

To: Board of Management

From: Manager, Guest Relations

Subject: **2019 ON-SITE GUEST SATISFACTION SURVEY RESULTS**

Date: 2020-01-14

SUMMARY:

This report will provide a summary of the results from the 2019 On-site Guest Satisfaction survey fielded during the months of July and August.

RECOMMENDATION:

The Manager, Guest Relations recommends that:

- 1. The Toronto Zoo Board of Management receive this report for information.**

BACKGROUND:

Guest Relations conducts an annual guest satisfaction survey during the summer months. The objective is to measure overall customer satisfaction and value with the Zoo visit.

In 2019, a total of 830 surveys were completed over a 9-week period during the summer. A number of attributes including guest experience, food and retail, marketing, animal exhibit areas, signage and wayfinding, site conditions, and more were evaluated. The minimum sample size to ensure statistically sound data is 400 completed surveys. The survey questionnaire was carefully reviewed and resulted in questions being separated into two versions to reduce the length of time each guest was required to commit to completing the survey with some questions included on both versions. There were a total of 25 questions fielded with 426 respondents for version 1 and 404 for version 2.

COMMENTS:

Highlights of the 2019 guest survey include:

- Two key measures of performance – overall visit satisfaction and recommend to a friend continue to receive overwhelmingly positive ratings from respondents.

Overall satisfaction received an average rating of 4.6 on a scale of 1 to 5 (with 5 being excellent). 99.7% rated overall satisfaction as “good to excellent”, more importantly 96.3% of respondents selected one of the top two ratings of “very good” and “excellent”.

Recommend to a friend received an average rating of 4.8 on a scale of 1 to 5 (with 5 being strongly recommend), this is the highest rating over the past five years with 81.3% responding strongly recommend. This is a significant 10% shift from “likely” to “strongly” with the previous four years ranging from 68.8% to 71.8% strongly recommend.

- When asked “What prompted your visit today?” the overwhelmingly highest response was “to see animals” with 62.1% of responses falling into this grouping. Included in the “Other” category is “Family Outing” which was the second highest rated group of responses at 12.1%.
- Zoo visitation continues to be a day-long event with an average length of stay of 4.6 hours.
- The Zoo continues to rely heavily on local market with Toronto/GTA representing 64.6% respondents and an additional 18.7% outside the GTA but within Ontario. Visits from outside the Province, the US and International dropped to 16.7% of total respondents (19.8% in 2018 and 25.9% in 2017). The trend over the last four years shows increasing visitation from within Ontario and decreasing visitation from the rest of Canada, the US and International.
- The primary zoo demographic is still young families with children under 13. 79.5% of respondents have at least one child in the group and 54.8% indicated having two children or more in the group. The average children count is 2.0 which is consistent with the preceding two years.
- 8.7% of respondents replied “yes” to having been influenced by Toronto Zoo advertising before their visit to the Zoo (a decrease from 12.0% in 2018).
- Of those who were influenced by advertising 35.1% first mentioned Outdoor Billboard which is a 20% increase from 2018. Television Advertising was no longer the highest first mention and decreased to 21.6% of respondents in 2019 (32.9% in 2018). Other notable first mention increase was Online Advertising which increased from 13.2% in 2018 to 21.6% in 2019.

Other noteworthy feedback from the summer survey include:

- Overall satisfaction with the food experience continues to be rated well with an average rating of 4.4 out of 5 (with 5 being excellent) and 97.9% of respondents rating “good to excellent”.
- The most visited attraction continues to be the African Savanna with 87.9% of responses, followed by the Africa Rainforest Pavilion (79.5%) and Indo-Malaya Pavilion (75.7%). Over 70% of respondents visited Tundra Trek and Gorilla Rainforest and over 60% indicated having visited Americas Pavilion, Australasia Pavilion, Malayan Woods Pavilion and Eurasia Wilds.
- When asked “What is the role of a Zoo today?” 45.1% of respondents identified “Education/A Place of Learning”. When asked “Which of the following statements

best defines the Toronto Zoo?” 35.7% of respondents selected “A Fun Family Destination” and 31.9% selected “A Place to See and Connect with Wildlife From Around the World” while “A Place of Learning” was selected by 18.4% of respondents. On a 5-point scale with 5 being strongly agree and 1 being strongly disagree, the Zoo rated highly on all four statements including an average rating of 4.8 for “A Fun Family Destination” and 4.6 for “A Place of Learning”

- Respondents were asked to rate several attributes on a scale of 1 to 5 (5 being excellent). Overall there was an increase in ratings of almost all attributes. “Employee Helpfulness” and adventures Conservation Carousel and Tundra Trek were the top three rated attributes.

