**TORONTO ZOO**
**2022 GUEST SURVEY RESULTS**

## Number of Survey Respondents:

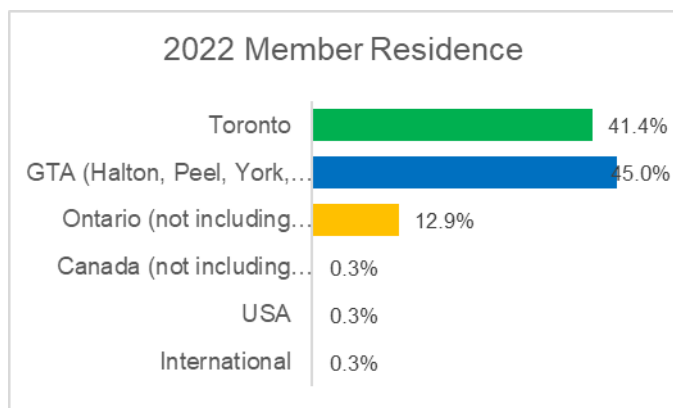|  | 2022 | 2021 |
|---|---|---|
| Total # | 7,340 | 10,164 |
| Member % | 5.3 | 30.1 |
| Non Member % | 94.7 | 69.9 |

## 1. Where do you reside?

Toronto Zoo visitation was highly localized in 2022 with 86.4% of Member and 56.5% of Non Member respondents coming from Toronto/GTA. Visitation from outside of Canada has not yet recovered to pre-pandemic levels. In 2022, 3.4% of respondents were from the US or International verses 13.9% in 2019.
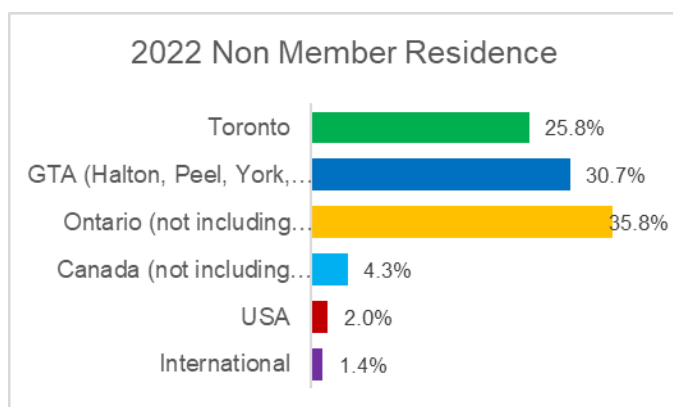
Member

| % | 2022 | 2021 |
|---|---|---|
| Toronto | 41.4 | 43.7 |
| GTA | 45.0 | 49.2 |
| Other Ontario | 12.9 | 6.9 |
| Other Canada | 0.3 | 0.1 |
| US | 0.3 | 0.1 |
| International | 0.3 | 0.1 |

Non Member

| % | 2022 | 2021 |
|---|---|---|
| Toronto | 25.8 | 30.7 |
| GTA | 30.7 | 35.8 |
| Other Ontario | 35.8 | 29.3 |
| Other Canada | 4.3 | 3.2 |
| US | 2.0 | 0.5 |
| International | 1.4 | 0.4 |



2022 Member Residence

| | |
|---|---|
| Toronto | 41.4% |
| GTA (Halton, Peel, York,... | 45.0% |
| Ontario (not including... | 12.9% |
| Canada (not including... | 0.3% |
| USA | 0.3% |
| International | 0.3% |



2022 Non Member Residence

| | |
|---|---|
| Toronto | 25.8% |
| GTA (Halton, Peel, York,... | 30.7% |
| Ontario (not including... | 35.8% |
| Canada (not including... | 4.3% |
| USA | 2.0% |
| International | 1.4% |

**2. What are the ethnic or cultural origins of your ancestors?** Ethnic origin refers to your 'roots' and should not be confused with citizenship, nationality, or place of birth. The following question regarding ethnicity is based on the categories used by Statistics Canada when categorizing race or ethnicity.

Member

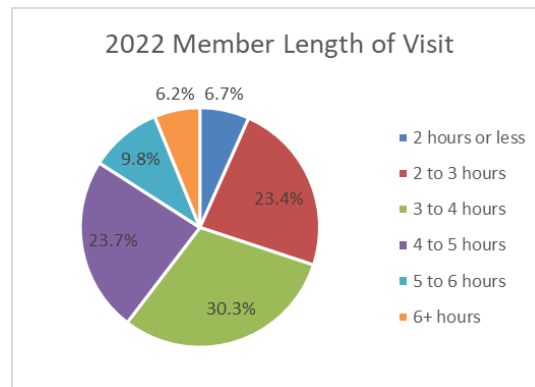| % | 2022 | 2021 |
|---|---|---|
| British Isles (e.g., English, Irish, Scottish) | 45.2 | 41.3 |
| French | 5.9 | 5.1 |
| Other European (e.g, German, Russian, Italian, Norwegian) | 25.2 | 27.8 |
| Aboriginal (e.g, Inuit, Métis, North American Indian) | 2.1 | 2.2 |
| Other North American (e.g., Canadian, American, Newfoundlander, Québécois) | 20.1 | 18.8 |
| Caribbean (e.g., Jamaican, Barbadian, Cuban, West Indian) | 2.4 | 5.0 |
| African (e.g., South African, Ethiopian, Nigerian, Zimbabwean) | 1.0 | 0.6 |
| Arab/West Asian (e.g., Lebanese, Moroccan, Iranian, Turk) | 2.6 | 1.5 |
| South Asian (e.g., East Indian, Pakistani, Goan, Sri Lankan) | 6.4 | 4.8 |
| Chinese | 11.3 | 12.1 |
| Other East and Southeast Asian (e.g., Filipino, Vietnamese, Korean, Japanese) | 4.1 | 5.8 |
| Oceania (e.g., Australian, New Zealander, Fijian, Samoan) | 0.5 | 0.3 |
| Jewish (non-denominational) | 3.6 | 4.5 |
| Other | 1.8 | 2.9 |
| Prefer not to answer | 7.7 | 8.2 |

