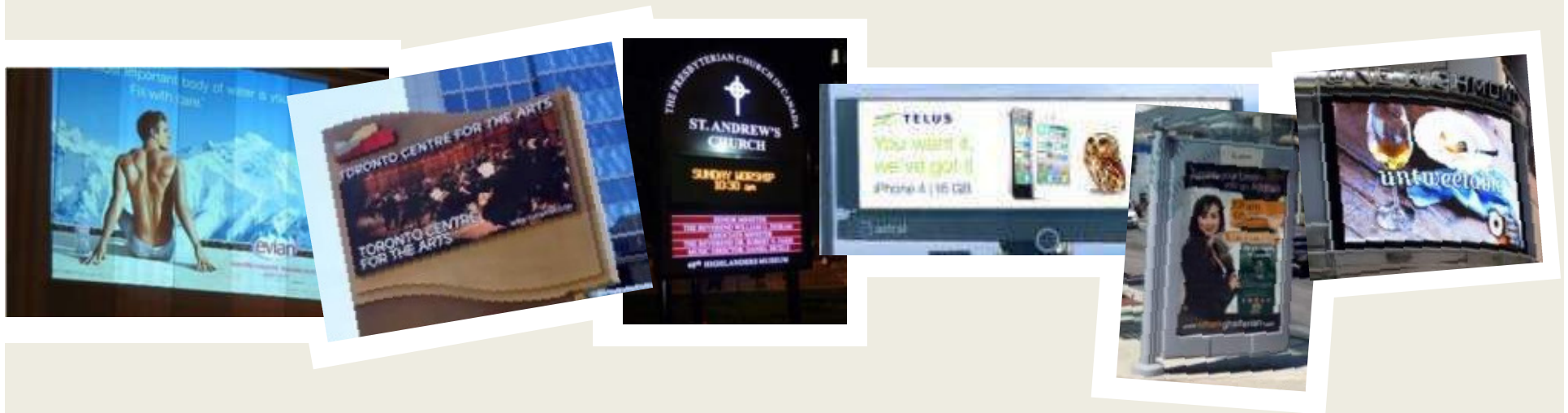
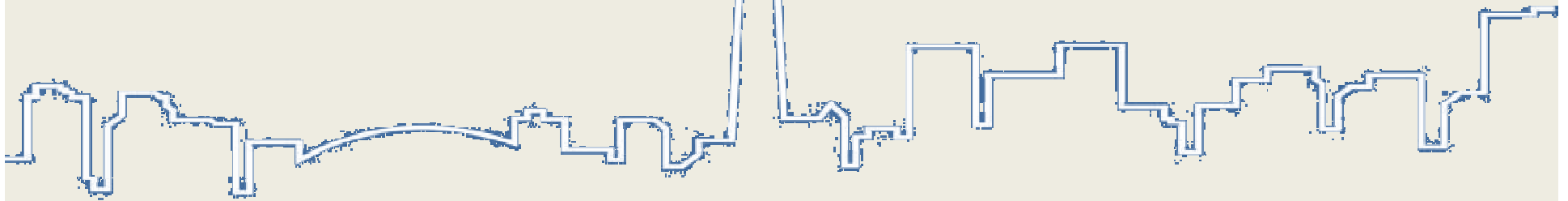




City of Toronto

Attitudes and Options Towards Electronic Signs



August 2013

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Research Objectives

Ipsos Reid was commissioned by the City of Toronto Building and Sign By-Law Unit to conduct research among residents in order to better understand attitudes, opinions, and behaviours associated with the electronic and illuminated signs around the City.

Specifically, the objectives of this research are (but not limited) to understand:

- Attitudes and opinions towards different types of electronic and illuminated signs;
- Positive and negative features of electronic and illuminated signs;
- Appropriate times for using electronic and illuminated signs;
- Level by which different types of electronic and illuminated signs are distracting to those who walk, drive, and cycle; and,
- Acceptability of different types of electronic and illuminated signs in residential, commercial, and other areas in the City.