CONCLUSION:

The survey provides an important measure of our guest experience and overall satisfaction, this critical information supports various management strategies, practices and offers. The survey indicates that the Zoo continues to perform very well in key areas with an average collective attribute rating of 4.54 on a 1 to 5 scale, with 5 being excellent and 1 being poor. Key metrics of “overall satisfaction” and “recommend to a friend” were both rated highly with respective ratings of 4.6 and 4.8. We will be using the results of this survey as insight to improve the guest experience in specific areas.

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ATTACHMENT:

2019 Summer Survey Results & Analysis

TORONTO ZOO 2019 ON-SITE GUEST SURVEY RESULTS

Methodology

Guest Relations seasonal staff completed 830 guest surveys between July and August 2019. Guests were selected randomly and included regular guests, members, and tour groups. The poll included both males and females. 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 guests 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 guests 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:

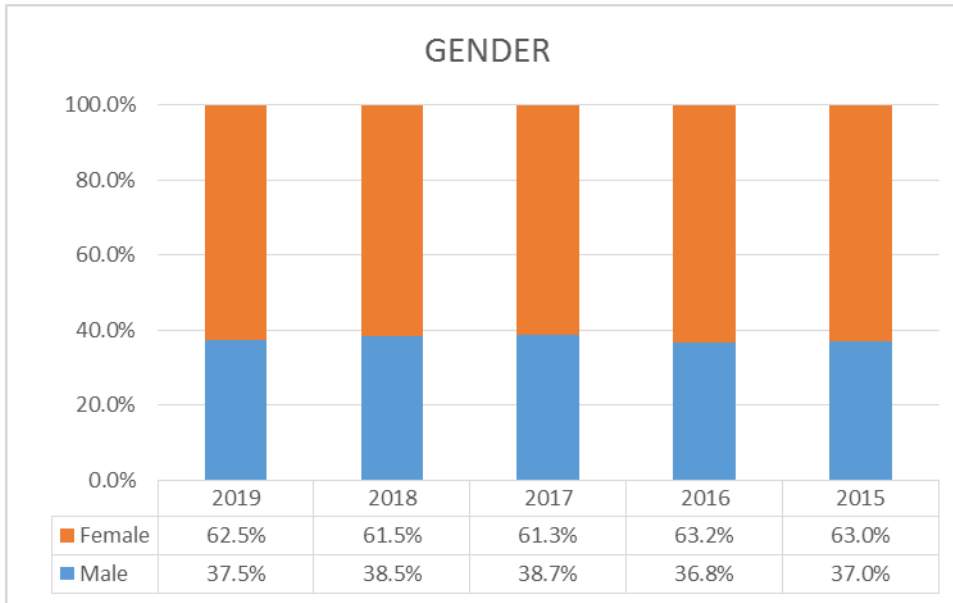
2019 = 830	2018 = 741	2017 = 664	2016 = 797
2015 = 800	2014 = 813	2013 = 821	2012 = 849

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

RESULTS AND ANALYSIS

1. Gender.

Of the 830 respondents, there were 519 (62.5%) female respondents (456 or 61.5% in 2018) and 311 (37.5%) male respondents (285 or 38.5% in 2018).

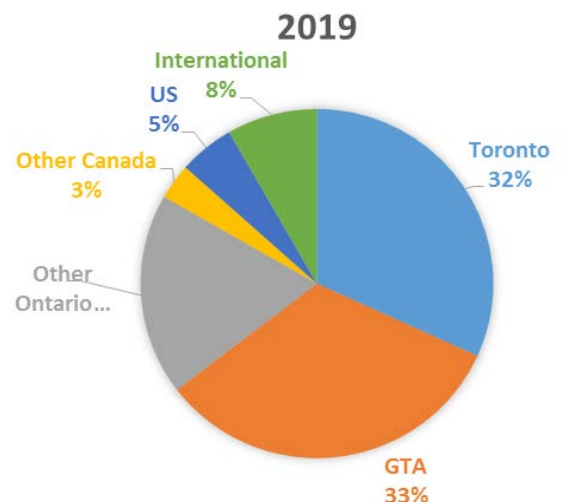


2. Where is your group from?

Using the Admits point-of-sale system to field the postal code survey for every third admission transaction processed at the gate, attendance to the Zoo is still highly local with 64.6% from the Toronto/GTA (60.8% in 2018). Total Ontario guests was slightly higher than the previous year at 83.3% (80.2% in 2018) of total surveyed. US and International guests decreased slightly compared to 2018 with 5.1% and 8.3% (compared to 6.5% and 9.4% in 2018). There was a total of 88,987 collected data from January 1 – October 10 with 3,735 declined/invalid responses, for a net sample size of 85,252.

