to travel to the Zoo? *(first asked in 2017)*

Length of Time%	2017
Under 20 Minutes	9.0
20-29 Minutes	14.3
30 Minutes	16.7
Over 30 to 59 Minutes	18.4
1 Hour to 1 Hour 29 Min	18.2
1 Hour 30 Min to 2 Hours	16.6
Over 2 Hours	6.0
Many/Don't Know	0.8
Total	**100**
Average Length in Minutes	**59**

40% of respondents travelled 30 minutes or less to get to the Zoo; another 18.4% of respondents travelled more than 30 minutes but less than an hour and 40.8% of respondents travelled over an hour to get to the Zoo.

8. Do you have a Toronto Zoo Membership? (prior to 2016 only asked of those who had visited previously)

21.2% (or 141 of 664) of people surveyed have a zoo membership.

Member %	2017	2016	2015	2014	2013
Yes	**21.2**	23.0	37.0	30.0	26.8
No	78.8	77.0	63.0	70.0	73.2
Total	**100**	100	100	100	100

9. Name three benefits that you like most about your Zoo membership. ***(asked of those who responded yes to having a membership, first asked in 2017)***

%	**2017**
Multiple Visits	96.5
Free Zoomobile	88.7
Member Program Discounts	56.0
Special Member Events/Access to the Zoo	31.9
Wild for Life Magazine	12.1

Of the 141 guests surveyed with Zoo membership, 136 respondent (or 96.5%) identified "multiple visits", 125 respondent (or 88.7%) stated "free zoomobile" and 79 respondent (or 56.0%) mentioned "Member program discounts" as the top three most liked membership benefits. For 2017, member visitation to the end of October represented 20.3% of total Zoo attendance (19.1% in 2016 for the same time period).

10. What would persuade you to be a Zoo Member? (prior to 2016 only asked of those who had previously visited the Zoo)

Of the 78.8% (523 out of 664) of the respondents who do not have a membership and were asked what would persuade them to become a member, the following responses were received:

%	**2017**	2016	2015	2014	2013
Live too far / don't live in the area / if I lived closer	**35.1**	51.2	48.7	36.3	33.8
Nothing / not interested	**30.7**	14.9	12.7	14.5	21.5
Lower prices / cheaper / if it didn't cost so much	**10.5**	8.9	6.3	7.3	12.6
No kids / kids are grown / if kids were older	4.0	3.0	6.9	9.4	7.1
Don't come often / would not use it enough	5.9	7.4	6.6	6.6	6.3
More benefits / better family benefits / if transferable	3.7	1.4	3.8	3.5	5.0
I'm considering it / I might	1.5	2.7	3.3	3.7	3.2
Don't have enough time / too busy	1.3	2.4	2.3	1.9	1.8
Other / Not stated	7.4	8.1	9.4	16.9	8.7
Total	**100**	100	100	100	100

11. What helped you prepare for your Zoo trip today? ***(first asked in 2017)***

%	**2017**
Previous Visit(s)	**39.0**
Toronto Zoo Website	**37.7**
Referral	18.7
Search Engines (Google, Bing, etc)	15.8
Toronto Zoo Social Media (FB, Twitter, Instagram)	3.2
Travel Websites (Expedia, Trip Advisor, Yelp)	2.7
Other	6.0
None Mentioned	7.2

259 out of 664 respondents (39.0%) identified prior visit(s) to have prepared them for their Zoo visit; this is closely followed by 250 respondents (37.7%) who stated Toronto Zoo website helped prepare them for their Zoo visit.

12. How do you get your news? *(first asked in 2017)*

%	**2017**
Online Newspaper	44.3
Social Media (Twitter, FB, YouTube, etc)	33.3
TV News Broadcasting	28.3
Printed Newspaper	12.3
Mobile Phone	12.2
Mobile Device (ipad, Tablet etc)	5.9
Other	4.1
Not Interested in News	8.7
None Mentioned	0.2

294 out of 664 respondents (44.3%) identified Online Newspaper as their news source. Social media (Twitter, FB, YouTube, etc) was named as news source by 221 respondents (33.3%). This was closely followed by TV News Broadcasting with 188 respondents (28.3%).