Methodology

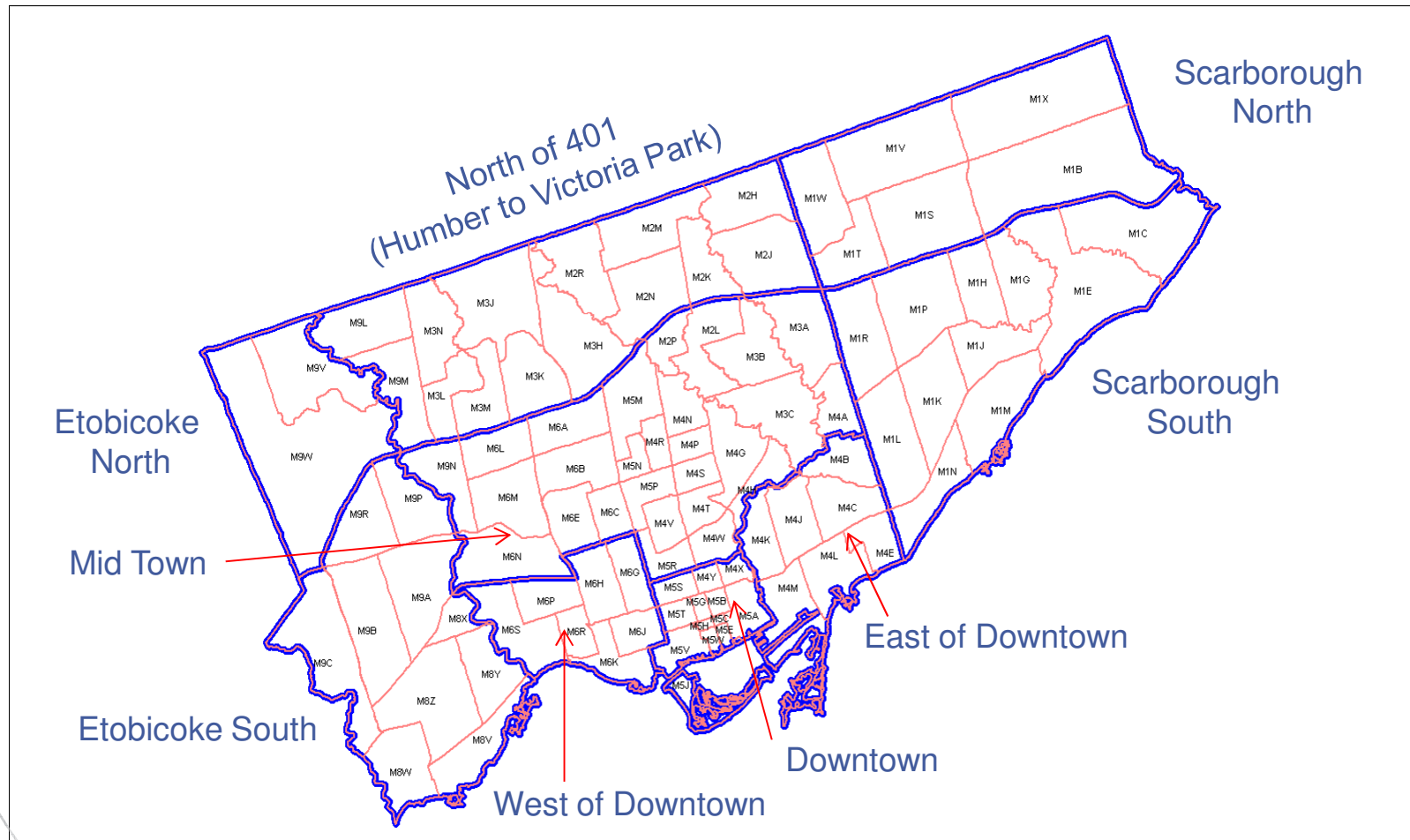
- A representative sample of n=1504 Toronto residents over the age of 18 were surveyed via the Ipsos Online Panel between July 5th and July 18th, 2013.
- Interviewing quotas were administered and the data was weighted according to the 2011 Statistics Canada census data by age, gender and region in order to ensure that the sample of respondents is representative of the distribution of adult residents of the City of Toronto.
- The sample of total residents and by city region is outlined in the table below:

Region	Sample Size
Etobicoke North	(n=35)
Etobicoke South	(n=135)
North of 401 (Humber to Victoria Park)	(n=233)
Mid-Town	(n=339)
Scarborough North	(n=119)
Scarborough South	(n=223)
East of Downtown	(n=124)
West of Downtown	(n=116)
Downtown	(n=180)

- Geographic boundaries are defined on the following slide.