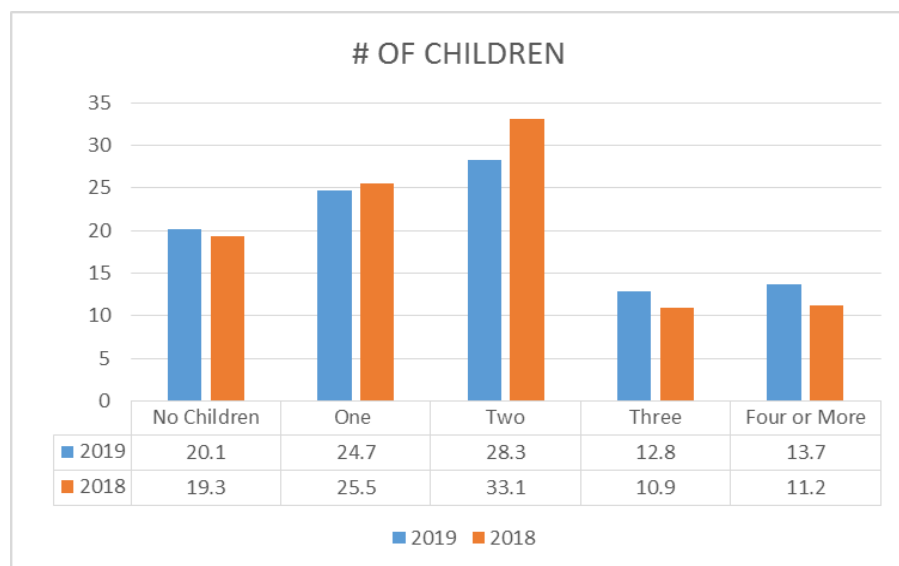
%	2019*	2018*	2017	2016	2015
Toronto	31.8	30.7	24.2	25.8	26.9
GTA	32.8	30.1	28.6	26.6	31.7
Other Ontario	18.7	19.4	21.3	21.2	22.4
Sub-total Ontario%	83.3	80.2	74.1	73.6	81.0
Other Canada	3.3	3.9	5.9	6.1	4.6
US	5.1	6.5	8.2	8.8	6.4
International	8.3	9.4	11.8	11.5	8.0
Total	100	100	100	100	100

*Includes data collected from January 1 to October 10, 2019



3. How many children are there in your group?

79.5% of respondents have at least one child in the group (80.7% in 2018).



Average children count for the past five years as follows:

	2019	2018	2017	2016	2015
Average children count	2.0	2.0	2.0	1.8	1.8

The age of children continues to reflect families with young kids with 85.3% under the age of 13 (85.6% in 2018).

Age of Children %	2019	2018	2017	2016	2015
Under 3	26.5	25.5	24.2	28.2	22.2
3-12	58.8	60.1	56.8	56.2	62.8
13-17	14.7	14.3	19.0	15.6	15.0
Total	100	100	100	100	100

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

426 respondents produced 563 distinct responses. "Previous Visit(s)" and "Toronto Zoo Website" were again the top two responses selected at 38.9% and 29.7% respectively.

% of Responses	2019	2018	2017
Previous Visit(s)	38.9	38.2	29.9
Toronto Zoo Website	29.7	27.9	28.9
Referral	9.1	10.5	14.3
Search Engines (Google, Bing, etc)	9.8	8.8	12.1
Toronto Zoo Social Media (FB, Twitter, Instagram)	4.1	2.2	2.4
Travel Websites (Expedia, Trip Advisor, Yelp)	3	3.7	2.1
Other	3.8	5.3	4.6
None Mentioned	1.7	3.4	5.7
Total	100	100	100

