

TORONTO ZOO 2023 GUEST SURVEY RESULTS

Number of Survey Respondents:

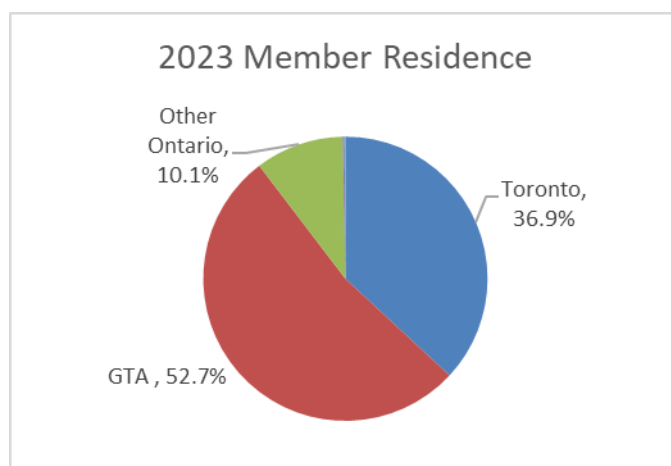
	2023	2022	2021
Total #	9,143	7,340	10,164
Member %	56.2	5.3	30.1
Non-Member %	43.8	94.7	69.9

1. Where do you reside?

Toronto Zoo visitation continues to be well represented by Toronto and Greater Toronto Area (GTA) residents with 89.6% of member and 51.6% of non-member survey respondents residing in Toronto/GTA. In 2023, there continued to be a trend of a slight increase in international survey respondents with 4.0% and 2.3% of non-member respondents being from the US or other International respectively.

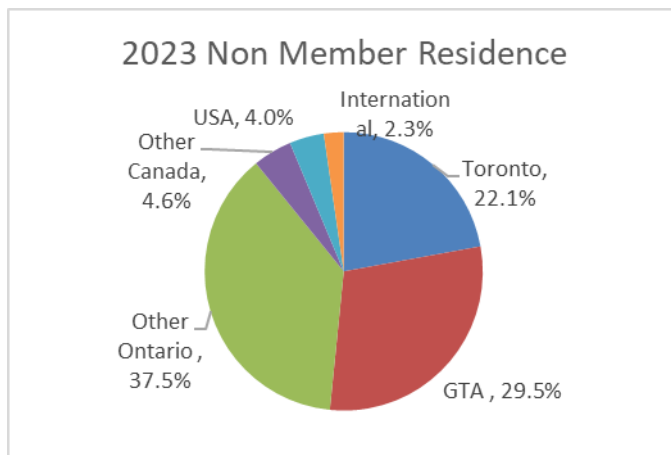
Member

%	2023	2022	2021
Toronto	36.9	41.4	43.7
GTA	52.7	45.0	49.2
Other Ontario	10.1	12.9	6.9
Other Canada	0.2	0.3	0.1
US	0.1	0.3	0.1
International	0.0	0.3	0.1



Non-Member

%	2023	2022	2021
Toronto	22.1	25.8	30.7
GTA	29.5	30.7	35.8
Other Ontario	37.5	35.8	29.3
Other Canada	4.6	4.3	3.2
US	4.0	2.0	0.5
International	2.3	1.4	0.4



