

# Belfast City Council

## Market Research for Belfast Zoo

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September 2015

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 MillwardBrownUlster





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# Background and Methodology

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# Background and Methodology



- Belfast Zoological Gardens is one of Northern Ireland's top visitor attractions
- In 2014 Belfast Zoo was one of the top fee-paying visitor attractions in Northern Ireland, receiving more than 250,000 visitors
- In August 2015 Belfast Zoo commissioned Millward Brown to conduct market research to inform decision making and business development
- A programme of complementary quantitative and qualitative methods were designed and utilised to inform the Zoo of its visitor profile and to explore perceptions of the Zoo:
  - Quantitative - Exit Survey
    - Face-to-face survey conducted by Millward Brown interviewers
  - Qualitative - Social Media monitor
    - Millward Brown monitoring tool Brandwatch

# Background and Methodology

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- All fieldwork for the exit survey was conducted amongst visitors on a self-complete basis utilising Millward Brown's Handheld Assisted Personal Interviewing (HAPI) devices
- Interviewing was conducted in the main lobby area of the Zoo visitor centre as visitors were exiting
- No quotas were placed on the sample to allow us to build an up-to-date visitor profile for Belfast Zoo
- All fieldwork was conducted between the 15<sup>th</sup> August and the 19<sup>th</sup> September 2015
- All research complied fully within the Market Research Society ethical Code of Conduct and in accordance with the definitive standards of IQCS Interviewer Quality Control Scheme and MRQSA Market Research Quality Standards Authority.

# Exit Survey



# Analysis of sample

- Interviewers were on-site every Saturday between the 15<sup>th</sup> August and the 19<sup>th</sup> September, with interviewing spanning all opening hours.
- The interviewer resource was on-site on Saturday's to encourage visitors to take part in the survey when footfall was heaviest.
- All research fieldwork was conducted during peak season, however, no more than 2 interviewers were onsite at any one time.
- A random sampling technique was applied, whereby every 3<sup>rd</sup> adult 16+ visitor was approached for interview.

	Number interviews	% of interviews
<b>Gender</b>		
Male	102	49%
Female	105	51%
<b>Age</b>		
16-29	86	42%
30-44	73	35%
45-60	40	19%
60+	8	4%
<b>Origin</b>		
Belfast	44	21%
Rest NI	135	65%
Out of State	60	14%
<b>Total</b>	<b>207</b>	<b>100%</b>

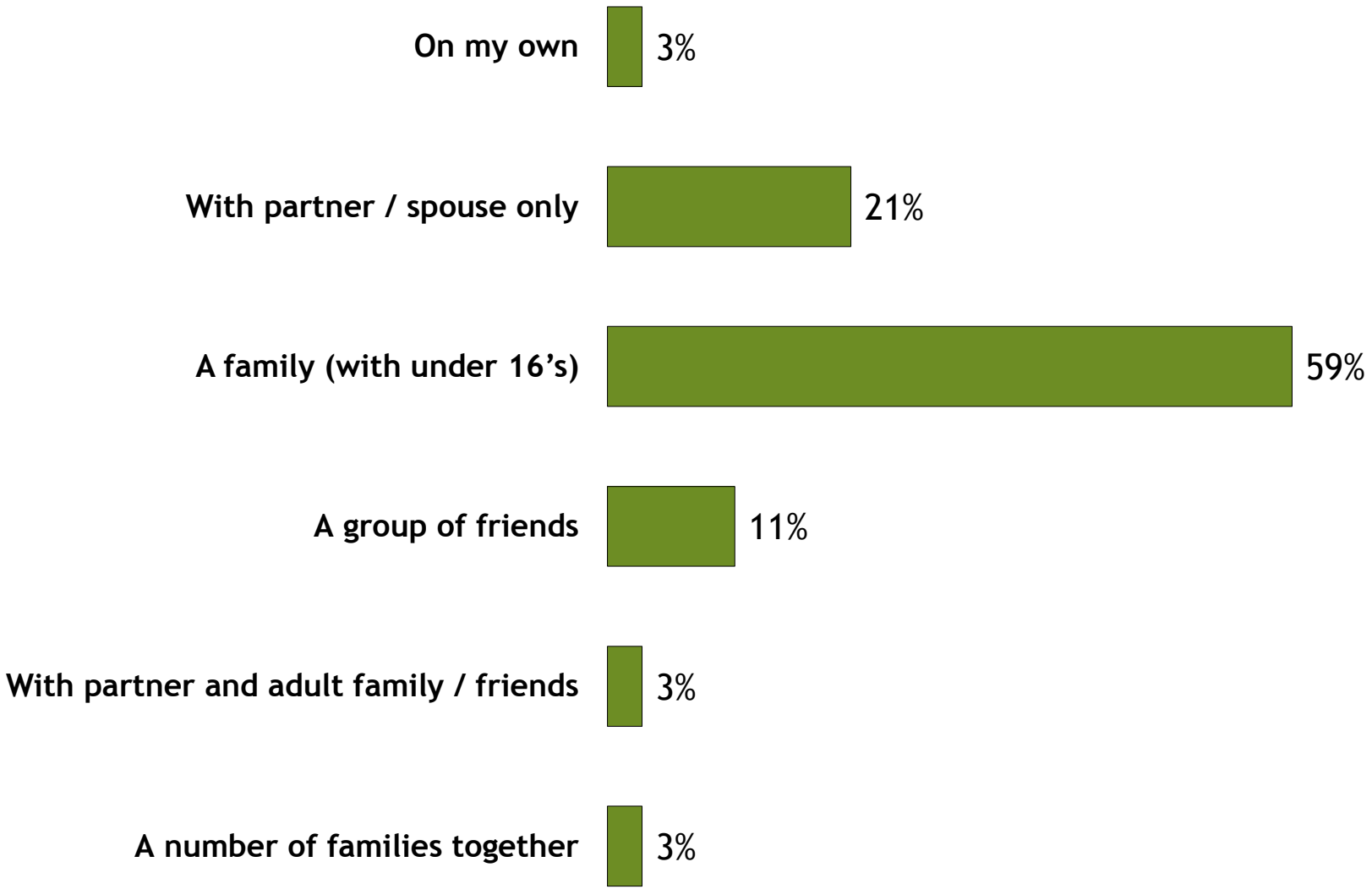
# Visitor Profile

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# Which one of these best describes the people, if any, you are with on this visit to Belfast Zoo?

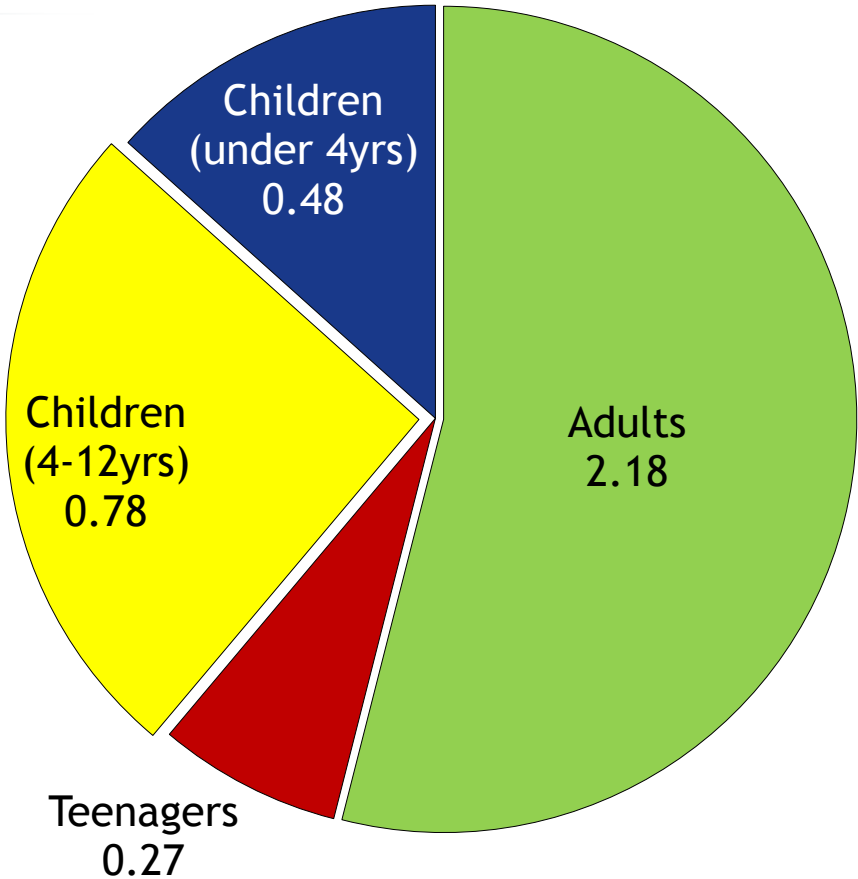
Base: All visitors (n=207)



# Visiting party profile

Base: All visitors (n=207)

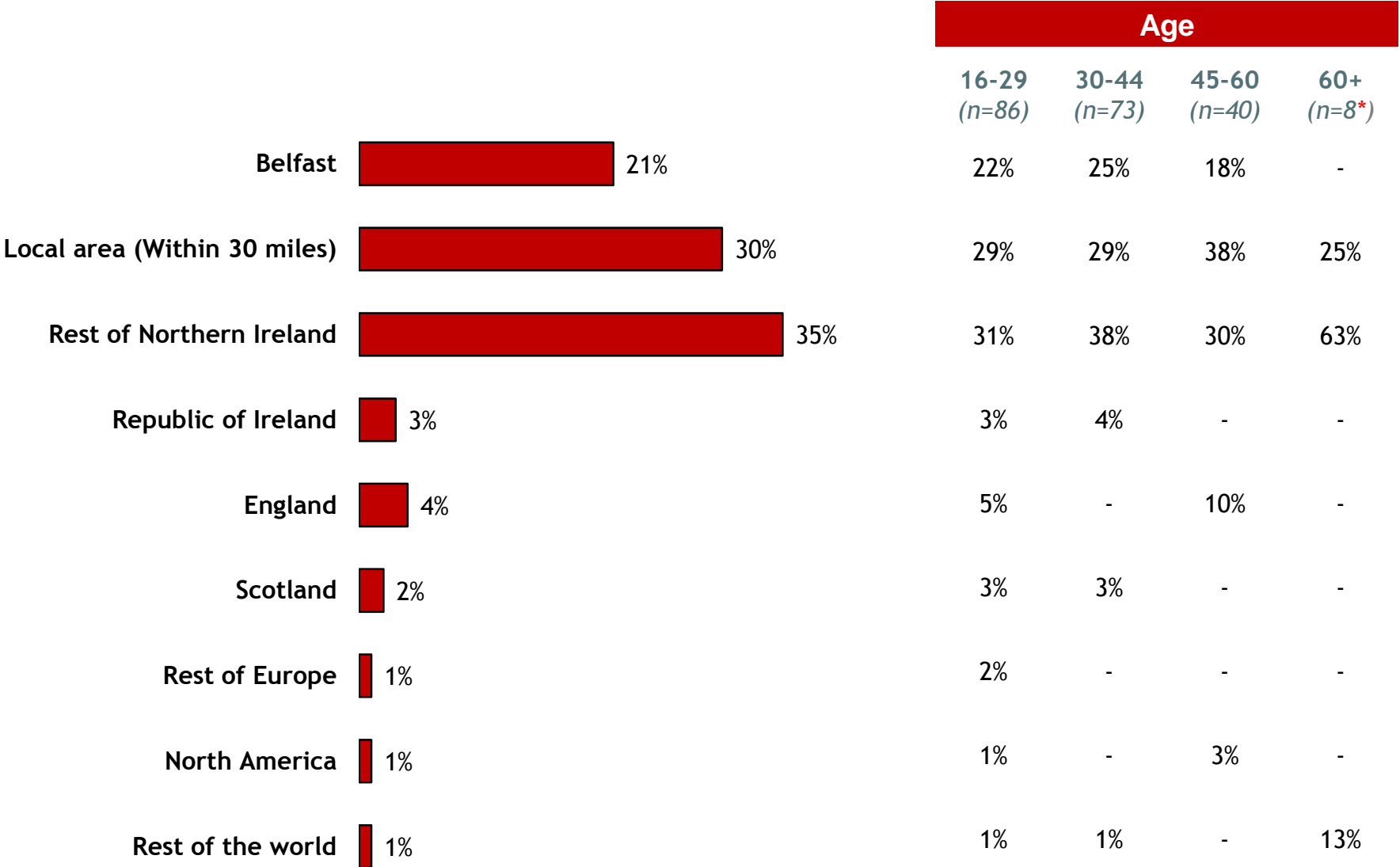
More than three fifths (63%) of all parties contained a child aged 12 or under



Average number of adults in party = 2.18  
Average number of teenagers in party = 0.27  
Average number of children aged 4 to 12 in party = 0.78  
Average number of children aged under 4 in party = 0.48  
**Average Total Party Size = 3.71**

# Where are you from?

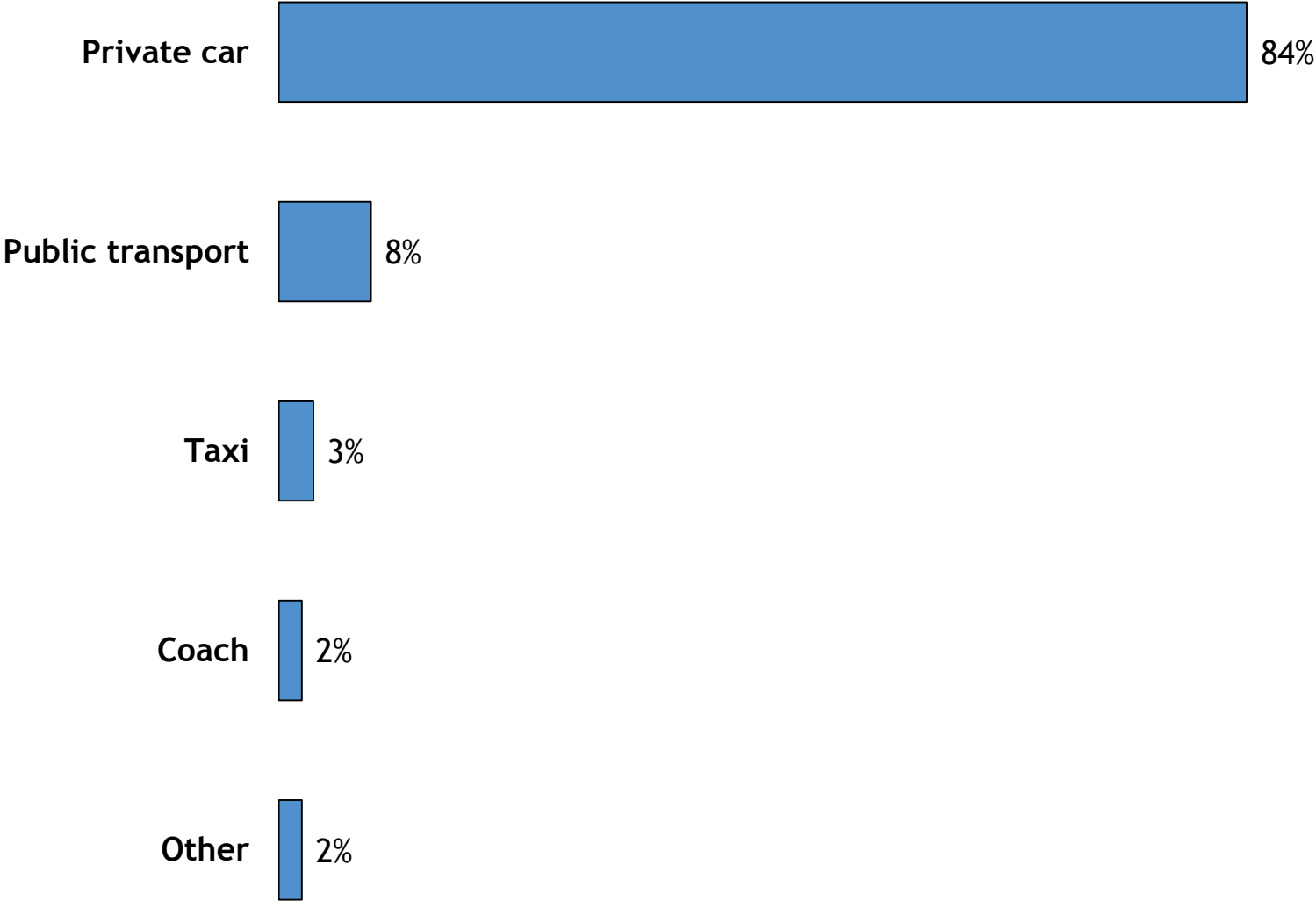
Base: All visitors (n=207)