Non Member

| % | 2022 | 2021 |
|---|---|---|
| British Isles (e.g., English, Irish, Scottish) | 37.0 | 36.9 |
| French | 6.8 | 6.5 |
| Other European (e.g, German, Russian, Italian, Norwegian) | 26.4 | 28.8 |
| Aboriginal (e.g, Inuit, Métis, North American Indian) | 3.2 | 2.9 |
| Other North American (e.g., Canadian, American, Newfoundlander, Québécois) | 20.8 | 18.0 |
| Caribbean (e.g., Jamaican, Barbadian, Cuban, West Indian) | 3.8 | 5.8 |
| African (e.g., South African, Ethiopian, Nigerian, Zimbabwean) | 2.0 | 1.5 |
| Arab/West Asian (e.g., Lebanese, Moroccan, Iranian, Turk) | 3.0 | 2.6 |
| South Asian (e.g., East Indian, Pakistani, Goan, Sri Lankan) | 7.6 | 7.4 |
| Chinese | 4.9 | 4.5 |
| Other East and Southeast Asian (e.g., Filipino, Vietnamese, Korean, Japanese) | 4.1 | 4.6 |
| Oceania (e.g., Australian, New Zealander, Fijian, Samoan) | 0.4 | 0.3 |
| Jewish (non-denominational) | 2.4 | 2.5 |
| Other | 3.0 | 4.7 |
| Prefer not to answer | 9.6 | 9.5 |

### 3. Approximately how long did you spend at the Zoo?

For 2022, 84.4% of non member respondents spent 3 or more hours at the Zoo (For 2019, 83.5% of respondents spent 3 or more hours at the Zoo (80.9% in 2021). Member respondents reported shorter visit times than non members with 70.0% visiting for 3 or more hours in 2022. This is a significant increase over 2021 where 46% of members respondents visited for 3 or more hours.
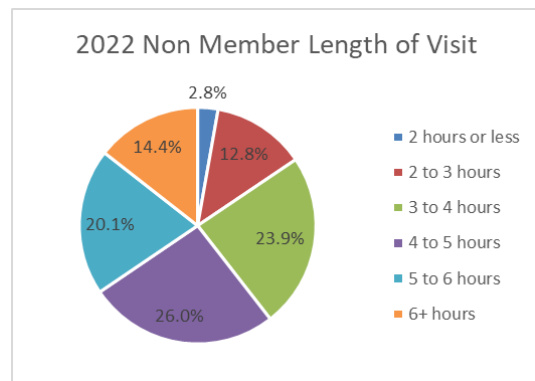
Member

| % | 2022 | 2021 |
|---|---|---|
| 2 hours or less | 6.7 | 19.3 |
| 2 to 3 hours | 23.4 | 34.8 |
| 3 to 4 hours | 30.3 | 25.0 |
| 4 to 5 hours | 23.7 | 12.3 |
| 5 to 6 hours | 9.8 | 6.1 |
| 6+ hours | 6.2 | 2.6 |

Non Member

| % | 2022 | 2021 |
|---|---|---|
| 2 hours or less | 2.8 | 3.6 |
| 2 to 3 hours | 12.8 | 15.5 |
| 3 to 4 hours | 23.9 | 27.0 |
| 4 to 5 hours | 26.0 | 26.0 |
| 5 to 6 hours | 20.1 | 17.4 |
| 6+ hours | 14.4 | 10.5 |

**2022 Member Length of Visit**

- 2 hours or less: 6.7%
- 2 to 3 hours: 23.4%
- 3 to 4 hours: 30.3%
- 4 to 5 hours: 23.7%
- 5 to 6 hours: 9.8%
- 6+ hours: 6.2%

**2022 Non Member Length of Visit**

- 2 hours or less: 2.8%
- 2 to 3 hours: 12.8%
- 3 to 4 hours: 23.9%
- 4 to 5 hours: 26.0%
- 5 to 6 hours: 20.1%
- 6+ hours: 14.4%

### 4. Did you purchase food during your visit?

66.9% of non member respondents purchased food in 2022 which is consistent with 2021 responses. Just over half of member respondents purchased food during their visit which is again consistent with 2021 results.