- 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

%	2023	2022	2021
British Isles (e.g., English, Irish, Scottish)	47.4	45.2	41.3
French	5.9	5.9	5.1
Other European (e.g., German, Russian, Italian, Norwegian)	28.5	25.2	27.8
Aboriginal (e.g., Inuit, Métis, North American Indian)	2.4	2.1	2.2
Other North American (e.g., Canadian, American, Newfoundlander, Québécois)	19.7	20.1	18.8
Caribbean (e.g., Jamaican, Barbadian, Cuban, West Indian)	4.0	2.4	5.0
African (e.g., South African, Ethiopian, Nigerian, Zimbabwean)	1.2	1.0	0.6
Arab/West Asian (e.g., Lebanese, Moroccan, Iranian, Turk)	1.4	2.6	1.5
South Asian (e.g., East Indian, Pakistani, Goan, Sri Lankan)	4.2	6.4	4.8
Chinese	9.4	11.3	12.1
Other East and Southeast Asian (e.g., Filipino, Vietnamese, Korean, Japanese)	4.9	4.1	5.8
Oceania (e.g., Australian, New Zealander, Fijian, Samoan)	0.1	0.5	0.3
Jewish (non-denominational)	3.1	3.6	4.5
Latin America	2.0		
Other	1.5	1.8	2.9
Prefer not to answer	7.0	7.7	8.2

Non-Member

%	2023	2022	2021
British Isles (e.g., English, Irish, Scottish)	36.4	37.0	36.9
French	6.8	6.8	6.5
Other European (e.g., German, Russian, Italian, Norwegian)	26.1	26.4	28.8
Aboriginal (e.g., Inuit, Métis, North American Indian)	4.1	3.2	2.9
Other North American (e.g., Canadian, American, Newfoundlander, Québécois)	20.9	20.8	18.0
Caribbean (e.g., Jamaican, Barbadian, Cuban, West Indian)	3.8	3.8	5.8
African (e.g., South African, Ethiopian, Nigerian, Zimbabwean)	1.4	2.0	1.5
Arab/West Asian (e.g., Lebanese, Moroccan, Iranian, Turk)	2.7	3.0	2.6
South Asian (e.g., East Indian, Pakistani, Goan, Sri Lankan)	7.8	7.6	7.4
Chinese	4.9	4.9	4.5
Other East and Southeast Asian (e.g., Filipino, Vietnamese, Korean, Japanese)	4.3	4.1	4.6
Oceania (e.g., Australian, New Zealander, Fijian, Samoan)	0.2	0.4	0.3
Jewish (non-denominational)	2.0	2.4	2.5
Latin America	4.4		
Other	1.9	3.0	4.7
Prefer not to answer	7.9	9.6	9.5

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

For 2023, 87.8% of non-member respondents spent 3 or more hours at the Zoo (84.4% in 2022). Member respondents reported shorter visit times than non-members with 54.9% visiting for 3 or more hours in 2023.

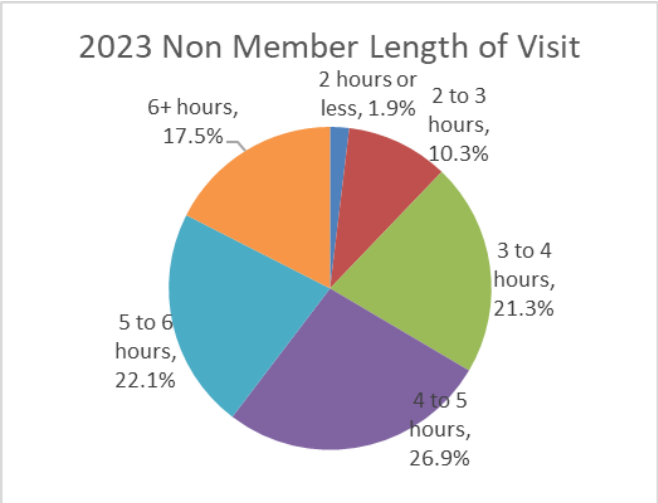
Member

%	2023	2022	2021
2 hours or less	14.0	6.7	19.3
2 to 3 hours	31.2	23.4	34.8
3 to 4 hours	26.8	30.3	25.0
4 to 5 hours	16.2	23.7	12.3
5 to 6 hours	7.9	9.8	6.1
6+ hours	4.0	6.2	2.6



Non-Member

%	2023	2022	2021
2 hours or less	1.9	2.8	3.6
2 to 3 hours	10.3	12.8	15.5
3 to 4 hours	21.3	23.9	27.0
4 to 5 hours	26.9	26.0	26.0
5 to 6 hours	22.1	20.1	17.4
6+ hours	17.5	14.4	10.5



4. Did you purchase food during your visit?

70.6% of non-member respondents purchased food in 2023, an increase of 3.7% over 2022. Just over half of member respondents purchased food during their visit.