*\*Caution : very small base*

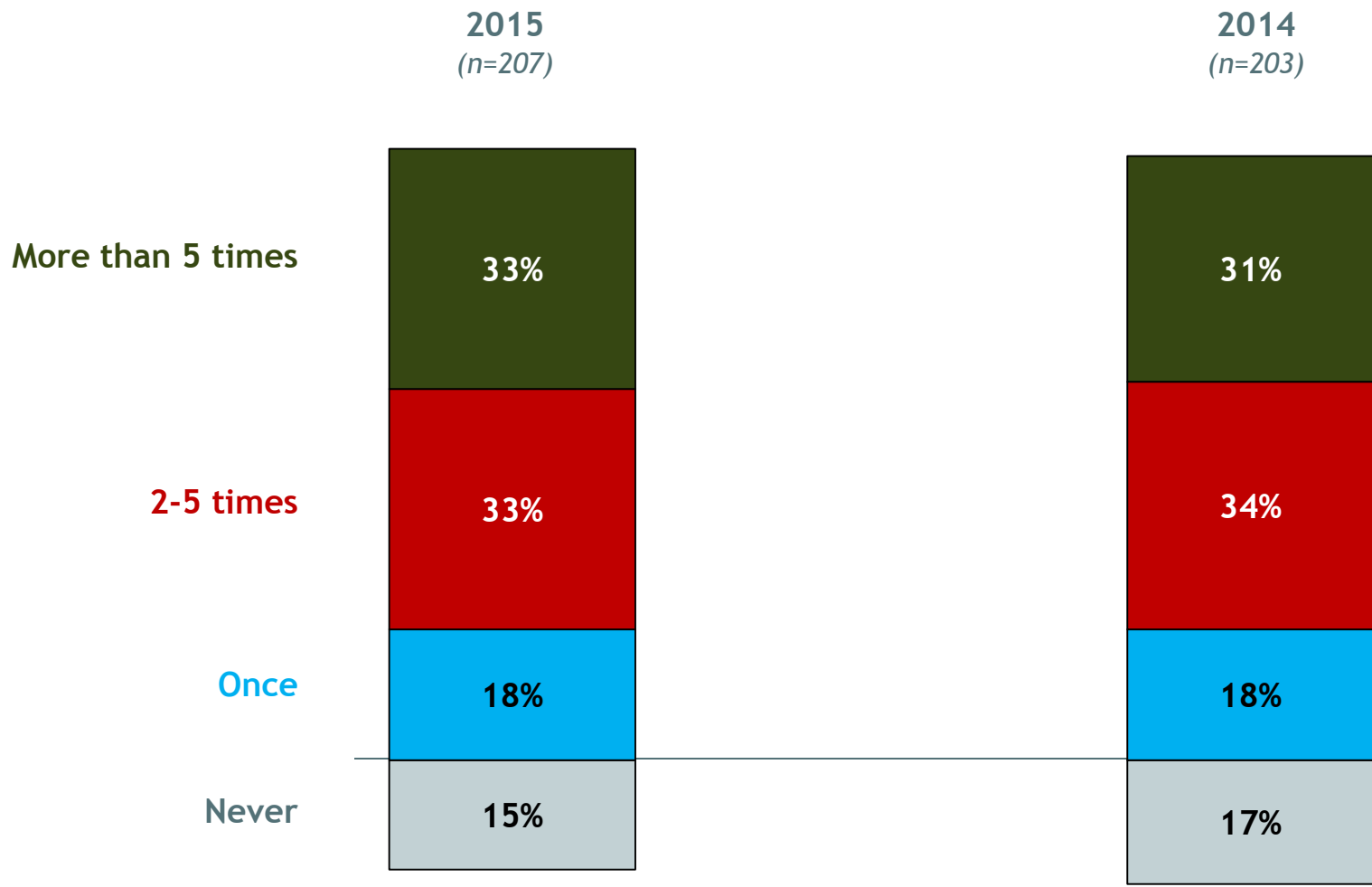
# How did you travel to the Zoo today?

Base: All visitors (n=207)



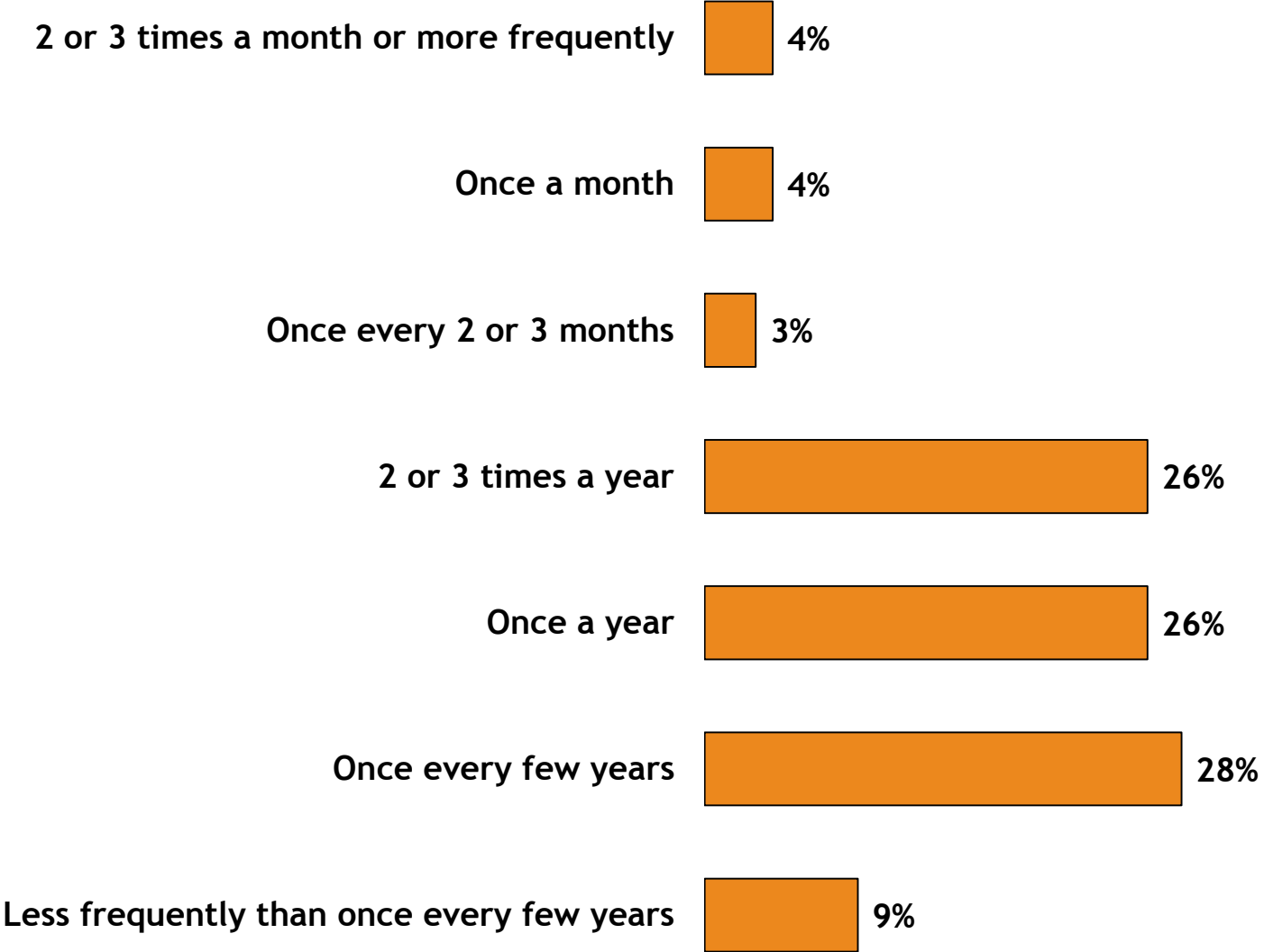
# How many times have you been to Belfast Zoo before today?

Base: All visitors (n=207)



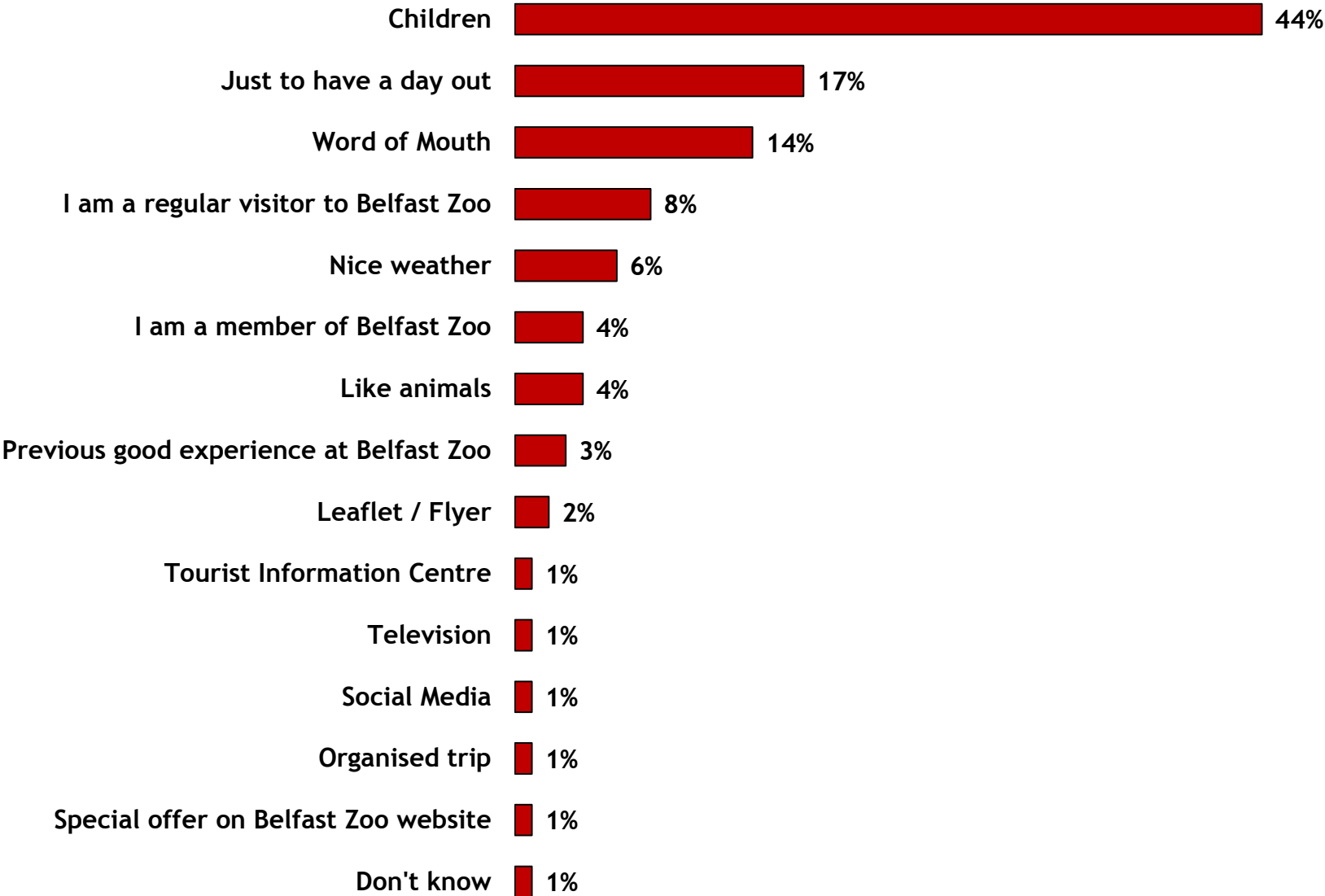
# How frequently do you visit Belfast Zoo?

Base: All who had previously visited Belfast Zoo more than once (n=138)



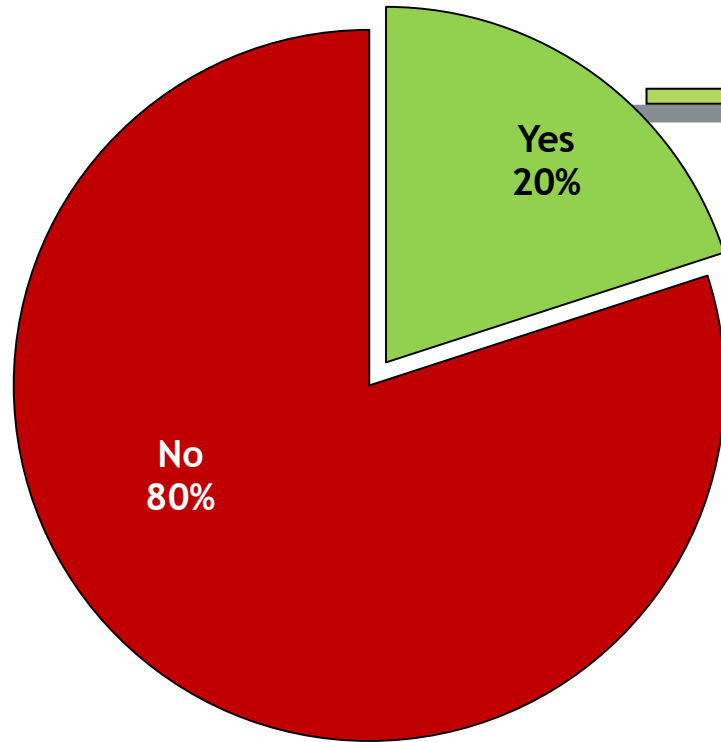
# What influenced you to visit Belfast Zoo today?

Base: All visitors (n=207)

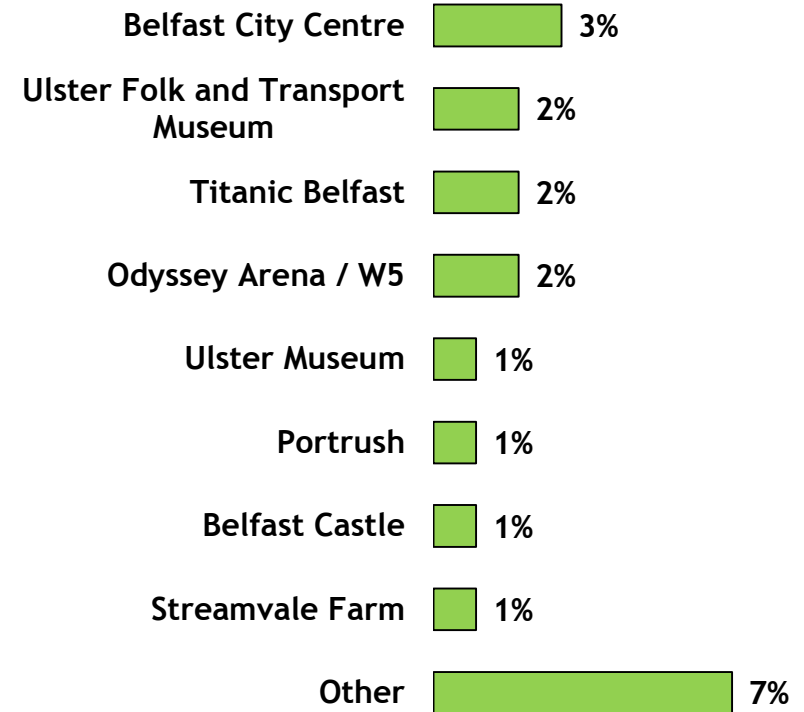


# Did you consider visiting anywhere else today?

Base: All visitors (n=207)



## Where else considered visiting that day



Others include: Giants Causeway, Dundonald Ice Bowl, Tayto Park, Armagh Planetarium, Cavehill, Carrick-a-Rede, Antrim Coast, Crumlin Road Jail, Slieve Gullion