13. What prompted your visit today?

%	**2017**	2016	2015	2014	2013
Special event		19.9	7.9	18.0	31.3
Special exhibit					7.0
Wildlife Health Centre	4.5				
Giant Panda Exhibit	23.8				
Splash Island	2.0				
Kids Zoo	1.8				
Animal Show	0.9				
Family outing		48.5	58.0	58.2	47.5
Favourite animal		8.7	7.0	9.4	10.8
To See Animals	**43.4**				
Outdoor park setting		2.2	1.7	2.3	1.6
Organized group	5.7	4.9	4.0	4.6	3.1
Other – holiday/visitors		1.8	3.1	0.7	0.3
Other – CityPASS		2.9	3.0	1.3	0.5
Other – weather		4.2	7.9	1.4	0.5
Other	39.5	6.9	7.4	4.1	4.3
Not stated	1.0				
Total		100	100	100	100

This survey question is a revision from prior year's question but with a revised and shorter list of response grouping. In 2017, the responses are measured against the total number of survey respondents of 664. The overwhelming response with 43.4% of respondents stating was "To see animals". This was

followed by 23.8% of respondents specifically stating "Giant panda exhibit" as what prompted their visit to the Zoo.

In 2016, of the 19.9% who were prompted to visit the Zoo due to a "special event/exhibit", giant pandas and baby pandas were the main draw followed by baby animals.

%	**2016**	2015	2014	2013
Giant Panda Exhibit	**37.7**	54.5	88.0	86.2
Baby Pandas	**31.0**			
Baby Animals	**17.0**			
Discovery Zone	1.7	4.5		1.5
Splash Island	7.0	18.2	5.1	4.2
Kids Zoo	1.0	5.7	0.6	1.8
Waterside Animal Shows	0.3	4.5	0.6	1.2
Tundra Trek	2.0	2.3	1.9	4.8
Wild Connections		1.1		
Weekend Event		2.3		
Other	2.3	6.9	3.8	0.3
Total	**100**	100	100	100

14. Approximately how long did you spend at the Zoo today?

For 2017, approximately 87.2% of respondents spent 3 or more hours at the Zoo (87.6% in 2016). A Zoo visit continues to be a day-long event with an average length of stay of 4.7 hours.

Length of stay %	**2017**	2016	2015	2014	2013
2 hours or less	3.5	0.8	1.2	3.2	3.0
Over 2 to 3 hours	9.3	11.6	14.2	13.3	16.3
Over 3 to 4 hours	**25.9**	27.0	32.5	30.1	27.5
Over 4 to 5 hours	**32.1**	29.4	26.9	28.4	26.6
Over 5 to 6 hours	**21.4**	20.5	16.8	16.5	17.8
Over 6 hours	**7.8**	10.7	8.4	7.9	8.8
Not stated				0.6	
Total	**100**	100	100	100	100
Average stay	**4.7**	4.8	4.6	4.6	4.5

15. Prior to your visit today, did ANY Toronto Zoo advertising influenced your visit to the Zoo? ***(first asked in 2017)***

%	**2017**
Yes	23.0
No	77.0
	100

153 out of 664 respondents (23.0%) was influenced by a Zoo advertising to visit the Zoo.

16. Where have you seen or heard Toronto Zoo advertising this year? *(first asked in 2017)*

Asked of 153 respondents who answered Yes to have been influenced by a Zoo advertising to visit the Zoo, "television advertising" received the most first mention with 32.7% responses, followed by "on-line advertising" for most second mention with 9.2% responses and "outboard billboard" and "on-line advertising" for most third mention with 5.2% responses. On an aggregate total, television advertising, online advertising and outdoor billboard placed 1st, 2nd and 3rd for most Total Mention.

%	2017 1st Mention	2017 2nd Mention	2017 3rd Mention	Total Mention
Newspaper Advertising	15.0	3.9	0.7	11.1
Television Advertising	**32.7**	5.2	0.7	**21.8**
Transit Shelter Advertising	3.3	3.3	3.3	5.5
Outdoor Billboard	10.5	6.5	**5.2**	**12.5**
Brochure/Guide Book/Tourist Publication	3.9	3.9	2.6	5.9
Magazine Advertising	2.0	3.3	3.3	4.8
On-line Advertising	11.8	**9.2**	**5.2**	**14.8**
Social Media	11.8	7.8	2.6	12.5
Promotional/Discount Coupon Offers	4.6	3.9	2.6	6.3
Other	4.6	3.3	0.7	4.8
None Mentioned		49.7	73.2	
Total	**100**	**100**	**100**	**100**

In 2016 and prior years, the fielded question was "Do you recall any external advertising about the Toronto Zoo this Year?" This question generated a different response with 44.3% of respondents having an advertising recall with 36.3% responding to a recollection of panda exhibit or any panda-mention in the media or on TTC and bus shelters; 12.6% responding to a recollection of media (tv, radio or newspaper ad) and 10.7% responding to a recollection of website or social media channel.