Member

%	2023	2022	2021
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Yes	54.4	56.6	53.9
No	45.6	43.4	46.1

Non-Member

%	2023	2022	2021
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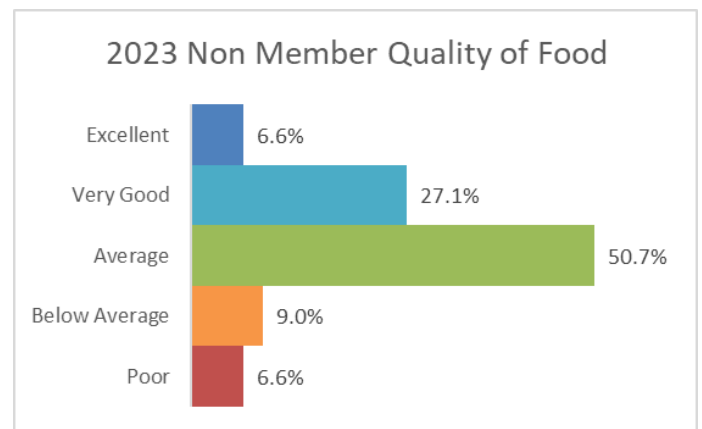
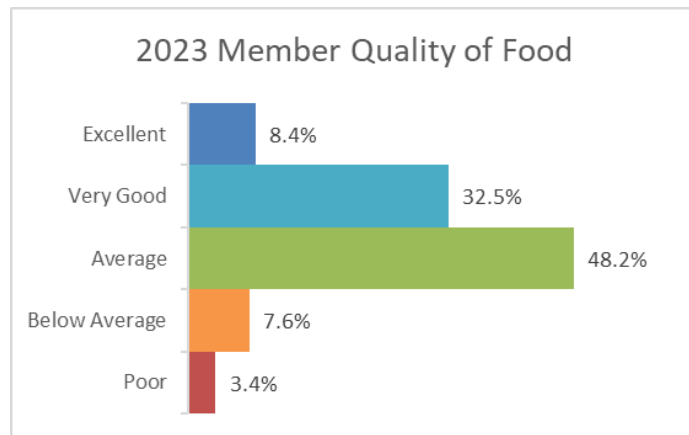
Yes	70.6	66.9	66.7
No	29.4	33.1	33.3

5. How would you rate your food purchase experience?

For 2023, 89.0% of member respondents rated quality of food as average or better (92.7% in 2022) and 89.3% rated quality of service as average or better (81.4% in 2022), this is a 7.9% increase. 84.4% of non-member respondents rated quality of food average or better (82.2% in 2022) and 84.8% rated quality of service average or better (83.3% in 2022).