Regional Breakdown

- Regional data in the report is provided by nine priority regions, including: Etobicoke North, Etobicoke South, North of 401 (Humber to Victoria Park), Mid Town, Scarborough North, Scarborough South, East of Downtown, West of Downtown and Downtown as described below.





Reporting Conventions

Statistically Significant Differences in Opinion

- Differences in opinion within key sub-groups (e.g. region) are identified by colour.
- A percentage that is coloured green indicates that the percentage is significantly higher than the percentage coloured red.
- In the example below, Etobicoke North (71%) residents are more likely to believe illuminated or electronic signs contribute to the look and vibrancy of city streets than those in Mid-Town (53%) and Scarborough South (51%), but no more or less likely than Scarborough North (55%).

	Region			
	Etobicoke North	Mid Town	Scarborough North	Scarborough South
	a	b	c	d
	n=35	n=339	n=119	n=223
Illuminated or Electronic signs contribute to the look and vibrancy of city streets	71%	53%	55%	51%

Executive Summary



Executive Summary - Attitudes and Options Towards Electronic Signs

- The vast majority (70%) of Toronto residents believe that illuminated and electronic signs are a normal part of public spaces in large cities like Toronto.
- Similarly, over half of residents (55%) agree that illuminated or electronic signs contribute to the look and vibrancy of cities. Four-in-ten (43%) agree that these signs are an attractive element of Toronto.
- That being said, Torontonians are generally split as to whether or not they are concerned about the negative impacts of these types of signs on the way their neighbourhood looks or the enjoyment of their home with about a third of residents either agreeing, disagreeing, or in the middle.
- Regionally, residents in the downtown area and in North Scarborough tend to be more concerned about the negative impacts that illuminated or electronic signs have on their neighbourhood, compared to residents in other parts of the City.
- Although two-thirds (63%) of Torontonians find electronic and illuminated signs useful to them, slightly more than half of residents believe that the City needs to do more to control the use of these types of signs (55%).
- Half (52%) of residents find electronic or illuminated signs distracting while they drive, compared to only one-in-five (18%) residents who find traditional signs distracting.



Executive Summary – Attitudes and Opinions to Different Types of Electronic and Illuminated Signs

- Overall, most Torontonians do not have an issue with the times that electronic signs are illuminated or the number of these types of signs in the City.
- On the other hand, residents are more concerned about the distracting nature of certain types of signs, as about half of residents find electronic static (47%) or moving signs (45%) distracting to them when driving.
- Torontonians are also the most likely to agree that electronic static signs and moving signs are illuminated too bright (39% and 32% respectively), compared to other types of signs.

% Agree	Illuminated Signs	Read o graph Signs	Electronic Static Signs	Electronic Moving Signs	Projected Signs
I have not found this type of sign to be illuminated too late at night	32%	16%	29%	30%	27%
There are too many signs like this in the city	30%	21%	33%	27%	19%
This type of sign distracts me while I drive	28%	22%	47%	45%	38%
I have found this type of sign to be too bright	22%	14%	39%	32%	25%
This type of sign distracts me while I walk	17%	14%	25%	28%	23%
This type of sign distracts me while I cycle	13%	10%	18%	18%	16%



Executive Summary – Acceptability of Different Types of Electronic and Illuminated Signs

- The vast majority of residents find all types of signs acceptable to be located in commercial or industrial areas and for the most part near community centers and other public spaces.
- About half of residents believe it is acceptable to locate electronic static and moving signs next to highways and four-in-ten believe these signs are acceptable next to streets, despite the fact that many residents also agree that these type of signs are distracting to them when driving.
- In general, significantly fewer residents find it acceptable to locate any type of electronic or illuminated sign in their neighbourhood, on their street, or in residential areas compared to other areas of the City. This is particularly true for electronic static and moving signs as fewer than one-in-five residents feel these types of signs are acceptable in residential areas or on their street.

