

Tourism-Oriented Directional Signing 2013-14 Program Review

Stakeholder Survey Preliminary Results

Ministry of Tourism, Culture and Sport

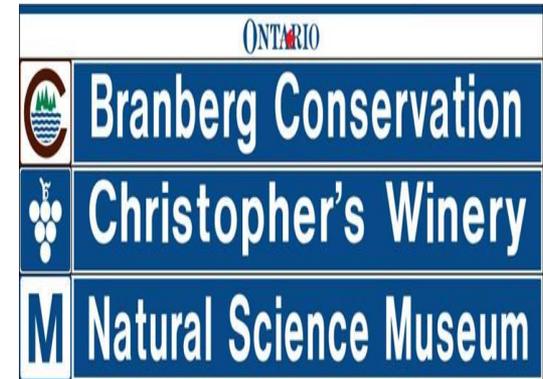
November 12, 2013

Purpose

- Provide an overview of the Tourism-Oriented Directional Signing (TODS) Policy and 2013-14 TODS Program Review
- Share preliminary results from the 2013-14 TODS Program Review
- Invite Regional Tourism Organizations (RTOs) to provide their initial reaction to preliminary results and provide their feedback on the TODS Program
- Advise RTOs of proposed next steps and future opportunities for engagement (e.g. focus groups)
- Seek RTO feedback on design of possible RTO focus group

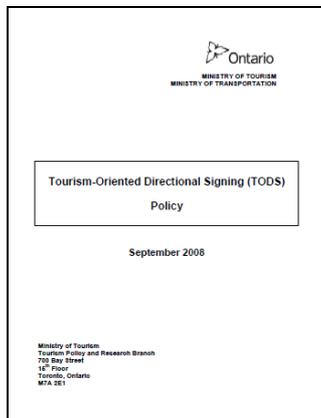
Overview of the TODS Program

- TODS signs are intended to be directional rather than advertising. They lead the motoring public to tourism operations and destinations.
- The province is responsible for the policy that establishes the eligibility criteria for the TODS program.
- Canadian TODS Limited (CTODS), a private sector company, administers the province's TODS program under the supervision of the Ministry of Transportation (MTO) and the Ministry of Tourism, Culture and Sport (MTCS).
- CTODS was selected through an open procurement. CTODS ensures that tourism-oriented signage on the Province's roads is reliable and consistent in location, form and design. CTODS is responsible for day-to-day operations.
- To facilitate the TODS program review and a future procurement renewal process, the Ministries have extended CTODS' contract to December 2016. MTCS can make changes to the policy in advance of the next contact extension.



The signs are standardized (e.g., size, colour and message) depending on the nature of the attraction and location, and coordinated to ensure that they do not interfere with other MTO traffic signage or cause unnecessary motorist distraction.