Advertising recall %	2016	2015	2014	2013	2012
Yes	44.3	36.5	33.6	55.7	39.8
No	55.7	63.5	66.4	44.3	60.2
Total	**100**	100	100	100	100

17. Can you identify which companies are sponsors of the Zoo?

At first mention, Mandarin is the most identified sponsor of the Zoo at 30.1%, followed by Coca-Cola at 8.6%. For total mention, Mandarin remains the most identified sponsor of the Zoo at 29.4%, followed by Pizza Pizza at 10.8%.

	First mention %					Total mention %				
	2017	2016	2015	2014	2013	**2017**	2016	2015	2014	2013
Canon				2.3	3.5				3.0	5.1
Coca-Cola	**8.6**	14.8	18.8	19.1	20.5	9.7	14.3	19.3	18.4	19.8
Federal Express	1.4	2.5	3.4	7.1	4.6	2.8	5.4	4.6	8.0	8.2

Mandarin	**30.1**	35.0	27.1	25.0	20.1	**29.4**	31.0	27.4	26.1	22.2
Pizza Pizza	6.6	12.3	13.0	14.0	13.9	**10.8**	21.4	20.6	20.9	19.3
Fin'l institutions, Media, Gov't					3.1					3.6
Telus	1.4					3.8				
Other	11.3	6.4	7.4	3.4	1.3	11.5	8.4	7.7	4.2	1.3
None Mentioned	40.7	29.0	30.3	29.0	33.0	32.0	19.5	20.4	19.4	20.5
	100	100	100	100	100	**100**	100	100	100	100

18. What Social media platforms are you most active on? (first asked in 2017)

%	2017 1st Mention	2017 2nd Mention	2017 3rd Mention	Total Mention
Facebook	**63.6**	9.8	1.8	**47.8**
Instagram	15.1	**18.7**	2.7	**23.3**
Twitter	4.2	9.0	**4.1**	**11.1**
Pinterest	1.4	1.1	1.2	2.3
YouTube	1.8	4.4	3.9	6.4
None Mentioned	14.0	57.1	86.3	8.9
Total	**100**	**100**	**100**	**100**

422 of respondents (63.6%) stated Facebook as the most first mention social media platform they are most active on; followed by Instagram as the most second mention social media platform at 18.7%; and YouTube at 3.9% most third mention social media platform.

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

Food purchasing on site experienced a decline to 64.2% in 2017 (compared to 68.2% in 2016 and an increasing trend since 2014).

%	2017	2016	2015	2014	2013
Yes	**64.2**	68.2	59.4	54.7	62.6
No	22.1	10.9	18.2	18.7	15.7
Brought Food	13.9	20.9	22.4	26.6	21.7
	100	100	100	100	100

20. How satisfied were you that food <u>order was correct and complete</u>?

Visitor satisfaction with food order correctness and completeness is very favorable with 96.3% giving a rating of "good to excellent" (98.3% in 2016) with an average rating of 4.6.

%	2017	2016
Excellent (5)	**69.6**	71.2
Very Good (4)	**22.5**	20.2
Good (3)	**4.2**	6.9
Below Average (2)	1.8	1.4
Poor (1)	1.3	0.3
Not stated	0.4	
Average	**4.6**	4.6

21. How satisfied were you with the overall speed of service (service was prompt)?

Visitor satisfaction with speed of service is favorable with respondents giving a rating of 95.4% (96.7% in 2016) of "good to excellent" with an average rating of 4.4.

%	**2017**	2016	2015	2014	2013
Excellent (5)	**59.4**	69.1	50.9	42.0	36.8
Very Good (4)	**26.6**	21.7	30.6	33.8	34.5
Good (3)	**9.4**	5.9	14.1	19.3	20.7
Below Average (2)	2.5	1.7	2.8	3.1	5.3
Poor (1)	1.8	1.2	0.8	1.8	2.7
Not stated	0.4	0.4	0.8	0.0	
Total / Average	**4.4**	4.6	4.3	4.1	4.0

22. How satisfied were you with the food service staff (staff friendly and courteous)?

Overall, visitor satisfaction with food service staff continues to be very favorable with 96.9% (98.9% in 2016) giving a rating of "good to excellent" with an average rating of 4.5.