% Acceptable	Illuminated Signs	Read o graph Signs	Electronic Static Signs	Electronic Moving Signs	Projected Signs
Commercial areas or industrial areas	81%	82%	77%	77%	76%
Community Centers or other public places	71%	76%	60%	65%	62%
Next to highways	60%	61%	53%	47%	46%
Next to streets	56%	61%	44%	43%	43%
In my neighbourhood	35%	43%	25%	23%	23%
On my street	27%	33%	18%	18%	19%
Residential areas	24%	34%	17%	16%	16%

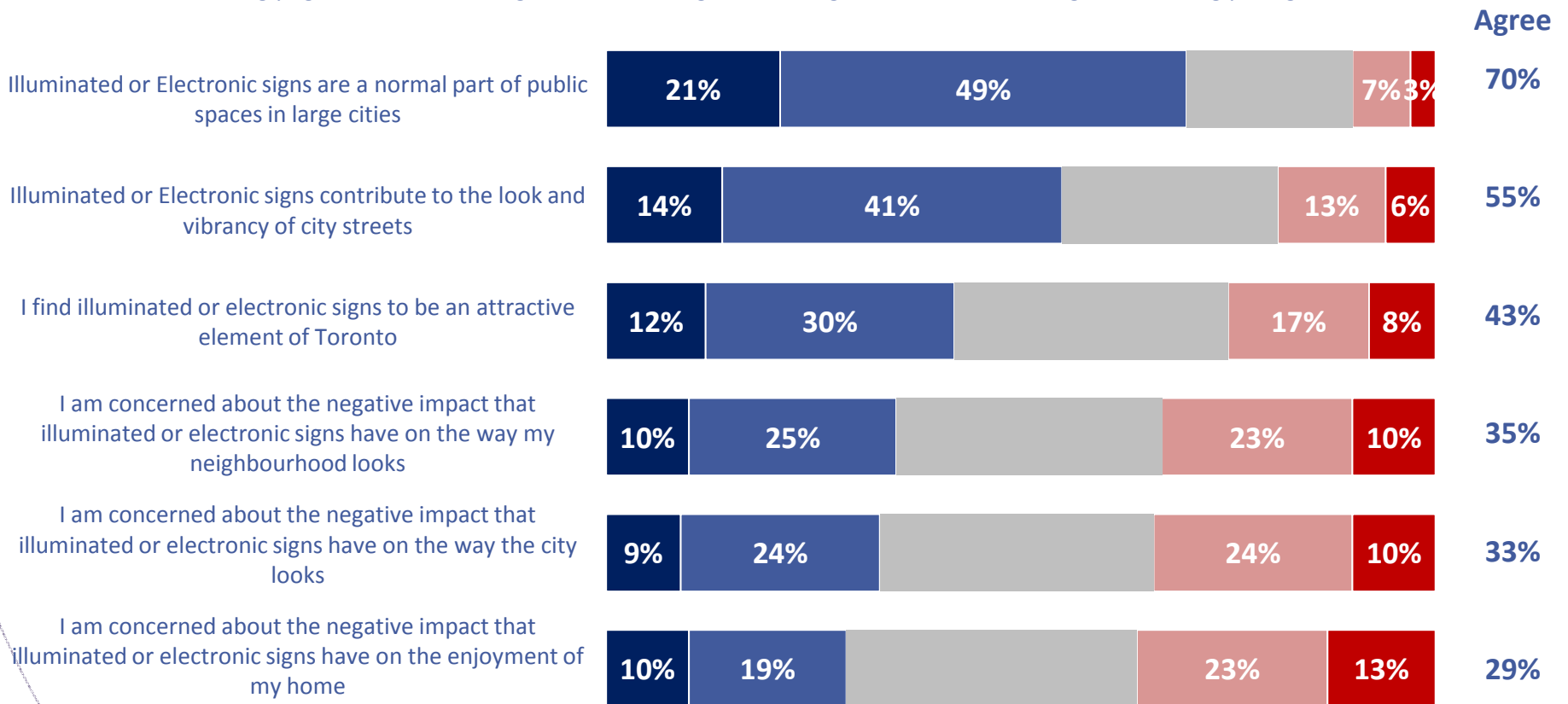
Detailed Results: Attitudes and Opinions