TODS POLICY Overview

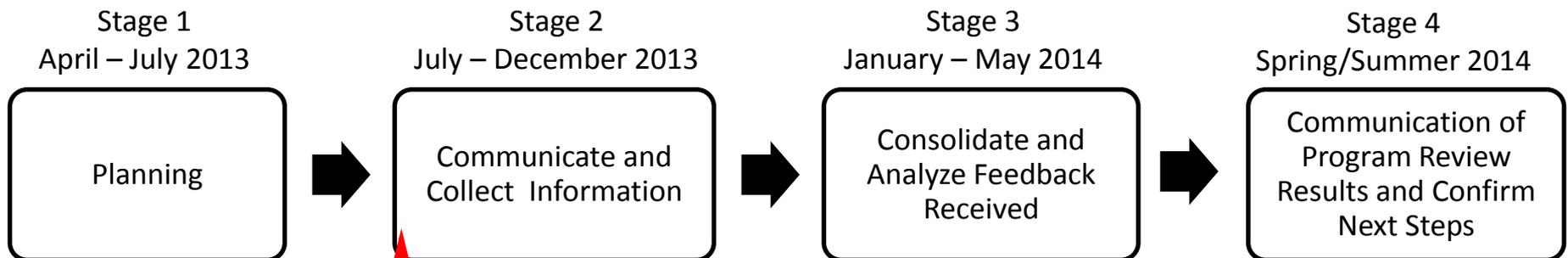


<p>1. Policy Objectives</p>	<ol style="list-style-type: none"> 1. To provide and improve directional information to Ontario's tourist attractions, operations and services; 2. To increase awareness of Ontario's tourist attractions, operations and services located off provincial highways; 3. To promote and strengthen tourism in Ontario on a province-wide basis
<p>2. Way-Finding and Signing Principles</p>	<p>Attraction signing is designed to permit individual tourism operations to be signed from provincial roads. The process of following a specific route to arrive at a pre-selected destination is known as way-finding.</p>
<p>3. Standards and Policies</p>	<p>Motorists become dependent upon signing, and they grow to expect it to be provided clearly, consistently, and accurately. For this reason, an easily identifiable "Ontario" word mark was selected to appear along the top of all TODS signs installed on Provincial roadways. Sign installations follow one of many formats possible in the TODS system.</p>
<p>4. Technical Data</p>	<p>The Contractor shall be responsible for conforming to all applicable standards and guidelines as outlined or referenced in the policy. The applicant is advised of Eligibility and Selection Criteria which must be met in order to permit any TODS installation.</p>
<p>5. Administration</p>	<p>The Contractor is the company contracted by the Province of Ontario for financing, administering, erecting, and maintaining the TODS system as set out in the policy. It is their role to provide an effective signing system, at a reasonable cost, in a manner that responds to the needs of the individual tourism operator.</p>

TODS Program Review and Way-finding Discussion

- MTCS and MTO have committed to ongoing reviews of the TODS program and are currently conducting a detailed program review. The last review was conducted in 2009.
- We want to partner with the RTOs, the Tourism Industry Association of Ontario (TIAO) and other tourism stakeholders to collect feedback about the program and to discuss other potential provincial way-finding opportunities.
- MTCS is also engaging with the Ministry of Finance (MOF) to conduct a Consulting Review of the TODS program.
- Intended Learning from Review:
 - Customer satisfaction and areas for improvement
 - Possible new program criteria and categories
 - Ideas on other way-finding activities (e.g., use of technology)

Stages and Timelines:



Sept. 20, 2013 – TODS Program Review Survey and dedicated email address launched (deadline for feedback: October 31, 2013).

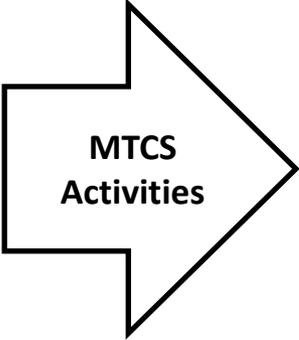
TODS Program Review

RTO and MTCS Activities



RTO Support / Activities

- RTOs provide feedback on TODS Program Review Plan (June 2013)
- RTOs share survey link with local tourism partners (September 2013)
- RTOs respond to survey/ submit feedback by email (September/October 2013)
- RTOs comment on and provide initial reaction to preliminary results (November 12, 2013)
- RTOs participate in ongoing engagement with MTCS as required and provide feedback on preliminary options (December 2013 – March 2014)



MTCS Activities

- MTCS provides update to RTOs on TODS Program Review Plan (June 2013)
- MTCS shares survey with TIAO, RTOs and tourism stakeholders (September 20, 2013)
- MTCS leads focus groups and meetings with RTOs, TIAO and other key stakeholder groups as required (Fall 2013, In Progress)
- MTCS reviews and analyzes feedback received (Fall 2013 – Winter 2014, In Progress)
- MTCS develops draft report, preliminary options and recommendations and continues to engage with stakeholders (Winter 2014)
- MTCS seeks Ministry approval of recommendations (Winter/Spring 2014)
- MTCS shares Program Review results and confirms next steps with stakeholders (Spring/Summer 2014)
- MTCS implements approved recommendations (Summer 2014)