%	**2017**	2016	2015	2014	2013
Excellent (5)	**64.5**	73.3	51.7	42.5	34.5
Very Good (4)	**26.1**	19.7	32.8	37.4	40.6
Good (3)	**6.3**	5.9	12.3	16.8	21.3
Below Average (2)	1.3	0.7	0.8	2.4	2.7
Poor (1)	1.3	0.2	1.2	0.9	0.6
Not stated	0.4	0.2	1.2	0.0	0.4
Average	**4.5**	4.7	4.4	4.2	4.1

23. How satisfied were you with the overall cleanliness of the area?

Visitor satisfaction with overall cleanliness of the area is favorable with respondents giving a rating of 97.1% (98.1% in 2016) of "good to excellent" with an average rating of 4.4.

%	**2017**	2016	2015	2014	2013
Excellent (5)	**58.5**	62.4	48.7	45.6	33.2
Very Good (4)	**27.0**	26.9	32.6	34.1	40.4
Good (3)	**11.6**	8.8	16.5	17.3	21.6
Below Average (2)	1.6	0.7	1.4	2.2	3.4
Poor (1)	0.9	0.9		0.8	0.9
Not stated	0.4	0.3	0.8	0.0	0.4
Total / Average	**4.4**	4.5	4.3	4.2	4.0

24. How satisfied were you with the overall food experience?

Visitor satisfaction with overall food experience, respondent gave a rating of 96.3% (98.3% in 2016) of "good to excellent" with an average rating of 4.4.

%	**2017**	2016	2015	2014	2013
Excellent (5)	**55.4**	64.7	47.5	36.5	31.7
Very Good (4)	**31.3**	26.2	35.0	37.8	41.9
Good (3)	**9.6**	7.4	15.1	20.5	21.8
Below Average (2)	2.2	1.0	1.2	3.5	2.7
Poor (1)	1.1	0.5	0.4	1.3	0.8
Not stated	0.4	0.2	0.8	0.4	1.1
Average	**4.4**	4.5	4.3	4.1	4.0

25. Volunteered comments by those who purchased food.

Comments %	**2017**	2016	2015	2014	2013
Too expensive / pricy	**18.1**	17.0	23.2	24.7	24.6
Good/Very good / Great / Good value / variety	**18.1**	19.0	33.5	26.5	18.9
Poor quality / cold / not fresh	14.5	5.0	6.7	13.0	11.5
Need more variety / more selection	16.9	7.0	11.0	10.5	10.7
Tables are not clean / clear the tables	2.4	9.0	3.9	1.2	9.8
Friendly / efficient / very fast / quick service	7.2	10.0	5.5	6.8	7.5
Slow / slow service / long wait / long lines	10.8	11.0	4.3	6.2	6.6
Need more seating			1.8	1.2	2.5
Need more staff / appear rushed / rude	8.4	6.0	3.7	1.9	2.5
Other mentions	3.6	16.0	6.4	8.0	5.4
Total	**100**	100	100	100	100

75 respondents provided 83 distinct comments about their food experience. “Too expense/Pricy” and “Good/Very good/Great/Good value/Variety” topped the list of volunteered comments.

26. Exhibits, events AND/OR attractions attended today.

Most visited attraction is the African Savanna with 84.9% of guests visiting, followed by the Tundra Trek with 79.1% of guests visiting and Africa Rainforest Pavilion is in third place at 76.1% of guests visiting. Over 70% of guests surveyed indicated having visited the Gorilla Rainforest, Indo-Malaya Pavilion, Giant Panda Experience and Australasia Pavilion. In addition, over 60% of guests surveyed also indicated having visited Malayan Woods Pavilion, Americas Pavilion and Eurasia Wilds.