Attitudes Towards Electronic Signs

Overall, Torontonians are accepting of illuminated and electronic signs and perceive them to be a natural accessory in big cities like Toronto. Seven-in-ten Torontonians (70%) believe that electronic signs are a normal part of the public landscape in large cities. Over half (55%) believe that such signs add to the “look and vibrancy” of the City, with 43% finding them attractive. Roughly three-in-ten residents are concerned about the negative impact electronic signs have on the look of the City whether it be in their neighbourhood (35%), the City in general (33%) or the enjoyment of their home (29%). However, only about one-in-ten residents are ‘very concerned’.

■ Strongly agree ■ Somewhat agree ■ Neither agree nor disagree ■ Somewhat disagree ■ Strongly disagree



Q.1. Indicate whether you strongly agree, somewhat agree, neither agree nor disagree, somewhat disagree, or strongly disagree with the following statements.

Base: All Respondents (n= 1504)

Attitudes Towards Electronic Signs: by Region

Although Torontonians are by-in-large accepting of illuminate and electronic signs, there are regional differences of opinion within the City. Residents who reside North of the 401 are significantly more accepting and favourable towards electronic signs compared with most other regions. Seven-in-ten (71%) of Etobicoke and 62% of North of the 401 residents agree that the signs add vibrancy to the City, compared to only about half of residents who reside East or West Downtown and in southern Etobicoke and southern Scarborough.

Region										
STRONGLY/ SOMEWHAT AGREE	Total	Etobicoke North	Etobicoke South	North of 401 (Humber to Victoria Park)	Mid Town	Scarborough North	Scarborough South	East of Downtown	West of Downtown	Downtown
	(A)	(B)	(C)	(D)	(E)	(F)	(G)	(H)	(I)	
	(n=1504)	(n=35)*	(n=135)	(n=233)	(n=339)	(n=119)	(n=223)	(n=124)	(n=116)	(n=180)
Illuminated or Electronic signs are a normal part of public spaces in large cities	70%	78%	70%	71%	69%	66%	69%	63%	72%	75%
Illuminated or Electronic signs contribute to the look and vibrancy of city streets	55%	71%	51%	62%	53%	55%	51%	48%	52%	60%
	43%	59%	37%	50%	38%	45%	42%	31%	43%	47%

*caution should be used when interpreting results for Etobicoke North due to a small sample size.

Q.1. Indicate whether you strongly agree, somewhat agree, neither agree nor disagree, somewhat disagree, or strongly disagree with the following statements. Base: All Respondents (n= 1504)



Concern Towards Electronic Signs: by Region

Residents living in the downtown, particularly those in East and West downtown, and those who reside in Scarborough North are overall the most concerned about electronic signs. Those living downtown are the most concerned about the negative impact that electronic signs have on the way the City looks, while Scarborough North residents are most concerned about the negative impact that illuminated or electronic signs have on the enjoyment of their home (40%).

STRONGLY/ SOMEWHAT AGREE	Region									
	Total	Etobicoke North	Etobicoke South	North of 401 (Humber to Victoria Park)	Mid Town	Scarborough North	Scarborough South	East of Downtown	West of Downtown	Downtown
		(A)	(B)	(C)	(D)	(E)	(F)	(G)	(H)	(I)
	(n=1504)	(n=35)	(n=135)	(n=233)	(n=339)	(n=119)	(n=223)	(n=124)	(n=116)	(n=180)
I am concerned about the negative impact that illuminated or electronic signs have on the way my neighbourhood looks	35%	26%	34%	35%	31%	42%	29%	44%	45%	36%
I am concerned about the negative impact that illuminated or electronic signs have on the way the city looks	33%	21%	30%	32%	31%	34%	26%	43%	42%	40%
I am concerned about the negative impact that illuminated or electronic signs have on the enjoyment of my home	29%	30%	28%	30%	27%	40%	22%	37%	32%	32%