Member

| % | 2022 | 2021 |
|---|---|---|
| Yes | 56.6 | 53.9 |
| No | 43.4 | 46.1 |

Non Member

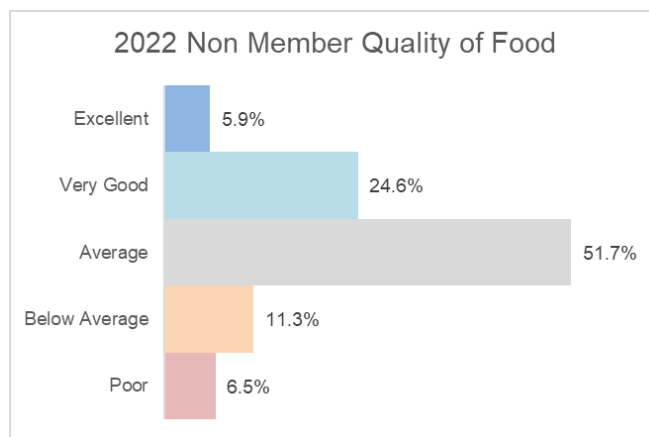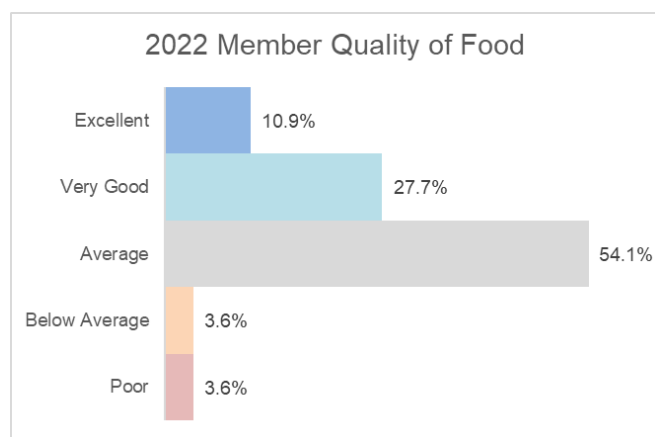| % | 2022 | 2021 |
|---|---|---|
| Yes | 66.9 | 66.7 |
| No | 33.1 | 33.3 |

## 5. How would you rate your food purchase experience?

For 2022, 92.7% of member respondents rated quality of food as average or better (91.6% in 2021) and 81.4% rated quality of service as average or better (92.6% in 2021). Non member respondents rated quality of food lower with 82.2% average or better (84.9% in 2021) but were consistent with members on quality of service with 83.3% rating average or better (85.0% in 2021).
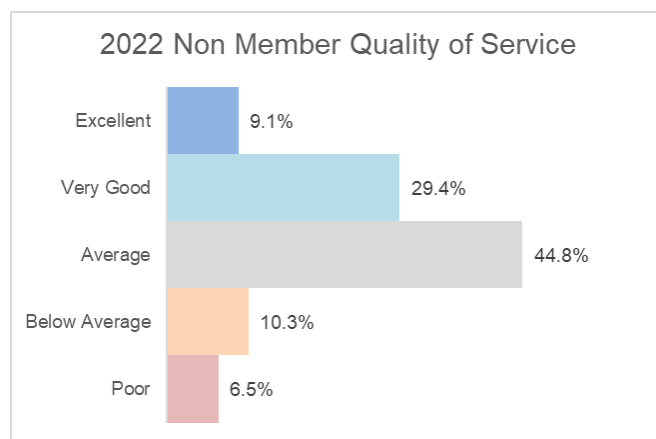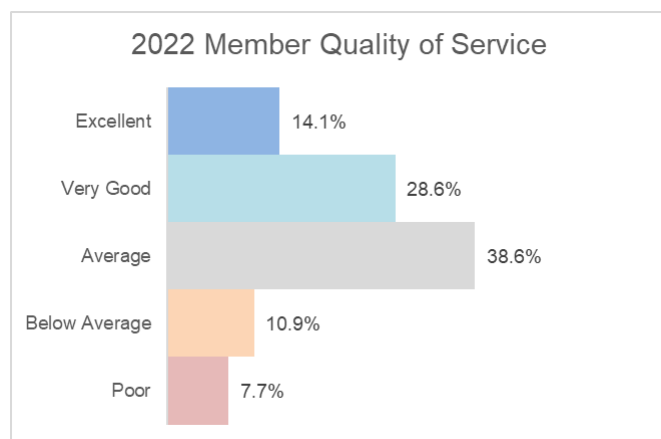
Quality of Food

| Average Rating (1-5 scale, 5 being excellent) | 2022 | 2021 |
|---|---|---|
| Member | 3.4 | 3.5 |
| Non Member | 3.1 | 3.2 |

### 2022 Member Quality of Food

| | |
|---|---|
| Excellent | 10.9% |
| Very Good | 27.7% |
| Average | 54.1% |
| Below Average | 3.6% |
| Poor | 3.6% |

### 2022 Non Member Quality of Food

| | |
|---|---|
| Excellent | 5.9% |
| Very Good | 24.6% |
| Average | 51.7% |
| Below Average | 11.3% |
| Poor | 6.5% |

Quality of Service

| Average Rating (1-5 scale, 5 being excellent) | 2022 | 2021 |
|---|---|---|
| Member | 3.3 | 3.7 |
| Non Member | 3.2 | 3.4 |

### 2022 Member Quality of Service

| | |
|---|---|
| Excellent | 14.1% |
| Very Good | 28.6% |
| Average | 38.6% |
| Below Average | 10.9% |
| Poor | 7.7% |

### 2022 Non Member Quality of Service

| | |
|---|---|
| Excellent | 9.1% |
| Very Good | 29.4% |
| Average | 44.8% |
| Below Average | 10.3% |
| Poor | 6.5% |