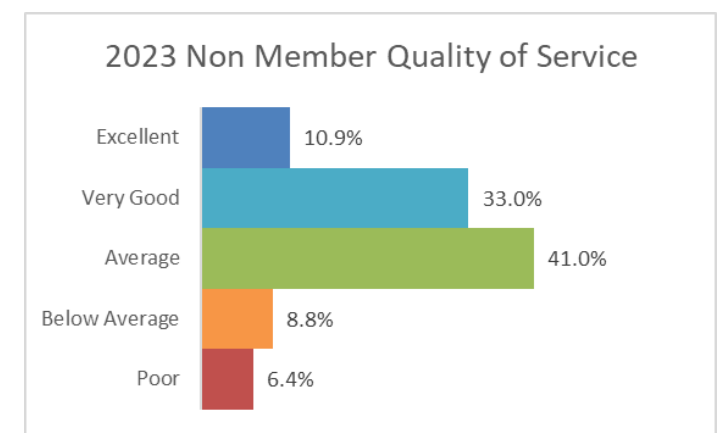
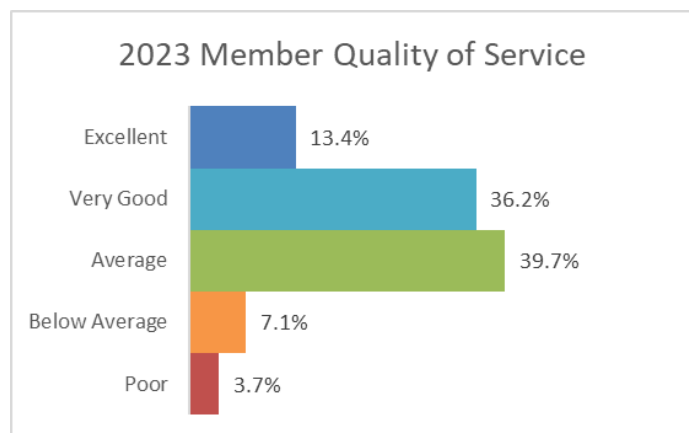
Quality of Food

Average Rating (1-5 scale, 5 being excellent)	2023	2022	2021
Member	3.4	3.4	3.5
Non-Member	3.2	3.1	3.2



Quality of Service

Average Rating (1-5 scale, 5 being excellent)	2023	2022	2021
Member	3.5	3.3	3.7
Non-Member	3.3	3.2	3.4



6. What areas did you experience today? How would you rate each area?

The most visited areas for both member and non-member respondents were Africa Savanna, African Rainforest Pavilion and Tundra Trek, these are the same most visited areas as 2022. Member respondents on average rated areas higher than non-member respondents. Members rated the Wildlife Health Centre the highest, which again is the same as 2022 ratings. Non-member respondents rated Africa Savanna, African Rainforest Pavilion and Tundra Trek the highest. Canadian Domain is rated significantly lower than other areas by both members and non-members.