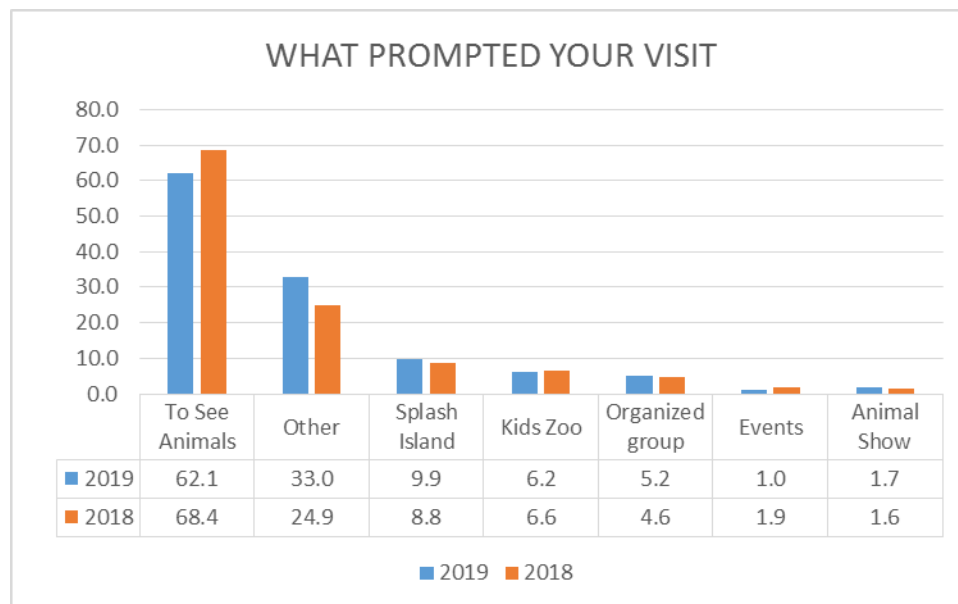
5. What is the typical way you get your news? (first asked in 2017)

426 respondents produced 660 responses. Social media (Twitter, FB, YouTube, etc) received the most mentions as a news source at 49.5% of respondents, up from 44.9% in 2018. 45.5% of respondents identified Online Newspaper as their news source which is also an increase from 41.7% in 2018.

%	2019	2018	2017
Online Newspaper	45.5	41.7	44.3
Social Media (Twitter, FB, YouTube, etc)	49.5	44.9	33.3
TV News Broadcasting	32.6	27.7	28.3
Printed Newspaper	10.6	8.9	12.3
Mobile Phone	0.5		12.2
Mobile Device (ipad, Tablet etc)	2.3		5.9
Radio	12.0	12.3	
Other	1.2	2.0	4.1
Not Interested in News	0.7		8.9

6. What prompted your visit today?

This survey question is a revision from prior year's question but with a revised and shorter list of response grouping from 2018 onwards. The overwhelming response with 62.1% of respondents stating was "To see animals" (68.4% in 2018). "Other" responses included Family Outing (12.1%), Day Off/Vacation (5.2%), Weather (3.5%), etc.



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

For 2019, 83.5% of respondents spent 3 or more hours at the Zoo (89.8% in 2018). A Zoo visit continues to be a day-long event with an average length of stay of **4.6 hours**.

Length of stay %	2019	2018	2017	2016	2015
2 hours or less	1.7	0.8	3.5	0.8	1.2
Over 2 to 3 hours	14.8	9.4	9.3	11.6	14.2
Over 3 to 4 hours	31.1	36.0	25.9	27.0	32.5
Over 4 to 5 hours	26.9	30.5	32.1	29.4	26.9
Over 5 to 6 hours	15.5	17.0	21.4	20.5	16.8
Over 6 hours	10	6.3	7.8	10.7	8.4
Not stated					
Total	100	100	100	100	100
Average stay	4.6	4.6	4.7	4.8	4.6

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

The percentage of respondents influenced by Zoo advertising prior to their visit declined with 37 out of 426 respondents (8.7%) responding “Yes”.