**6. What areas or adventures did you attend today? How would you rate each area?**

The most visited areas for both member and non-member respondents were the African Savanna, African Rainforest Pavilion and Tundra Trek. Member respondents on average rated areas and adventures higher than non member respondents. Members rated Wildlife Health Centre and Conservation Carousel the highest. African Savanna, African Rainforest Pavilion, Indo-Malaya Pavilion, Splash Island and Conservation Carousel tied for the top ratings by non member respondents.
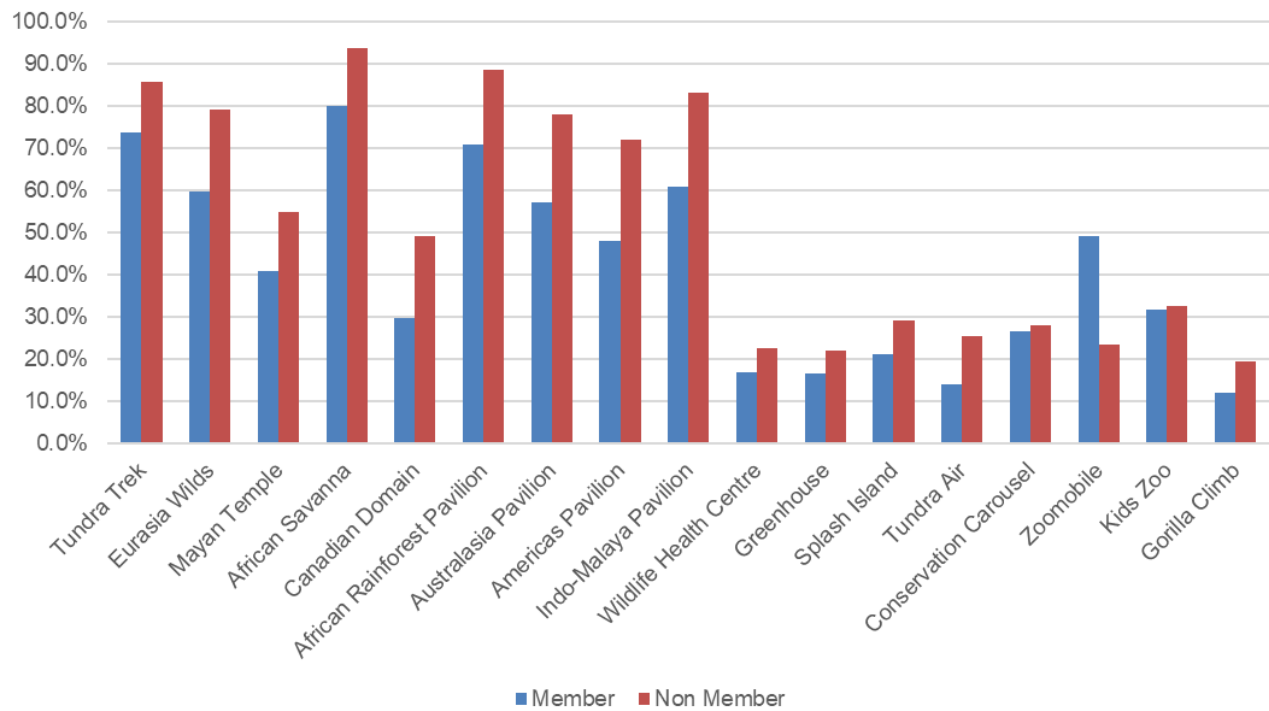
Member

| | 2022 % Attended | 2022 Rating | 2021 %Attended | 2021 Rating |
|---|---|---|---|---|
| Tundra Trek | 73.8 | 4.1 | 70.3 | 4.2 |
| Eurasia Wilds | 59.6 | 4.0 | 53.2 | 4.1 |
| Mayan Temple | 41.0 | 3.9 | 37.7 | 4.2 |
| African Savanna | 79.9 | 4.1 | 73.7 | 4.3 |
| Canadian Domain | 29.7 | 3.5 | 24.7 | 3.6 |
| African Rainforest Pavilion | 71.0 | 4.1 | 56.3 | 4.2 |
| Australasia Pavilion | 57.1 | 4.1 | 47.2 | 4.2 |
| Americas Pavilion | 48.1 | 4.0 | 36.8 | 4.2 |
| Indo-Malaya Pavilion | 60.9 | 4.1 | 49.8 | 4.2 |
| Wildlife Health Centre | 17.0 | 4.3 | 19.7 | 4.1 |
| Greenhouse | 16.7 | 4.2 | 17.6 | 4.0 |
| Splash Island | 21.2 | 4.2 | 22.8 | 4.3 |
| Tundra Air | 14.1 | 4.1 | 11.9 | 4.1 |
| Conservation Carousel | 26.7 | 4.3 | 30.7 | 4.1 |
| Kids Zoo | 31.7 | 3.8 | 34.1 | 4.0 |
| Gorilla Climb | 12.0 | 4.2 | 9.1 | 4.2 |
| Zoomobile | 49.2 | 4.1 | n/a | n/a |