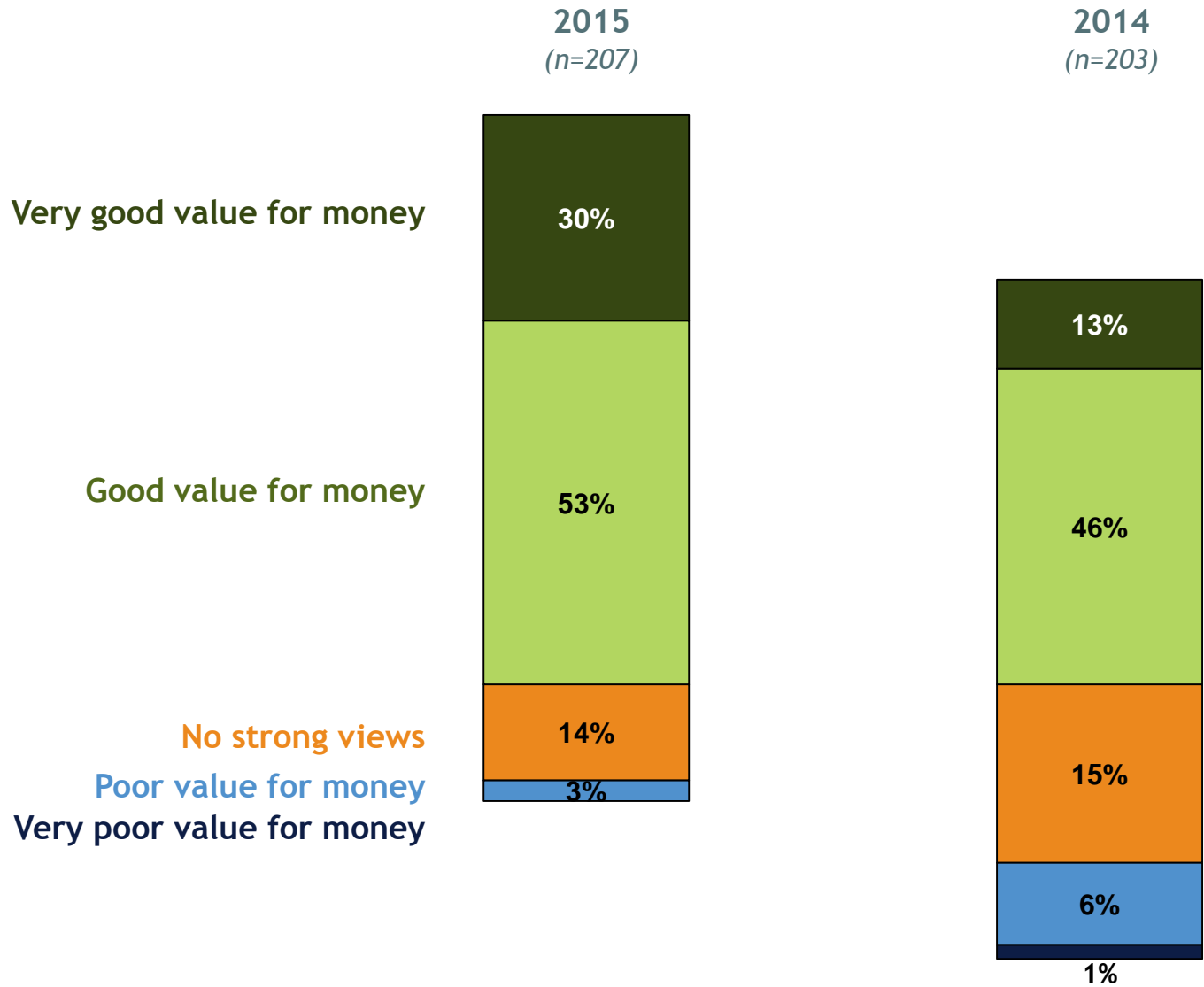


# Value for Money & Overall Experience

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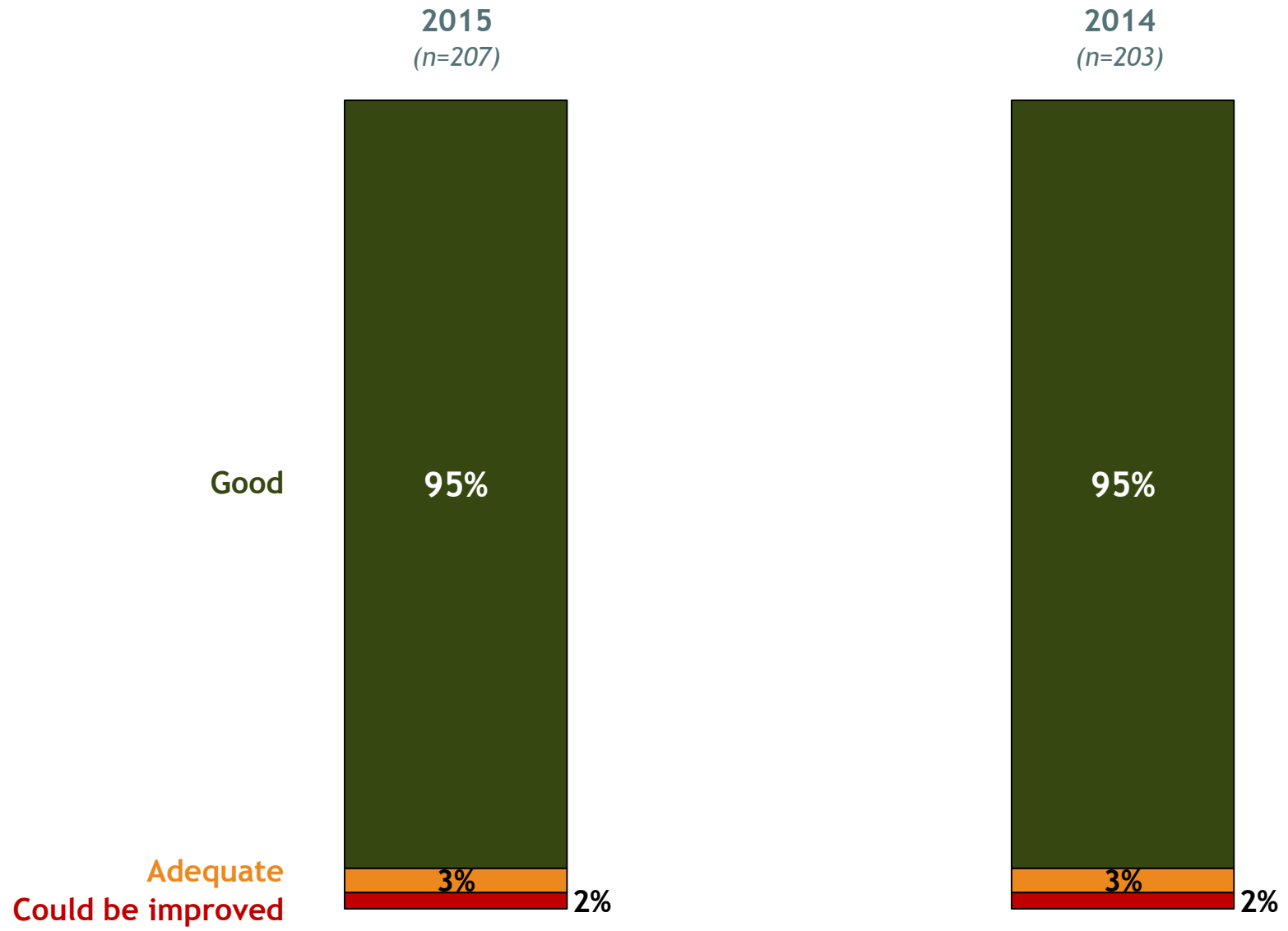
# Do you consider the cost of entry to be ...?

Base: All visitors (n=207)



# Overall experience in Zoo today

Base: All visitors (n=207)

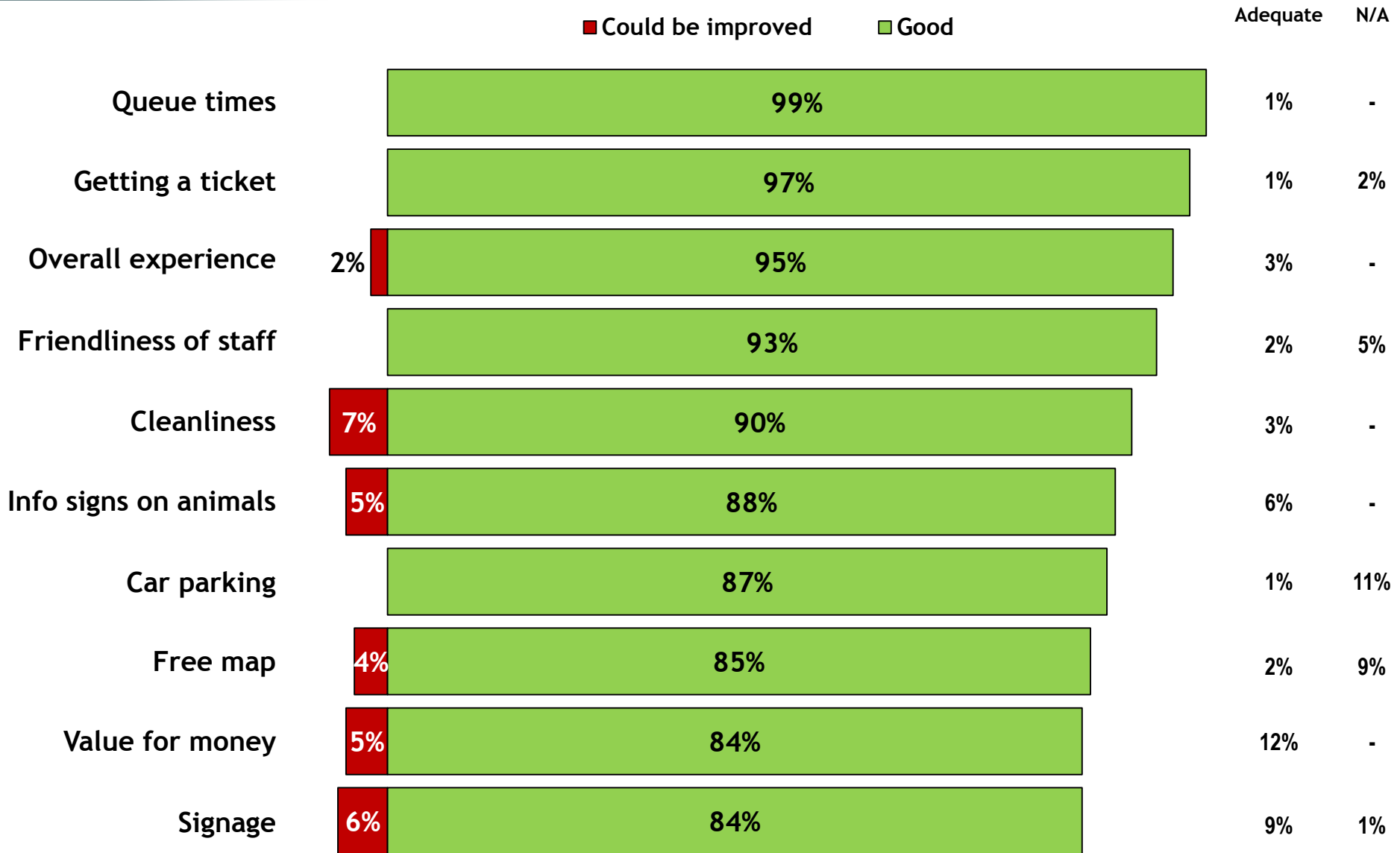


# Zoo Performance

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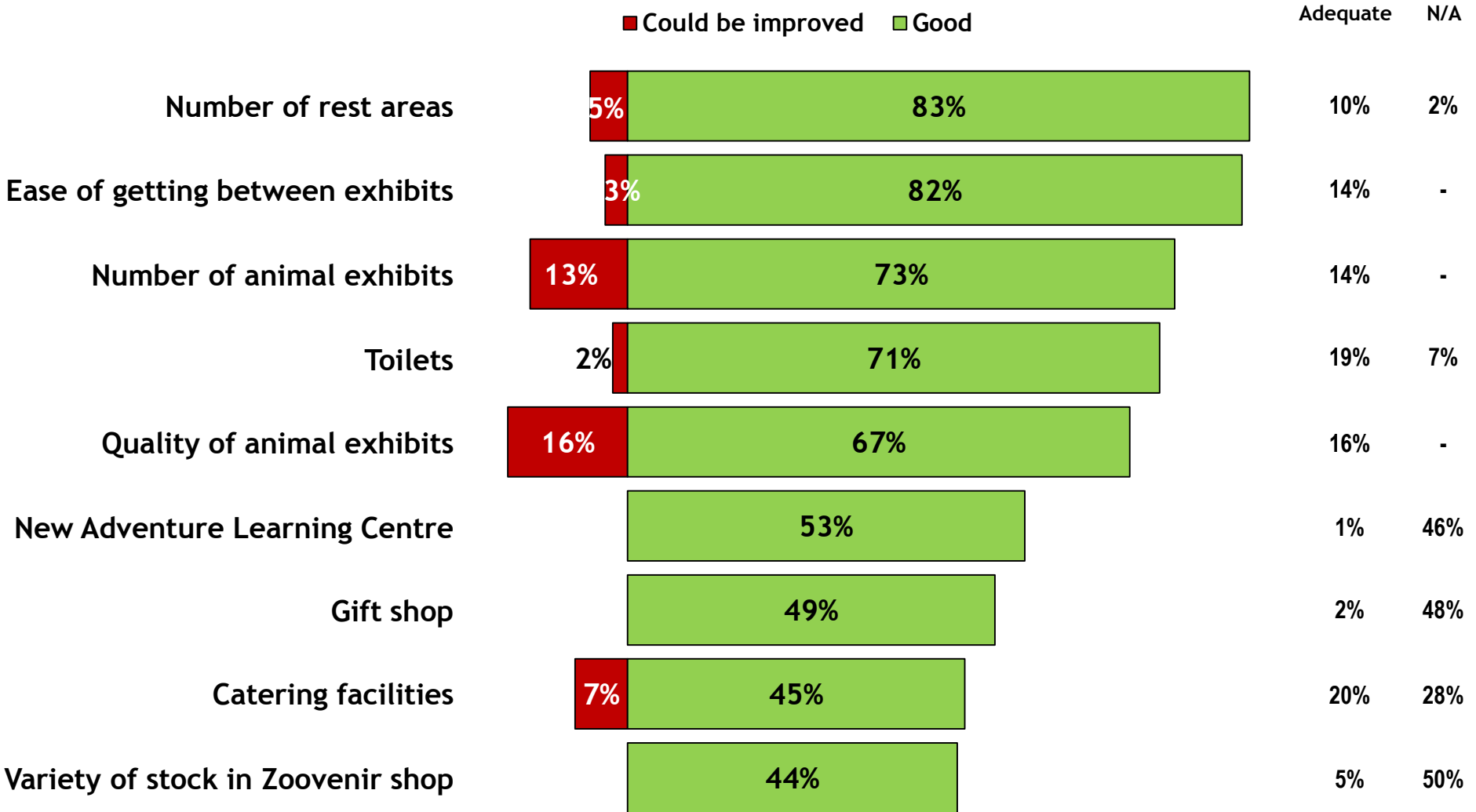
# Rating of various aspects of Belfast Zoo

Base: All visitors (n=207)



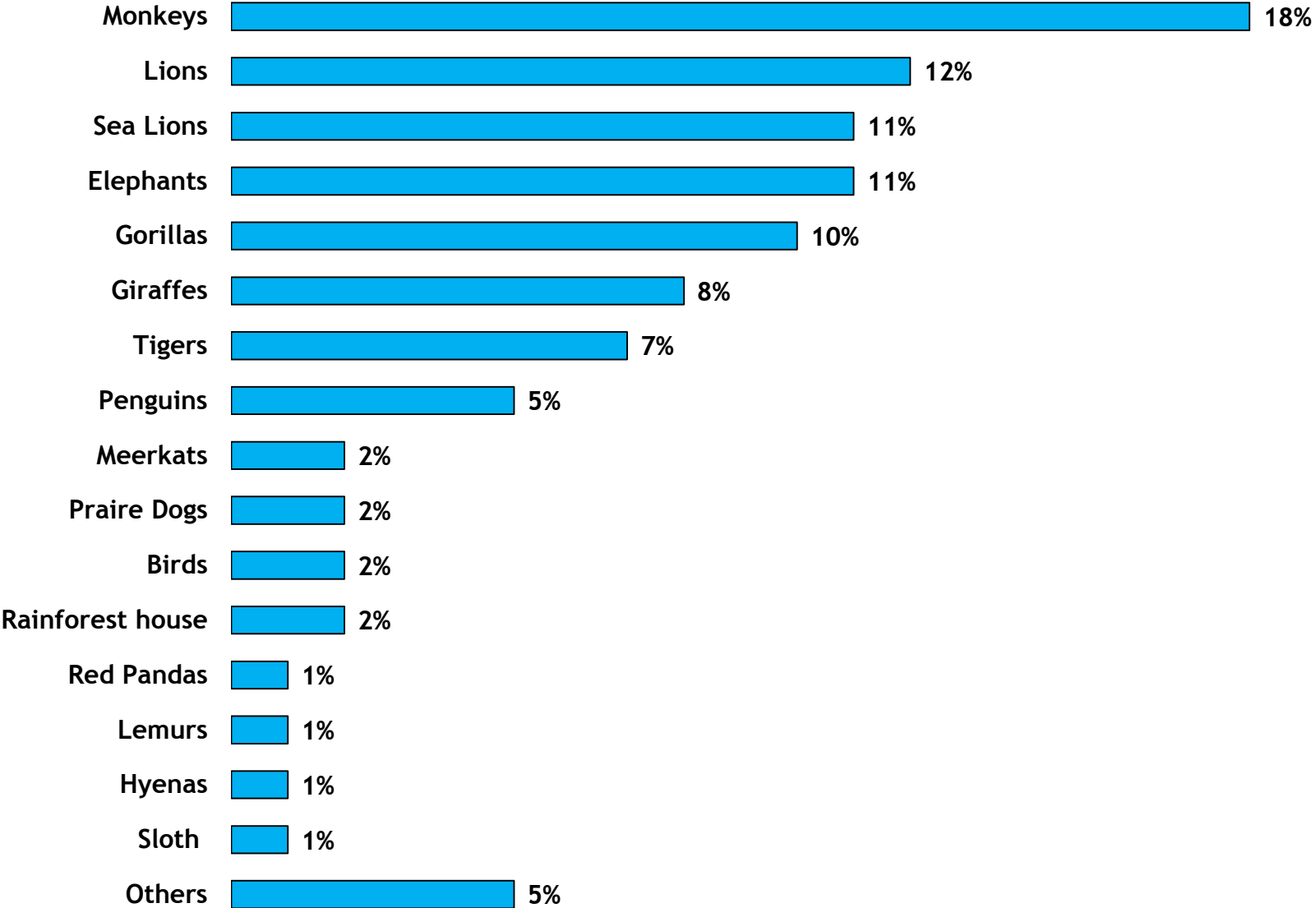
# Rating of various aspects of Belfast Zoo