%	2019	2018	2017
Yes	8.7	12.0	23.0
No	91.3	88.0	77.0
Total	100	100	100

9. Where have you seen or heard Toronto Zoo advertising this year?

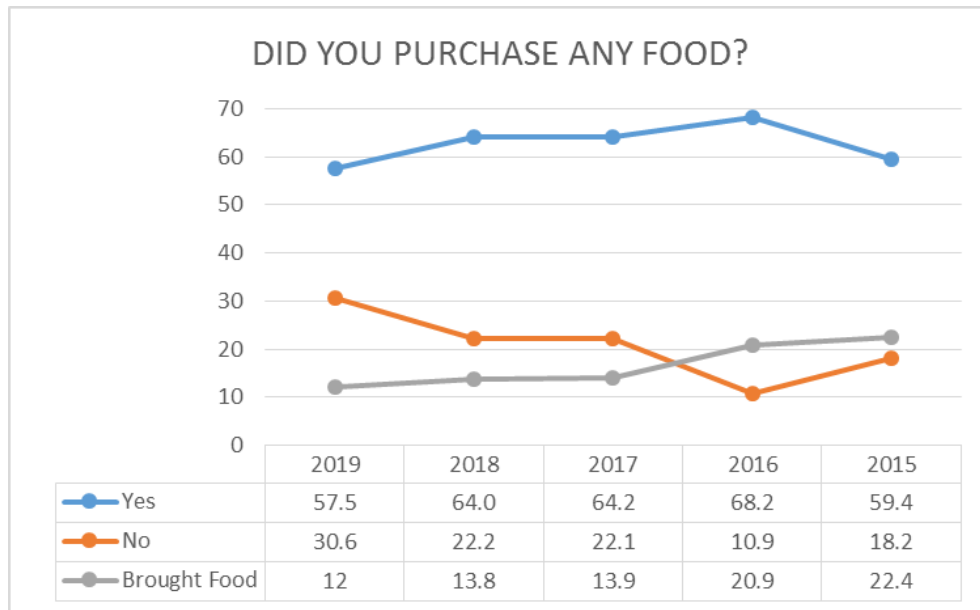
Asked of 37 respondents who answered Yes to having been influenced by Zoo advertising to visit the Zoo, “outdoor billboard” received the most first mention with **35.1%** responses, followed by ‘television advertising” and “on-line advertising” both at 21.6%.

UNAIDED %	A-First Mention		B-Second Mention		C-Third Mention	
	2019	2018	2019	2018	2019	2018
Newspaper Advertising	5.4	1.3	5.4	1.1		1.1
Television Advertising	21.6	32.9	10.8	2.2		1.1
Radio	5.4	4.0		3.4	5.4	
Outdoor Billboard	35.1	15.8	5.4	7.9	5.4	
Brochure/Guide Book/Tourist Publication		1.3	5.4	1.1		
Magazine Advertisement		7.9	5.4			
On-line Advertising	21.6	13.2	2.7	6.7	5.4	1.1
Social Media	10.8	7.9	8.1	2.2	10.8	
Promotional/Discount Coupon Offers		2.6	5.4	2.2	2.7	3.4
Groupon		1.3				1.1
Other		11.8	2.7	2.2		2.2
None Mentioned			48.6	71.0	70.3	90.0

UNAIDED %	A-First Mention		B-Second Mention		C-Third Mention	
Total	100	100	100	100	100	100

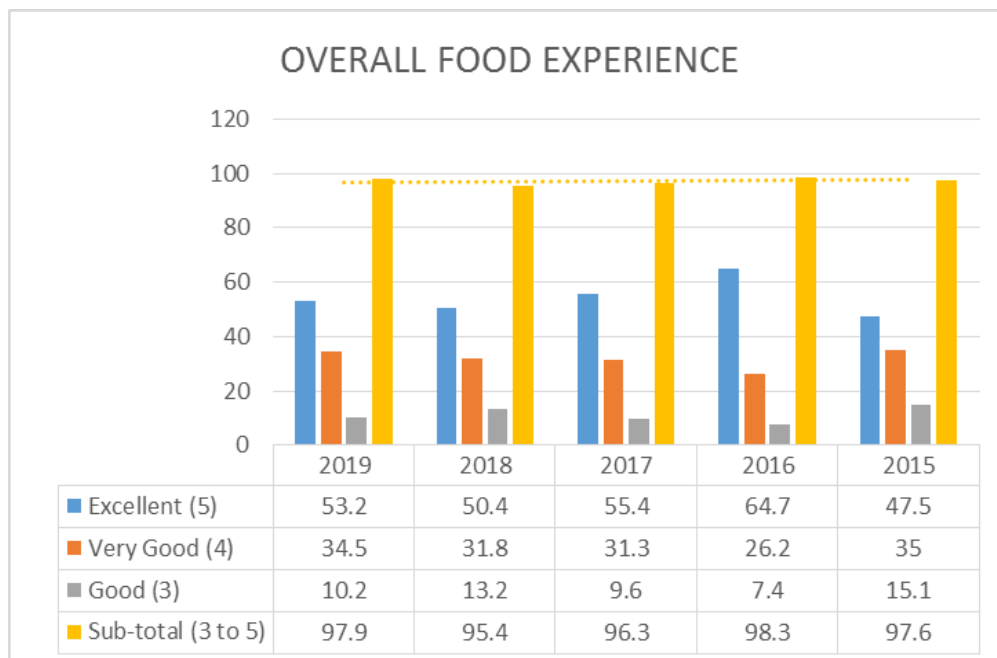
10. Did you purchase any food while you were here today?