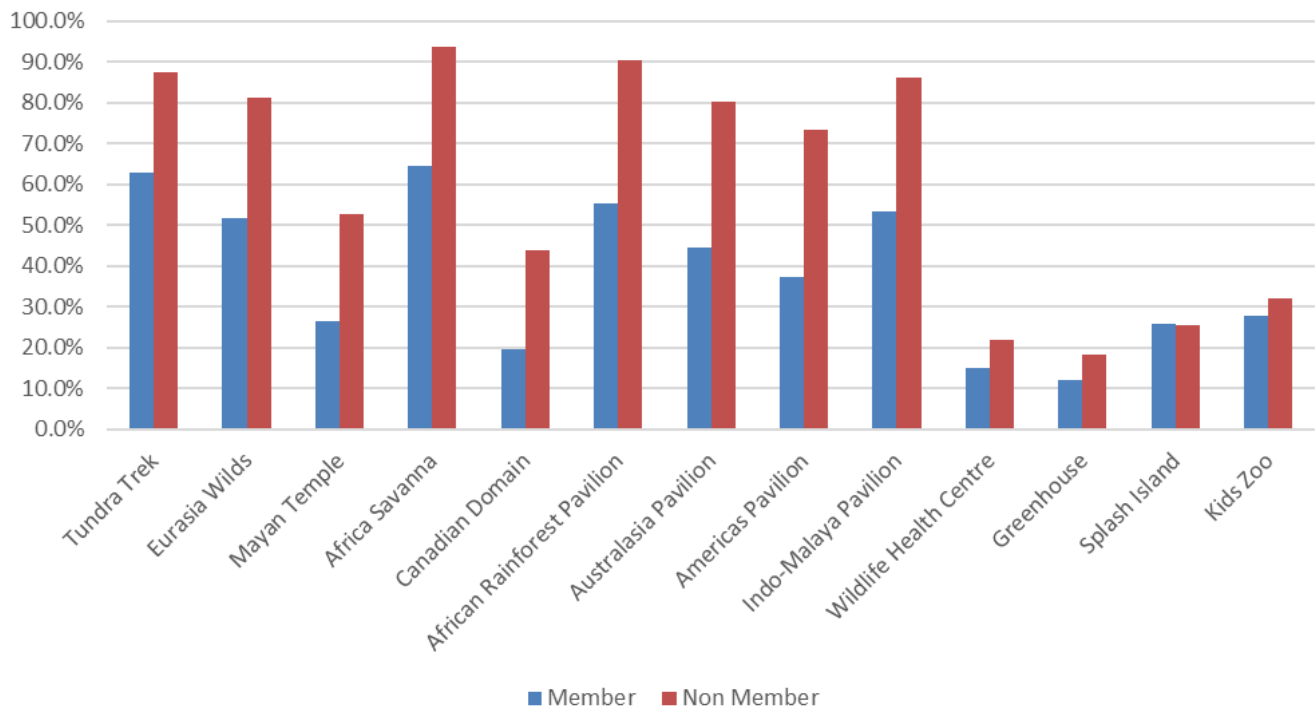
Member

	2023 % Attended	2022 % Attended	2021 % Attended	2023 Rating	2022 Rating	2021 Rating
Tundra Trek	62.9	73.8	70.3	4.2	4.1	4.2
Eurasia Wilds	51.8	59.6	53.2	4.1	4.0	4.1
Mayan Temple	26.6	41.0	37.7	3.9	3.9	4.2
Africa Savanna	64.4	79.9	73.7	4.2	4.1	4.3
Canadian Domain	19.6	29.7	24.7	3.3	3.5	3.6
African Rainforest Pavilion	55.4	71.0	56.3	4.2	4.1	4.2
Australasia Pavilion	44.5	57.1	47.2	4.1	4.1	4.2
Americas Pavilion	37.4	48.1	36.8	4.2	4.0	4.2
Indo-Malaya Pavilion	53.5	60.9	49.8	4.2	4.1	4.2
Wildlife Health Centre	14.9	17.0	19.7	4.3	4.3	4.1
Greenhouse	12.0	16.7	17.6	4.0	4.2	4.0
Splash Island	25.8	21.2	22.8	4.1	4.2	4.3
Kids Zoo	27.7	31.7	34.1	3.9	3.8	4.0