Base: All visitors (n=207)



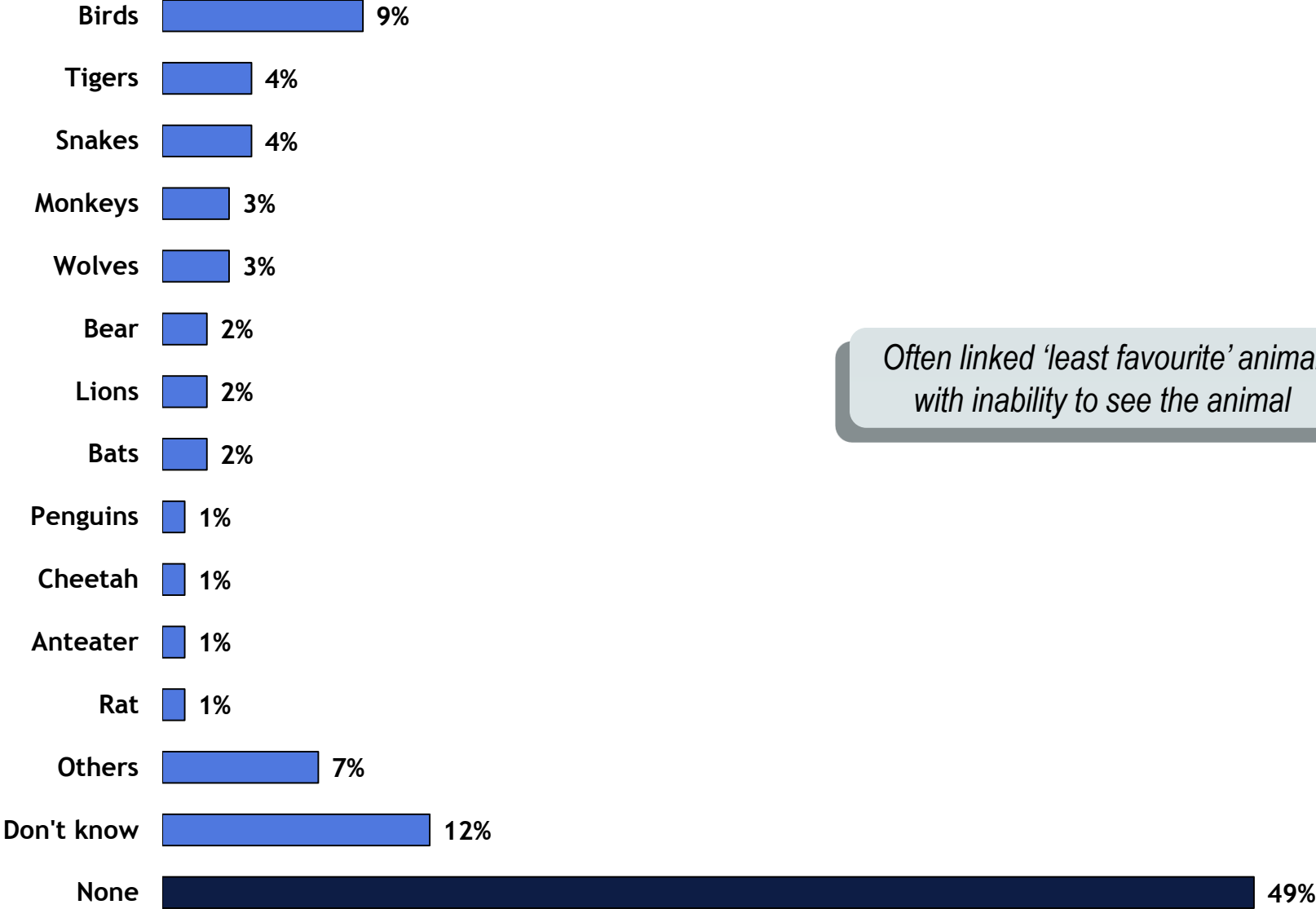
# What was your MOST favourite animal exhibit that you visited today?

Base: All visitors (n=207)



# What was your LEAST favourite animal exhibit that you visited today?

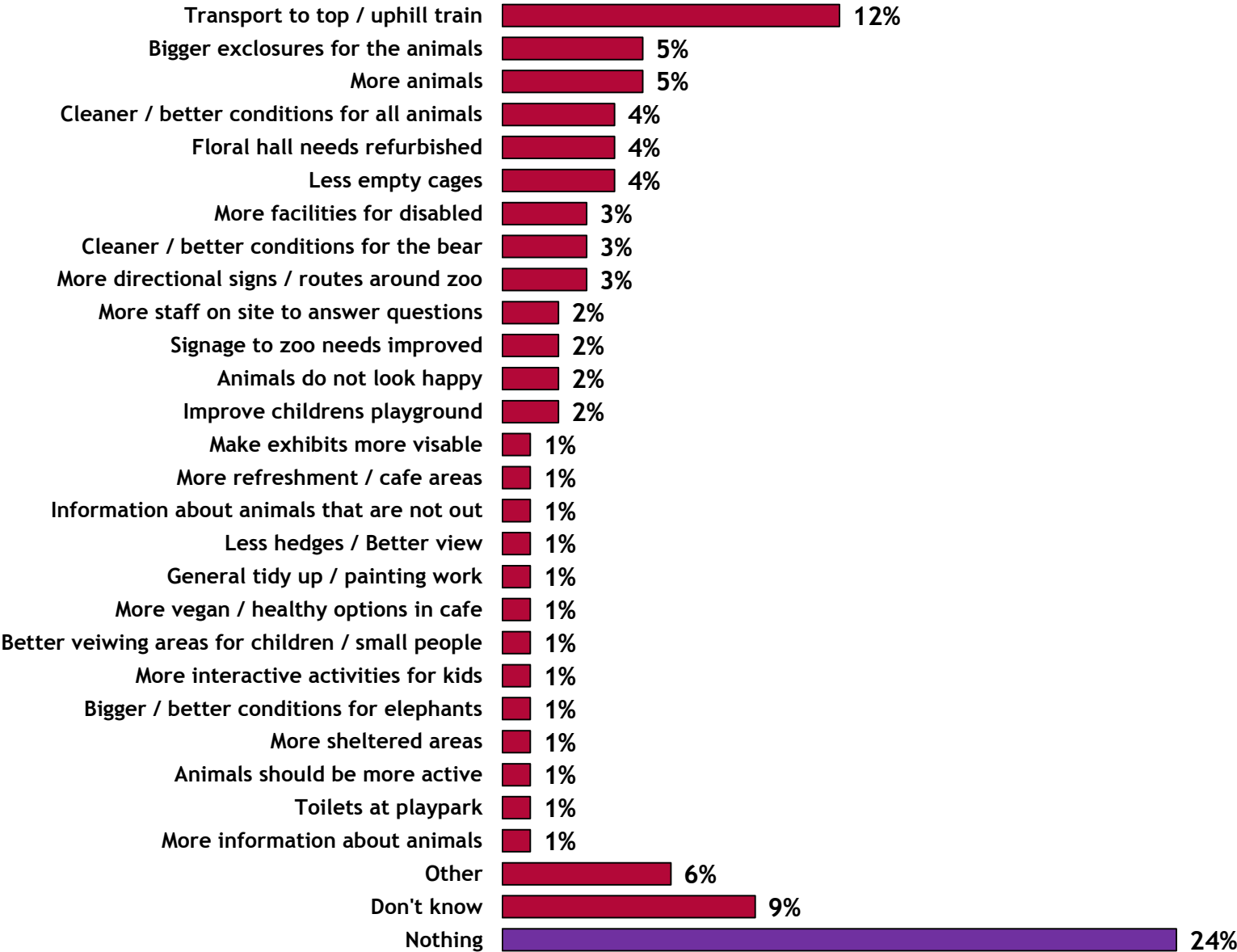
Base: All visitors (n=207)





# In what specific ways, if any, do you think the Zoo could be improved?

Base: All visitors (n=207)



# Zoo Services & Opening Hours

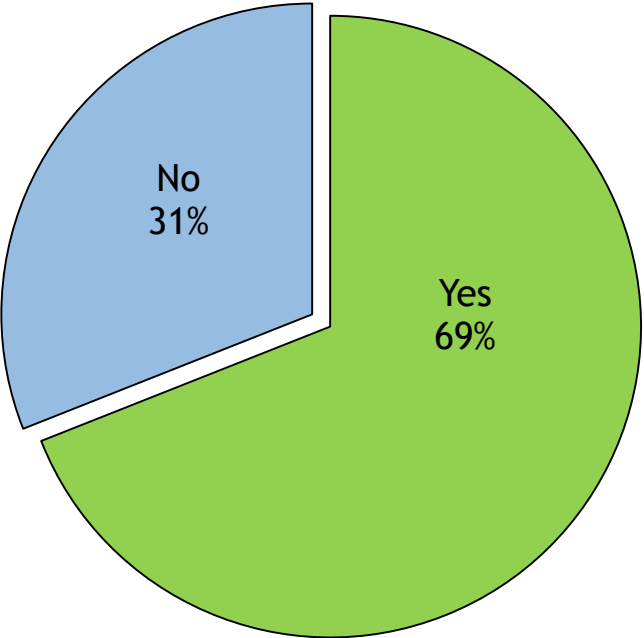
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# Awareness of additional Belfast Zoo services / offers

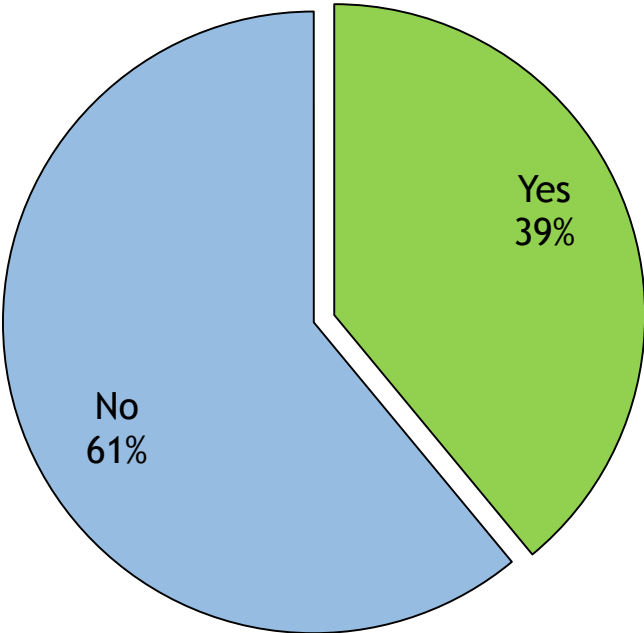
Base: All visitors (n=207)

*Awareness that Belfast Zoo offers a range of other services such as animal adoptions, membership, friends of the zoo volunteer group, keeper for a day, corporate partnerships etc..*

2015



2014

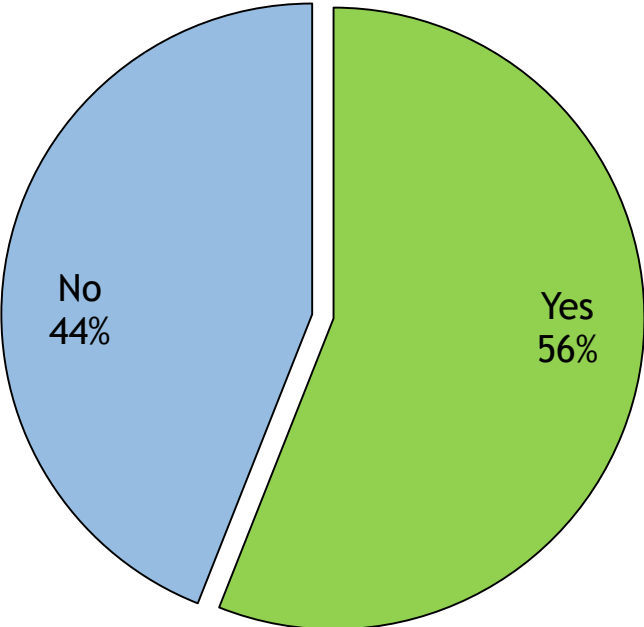


# Awareness of additional Belfast Zoo services / offers

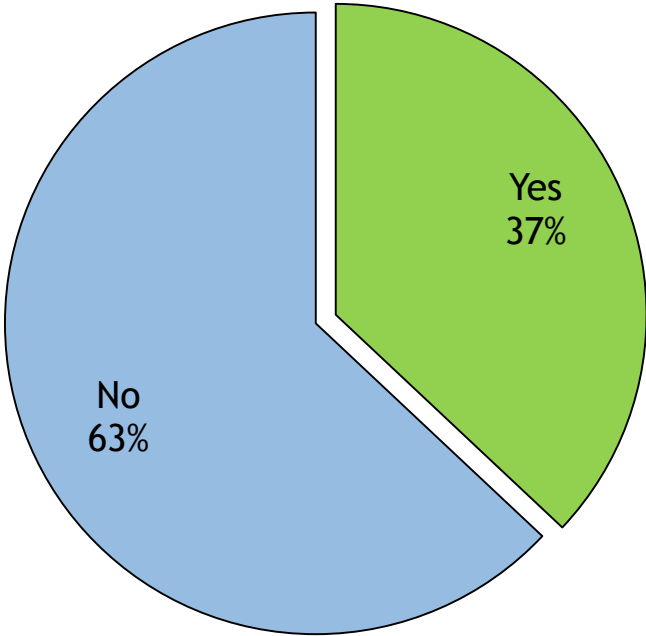
Base: All visitors (n=207)

*Awareness that Belfast Zoo offer a number of different events throughout the year such as the historical zoo tour and seasonal events such as the kids Halloween fun day etc..*

2015

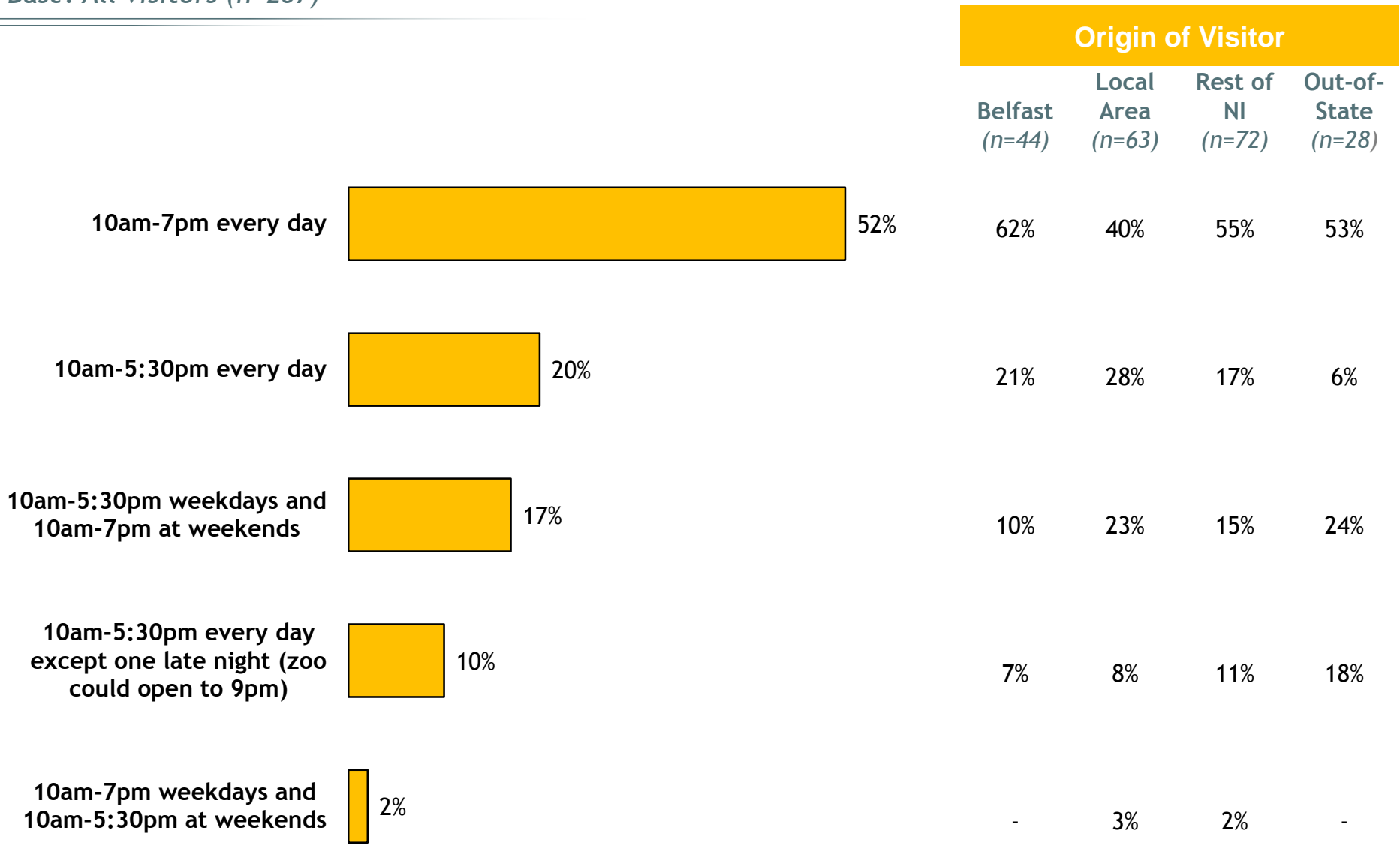


2014



# Currently the zoo is open from 10am to 7pm every day. Which of the following opening hour options would you most be in favour of?