TODS Program Review

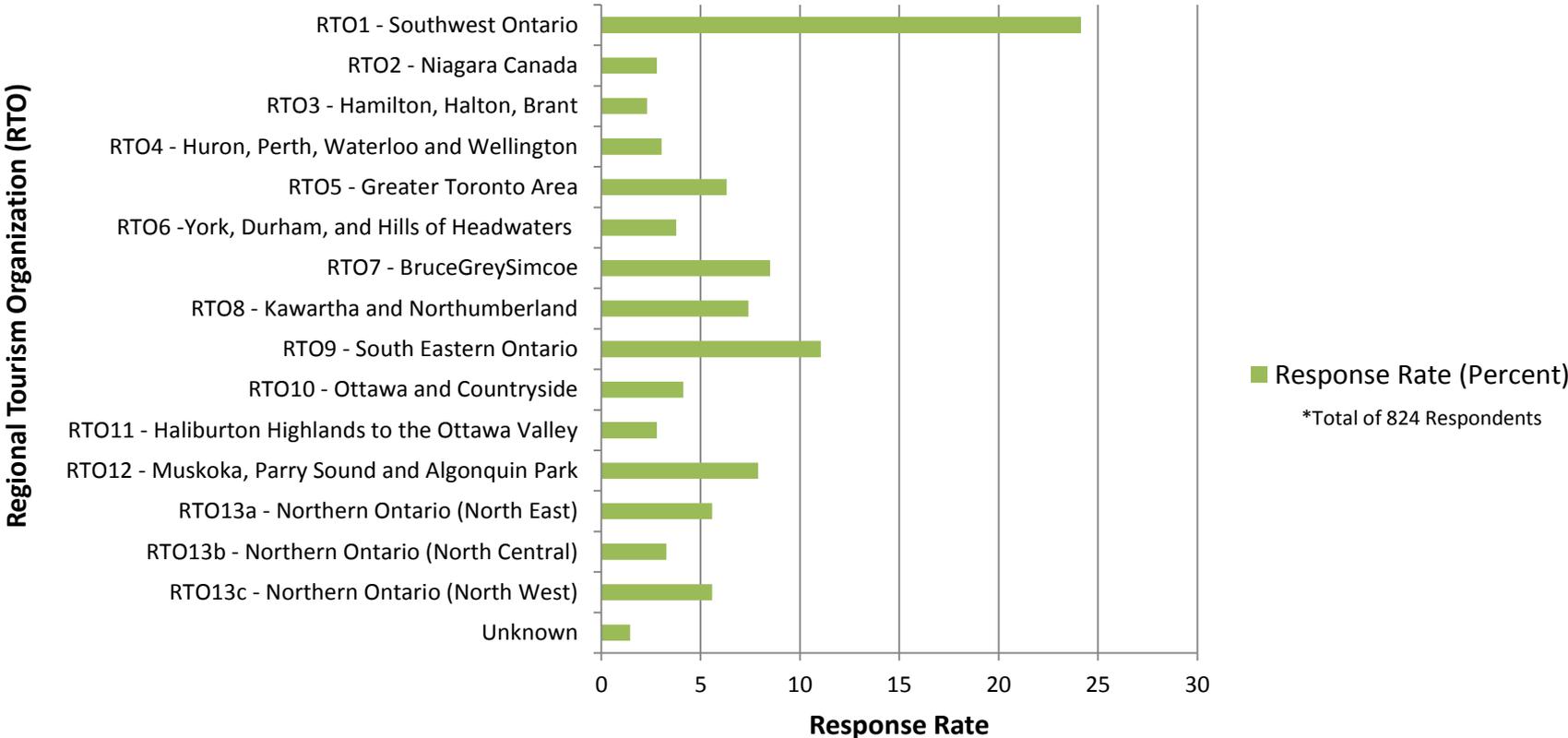
Feedback Received – By the Numbers

- 826 Survey responses
 - 373 responses from TODS Program participants
 - 451 responses from non-participants
 - 2 respondents did not state participation status
- 18 email messages received
- Additional feedback has also been received by other means (e.g., correspondence, teleconferences, etc...)

TODS Program Review

Feedback Received by Tourism Region

Response Rate by Tourism Region



TODS Program Review

Preliminary Results

Preliminary results have highlighted some areas for improvement, including:

- Eligibility criteria
- Customer service (e.g. communication, timeliness of repair and installation of signs/maintenance)
- Cost of signage
- Capacity / Limited space for signage
- Sign design
- Area Profile signs
- Coordination with RTOs and municipalities

Preliminary Results: Eligibility

Context:

- The TODS program sets out eligibility criteria and categories that tourism operators must meet to obtain signage.
- In 2009, the policy was expanded to include the new categories Spas, Rural Downtowns and Public Beaches.

Preliminary results indicate that stakeholders would like to see the following categories included:

- Private campgrounds
- Historic Sites
- Seasonal Operations
- Boat Launches
- UNESCO World Heritage Sites
- Antique Stores
- Retail/Shopping Centres
- Libraries
- Restaurants
- Trail Access
- Temporary event signage

Proposed Focus Group Questions:

- Are any of the above categories a priority for RTOs?
- Do any of the above categories raise any concerns for RTOs?

Preliminary Results: Service Delivery

Context:

- CTODS administers the day-to-day operations of the TODS program, ensuring that tourism-oriented signage on the Province's roads is reliable and consistent in location, form and design.
- Sign pricing has not increased since the program began in 1996.
- In 2009, an enhanced service delivery framework was introduced. The ministries monitor the performance of the service delivery agent on a regular basis.