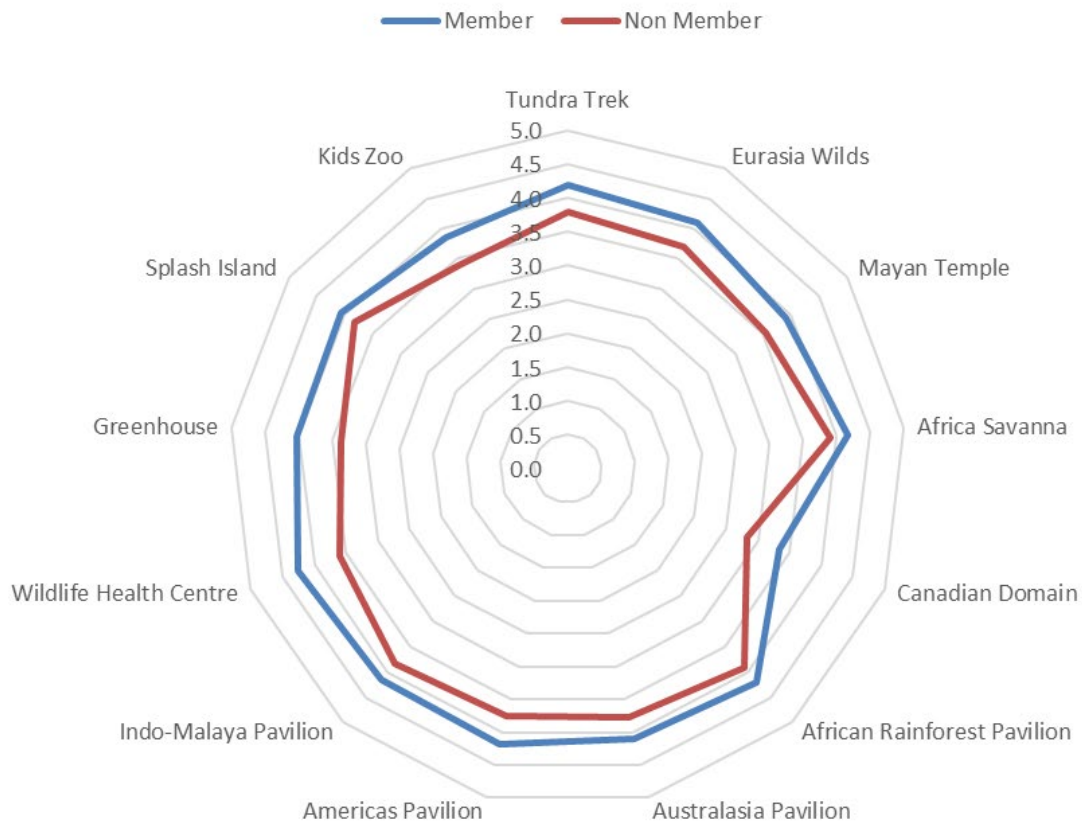
Non-Member

	2023 % Attended	2022 % Attended	2021 % Attended	2023 Rating	2022 Rating	2021 Rating
Tundra Trek	87.5	85.8	85.0	3.8	3.6	3.8
Eurasia Wilds	81.5	79.2	77.2	3.7	3.6	3.7
Mayan Temple	52.6	54.9	56.6	3.6	3.5	3.7
Africa Savanna	93.6	93.7	94.0	3.9	3.8	4.0
Canadian Domain	43.9	49.1	47.9	2.8	2.9	3.2
African Rainforest Pavilion	90.5	88.4	84.7	3.9	3.8	4.0
Australasia Pavilion	80.2	78.0	73.7	3.8	3.7	3.8
Americas Pavilion	73.4	71.9	68.1	3.8	3.6	3.8
Indo-Malaya Pavilion	86.2	83.1	79.4	3.9	3.8	3.9
Wildlife Health Centre	22.0	22.7	14.1	3.6	3.6	3.8
Greenhouse	18.3	22.1	13.7	3.4	3.5	3.7
Splash Island	25.5	29.2	19.4	3.8	3.8	3.8
Kids Zoo	32.0	32.7	28.8	3.4	3.4	3.4

2023 % Area Experienced



2023 Average Rating Areas



7. What adventures did you experience today? How would you rate each adventure?

Not surprisingly, Zoomobile was the most experienced ride for member respondents, as Zoomobile is a benefit of Gold memberships. For non-member respondents, carousel was the most frequently experienced.

Member

	2023 % Attended	2023 Rating	2022 Rating	2021 Rating
Tundra Air	2.9	4.1	4.1	4.1
Conservation Carousel	23.5	4.1	4.3	4.1
Gorilla Climb	5.6	4.2	4.2	4.2
Zoomobile	39.9	4.0	4.1	

Non-Member

	2023 % Attended	2023 Rating	2022 Rating	2021 Rating
Tundra Air	8.0	3.6	3.6	3.7
Conservation Carousel	25.6	3.7	3.8	3.9
Gorilla Climb	10.3	3.7	3.7	3.9
Zoomobile	19.5	3.6	3.6	

8. 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.