57.5% of respondents purchased food in 2019 down 6.5% from 2018. Incidence of food purchase on site is trending downwards, though this is not being offset by an increase in respondents bringing their own food.



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

Satisfaction with overall food experience is favourable with respondents giving a rating of 97.9% (95.4% in 2018) of “good to excellent” with an average rating of 4.4.



	2019	2018	2017	2016	2015
Average	4.4	4.3	4.4	4.5	4.3

12. Volunteered comments by those who purchased food.

63 respondents provided 67 distinct comments about their food experience. “Too expensive/Pricy” and “need more variety/selection” topped the list of volunteered comments.

Comments %	2019	2018	2017	2016	2015
Too expensive / pricy	19.1	18.8	18.1	17.0	23.2
Good/Very good / Great / Good value / variety	14.6	12.5	18.1	19.0	33.5
Poor quality / cold / not fresh	11.8	6.3	14.5	5.0	6.7
Need more variety / more selection	20.6	12.5	16.9	7.0	11.0
Tables are not clean / clear the tables	7.4	9.4	2.4	9.0	3.9
Friendly / efficient / very fast / quick service	5.9	4.2	7.2	10.0	5.5
Slow / slow service / long wait / long lines	7.4	16.7	10.8	11.0	4.3
Need more restaurants/open longer	4.4				
Need more staff / appear rushed / rude	4.4	8.3	8.4	6.0	3.7
Other mentions	4.4	11.3	3.6	16.0	6.4
Total	100	100	100	100	100

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

Of the 404 respondents, the most visited attraction continues to be the **African Savanna** with 87.9%, followed by the **African Rainforest Pavilion** with 79.5% visiting and **Indo-Malaya Pavilion** is in third place at 75.7%. Over 70% of guests surveyed indicated having visited the **Tundra Trek** and **Gorilla Rainforest**. In addition, over 60% of guests surveyed also indicated having visited Eurasia Wilds, Americas Pavilion, Australasia Pavilion and Malaysian Woods Pavilion.

%	2019	2018	2017	2016	2015
Giant Panda Experience			73.6	70.8	86.9
Wildlife Health Centre	18.1	18.9			
Tundra Trek	73.8	71.8	79.1	77.7	76.0
Gorilla Rainforest	73.8	75.0	74.5	73.4	75.1
African Savanna	87.9	88.8	84.9	80.4	82.4
Splash Island	42.1	31.7	26.7	33.1	33.8
Kids Zoo	39.1	35.6	28.0	32.7	36.6
Animal Show	20.5	15.7	14.8	17.9	17.6
African Rainforest Pavilion	79.5	77.7	76.1	72.5	74.1
Americas Pavilion	67.6	61.0	61.3	62.2	62.0
Australasia Pavilion	66.8	63.0	70.2	62.9	65.5
Indo-Malaya Pavilion	75.7	78.3	74.1	69.1	70.6
Malayan Woods Pavilion	66.1	64.2	64.0	53.8	55.1
Eurasia Wilds	68.6	54.5	60.5		
Canadian Domain	37.9	35.6	39.0		

The average overall satisfaction rating for the exhibits was **4.5** on a on a scale of 1 to 5 with 5 being excellent and 1 being poor.

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

830 respondents produced 1186 distinct responses as received verbatim. 45.1% of the respondent answers related to **Education, A Place of Learning** as the role of a Zoo today, followed by Entertainment and Conservation.