Non Member

| | 2022 % Attended | 2022 Rating | 2021 %Attended | 2021 Rating |
|---|---|---|---|---|
| Tundra Trek | 85.8 | 3.6 | 85.0 | 3.8 |
| Eurasia Wilds | 79.2 | 3.6 | 77.2 | 3.7 |
| Mayan Temple | 54.9 | 3.5 | 56.6 | 3.7 |
| African Savanna | 93.7 | 3.8 | 94.0 | 4.0 |
| Canadian Domain | 49.1 | 2.9 | 47.9 | 3.2 |
| African Rainforest Pavilion | 88.4 | 3.8 | 84.7 | 4.0 |
| Australasia Pavilion | 78.0 | 3.7 | 73.7 | 3.8 |
| Americas Pavilion | 71.9 | 3.6 | 68.1 | 3.8 |
| Indo-Malaya Pavilion | 83.1 | 3.8 | 79.4 | 3.9 |
| Wildlife Health Centre | 22.7 | 3.6 | 14.1 | 3.8 |
| Greenhouse | 22.1 | 3.5 | 13.7 | 3.7 |
| Splash Island | 29.2 | 3.8 | 19.4 | 3.8 |
| Tundra Air | 25.5 | 3.6 | 24.3 | 3.7 |
| Conservation Carousel | 28.1 | 3.8 | 28.5 | 3.9 |
| Kids Zoo | 32.7 | 3.4 | 28.8 | 3.4 |
| Gorilla Climb | 19.6 | 3.7 | 16.1 | 3.9 |
| Zoomobile | 23.5 | 3.6 | n/a | n/a |

2022 % Attended Area & Adventure



2022 Average Rating Areas and Adventures
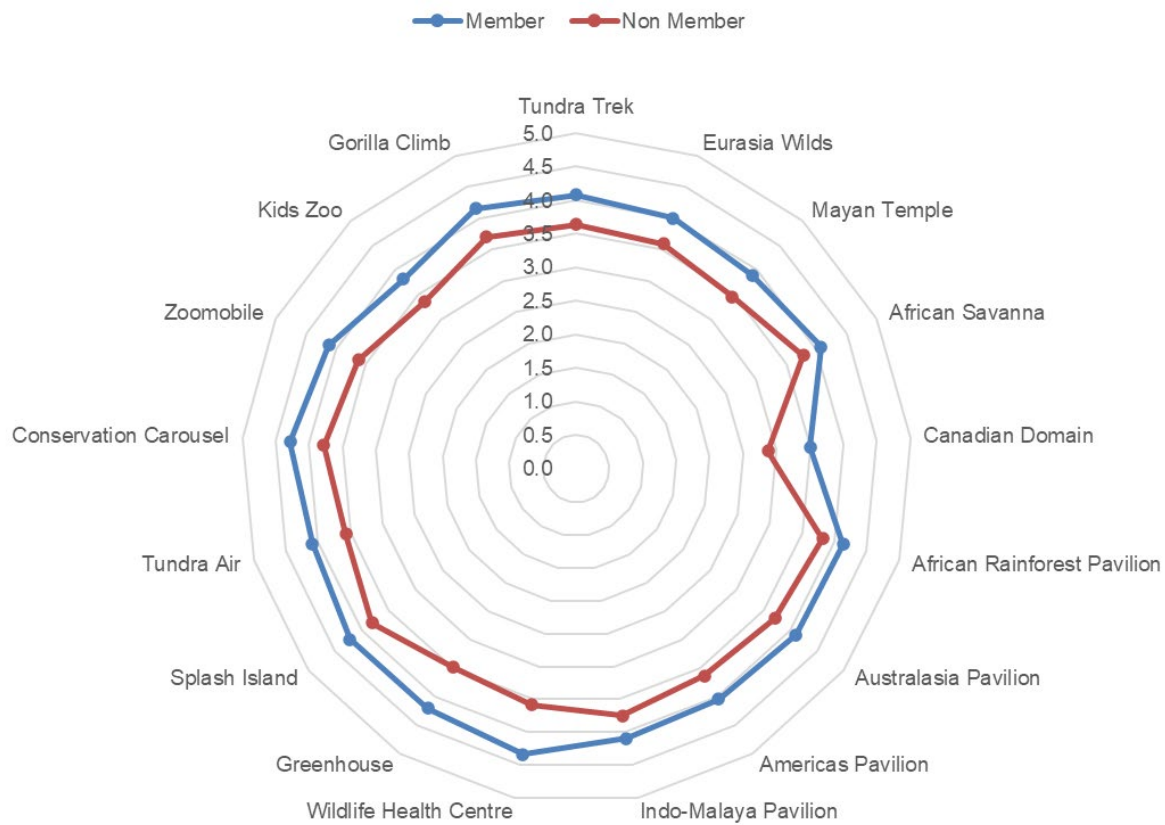
## 7. How do you rate the Zoo on the following attributes?