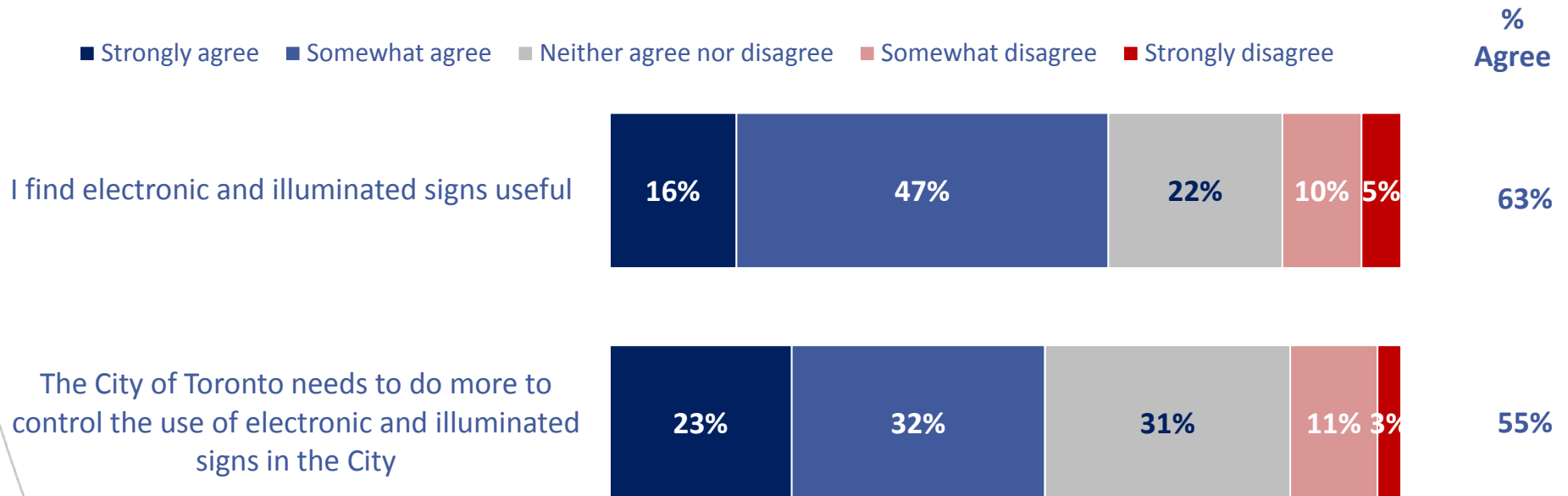
*caution should be used when interpreting results for Etobicoke North due to a small sample size.

Q.1. Indicate whether you strongly agree, somewhat agree, neither agree nor disagree, somewhat disagree, or strongly disagree with the following statements. Base: All Respondents (n= 1504)



Attitudes Towards Usefulness and Regulation of Electronic Signs

While the majority of Torontonians (63%) find electronic and illuminated signs useful just over half of residents (55%) believe that the City needs to do more to control the use of these signs. Residents from Etobicoke South find these signs significantly more useful (70%) compared with other regions, where as East of downtown residents believe the City needs to do more to control the use of these signs (65%).



Q. 26. Please indicate whether you agree or disagree with the following statement.
Base: All Respondents (n=1504)



Perceived Benefits and Drawbacks of Electronic or Illuminated Signs

The most frequently mentioned benefits of electronic or illuminated signs are their convenience (easy to read and see at night, 16%) and the real-time information that they provide (14%). The biggest drawbacks mentioned by residents include the distractive elements of the sign (20%), light pollution (19%) and their waste of energy (18%).

Top Ten Benefits and Drawbacks

Benefits			Drawbacks	
✓	Easy/ clear to see/ read (at night)	16%	✓	Road distraction (for motorists, pedestrians, etc.) 20%
✓	Informative/ provides (real-time) information/ direction	14%	✓	Light pollution/ too bright 19%
✓	Good advertising/ marketing	9%	✓	Energy consumption/ waste of energy 18%
✓	Eye-catching/ catch people's attention	9%	✓	Unattractive/ not visually appealing 10%
✓	Make the city more vibrant/ lively	8%	✓	Disturbance in residential areas 9%
✓	Visually appealing/ interesting	8%	✓	Too many signs/ ads (in one area) 9%
✓	Add light to the city (at night)	7%	✓	Disturbance (unspecified) 5%
✓	Area seems more urban/ adds to the urban feel	5%	✓	Visual pollution 4%
✓	Makes the city look good/ appealing (at night)	4%	✓	Destroy the city's (natural) view/ appearance 4%
✓	Generate income/revenue	4%	✓	Makes the area look busy/cluttered 3%

Q.2. What, if anything, do you believe are the benefits of electronic or illuminated signs?