Preliminary results indicate that stakeholders have concerns about CTODS' service delivery and customer service, including:

- Time required to approve an application, install or repair signs
- General CTODS responsiveness and communications
- TODS sign pricing
- Lack of service delivery improvement over time

Proposed Focus Group Question:

- What are the top two priorities for service delivery improvement?

Preliminary Results: Area Profile Signs

Context:

- TODS policy permits a maximum of two Area Profile Signs (one in each direction) on each provincial highway which passes within 40 km of its boundary, but which does not pass through the themed area.
- The current TODS Policy was created prior to the implementation of the Regional Tourism Approach and does not take into account the existence of RTOs.

Preliminary results indicate that stakeholders are:

- Concerned that the policy may block some communities from erecting signs in their own region if a neighbouring community gets there first
- Interested in the ministry considering adding RTO logos to Area Profile Signage or creating a separate category for RTO signs

Proposed Focus Group Questions:

- Should engagement with neighbouring areas/the RTO be required prior to approving and installing an Area Profile Sign?
- Should the TODS policy be modified to better align with the Regional Tourism Approach? How? (e.g., incorporate RTOs into Area Profile Signage or create a new category for RTOs)

Preliminary Results: Role for RTOs

Context:

- Currently, RTOs do not have a formal role in the ongoing administration of the TODS program.

Preliminary results indicate that:

- There is confusion among stakeholders regarding information about the TODS program, and in particular when signage requires approval from CTODS and municipalities.
- Some stakeholders are frustrated with the application process and limitations regarding the number of TODS signs permitted in an area.
- There is interest among stakeholders in working more closely with RTOs to help brand and market their areas and support the administration of the TODS program.

Proposed Focus Group Questions:

- What informal role do RTOs already play with respect to the ongoing administration of the TODS program?
- Is there interest or an opportunity for RTOs take on a more formal role (e.g., raising awareness about the TODS program, assisting stakeholders with the application process)?

TODS Program Review: Next Steps

Fall 2013 (In Progress)

- MTCS leads focus groups and meetings with RTOs, TIAO and other key stakeholder groups to discuss preliminary program review results



Fall 2013/Winter 2014

- MTCS reviews, consolidates, and analyzes feedback received

Winter/Spring 2014

- MTCS develops draft report, preliminary options and recommendations, and continues to engage with stakeholders

Spring 2014

- MTCS seeks Ministry approval of recommendations

Summer 2014

- MTCS shares program review results and confirms next steps with tourism stakeholders and local partners

November 2013

December 2013

January 2014

February 2014

March 2014

April 2014

May 2014

June 2014

July 2014

August 2014

November 2013

- RTOs comment on and provide initial reaction to preliminary results



November 2013 – March 2014

- RTOs participate in ongoing engagement with MTCS as required (e.g., focus groups), including a broader discussion of way-finding and feedback on preliminary options

Summer 2014

- Implementation of approved recommendations

TODS Program Review: RTO Discussion

- What are your initial reactions to these preliminary results?
- Are these preliminary results consistent with the comments and feedback you have heard from your local partners?
- Do you have feedback on the proposed next steps, including the RTO engagement process (e.g. site, attendees, size of focus group)?

APPENDIX A:

Overview of TODS Program - Provincial Road Signage

Considerations for participating in TODS program:

- What kind of road are you on?

Freeway	Major highway infrastructure (For example, the 400 series, QEW).
Kings Highway	Provincial owned and managed highway. Typically smaller highways than freeway (For example, Highway 7, Highway 35)
Municipal Road	Owned and maintained by local authority. TODS program does not apply to municipal roads.

- What kind of signage do you want?

1. Regular Attraction	Operators name with generic icons
2. Major Attraction	Operators name with corporate logo
3. Trailblazer	Guide motorists to particular destination
4. Tourism Route	Guide motorists on route along a path to multiple destinations
5. Composite	Generic pictograms, no operator names
6. Area Profile	To promote a major marketing theme in a region.

Regular Attraction:

A sign with the operator's name and generic icons.



Major Attraction:

A sign with the operator's name and corporate logos.



Trailblazing:

Signs that are off the major highway - once you have left the highway, these signs guide you to destination.



Tourist Routes:

Lead motorists to stop at different tourism operations along a path.



Composite Board:

Generic pictograms - NO operator name or logo - tell you one of these activities is available at the indicated highway exit.



Area Profile:

High-graphic standalone signs designed to promote a major marketing theme in a region.

Not to promote specific tourism destinations, but a broader area theme.