The top ranked attributes for both member and non member respondents were Volunteer and Employee helpfulness/knowledge. The lowest ranked attribute, Restaurant Services, was also the same for both. Following the trend of area and adventure ratings, member respondents ranked attributes higher than non members.
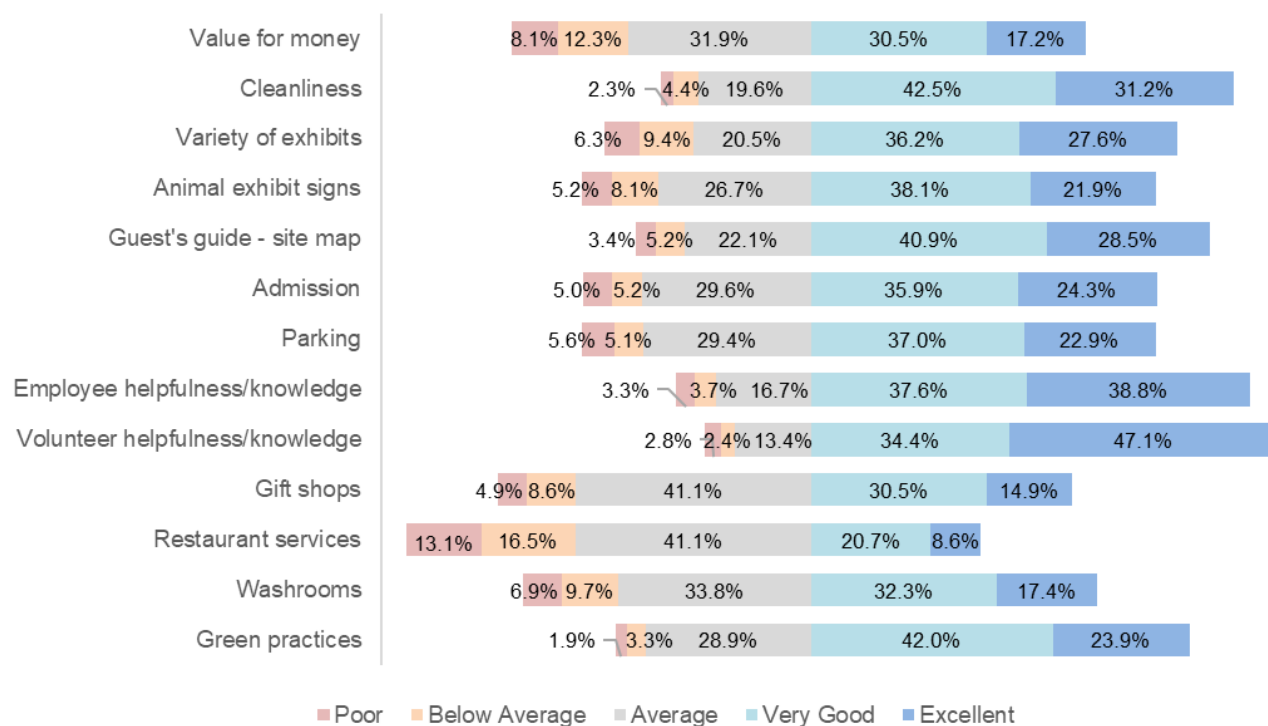
Member

|  | 2022 | 2021 |
|---|---|---|
| Value for money | 4.0 | 4.1 |
| Cleanliness | 4.2 | 4.4 |
| Variety of exhibits | 4.2 | 4.2 |
| Animal exhibit signs | 4.0 | 4.0 |
| Guest's guide - site map | 4.2 | 4.1 |
| Admission | 4.0 | 4.0 |
| Parking | 4.0 | 4.1 |
| Employee helpfulness/knowledge | 4.4 | 4.4 |
| Volunteer helpfulness/knowledge | 4.5 | 4.5 |
| Gift shops | 3.8 | 3.9 |
| Restaurant services | 3.2 | 3.5 |
| Washrooms | 3.7 | 3.8 |
| Green practices | 4.1 | 4.2 |

Non Member

|  | 2022 | 2021 |
|---|---|---|
| Value for money | 3.4 | 3.5 |
| Cleanliness | 4.0 | 4.0 |
| Variety of exhibits | 3.7 | 3.8 |
| Animal exhibit signs | 3.6 | 3.6 |
| Guest's guide - site map | 3.9 | 3.9 |
| Admission | 3.7 | 3.7 |
| Parking | 3.7 | 3.8 |
| Employee helpfulness/knowledge | 4.1 | 4.1 |
| Volunteer helpfulness/knowledge | 4.2 | 4.2 |
| Gift shops | 3.4 | 3.4 |
| Restaurant services | 3.0 | 3.1 |
| Washrooms | 3.4 | 3.4 |
| Green practices | 3.8 | 3.9 |

### 2022 Non Member Attribute Rating

| Attribute | Poor | Below Average | Average | Very Good | Excellent |
|---|---|---|---|---|---|
| Value for money | 8.1% | 12.3% | 31.9% | 30.5% | 17.2% |
| Cleanliness | 2.3% | 4.4% | 19.6% | 42.5% | 31.2% |
| Variety of exhibits | 6.3% | 9.4% | 20.5% | 36.2% | 27.6% |
| Animal exhibit signs | 5.2% | 8.1% | 26.7% | 38.1% | 21.9% |
| Guest's guide - site map | 3.4% | 5.2% | 22.1% | 40.9% | 28.5% |
| Admission | 5.0% | 5.2% | 29.6% | 35.9% | 24.3% |
| Parking | 5.6% | 5.1% | 29.4% | 37.0% | 22.9% |
| Employee helpfulness/knowledge | 3.3% | 3.7% | 16.7% | 37.6% | 38.8% |
| Volunteer helpfulness/knowledge | 2.8% | 2.4% | 13.4% | 34.4% | 47.1% |
| Gift shops | 4.9% | 8.6% | 41.1% | 30.5% | 14.9% |
| Restaurant services | 13.1% | 16.5% | 41.1% | 20.7% | 8.6% |
| Washrooms | 6.9% | 9.7% | 33.8% | 32.3% | 17.4% |
| Green practices | 1.9% | 3.3% | 28.9% | 42.0% | 23.9% |

8. **How would you rate your awareness and understanding of Conservation issues and impact affecting wildlife and wild spaces?**

For member respondents there was an 11.9% change in awareness (6.8% in 2021) from did not know much/knew a little to aware of some issues/conservation expert after their Zoo visit. For non member respondents there was an 8.3% change in awareness (7.5% in 2021).

