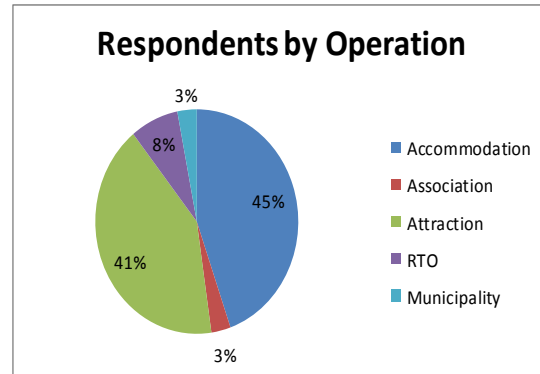


TODS Program Review Survey Results Overview: Regional Tourism Organization 12 (Muskoka, Parry Sound & Algonquin Park)

At a Glance

- 65 survey respondents were from RTO 12: Muskoka, Parry Sound and Algonquin Park
- 53.85% participate in the TODS program while 46.15% stated they do not.
- Respondents identified their operation as an RTO, attraction, accommodation, association, or municipality.
- 85.71% of participants stated they participated in the TODS Program for over 3 years; less than 5% have participated less than a year.
- 73.53% of participants feel TODS signs are very important or important in assisting travellers to locate their business.
- 61.77% of participants indicated that TODS signs had raised the profile of their business or destination "very much" or "somewhat".
- 30% of non-participants indicated eligibility criteria was an obstacle to participation in the TODS program; 26.67% cited program awareness and 23.33% cited cost.
- 41.88% of survey respondents from the region indicated that service delivery had not improved over time.

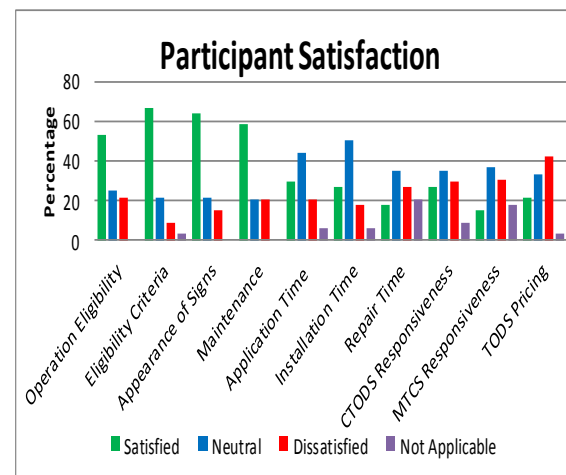


Location Capacity: Sold Out Locations and Waitlists

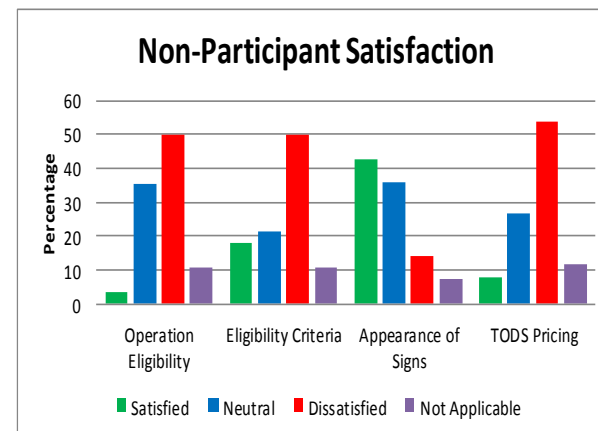
Location	# Sold Out Intersections	# Full Spaces	Waitlist
Georgian Bay	1	8	3
Bracebridge	4	17	2
Gravenhurst	5	23	2
Muskoka	9	38	12
Port Carling	2	6	0
Bala	1	6	0
Dwight	1	11	2
Deerhurst	2	9	1
Rosseau	2	16	4
McDougall	1	8	1

Survey Outcomes

- Participant Satisfaction:**
 Operation Eligibility (53.13%),
 Eligibility Criteria (66.67%),
 Sign Appearance (63.64%),
 Maintenance (58.82%)
- Participant Dissatisfaction:**
 Repair Time (26.67%),
 CTODS Responsiveness (29.31%),
 MTCS/ MTO Responsiveness (30.30%),
 TODS Pricing (42.42%)



- Non-Participant Satisfaction:**
 Sign Appearance (42.86%)
- Non-Participant Dissatisfaction:**
 Operation Eligibility (50%),
 Eligibility Criteria (50%),
 TODS Pricing (50%)



Additional Comments:

- TODS should be run locally. The DMO or RTO could set standards.
- Signage could be a source of revenue for RTOs.
- Signs are unfairly allocated
- Northern operations and municipalities find TODS signage too expensive
- Criteria is difficult to meet. In particular, the requirement that hotels be on the waterfront.
- The program should be simplified.
- There should not be too many categories added.

Opportunities

Opportunities for TODS Signage Improvement:

- Sign Pricing
- Sign Design
- Eligibility Criteria
- Location Capacity
- Province, Municipality, RTO Coordination
- Customer Service

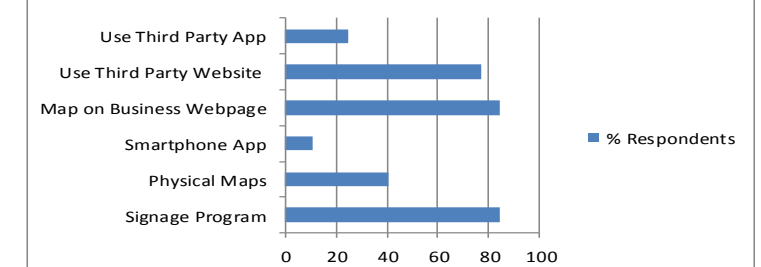
Respondents identified the following potential new categories for inclusion in the TODS program:

- Accommodations (8%)
- Private Campgrounds (8%)
- Retail (8%)
- Kayak logo (8%)
- Snowmobile rentals/ staging (8%)
- RTO branding (8%)

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. 84.21% of respondents have a map on their website.
- 63.93% of respondents believe despite increased use of GPS/ web-based/ mobile technologies, TODS signage will maintain its importance.

Respondents Way-Finding Tools



- Respondents' additional comments about technology and way-finding reference the following key themes: emerging technology :

- QR Codes
- GPS
- Link to websites
- Smartphone/ Tablet Apps
- GPS is unreliable
- Web-technology is inaccessible