%	**2017**	2016	2015	2014	2013
Giant Panda Experience	**73.6**	70.8	86.9	89.2	82.7
Tundra Trek	**79.1**	77.7	76.0	81.5	72.0
Gorilla Rainforest	**74.5**	73.4	75.1	81.5	69.4
African Savanna	**84.9**	80.4	82.4	85.6	81.9
Splash Island	26.7	33.1	33.8	26.1	26.9
Kids Zoo	28.0	32.7	36.6	33.5	31.9
Animal Show	14.8	17.9	17.6	13.7	13.4
African Rainforest Pavilion	**76.1**	72.5	74.1	77.4	71.3
Americas Pavilion	61.3	62.2	62.0	64.9	63.8
Australasia Pavilion	**70.2**	62.9	65.5	60.3	65.9
Indo-Malaya Pavilion	**74.1**	69.1	70.6	72.9	67.1
Malayan Woods Pavilion	64.0	53.8	55.1	56.7	55.1

Eurasia Wilds	60.5				
Canadian Domain	39.0				

27. 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 visited exhibits are rated highly with average scores of **4.4** on a scale of 1 to 5 reflecting "very good" and "excellent".

	2017	2016	2015	2014	2013
Giant Panda Experience	4.5	4.5	4.6	4.6	4.4
Tundra Trek	4.3	4.5	4.5	4.5	4.4
Gorilla Rainforest	4.4	4.6	4.6	4.6	4.4
African Savanna	4.5	4.6	4.6	4.6	4.5
Splash Island	4.5	4.7	4.7	4.7	4.5
Kids Zoo	4.5	4.7	4.5	4.6	4.5
Animal Show	4.4	4.6	4.5	4.6	4.4
Africa Rainforest Pavilion	4.5	4.5	4.5	4.5	4.3
Americas Pavilion	4.4	4.4	4.4	4.4	4.3
Australasia Pavilion	4.4	4.5	4.4	4.4	4.3
Indo-Malaya Pavilion	4.4	4.5	4.5	4.5	4.3
Malayan Woods Pavilion	4.3	4.5	4.5	4.4	4.3
Eurasia Wilds	4.4				
Canadian Domain	4.3				
Average rating	**4.4**	4.5	4.5	4.5	4.4

28. A) What is the role of a Zoo today? ***(first asked in 2017)***

664 respondents produced 896 distinct responses.

%	**2017 % of Respondents**	**2017 % of Responses**
Education, A Place of Learning	**40.4**	**30.0**
Entertainment	16.4	12.2
Conservation	15.4	11.4
Protecting, Caring for Animals	13.6	10.0
Preservation, Protecting Endangered Animals	13.0	9.6
Family Destination, Outing	11.6	8.6
To See Animals, Variety of Animals	11.4	8.5
To Educate Kids About Animals	6.5	4.8
Environment, Protecting the Environment	1.8	1.3
Research	1.5	1.1
Don't Know	2.7	2.0
No Answer	0.8	0.6
Total		**100**

B) Which of the following statements best defines the Toronto Zoo? *(first asked in 2017)*

%	2017
A Place of Learning	23.9
A Fun Family Destination	34.5
A Place That Saves and Protects Species and Their Habitats	15.7
A Place to See and Connect with Wildlife From Around the World	25.6
None Mentioned	0.3
Total	**100**

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

	2017	2016
A place of learning	4.5	
A fun family destination	4.7	
A place that saves and protects species and their habitats	4.5	4.6
A place to see and connect with wildlife from around the world	4.6	4.6

D) NAME ONE THING you learned today that stands out the most from your visit?

- Mention of giant pandas: about pandas, panda info, pandas eating, sleeping, elimination habits, strong jaws pandas breeding habits, gestation, first born in Canada, anti-social, have to be segregated, only one twin at a time, panda numbers are declining (19.7%)
- Mention of other animals: about polar bears, gorillas, birds, giraffes, yaks, rhinos, snakes, frogs, turtles, hippos, big cats, penguins, monkeys, orangutans, white lions, komodo dragon, camels, grizzly bear, jelly fish, about endangered animals, about speed of animals, about new animals, diversity, no elephants (41.9%)
- Zoo related: about surgery on animals, hospital, size of the zoo, lots of walking, very large, animals are well taken care of, money is spent on food and health, taking care of environment, conservation, preservation, best time to come is early morning, cool day (5.0%)
- Other: animal poop becoming energy, palm oil effect on rainforest, orangutans, about bamboo, amount used by pandas, bamboo flowers, Zoomobile information (9.0%)
- Can't remember / No mention (24.4%)

E) HOW and WHERE did you learn this?