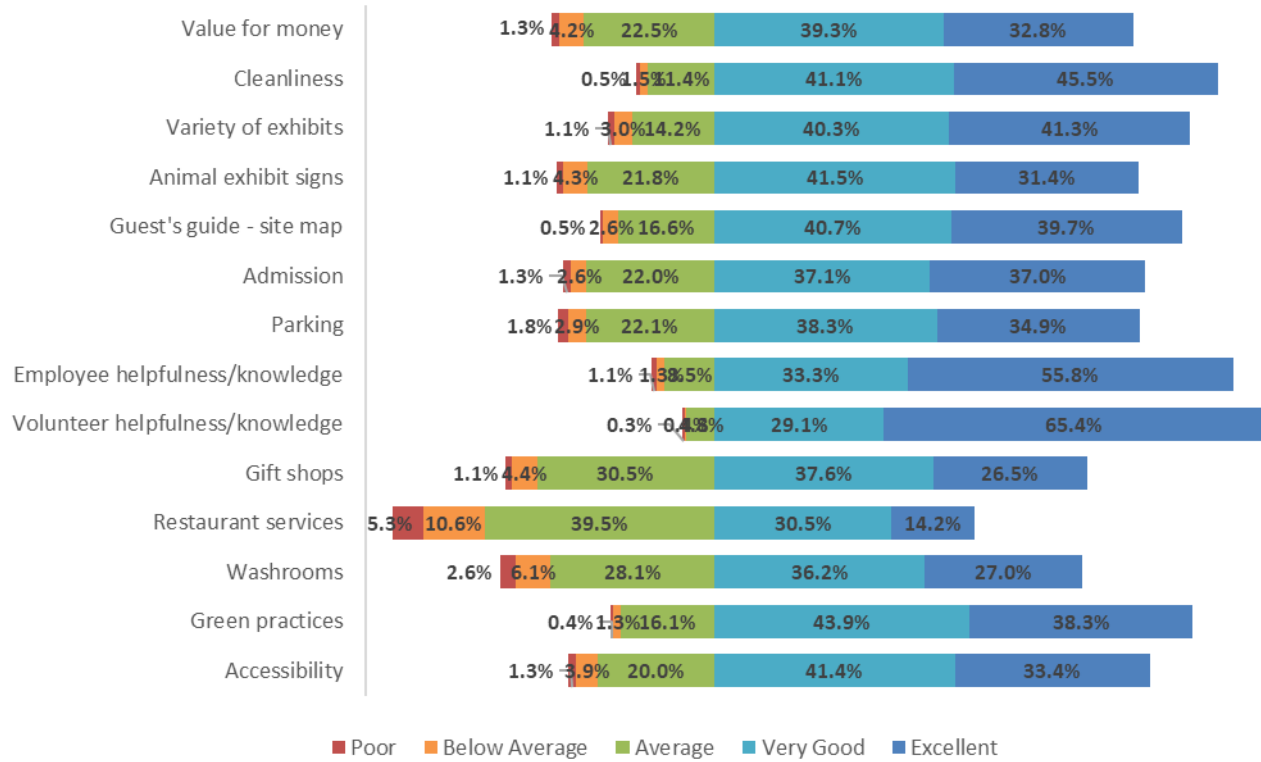
Member

	2023	2022	2021
Value for money	4.0	4.0	4.1
Cleanliness	4.3	4.2	4.4
Variety of exhibits	4.2	4.2	4.2
Animal exhibit signs	4.0	4.0	4.0
Guest's guide - site map	4.2	4.2	4.1
Admission	4.1	4.0	4.0
Parking	4.0	4.0	4.1
Employee helpfulness/knowledge	4.4	4.4	4.4
Volunteer helpfulness/knowledge	4.6	4.5	4.5
Gift shops	3.8	3.8	3.9
Restaurant services	3.4	3.2	3.5
Washrooms	3.8	3.7	3.8
Green practices	4.2	4.1	4.2
Accessibility	4.0		