Base: All visitors (n=207)



# Website, Media and Visitor Interests

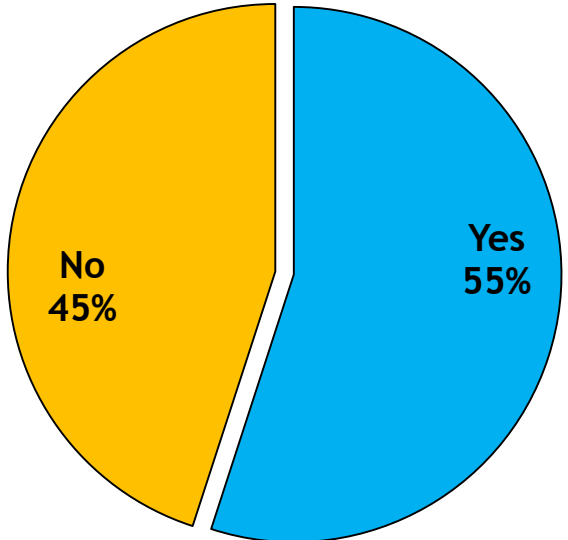
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# Belfast Zoo website

Base: All visitors (n=207)

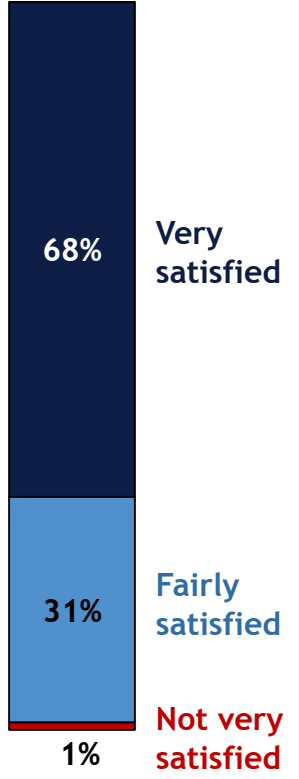
### Have you ever visited the Belfast Zoo website?

Base: All visitors (n=207)



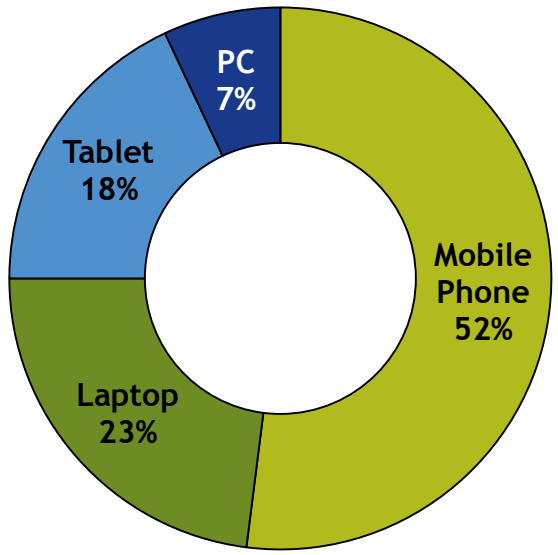
### Overall satisfaction with the Belfast Zoo website?

Base: All who visited the site (n=113)



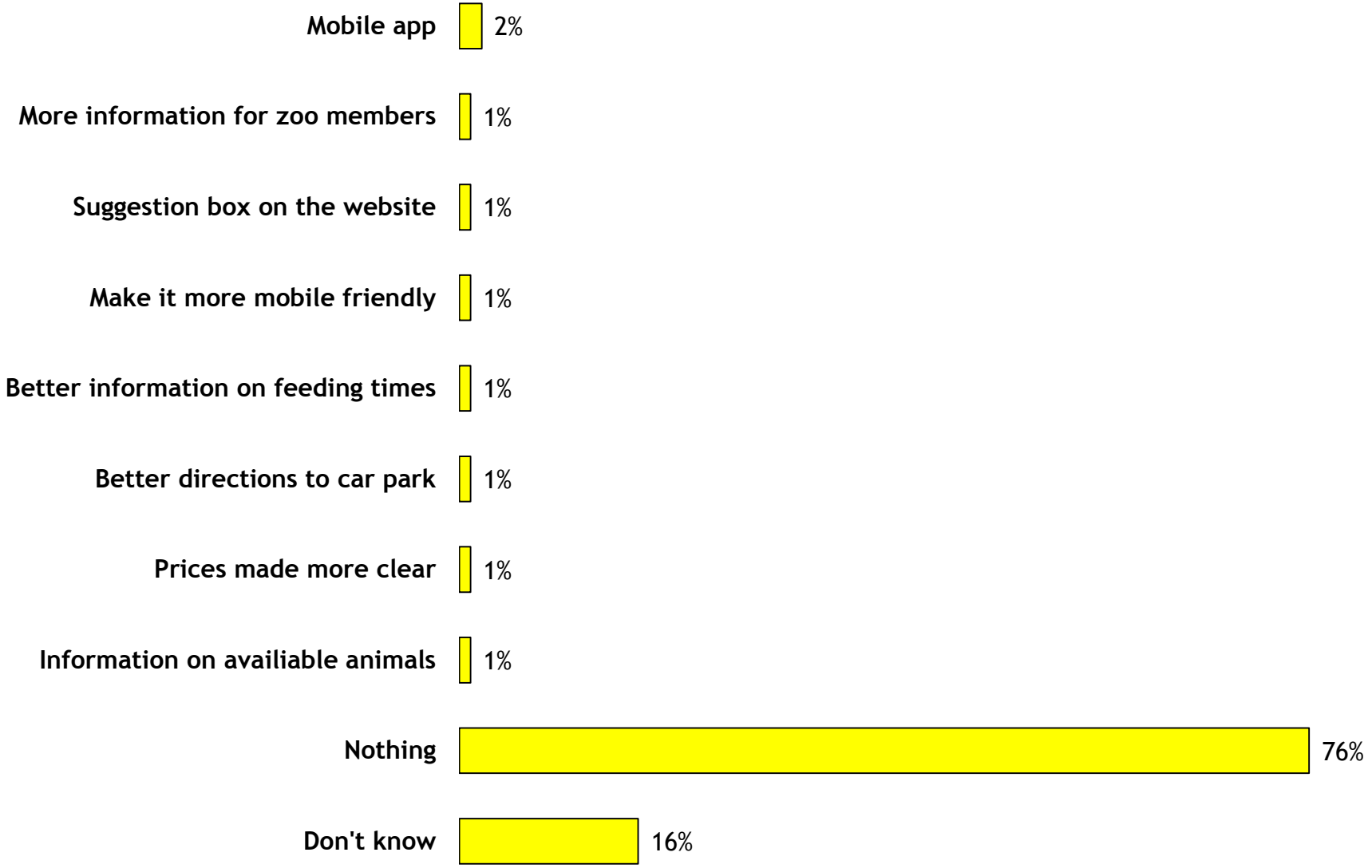
### Typically what device would you use most often when accessing websites such as the Zoo website?

Base: All who visited the site (n=113)



# What, if any, improvements would you like to see made to the Belfast Zoo website?

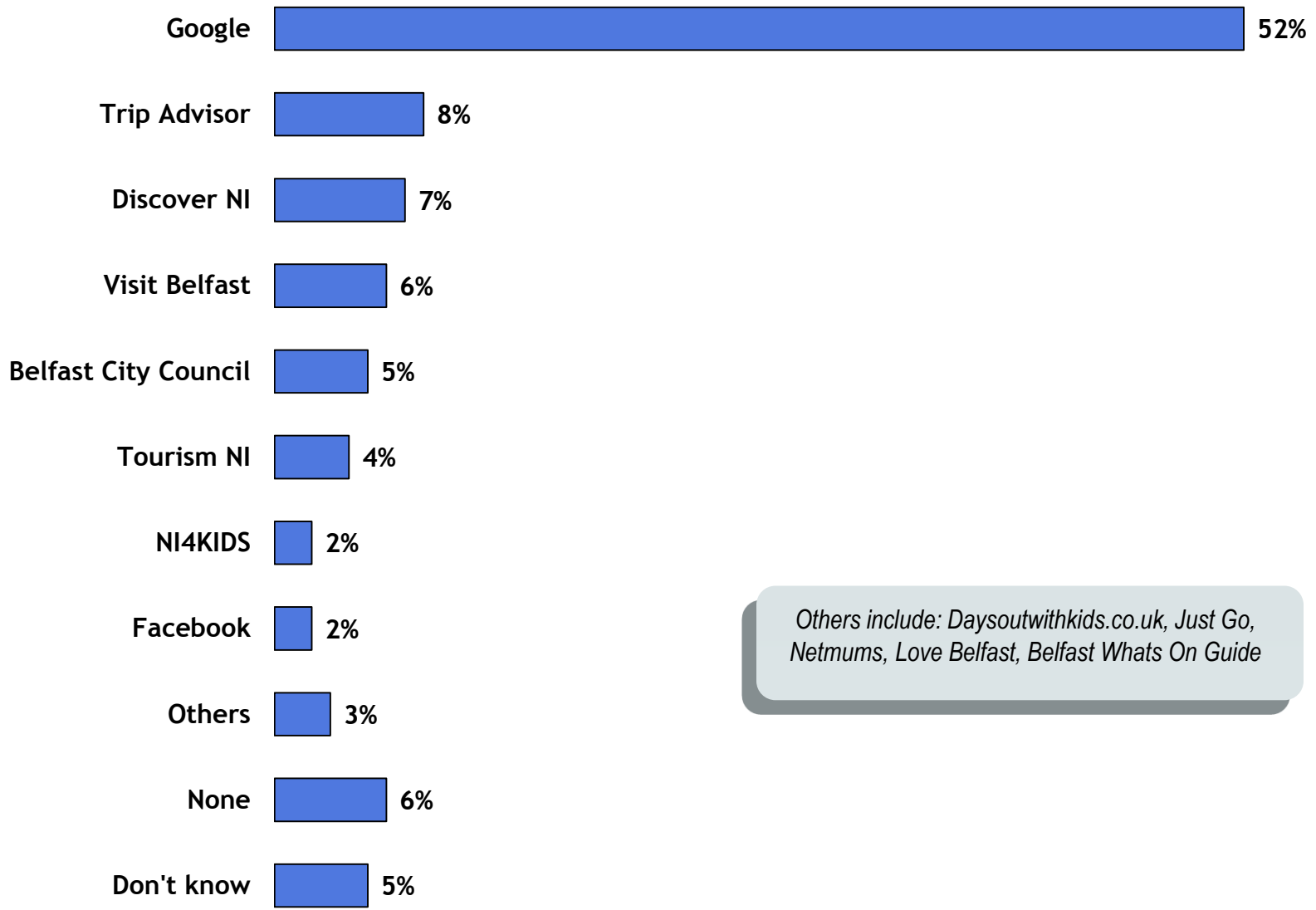
Base: All who visited Zoo website (n=113)





# What, if any, websites would you visit most often if you were looking for ideas or information for a day out?

Base: All visitors (n=207)



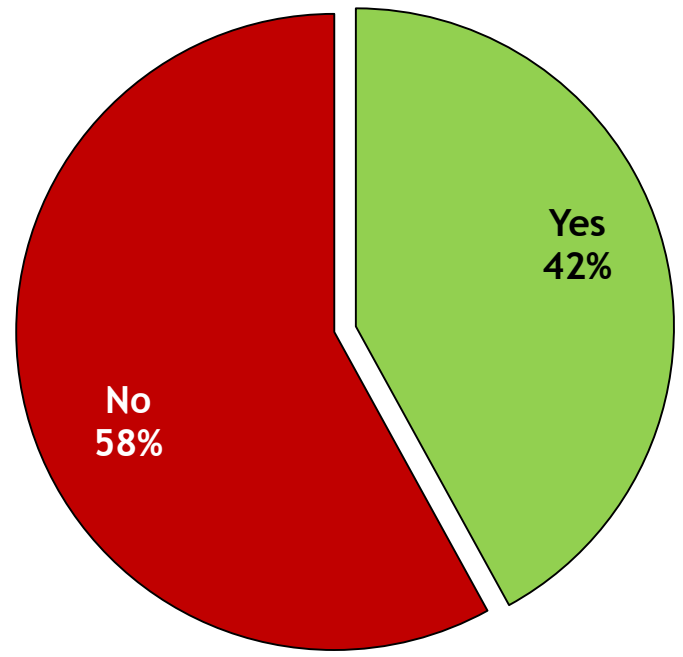
Others include: *Daysoutwithkids.co.uk, Just Go, Netmums, Love Belfast, Belfast Whats On Guide*

# Newspaper readership

Base: All visitors (n=207)

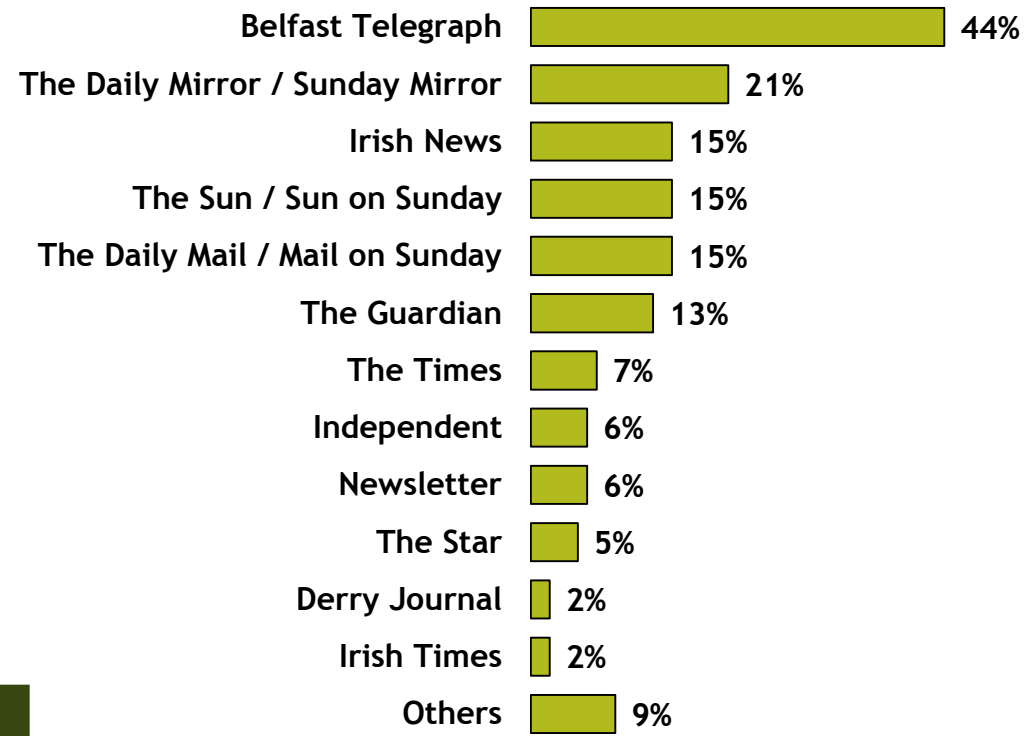
## Do you regularly read newspapers, either paper copies or an online version?

