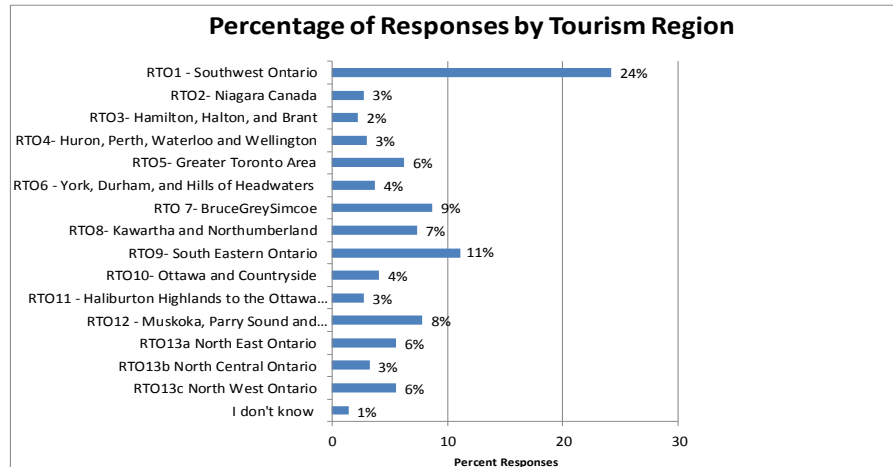
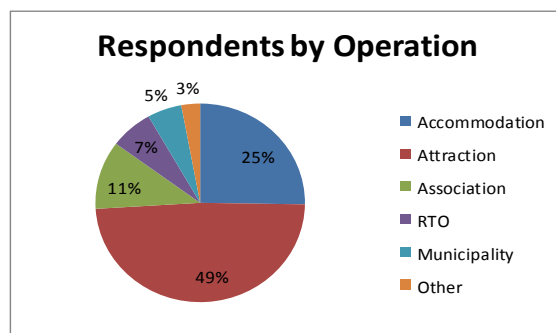


TODS Program Review Survey Results Overview: Province – Wide

At a Glance



- 830 survey respondents total. 19 email messages were received.
- 45.29% participate in the TODS program while 54.71% stated they do not.
- Respondents identified their operation as an RTO, attraction, accommodation, association, or municipality.
- 84.47% of participants stated they have participated in the TODS Program for over 3 years; 5.45% participated for less than one year.



- 82.04% of participants feel TODS signs are very important or important in assisting travellers to locate their business.
- 68.26% of participants indicated that TODS signs had raised the profile of their business or destination "very much" or "somewhat".
- 45.09% of non-participants indicated lack of program awareness was an obstacle to participation in the TODS program; 23.66% cited cost and 19.42% cited eligibility criteria.
- 41.02% of survey respondents indicated that service delivery had not improved over time.

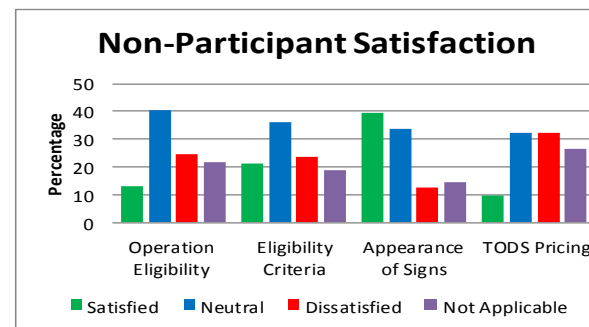
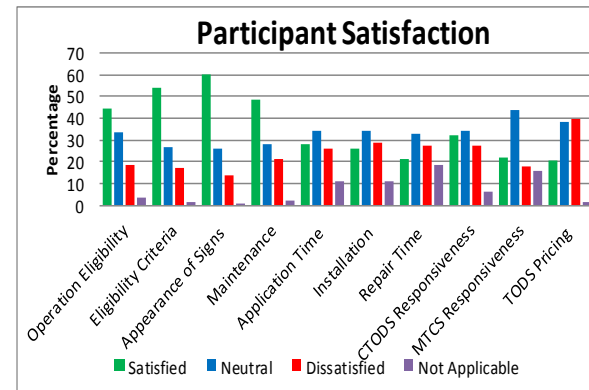
Survey Outcomes

Participant Satisfaction:
 Operation Eligibility (44.7%),
 Eligibility Criteria (54.22%),
 Sign Appearance (60.06%),
 Maintenance (48.5%)

Participant Dissatisfaction:
 TODS Pricing (39.63%)

Non-Participant Satisfaction:
 Sign Appearance (39.34%)

Non-Participant Dissatisfaction:
 TODS Pricing (32.04%)



Respondents identified the following potential new categories for inclusion in the TODS program:

- Campgrounds (9.76%)
- Markets (8.13%)
- Public Access/ Attractions (7.72%)
- Retail (6.9%)
- Downtowns (6.5%)
- Trails (6.1%)
- Seasonal/ Temporary Events (5.69%)
- Natural Attractions (5.69%)

Additional Comments:

- Lack of awareness of how to participate in TODS program
- Placement of signs a concern: too close to turn off on highway, limited space available at interchanges closets to tourism operation
- Too much bureaucracy makes it hard to work with municipalities
- Prices are too high for smaller, rural operations and NGOs
- Program too restrictive, rules limit participation
- Some operations with signs are not tourism focused
- Poor responsiveness in getting new signs and repairing damaged signs

Opportunities

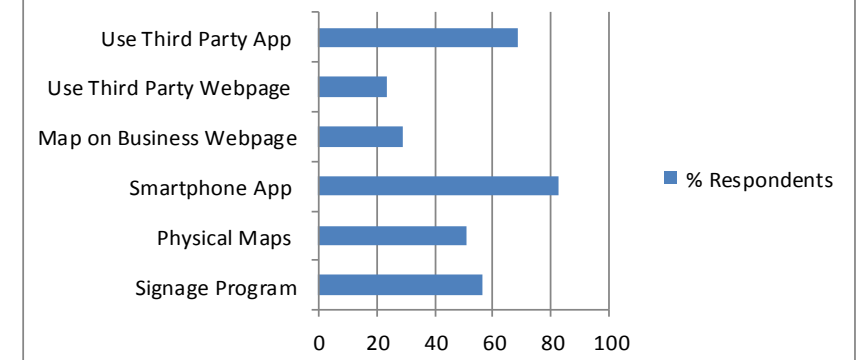
Opportunities for TODS Signage Improvement:

- ♦ Operation Eligibility
- ♦ Administration:
 - ♦ Province, Municipality, RTO Coordination
 - ♦ Contracts and billing
 - ♦ Program Awareness
- ♦ Customer Service
- ♦ Installation and Repair Time
- ♦ Maintenance
- ♦ Pricing
- ♦ Sign Design
- ♦ Eligibility Criteria

Way-finding refers to tools/ resources that help people understand their surroundings and how they got from point A to point B.

- The majority of respondents already use technology for way-finding. 82.8% of respondents have a map on their website.

Respondents Way-Finding Tools



- 76.36% of respondents believe despite increased use of GPS/ web-based/ mobile technologies, TODS signage will maintain its importance .
- Respondents' additional comments about technology and way-finding referenced the following themes:
 - GPS (9.85%)
 - Links to websites (6.82%)
 - Apps (15.15%)
 - QR Codes (5.3%)
 - Web Mapping (3.79%)
 - Web/ Technology Inaccessible (11.36%)
 - GPS Unreliable (20.45%)