Non-Member

	2023	2022	2021
Value for money	3.4	3.4	3.5
Cleanliness	4.0	4.0	4.0
Variety of exhibits	3.8	3.7	3.8
Animal exhibit signs	3.7	3.6	3.6
Guest's guide - site map	3.9	3.9	3.9
Admission	3.8	3.7	3.7
Parking	3.7	3.7	3.8
Employee helpfulness/knowledge	4.2	4.1	4.1
Volunteer helpfulness/knowledge	4.3	4.2	4.2
Gift shops	3.5	3.4	3.4
Restaurant services	3.2	3.0	3.1
Washrooms	3.5	3.4	3.4
Green practices	4.0	3.8	3.9
Accessibility	3.9		

2023 Member Attribute Rating



9. How would you rate your awareness and understanding of conservation issues and impact affecting wildlife and wild spaces?

For member respondents there was a 7.8% increase in “aware of some issues” and “conservation expert” rating after their visit. Members have a higher awareness of conservation issues before their visit than non-members but they still experience a positive change in conservation awareness after their visit. For non-member respondents there was 9.2% increase in “aware of some issues” and “conservation expert” after their visit.

Member

%	2023 Before Visit	2023 After Visit	2023 Change in Awareness	2022 Change in Awareness	2021 Change in Awareness
Did not know much about	8.5	6.0	-2.4	-2.8	-2.2
I knew a little bit	25.1	19.7	-5.4	-9.0	-4.6
I was aware of some issues	60.3	66.0	5.7	8.0	4.8
I am a Conservation expert!	6.2	8.3	2.1	3.9	2.0

Non-Member

%	2023 Before Visit	2023 After Visit	2023 Change in Awareness	2022 Change in Awareness	2021 Change in Awareness
Did not know much about	13.4	9.7	-3.6	-2.5	-3.2
I knew a little bit	26.6	21.1	-5.5	-5.9	-4.2
I was aware of some issues	55.1	61.8	6.7	6.7	6.1
I am a Conservation expert!	4.9	7.4	2.5	1.6	1.4

10. Overall how satisfied are you with your visit?

85.9% (85.4% in 2022) of member respondents rated their overall satisfaction as satisfied or very satisfied. 71.3% (68.4% in 2022) of non-member respondents rated their overall satisfaction as satisfied or very satisfied. Average rating remained consistent from 2022 to 2023 at 4.3 out of 5 for member respondents and 3.8 out of 5 for nonmember respondents.

Member

	2023	2022	2021
Average Rating	4.3	4.2	4.3
Very Satisfied (5) %	46.1	45.5	48.3
Satisfied (4) %	39.8	39.9	40.7
Neutral (3) %	9.2	9.8	7.4
Unsatisfied (2) %	3.2	2.3	2.3
Very Unsatisfied (1)%	1.7	2.6	1.4

Non-Member

	2023	2022	2021
Average Rating	3.8	3.8	3.9
Very Satisfied (5) %	33.0	30.3	33.7
Satisfied (4) %	38.3	38.1	40.0
Neutral (3) %	13.8	14.4	13.5
Unsatisfied (2) %	8.9	11.4	8.1
Very Unsatisfied (1)%	6.1	5.9	4.8



11. 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 a rating of 9-10 considered Promoters, 7-8 Passives and 0-6 Detractors.

Member respondents continue to be very strong supporters with a NPS of 52. Non-member respondents are not as likely as members to promote the Zoo with a NPS of 12.

Member

	2023	2022	2021
Net Promotor Score	52	55	61
Promoters (9-10) %	62.3	63.2	68.0
Passive (7-8) %	27.6	28.8	24.9
Detractors (0-6) %	10.1	8.0	7.1

Non-Member

	2023	2022	2021
Net Promotor Score	12	9	19
Promoters (9-10) %	41.1	39.6	44.1
Passive (7-8) %	29.4	30.1	30.6
Detractors (0-6) %	29.5	30.3	25.2