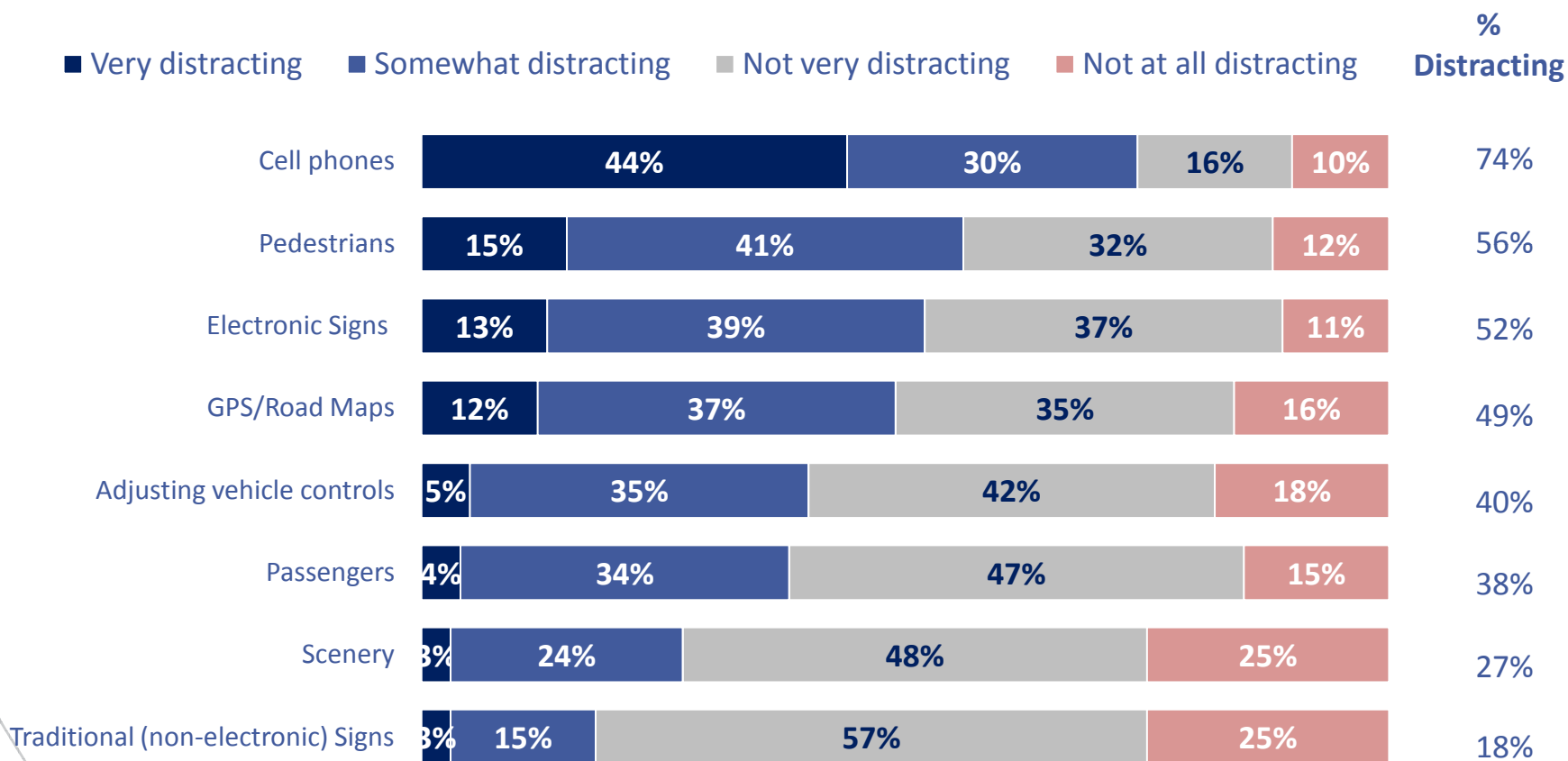
Q.3. What, if anything, do you think believe are drawbacks of electronic or illuminated signs?