478 responded to this question and provided the top six responses as follows:

- At the panda exhibit, signs, at the Interpretive Centre (25.9%)
- Information, story boards at the exhibit (16.3%)
- On the zoomobile (11.3%)
- Keeper talks /the zoo keeper (7.1%)
- African Savanna (7.1%)
- Volunteer, Guide, Staff (4.0%)

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

Collectively, all attributes averaged **4.34** on a scale of 1 to 5, with 5 being Excellent and 1 being Poor. The average rating is fairly consistent with the average ratings from last year at 4.42. Overall the survey 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 "Volunteer helpfulness", "Employee helpfulness" and "Fun Team", with average ratings of 4.67, 4.66 and 4.57 respectively. The lowest ranked attributes are "washrooms", "animal exhibit signs" and "visitor guide-site map" with average ratings of 3.70, 4.12 and 4.12 respectively.

An RFP has been completed in 2017 for Wayfinding Consulting Services to review general and directional signage throughout the Zoo. The consulting review is in process and a report is expected to be received in early 2018.

%	Excellent (5)	Very Good (4)	Good (3)	Below Average (2)	Poor (1)	Average Rating
Value for Money 2017	47.3	35.5	12.8	3.0	1.4	4.24
Value for Money 2016	49.8	32.5	14.5	2.8	1.4	4.29
Value for Money 2015	54.2	31.1	12.1	2.1	0.5	4.36
Cleanliness 2017	51.2	36.4	10.1	2.1	0.2	4.36
Cleanliness 2016	54.9	33.7	9.9	0.8	0.8	4.41
Cleanliness 2015	58.6	31.0	9.3	0.9	0.2	4.47
Variety of Exhibits 2017	62.9	28.7	6.9	1.1	0.5	4.53
Variety of Exhibits 2016	67.5	26.7	5.0	0.5	0.3	4.61
Variety of Exhibits 2015	69.8	23.8	5.6	0.8	0.0	4.63
Grounds & Landscaping 2017	60.2	30.8	7.5	1.3	0.3	4.49
Grounds & Landscaping 2016	59.9	31.4	7.1	1.0	0.5	4.49
Grounds & Landscaping 2015	65.9	25.5	6.5	1.7	0.4	4.55
Animal Exhibit Signs 2017	41.9	36.2	15.2	5.5	1.2	4.12
Animal Exhibit Signs 2016	54.5	30.0	12.9	2.3	0.3	4.36
Animal Exhibit Signs 2015	51.4	30.8	13.4	3.5	0.9	4.28
Visitors Guide – Site Map 2017	46.9	30.0	14.8	5.3	3.0	4.12
Visitors Guide – Site Map 2016	50.0	22.9	18.7	6.3	2.1	4.12
Visitors Guide – Site Map 2015	49.4	31.7	13.2	5.1	0.6	4.24
Employee Helpfulness 2017	73.6	20.3	4.7	1.0	0.4	**4.66**
Employee Helpfulness 2016	70.0	24.4	4.8	0.8	0.0	4.63
Employee Helpfulness 2015	76.8	19.4	3.4	0.2	0.2	4.72
Volunteer Helpfulness 2017	73.6	21.7	3.1	1.7	0.0	**4.67**
Volunteer Helpfulness 2016	72.1	21.9	5.1	1.0	0.0	4.65
Volunteer Helpfulness 2015	75.0	21.8	3.2	0.0	0.0	4.72
Fun Team 2017	66.8	24.5	7.1	1.5	0.0	**4.57**
Fun Team 2016 *(first asked 2016)*	73.9	18.9	7.2	0.0	0.0	4.67
Retail Gift Shops 2017	48.7	36.0	12.0	1.6	1.6	4.29
Retail Gift Shops 2016	50.0	27.8	18.9	1.9	1.4	4.23
Retail Gift Shops 2015	56.0	32.2	11.2	0.3	0.3	4.43
Zoomobile 2017	67.1	23.6	6.4	1.8	1.1	4.54
Zoomobile 2016	73.0	18.4	6.6	1.5	0.5	4.62
Zoomobile 2015	77.5	16.3	5.6	0.3	0.3	4.70