Member

| % | 2022 Before Visit | 2022 After Visit | 2022 Change in Awareness | 2021 Before Visit | 2021 After Visit | 2021 Change in Awareness |
|---|---|---|---|---|---|---|
| Did not know much about | 9.0 | 6.2 | -2.8 | 10.1 | 7.8 | -2.2 |
| I knew a little bit | 24.9 | 15.9 | -9.0 | 24.3 | 19.8 | -4.6 |
| I was aware of some issues | 58.6 | 66.6 | 8.0 | 59.9 | 64.7 | 4.8 |
| I am a Conservation expert! | 7.5 | 11.3 | 3.9 | 5.8 | 7.7 | 2.0 |

Non Member

| % | 2022 Before Visit | 2022 After Visit | 2022 Change in Awareness | 2021 Before Visit | 2021 After Visit | 2021 Change in Awareness |
|---|---|---|---|---|---|---|
| Did not know much about | 11.6 | 9.2 | -2.5 | 13.0 | 9.8 | -3.2 |
| I knew a little bit | 26.5 | 20.6 | -5.9 | 25.9 | 21.6 | -4.2 |
| I was aware of some issues | 56.8 | 63.5 | 6.7 | 56.1 | 62.2 | 6.1 |
| I am a Conservation expert! | 5.1 | 6.8 | 1.6 | 5.0 | 6.4 | 1.4 |
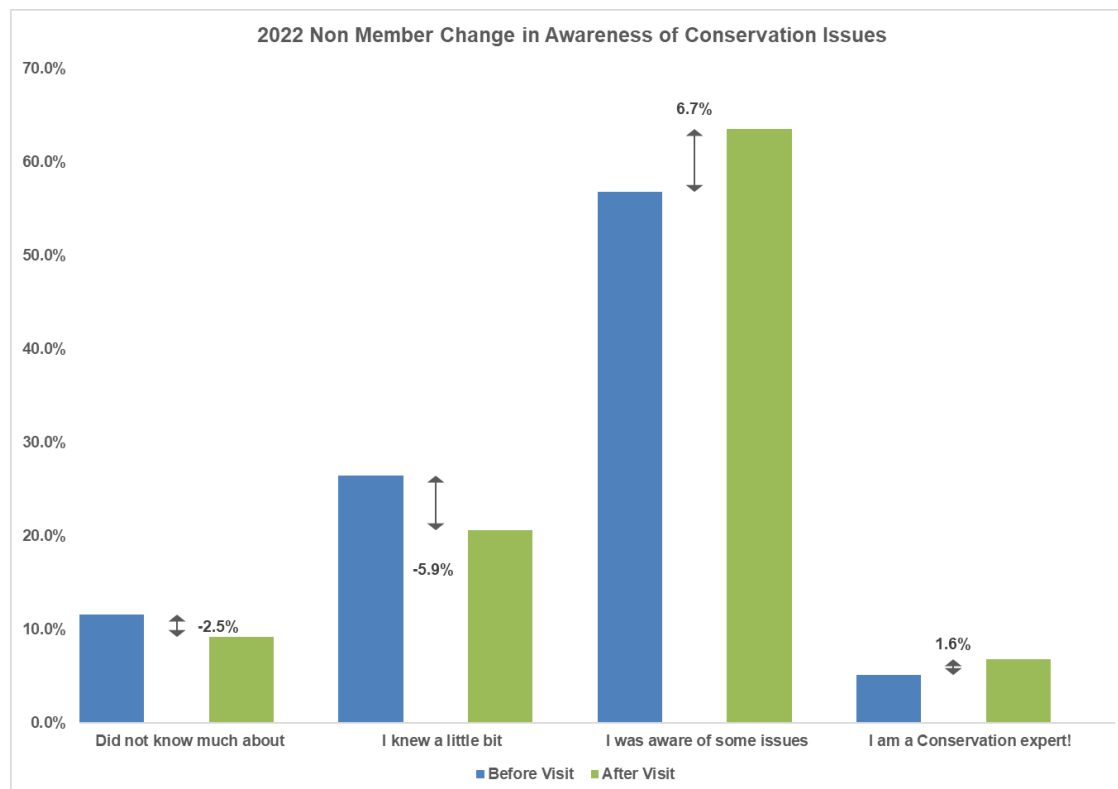
## 9.  Overall how satisfied are you with your visit?