Base: All visitors (n=207)



## Which newspapers (paper or online) do you read regularly?

Base: All who read news (n=87)

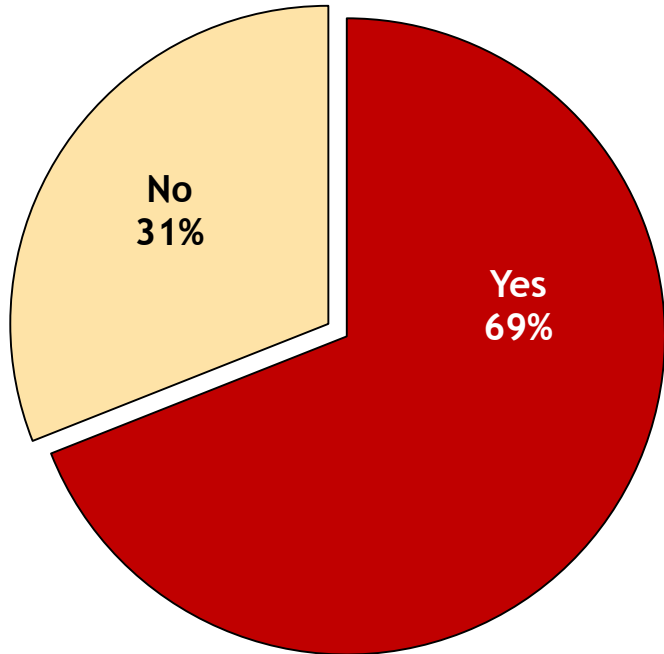


### News Readership by Sub-Group

Male	Female	16-29	30-44	45-60	60+
50%	34%	31%	45%	55%	63%

# Radio listenership

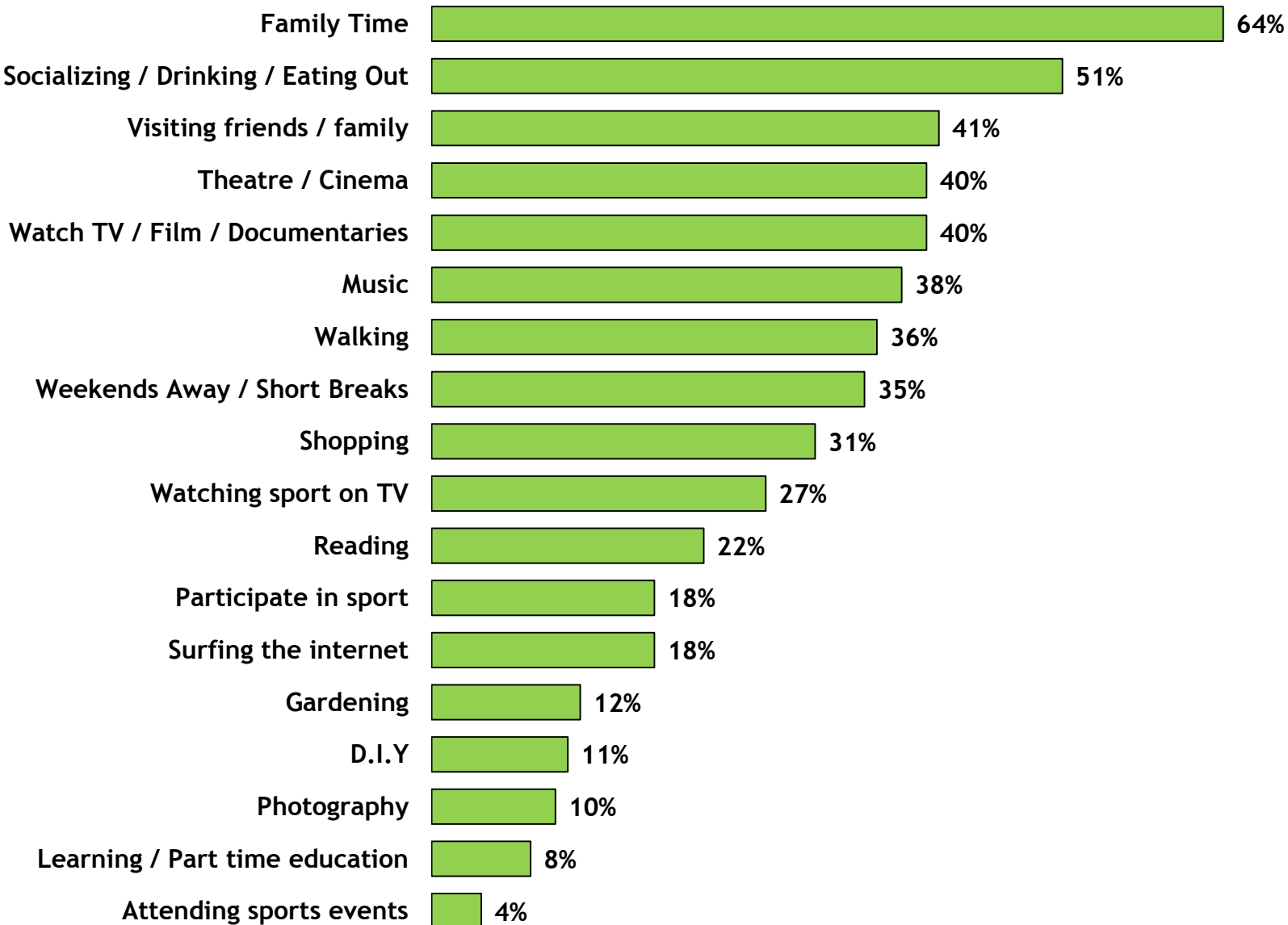
Base: All visitors (n=207)



Gender		Age			
Male (n=102)	Female (n=105)	16-29 (n=86)	30-44 (n=73)	45-60 (n=40)	60+ (n=8*)
77%	60%	59%	77%	73%	75%
23%	40%	41%	23%	28%	25%

# Which, if any, of the following would you describe as your hobbies or interests?

Base: All visitors (n=207)



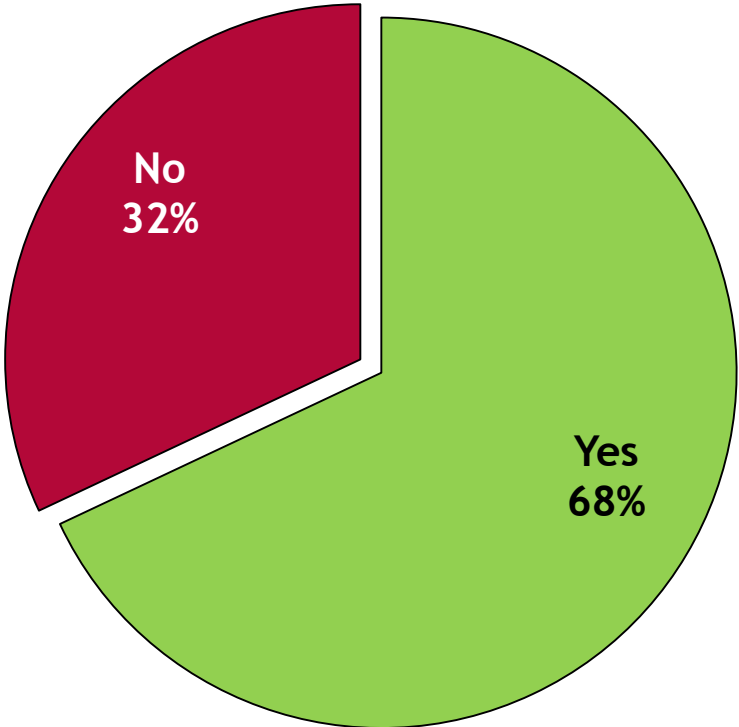
# New Adventure Learning Centre

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# New Adventure Learning Centre in Belfast Zoo

Base: All visitors with children in their party (n=130)

Did you or any of the children in your party visit the New Adventure Learning Centre during your trip to the Zoo today?

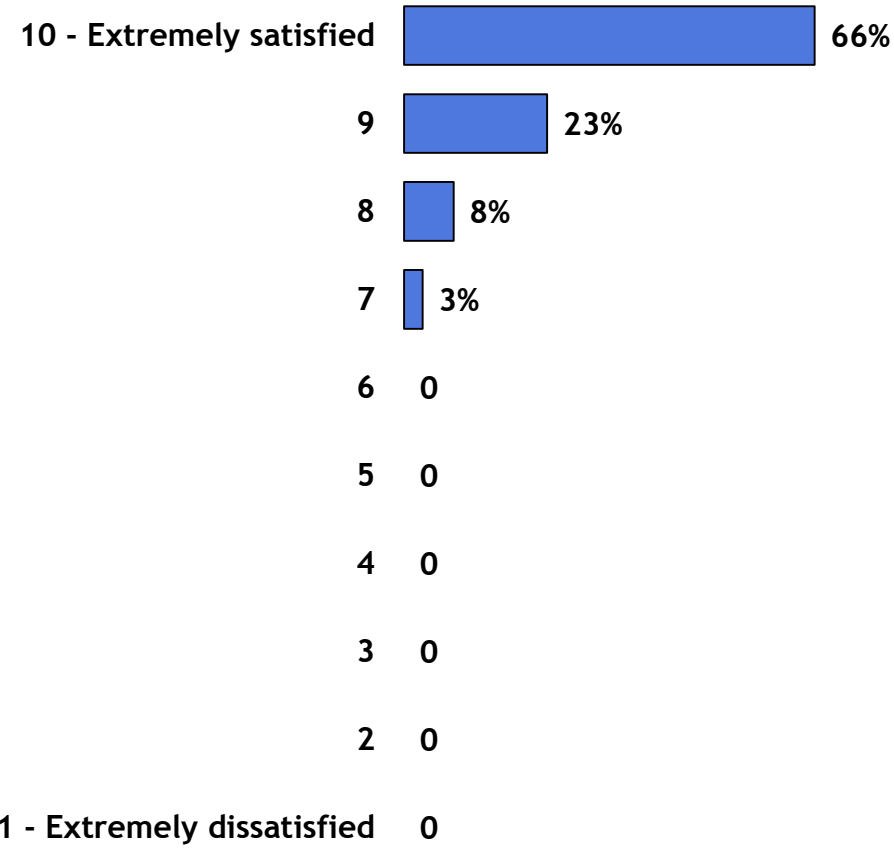


# New Adventure Learning Centre in the Zoo

Base: All visitors with children in their party (n=207)

How satisfied, or dissatisfied, were you with the New Adventure Learning Centre in the zoo?

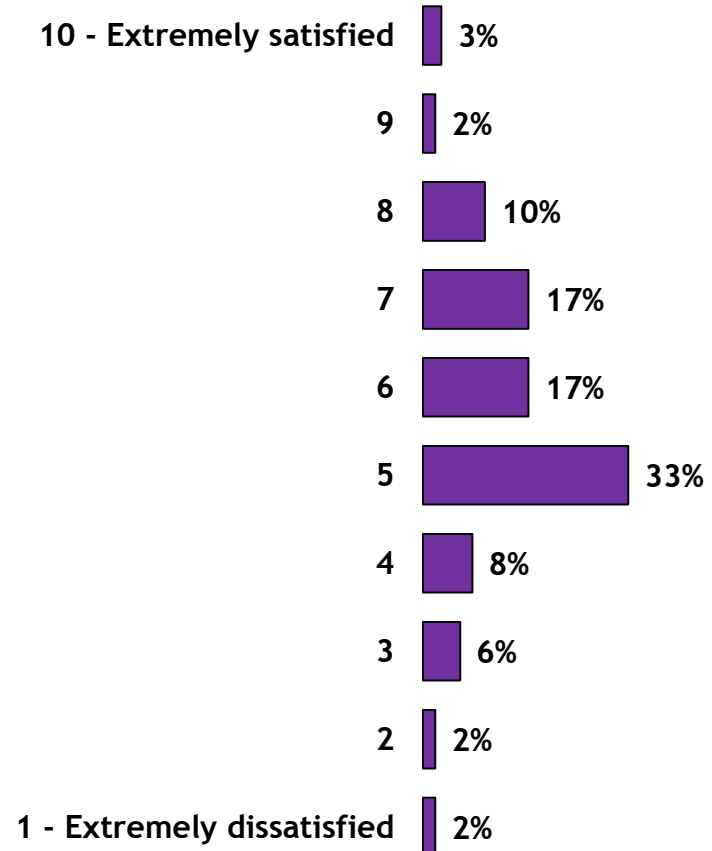
Base: All who visited New ALC (n=96)



Overall average rating = 9.5

How satisfied, or dissatisfied, were you with the old play park in the zoo?

Base: All who had visited the old play park (n=63)



Overall average rating = 5.7

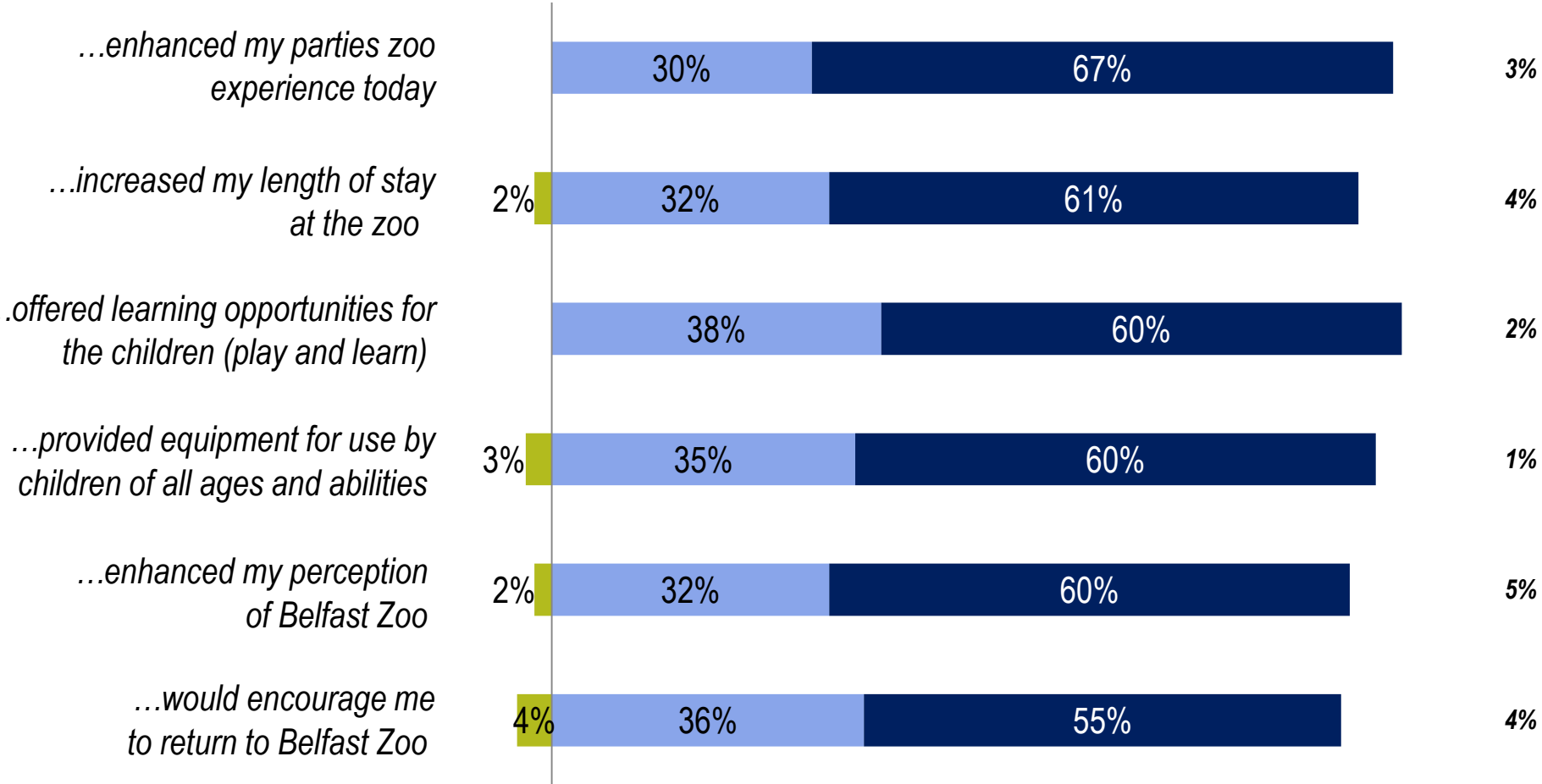
# New Adventure Learning Centre in the Zoo - Attitude Statements

Base: All who visited the New Adventure Learning Centre (n=96)

The New Adventure Learning Centre...