Gorilla Climb Ropes Course 2017	56.3	34.4	7.3	1.0	1.0	4.44
Gorilla Climb Ropes Course 2016	75.4	18.5	4.6	1.5	0.0	4.68
Gorilla Climb Ropes Course 2015	69.2	23.4	6.5	0.9	0.0	4.61
Conservation Carousel 2017	63.0	27.6	6.8	2.6	0.0	4.51
Conservation Carousel 2016	79.1	15.7	5.2	0.0	0.0	4.74
Conservation Carousel 2015	68.8	22.0	7.8	1.4	0.0	4.58
Tundra Air Ride 2017	57.0	33.3	8.6	1.1	0.0	4.46
Tundra Air Ride 2016	78.7	13.1	6.6	0.0	1.6	4.67
Tundra Air Ride 2014	68.3	26.8	2.4	2.4	0.0	4.61
Admission Process 2017	50.2	32.3	13.1	2.8	1.6	4.27
Admission Process 2016	61.9	21.5	12.4	3.4	0.8	4.40
Admission Process 2015	66.7	22.6	8.4	2.0	0.3	4.53
Washroom 2017	28.5	32.8	23.6	10.9	4.2	3.70
Washrooms 2016	32.9	27.4	22.8	12.2	4.6	3.72
Washrooms 2015	40.8	34.2	18.7	4.8	1.5	4.08
Picnic Areas 2017	52.5	35.9	8.9	2.0	0.7	4.37
Picnic Areas 2016	60.9	24.5	13.8	0.4	0.4	4.45
Picnic Areas 2015	59.3	31.0	8.5	0.8	0.4	4.48
Green Practices 2017	60.9	31.2	7.1	0.4	0.4	4.52
Green Practices 2016	66.4	21.5	11.7	0.3	0.0	4.54
Green Practices 2015	64.5	27.6	7.2	0.7	0.0	4.56

30. If the Zoo offered a mobile app, what features/functionalities would you find most useful? ***(first asked in 2017)***

664 respondents produced 996 distinct responses.

2017 %	% of Respondents	% of Responses
A Map, Interactive Map, Virtual Map	46.0	30.6
GPS/GPS Tracker, Location Finding, Route Planning, Directions, Show Closest Washrooms, Restaurants, Parking Spaces, Zoomo Stops, Gates	24.0	16.0
Stats, Facts, Info, News About Animals, Animals On/Off Display, New Animals in Exhibit	19.0	12.7
Schedules, Updates of Events, Show Times, Feedings, Talks, Wildlife Health Centre Schedule	19.6	13.1
Online Ticket Purchase: Entry, Parking, Rides, Restaurants	7.2	4.8
Wait Time, Crowd Size	5.4	3.6
Discounts, Coupons, Food Vouchers, Special Offers	4.1	2.7
Guides Tour, Auditory, Audio Guide	3.5	2.3
Games, Puzzles	1.7	1.1
Prices, Pricing	1.5	1.0
Videos, Webcam	0.9	0.6
Weather	0.9	0.6
Info About Zoo (Conservation)	0.9	0.6
Membership on the App	0.6	0.4
Wifi, Free Wifi	0.6	0.4

Translations	0.5	0.3
Bar Code at Every Exhibit	0.5	0.3
Other	0.6	0.4
Nothing, Wouldn't Use It	12.8	8.5
		100

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

98.7% (98.6% in 2016) of respondents rated the Zoo as offering "good to excellent" value, receiving an average rating of 4.5.

%	**2017**	2016	2015	2014	2013
Excellent (5)	**56.0**	58.8	62.0	63.0	50.2
Very Good (4)	**36.7**	34.9	33.1	30.9	41.9
Good (3)	**6.0**	4.9	4.3	4.7	6.9
Below Average (2)	1.2	0.9	0.4	0.9	0.7
Poor (1)	0.0	0.1	0.0	0.1	0.1
Not stated	0.0	0.4	0.2	0.4	0.1
Total	**100**	100	100	100	100
Average rating	**4.5**	4.5	4.6	4.6	4.4

32. Would you recommend the Zoo to a friend?

94.6% (94.9% in 2016) of respondents indicated that they would "likely/strongly" recommend the Zoo to a friend with an average rating of 4.6.

%	**2017**	2016	2015	2014	2013
Strongly (5)	**68.8**	71.4	71.8	73.2	64.4
Likely (4)	**25.8**	23.5	24.3	23.9	30.0
Neutral (3)	3.9	3.5	3.0	2.1	4.4
Not Likely (2)	1.2	0.5	0.5	0.6	0.6
Discourage (1)	0.3	0.4	0.0	0.1	0.5
Not stated	0.0	0.7	0.5	0.1	0.1
Total	**100**	100	100	100	100
Average rating	**4.6**	4.7	4.7	4.7	4.6
Top 2 box rating (Likely-strongly)	**94.6**	94.9	96.1	97.1	94.4