85.4% (89% in 2021) of member respondents rated their overall satisfaction as satisfied or very satisfied. 68.4% (73.7% in 2021) of non member respondents rated their overall satisfaction as satisfied or very satisfied. Average rating remained consistent from 2021 to 2022 at 4.2 out of 5 for member respondents and 3.8 out of 5 for non member respondents.
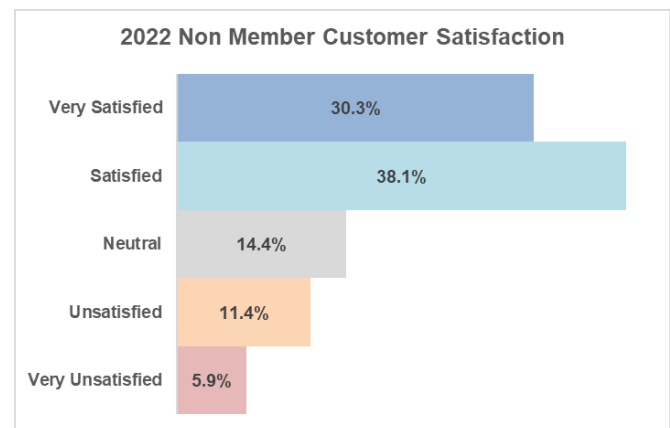
Member

|  | 2022 | 2021 |
|---|---|---|
| Average Rating | 4.2 | 4.3 |
| Very Satisfied (5) | 45.5% | 48.3% |
| Satisfied (4) | 39.9% | 40.7% |
| Neutral (3) | 9.8% | 7.4% |
| Unsatisfied (2) | 2.3% | 2.3% |
| Very Unsatisfied (1) | 2.6% | 1.4% |
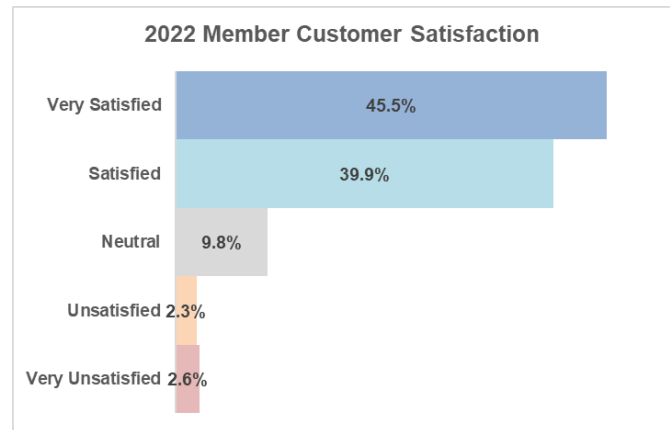
Non Member

|  | 2022 | 2021 |
|---|---|---|
| Average Rating | 3.8 | 3.9 |
| Very Satisfied (5) | 30.3% | 33.7% |
| Satisfied (4) | 38.1% | 40.0% |
| Neutral (3) | 14.4% | 13.5% |
| Unsatisfied (2) | 11.4% | 8.1% |
| Very Unsatisfied (1) | 5.9% | 4.8% |

**2022 Member Customer Satisfaction**

| | |
|---|---|
| Very Satisfied | 45.5% |
| Satisfied | 39.9% |
| Neutral | 9.8% |
| Unsatisfied | 2.3% |
| Very Unsatisfied | 2.6% |

**2022 Non Member Customer Satisfaction**

| | |
|---|---|
| Very Satisfied | 30.3% |
| Satisfied | 38.1% |
| Neutral | 14.4% |
| Unsatisfied | 11.4% |
| Very Unsatisfied | 5.9% |

## 10.  How likely is it that you would recommend the Toronto Zoo to a friend or colleague?

This question is used to determine Net Promotor Score (NPS). This is a metric used to measure the loyalty of customers to a company. The range for NPS is -100 to +100 with higher scores being more desirable. Respondents select a rating on a 0-10 scale with rating of 9-10 considered Promotors, 7-8 Passives and 0-6 Detractors.

Member respondents continue to be strong supporters with a NPS of 55 (61 in 2021). Non member respondents are not as likely as members to promote the Zoo with a NPS of 9 (19 in 2021).

Member

|  | 2022 | 2021 |
|---|---|---|
| Net Promotor Score | 55.3 | 60.9 |
| Promotors (9-10) | 63.2% | 68.0% |
| Passive (7-8) | 28.8% | 24.9% |
| Detractors (0-6) | 8.0% | 7.1% |

Non Member

|  | 2022 | 2021 |
|---|---|---|
| Net Promotor Score | 9.3 | 18.9 |
| Promotors (9-10) | 39.6% | 44.1 |
| Passive (7-8) | 30.1% | 30.6 |
| Detractors (0-6) | 30.3% | 25.2 |

**Open-Ended Questions**

There were three questions on the 2022 survey where respondents could provide their feedback as free-form text responses.

**1. Please describe which, if any, specific Conservation programs or initiatives made a big impact on your recent Zoo visit:**

Palm Oil awareness was the top response for those who answered this question with 27.3% of respondents referencing palm oil as their first mention. The Toronto Zoo's strategies to engage guests and to help break the link between palm oil production and deforestation are making an impact.

This was followed closely by responses mentioning specific species/areas at 25.3% of first mentions. Tiger was the most popular mention of specific species which is likely due to the Year of the Tiger programming, other popular species mentions include Polar Bear, Gorilla and Orangutan.

The third highest first mentions were related to waste management/reduction at 10.0% with recycling and plastic reduction being frequently referenced. Several commented on the Poly Bear sculpture designed and built by Toronto Zoo's Exhibit Design team from local plastic waste.