%	2019	2018	2017
Education, A Place of Learning	45.1	42.6	40.4
Entertainment	23.9	21.3	16.4
Conservation	18.1	19.0	15.4
Protecting, Caring for Animals	7.7	8.0	13.6
Preservation, Protecting Endangered Animals	10.7	10.8	13.0
Family Destination, Outing	8.4	9.4	11.6
To See Animals, Variety of Animals	13.1	14.6	11.4
To Educate Kids About Animals	6.9	9.7	6.5
Environment, Protecting the Environment	2.7	1.1	1.8
Research	0.4	0.8	1.5
Breeding	0.6	1.3	
Exercise	0.5	0.9	
Other	0.7	0.5	
Don't Know	0.2	0.4	2.7
No Answer	1.7	3.1	0.8

**B) Which of the following statements BEST defines the Toronto Zoo?
Respondents were provided with the four possible response options. (first asked in 2017)**

35.7% of the 830 respondents see the Toronto Zoo, foremost, as a fun family destination. A place to see and connect with wildlife from around the world had a significant increase with 31.9% of respondents stating this best defines the Zoo.

%	2019	2018	2017
A Place of Learning	18.4	23.1	23.9
A Fun Family Destination	35.7	40.9	34.5
A Place That Saves and Protects Species and Their Habitats	14.0	16.3	15.7
A Place to See and Connect with Wildlife From Around the World	31.9	19.7	25.6
None Mentioned	0.0	0.0	0.3
Total	100	100	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:**

	2019	2018	2017	2016
A place of learning	4.6	4.6	4.5	
A fun family destination	4.8	4.7	4.7	
A place that saves and protects species and their habitats	4.5	4.5	4.5	4.6
A place to see and connect with wildlife from around the world	4.7	4.7	4.6	4.6

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

- Mention of animals: about birds, polar bears, gorillas, penguins, rhinos, animals didn't know about, diversity, snakes, frogs, turtles, endangered animals, breeding endangered animals, hippos, giraffes, big cats, camels, speed of animals, monkeys, orangutans, grizzly bear, kangaroo, tree kangaroo, jelly fish, capybara, yak, hyena, elephants, red pandas, mountain goats/sheep, white lions, komodo dragon, other specific animals (63.3%)
- Zoo related: taking care of environment, conservation, preservation, animals well taken care of, money spent on food and health, size of zoo, lots of walking, large, best time to come is early morning, cool day, not a weekend, other zoo related info (5.4%)
- Plastic/Garbage in the oceans (4.8%)
- Other: animal poop becoming energy, natural energy use, palm oil, effect on rainforest, orangutans, other single mentions (3.3%)

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

Collectively, all attributes averaged **4.54** on a scale of 1 to 5, with 5 being Excellent and 1 being Poor. The average rating is higher with the average ratings from last year at 4.44. 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 "Tundra Air", "Employee Helpfulness", "Conservation Carousel", and "Volunteer Helpfulness" with average ratings of 4.75, 4.70, 4.69 and 4.68 respectively. The lowest ranked attributes are "Washrooms", "Value for Money", "Animal Exhibit Signs" and "Visitor Guide" with average ratings of 4.01, 4.31, 4.34, and 4.37 respectively.

SITE EXPERIENCES	2019	2018	2017
Cleanliness	4.55	4.45	4.36
Variety of Exhibits	4.55	4.54	4.53
Grounds & Landscaping	4.64	4.52	4.49
Washroom – Low 1	4.01	3.76	3.70
Picnic Areas	4.57	4.44	4.37

SERVICE EXPERIENCES	2019	2018	2017
Employee Helpfulness – <i>Top 2</i>	4.70	4.70	4.66
Volunteer Helpfulness	4.68	4.73	4.67
Retail Gift Shops	4.38	4.25	4.29
Admission Process	4.65	4.48	4.27