Disagree Agree Strongly Agree

Neither Agree Nor Disagree



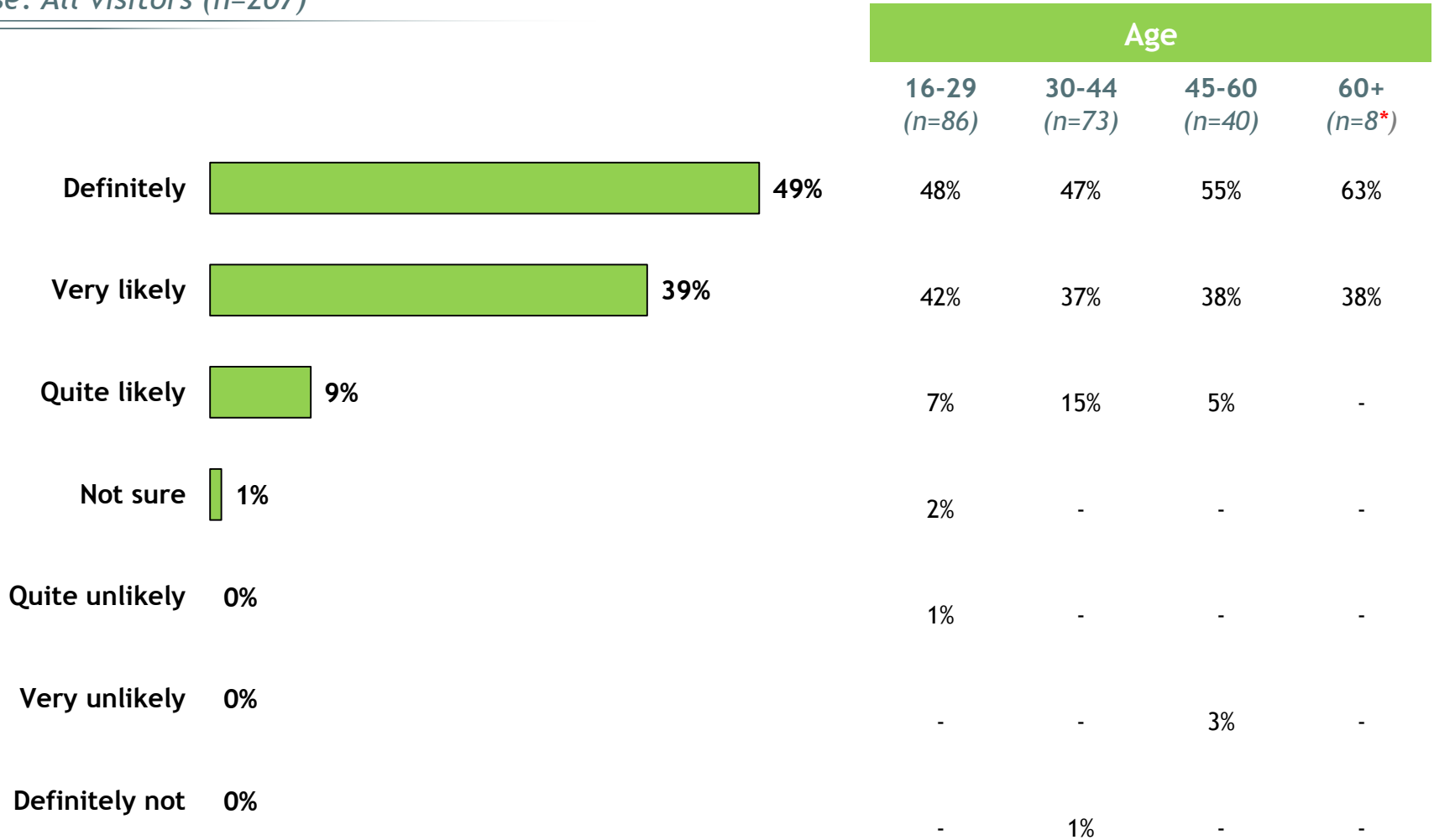


# Advocacy

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# How likely or unlikely is it that you would recommend family and friends to visit Belfast Zoo?

Base: All visitors (n=207)

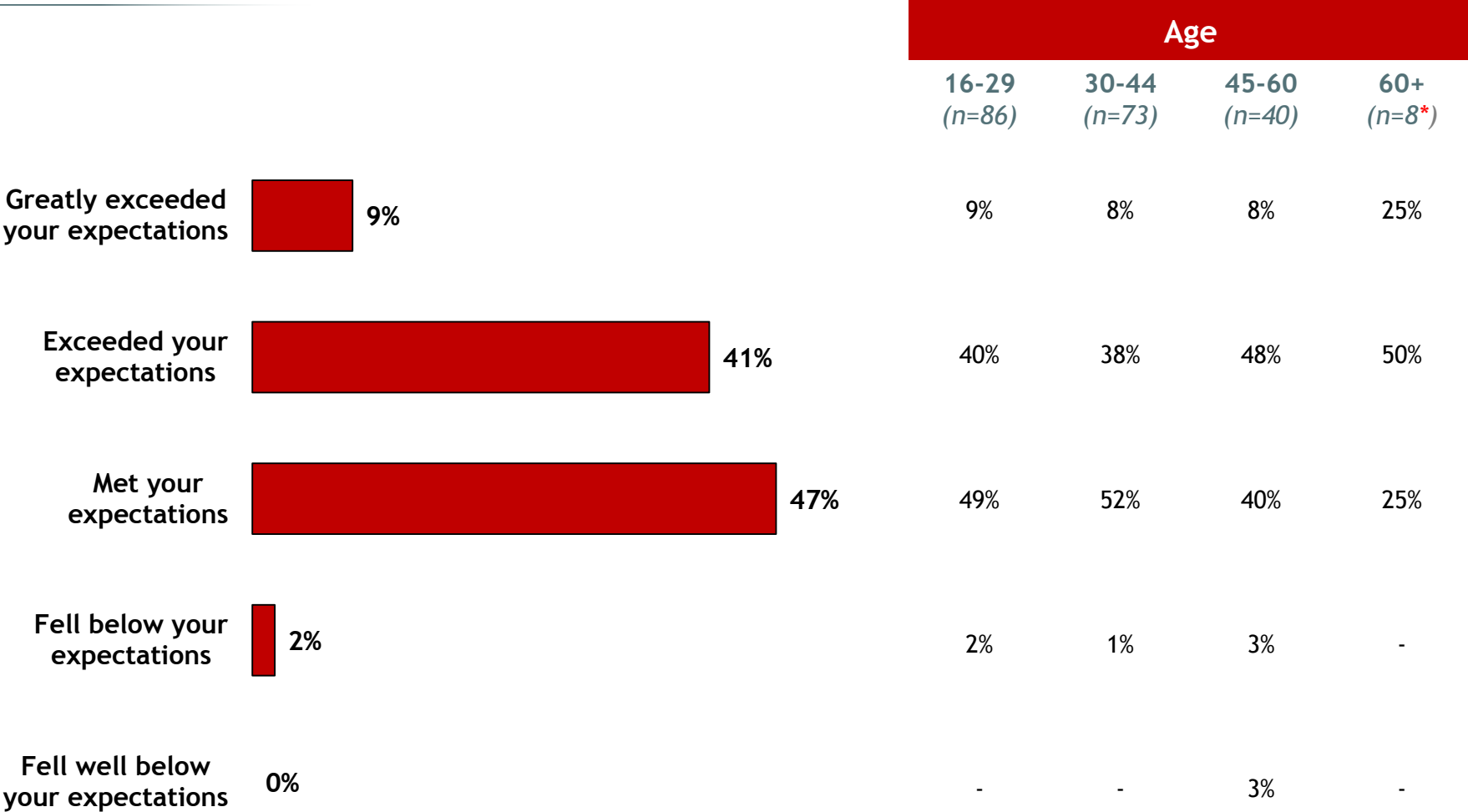


Top 2 (Def & Very Likely)		Likely to recommend (Def, very likely & quite likely)	
2015	2014	2015	2014
88%	77%	97%	87%

\*Caution : very small base

# Thinking about your entire experience today would you say that Belfast Zoo as a place to visit ..?

Base: All visitors (n=207)

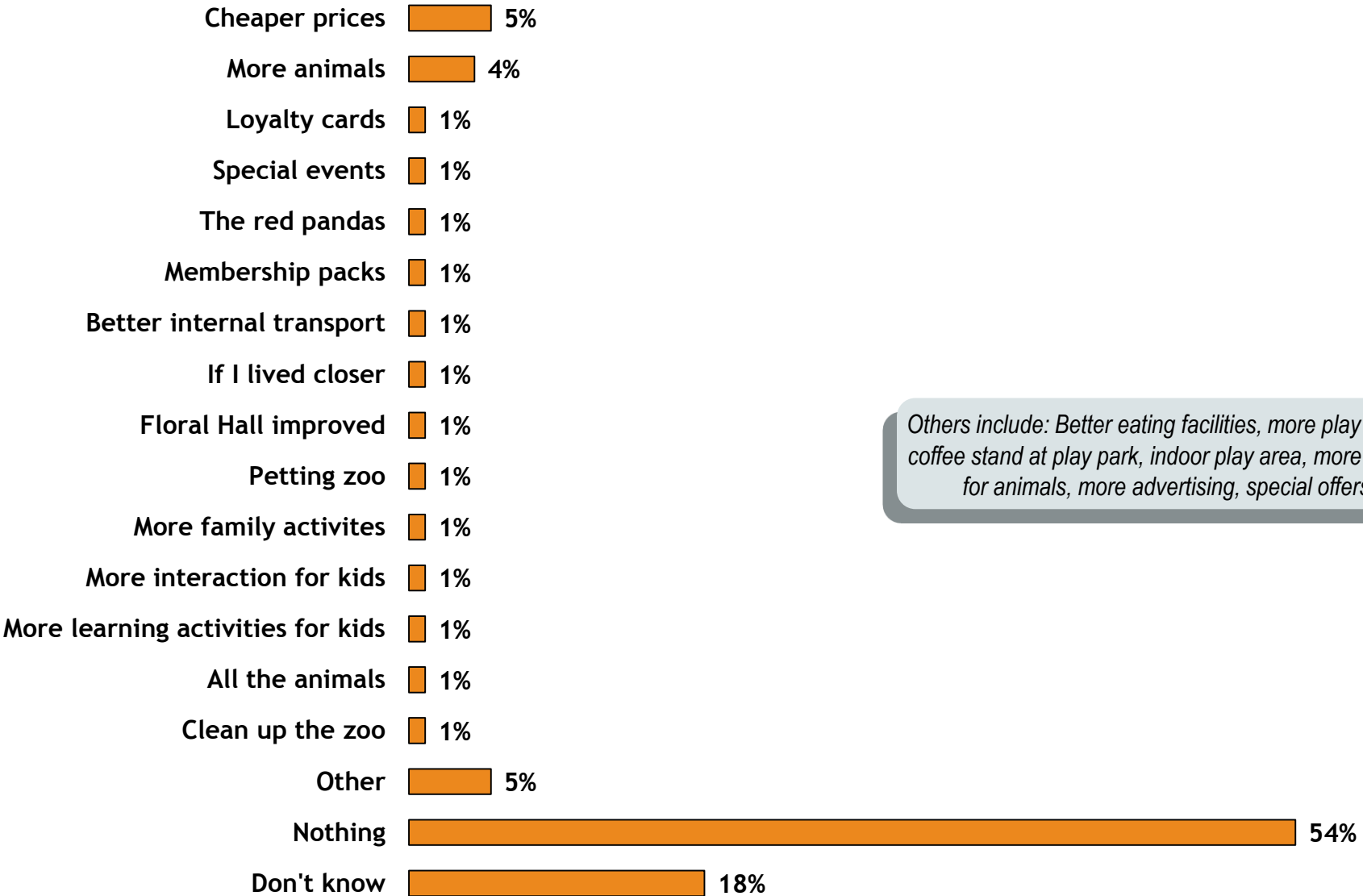


Exceeded Expectations	
2015	2014
50%	41%

\*Caution : very small base

# What, if anything, would encourage you to visit the Zoo more often?

Base: All visitors (n=207)



*Others include: Better eating facilities, more play areas, coffee stand at play park, indoor play area, more space for animals, more advertising, special offers*

# Brandwatch



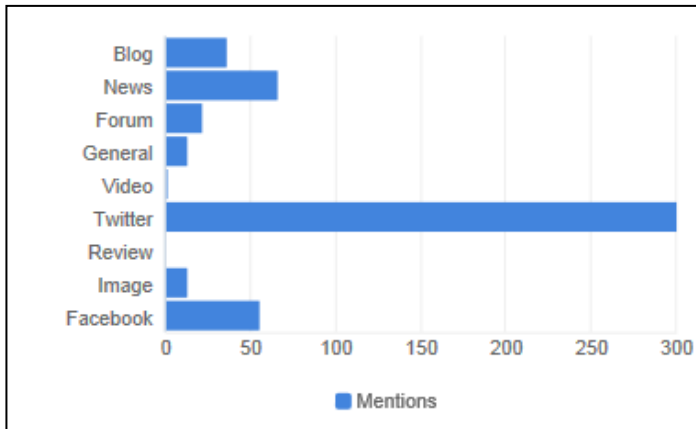
**Overview:** Since May 2015 Belfast Zoo has been mentioned 506 times across different social media channels. Of those that could be categorised, 67 were positive mentions while 16 were negative. Twitter provided the largest majority of conversation, with noise being loudest on week commencing 8<sup>th</sup> June 2015 (later shown to be due to the arrival of the dragon)

Mentions  
**506**

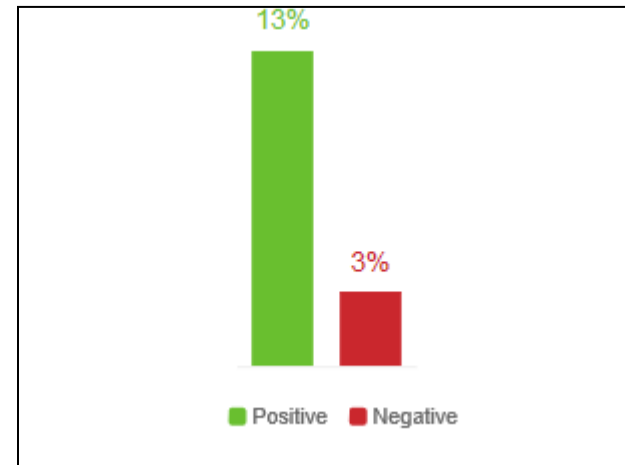
Positive  
**67**

Negative  
**16**

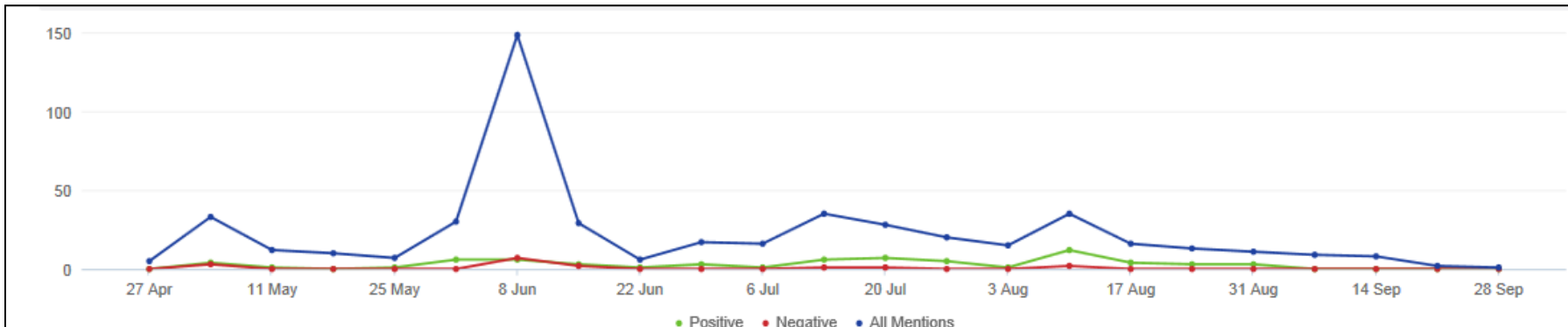
Where conversation was coming from



Sites

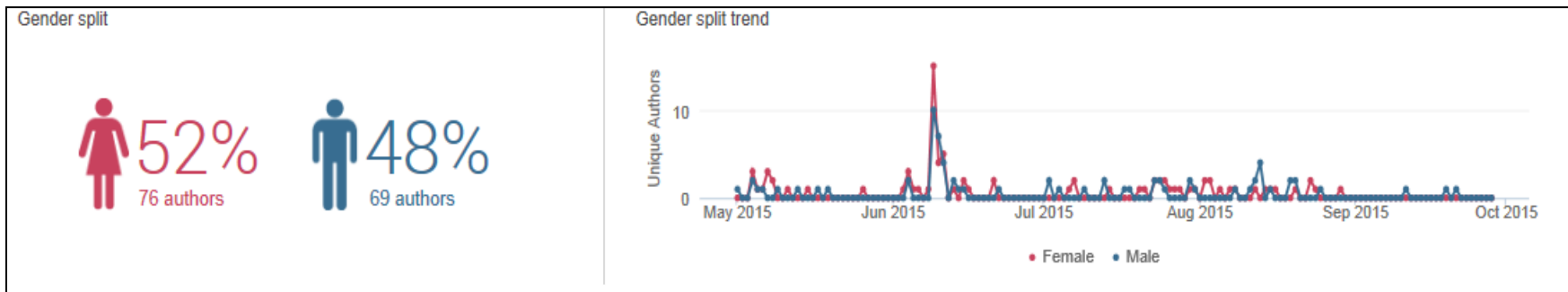


History

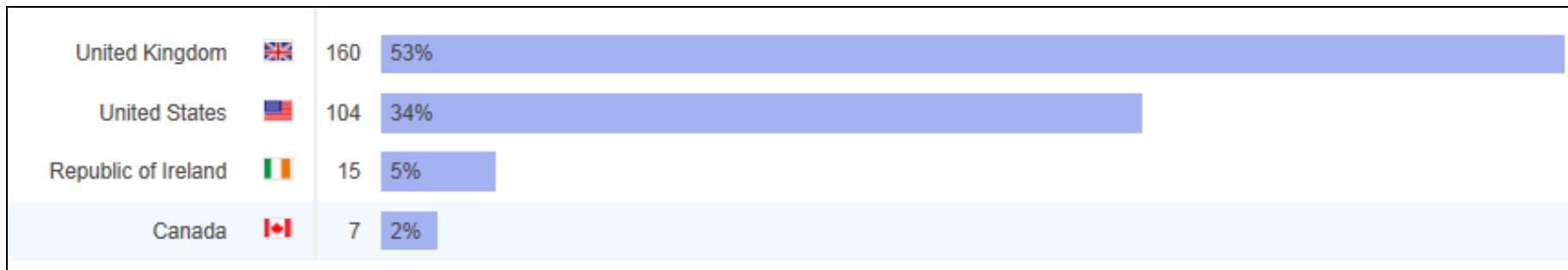


**Overview:** The gender split was almost equal for those who were talking about Belfast Zoo using social media, while there was a variation of countries making noise about the Zoo (where location information was available).

### Gender Split and Trend



### Country Split



**Wordle:** The wordle automatically outputs the most talked about topics across the selected date range. As seen below a significant amount of noise was made surrounding the Game of Thrones dragon arriving at Belfast Zoo back in June.

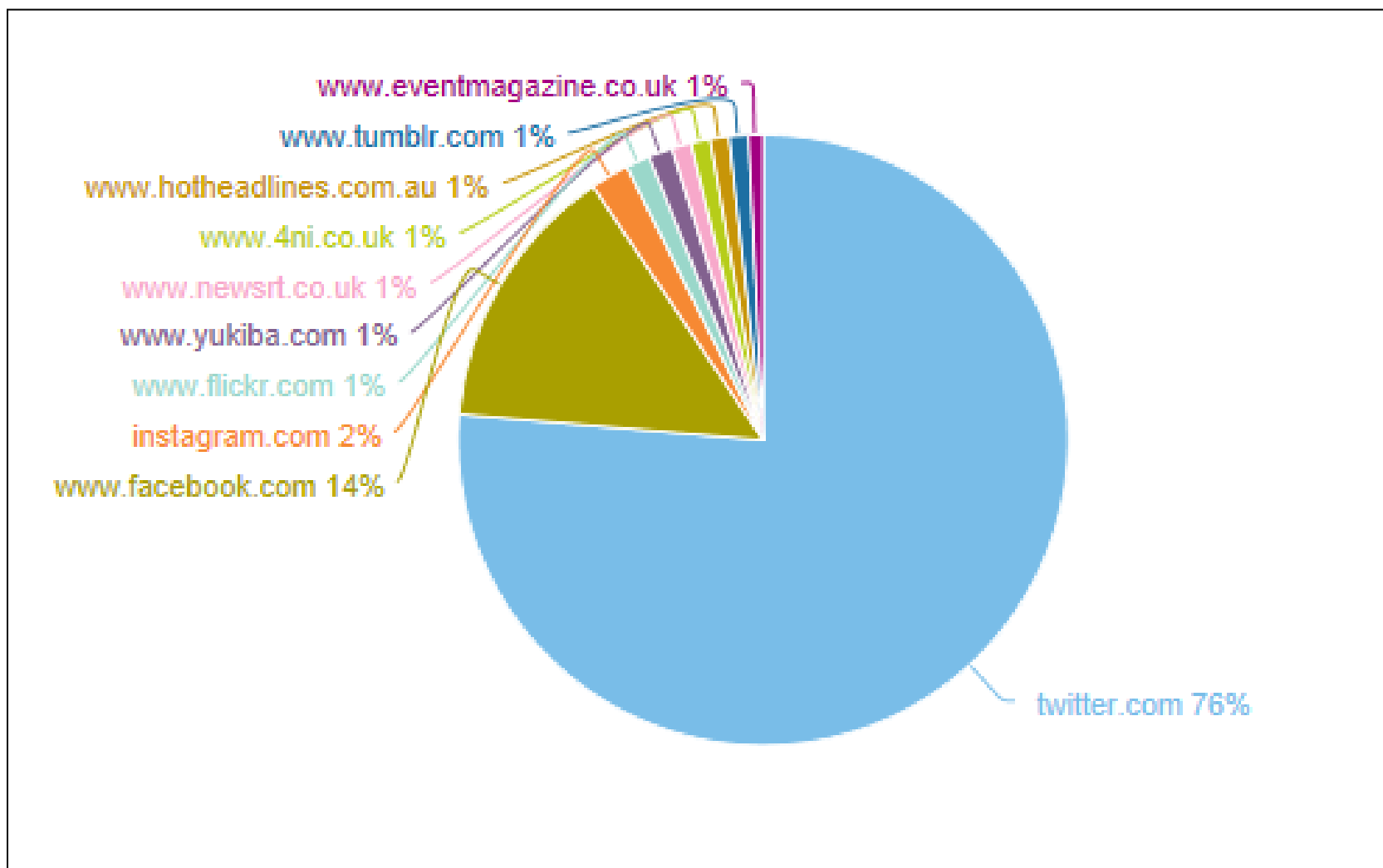
### Wordle





**Sites:** Twitter was by far the most used channel to talk about Belfast Zoo from May-September 2015. Facebook was the next most popular channel.

Mentions by Site



# Mentions (positive)

Twitter


 **Liverpool Airport**  
@LPL\_Airport


Need to keep the kids entertain this summer? Visit #**Belfast Zoo**. Fly from @lpl\_airport in 50 mins with @flybe [lja.uk/1E1acbW](http://lja.uk/1E1acbW)

 **Belfast Telegraph**  
@BelTel

**Belfast Zoo** get summer off to a splashing start as they welcome sea lion pup #NINews [belfasttelegraph.co.uk/news/northern-...](http://belfasttelegraph.co.uk/news/northern-...)



 **adhd @AdhdComber**  
16th Aug  
Belfast zoo allow carers in for free on production of proof. Ice cards are available to buy at our resource centre

 **Alan Tweedie**  
@alantweedie

Haven't been to **Belfast Zoo** before....just planned a trip for next week. I'm already looking forward to it!

2:33 p.m. - 19 May 2015

Instagram

Fab day at **Belfast Zoo** with my neices!!  
Knackered now! Lols




 **Boston Irish Lass**  
@BostonIrishLass

Awesome! **Belfast Zoo** animal magic as sick kids and their families enjoy Dreamnight [belfasttelegraph.co.uk/news/northern-...](http://belfasttelegraph.co.uk/news/northern-...) via @BelTel #**Belfast** #BelfastZoo


# Mentions (negative)

## Facebook

 **Laura Fusco**  
09-Jun-2015 14:44:37

**Belfast Zoo** is pathetic, a waste of money & time, that has you climbing up a mountain the entire time with little to no animals. I prefer Dublin **Zoo**, it's a great family day out!


## Twitter


 **Sara Beggs**  
@saraatheekidd

So, my family & I went to **Belfast Zoo** today. Complete waste of time. Got majorly drenched in the rain.

 **Patricia mccarthy**  
@pat35083377

@peta check out **Belfast zoo** on pick TV just seen a keeper use a bull hook on an elephant and it was chained sent tweet to them to complain.

 **Martin Rowson** @MartinRowson · May 5  
Right - off in a sec to London City on way to **Belfast** for @Cqaf gig at @BlackBoxBelfast 1pm tomorrow. Planning trip to **Belfast Zoo** too.

 **fionnuala griffiths**  
@emmetsmother

@MartinRowson don't go to **Belfast zoo** - it is horrible.

9:12 a.m. - 5 May 2015

# Mentions in pictures

## Instagram



**lazlo05**  
Belfast Zoological ... [FOLLOW](#)

34 likes 8w

lazlo05 The view from inside Belfast Zoo, reminds me of Jurassic Park [] #landscape #scenery #green #jurassicpark #mountain itsmydogslife That's funny because that's exactly what I thought before I read what you said []

## Website

SATURDAY, SEPTEMBER 12, 2015

### Shower Time for **Belfast Zoo** Gentoo Penguins

Earlier this year, three adorable gentoo penguin chicks turned heads at the **zoo**.

**Zoo** keepers have been preparing for their arrival since February, installing nest rings into the penguin enclosures and even putting up umbrellas for shade and to protect the parents and chicks from wet weather.



## Must Visit Locations

I'm a keen photographer and the majority of these pictures have been taken during my travels and holidays. Some glorious must visit locations.

ARCHIVE



Great day at Belfast zoo. It can be a steep walk at times but well worth it in the end.

#lemur #ring tailed lemur #zoo #animals #wildlife #tourism #tourists #travel #ireland #belfast #culture #lemurs

# Mentions in pictures

## Twitter

Ireland irelandcalling  
calling @irelandcalling1

**Belfast Zoo** Gets a Baby Dragon From Esteros  
irelandcalling.com/a-baby-dragon-...  
#gameofthrones #ireland #dragon #tourism  
#belfast

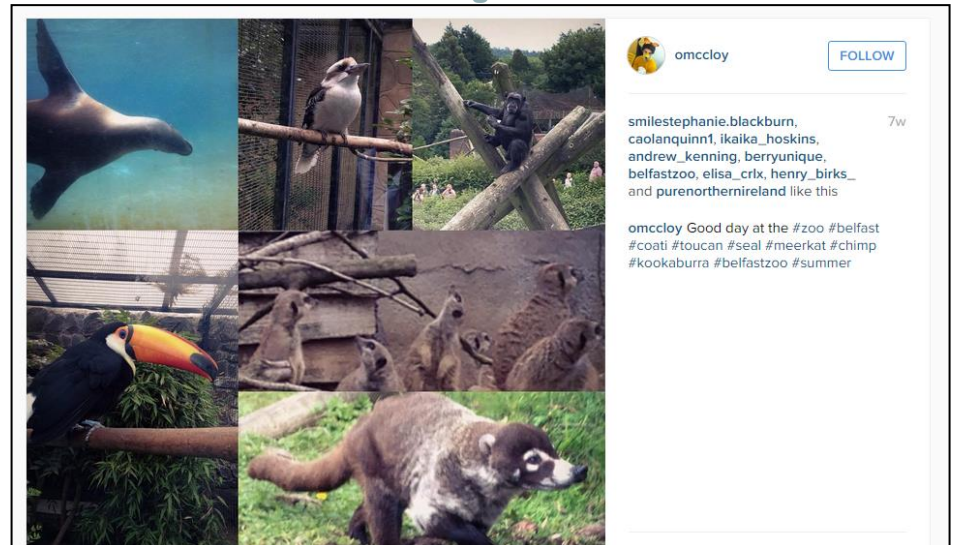


Event magazine  
@Eventmagazine

#GameOfThrones dragon to arrive at  
#Belfast Zoo ow.ly/O3ZPL #eventprofs  
#experiential @TourismIreland



## Instagram



# Summary



# Summary

## Visitor Profile

- Four fifths of all respondents visited the zoo as part of a family (59%) or as a couple (21%).
- More than two fifths were between the ages of 16 and 29 (42%). Those at the upper end of the age range were least likely to visit the zoo, less than one in twenty (4%) visitors were aged 60+.
- Just over a fifth of visitors during the peak season were from the greater Belfast area (21%) and a further one third (30%) lived within 30 miles of the zoo. More than one in ten (14%) were out-of-state visitors, primarily from GB and Rol.

## Transportation

- The majority of visitors travelled to the zoo by private car (84%).

## Previous Attendance

- Over four fifths (85%) of all respondents had previously visited Belfast Zoo. In fact a third (33%) of all visitors had been to Belfast Zoo on more than 5 previous occasions.
- Almost two fifths (37%) of all repeat visitors stated that, on average, they visit Belfast Zoo at least 2 or 3 times a year.

# Summary

## Visitor Influences

- More than two fifths (44%) of all visitors were most likely to have been influenced to visit the zoo by children.
- Four fifths (80%) of all visitors stated that they did not consider visiting elsewhere.
- Of the one fifth of visitors who did consider going elsewhere the most frequently cited alternatives were Belfast City Centre, the Ulster Folk and Transport Museum, Titanic Belfast, W5 and the Ulster Museum.

## Value for Money & Overall Experience

- More than four fifths (83%) of all visitors believe that Belfast Zoo is good value for money, a significant increase from the findings in 2014 (59% good value for money).
- Almost all (95%) visitors had a good experience during their visit to the zoo.

## Zoo Performance

- Queue times, ticketing, overall experience, friendliness of staff and general cleanliness were all rated positively by the overwhelming majority of visitors.
- Information signs on animals, car parking, the free map, value for money, signage, the number of rest areas and the ease of getting between exhibits were also rated positively but to a lesser extent.



# Summary

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## Zoo Performance (continued)

- The quality of the animal exhibits (16%) and the number of animal exhibits (13%) were the only two areas in which significant proportions of visitors believed could be improved.
- Of all the zoo services the catering facilities performed least positively. A fifth of all visitors stated that the catering facilities were only adequate and a further 7% stated that they could be improved.

## Animals

- When asked for their favourite animal exhibits a wide range of answers were given with the monkeys (18%), lions (12%), sea lions (11%), elephants (11%) and gorillas (10%) the most frequently cited.
- Almost half (49%) of all visitors did not cite a least favourite animal or stated that they liked all of the animal exhibits. The birds were the least favourite animal exhibit, however, as with most of the animals cited as 'least' favourite it was often linked to their inability to see the animals at the time of visit.

# Summary

## Improvements

- Almost a quarter (24%) of visitors don't think the zoo could be improved. The most frequently cited suggestions for improvement included: transport to the top of the zoo (12%), bigger enclosures for the animals (5%), more animals (5%), better conditions for the animals (4%), refurbishment of the Floral Hall (4%) and less empty cages (4%).

## Additional Zoo Services & Opening Hours

- More than two thirds (69%) of all visitors were aware of additional zoo services such as the animal adoptions, memberships and volunteer groups. This is a significant increase on 2014 when only two fifths (39%) were aware of those additional services.
- More than half (56%) of all visitors were aware that Belfast Zoo offer a number of different events throughout the year. Again, this is a significant increase on 2014 when less than two fifths (37%) were aware of the various event offerings.
- More than half (52%) of all visitors stated that they were most in favour of the opening hours remaining from 10am to 7pm everyday. Out-of-state visitors and those from NI who live more than 30 miles from the zoo were most in favour.

# Summary

## Website, Media and Visitor Interests

- More than half (55%) of all visitors have previously visited the Belfast Zoo website and satisfaction with the website was almost universal amongst visitors to the site.
- More than two thirds (70%) of visitors use a mobile phone or a tablet when accessing websites such as Belfast Zoo's. Despite high satisfaction it is therefore essential that the zoo website is mobile and tablet friendly.
- Google was cited by more than half (52%) of all visitors when asked what websites they would visit most often when looking for ideas or information on a day out.
- More than two fifths (42%) of all visitors read newspapers on a regular basis. Local publications such as the Belfast Telegraph and the Irish News proving popular.
- More than two thirds (69%) of visitors regularly listen to the radio, especially with visitors aged over 30.
- Visitors have a wide range of hobbies and interests with almost two thirds (64%) of all visitors citing family time as a key interest. Other hobbies and interests frequently cited by visitors included: socialising, visiting friends and family, theatre, cinema, watching TV, music, walking and short breaks.

# Summary

## New Adventure Learning Centre

- More than two thirds of visitors with children in their party visited or used the New Adventure Learning Centre during their trip to the zoo.
- Overall satisfaction was very high for the New Adventure Learning Centre (ALC) with an overall average of 9.5 out of a possible 10. The high satisfaction rating is especially significant when comparing satisfaction with the old play park, visitors only rated it with an average of 5.7 (out of a possible 10).
- The ALC also rated very strongly across a number of attitude statements. Almost all (97%) stated that the ALC enhanced their experience at the zoo (67% strongly agreed), 93% stated that the ALC increased their duration of visit (61% strongly agreed) and 98% stated that the ALC offered learning opportunities for their children.

## Advocacy

- Almost 9 in 10 (88%) visitors stated that they would definitely or very likely recommend Belfast Zoo to family and friends. A further 9% would quite likely recommend the zoo meaning that overall 97% left the zoo as advocates.

# Summary

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## Advocacy (continued)

- Positively, half (50%) of all visitors stated that their visit to Belfast Zoo exceeded or greatly exceeded their expectations, a significant increase from the findings in 2014 (41%).
- Finally, more than half (54%) of all visitors stated that nothing would encourage them to visit the zoo more often. However, suggestions that may encourage repeat visitation included: cheaper prices, more animals, loyalty cards, special events and better internal transport.