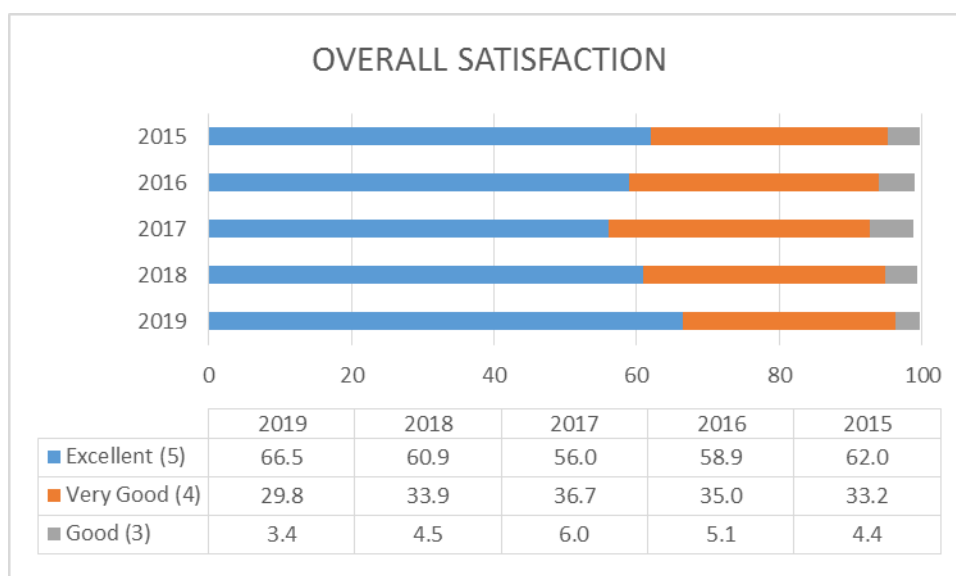
ADVENTURE & ATTRACTIONS	2019	2018	2017
Zoomobile	4.63	4.62	4.54
Gorilla Climb Ropes Course	4.62	4.57	4.44
Conservation Carousel – <i>Top 3</i>	4.69	4.62	4.51
Tundra Air – <i>Top 1</i>	4.75	4.40	4.46
Wild Rouge Zipline	4.66	4.45	

WAYFINDING	2019	2018	2017
Animal Exhibit Signs – <i>Low 3</i>	4.34	4.25	4.12
Visitors Guide - Site Map	4.37	4.31	4.12

OTHER ATTRIBUTES	2019	2018	2017
Value for Money – <i>Low 2</i>	4.31	4.23	4.24
Green Practices	4.55	4.53	4.52

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

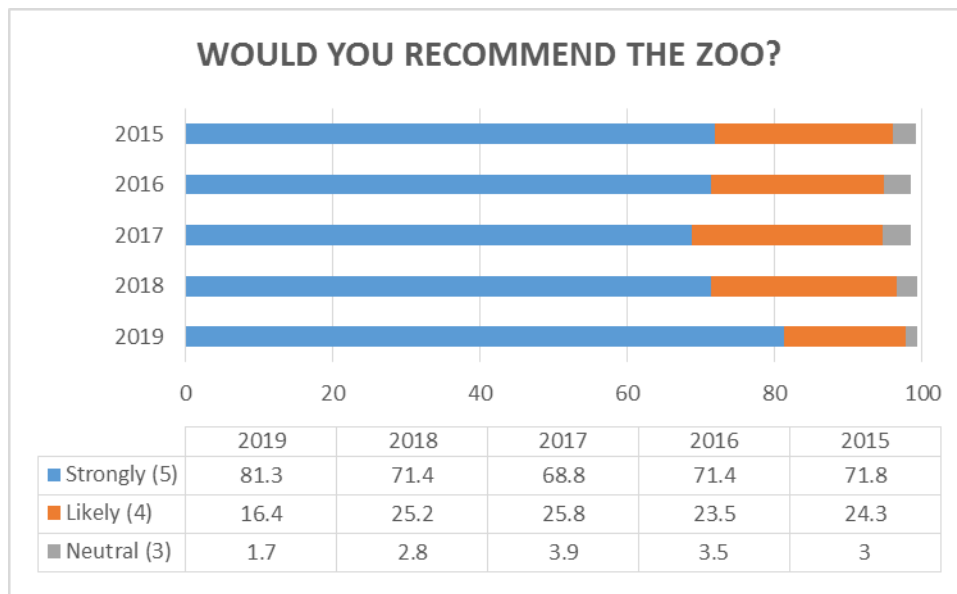
99.7% (99.3% in 2018) of respondents rated the Zoo as offering “good to excellent” value, receiving an average rating of 4.6. The top rating of excellent increased by 5.6%.



	2019	2018	2017	2016	2015
Average rating	4.6	4.5	4.5	4.5	4.6

17. Would you recommend the Zoo to a friend?

97.7% (96.6% in 2018) of respondents indicated that they would “likely/strongly” recommend the Zoo to a friend with an average rating of 4.8. There is a significant shift to strongly recommend with a 9.9% increase over 2018.



	2019	2018	2017	2016	2015
Average rating	4.8	4.7	4.6	4.7	4.7