Base: All Respondents (n=1507)



Levels of Distraction

Half of Toronto drivers find electronic signs distracting when they are driving (52%), on par with GPS and road maps (50%). Three-quarters (74%) of residents who drive find cell phones to be the most distracting, followed at some length by pedestrians (56%). Traditional non-electric signs are least distracting (18%).



Q.28a. Thinking about when you are driving in the City, how distracting do you find the following? Base: All Respondents (n=1504)



Benchmark Levels of Distraction: Demographics

Women (56%) find electronic signs significantly more distracting compared to men (48%) and residents 55 years of age and older (57%) find the signs significantly more distracting than those between the ages of 35-54 (49%). Similarly, residents living in the East of downtown region (63%) find electronic signs significantly more distracting than residents North of the 401 (48%).

Very/ Somewhat distracting	Gender		Region								
	Male	Female	Etobicoke North	Etobicoke South	North of 401 (Humber to Victoria Park)	Mid Town	Scarborough North	Scarborough South	East of Downtown	West of Downtown	Downtown
	(H)	(I)	(A)	(B)	(C)	(D)	(E)	(F)	(G)	(H)	(I)
	(n=499)	(n=551)	(n=24)	(n=116)	(n=188)	(n=227)	(n=106)	(n=169)	(n=75)	(n=65)	(n=80)
Cell phones	69%	77%	88%	77%	74%	72%	61%	78%	70%	71%	75%
Pedestrians	55%	57%	56%	56%	60%	51%	54%	56%	53%	64%	57%
Electronic Signs	48%	56%	45%	53%	48%	52%	55%	51%	63%	53%	50%
GPS/Road Maps	43%	55%	56%	56%	50%	45%	40%	53%	44%	44%	58%
Adjusting vehicle controls (AC, heat, music, etc.)	34%	45%	36%	33%	45%	34%	40%	43%	47%	40%	44%
Passengers	35%	41%	43%	38%	40%	31%	44%	37%	34%	44%	49%
Scenery	26%	27%	39%	22%	29%	20%	35%	25%	24%	28%	32%
Traditional (non- electronic) Signs	16%	20%	18%	19%	18%	11%	21%	20%	24%	17%	23%

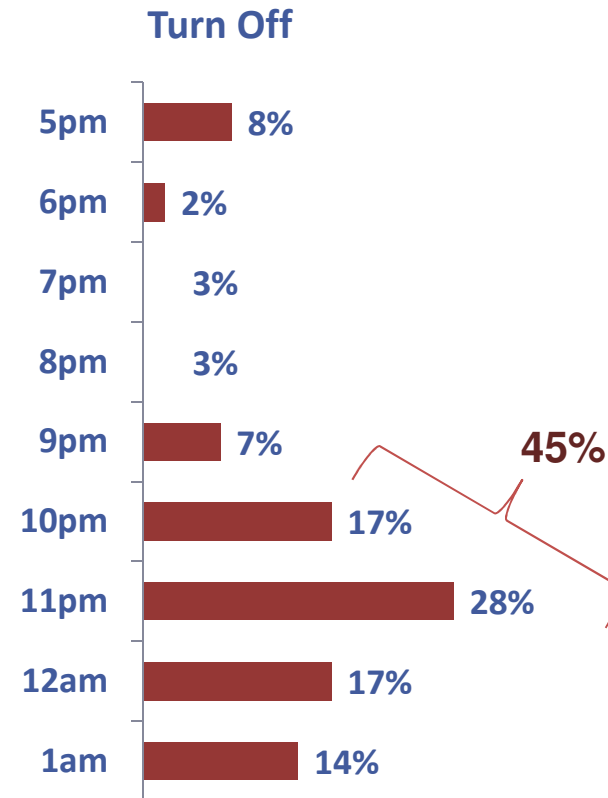
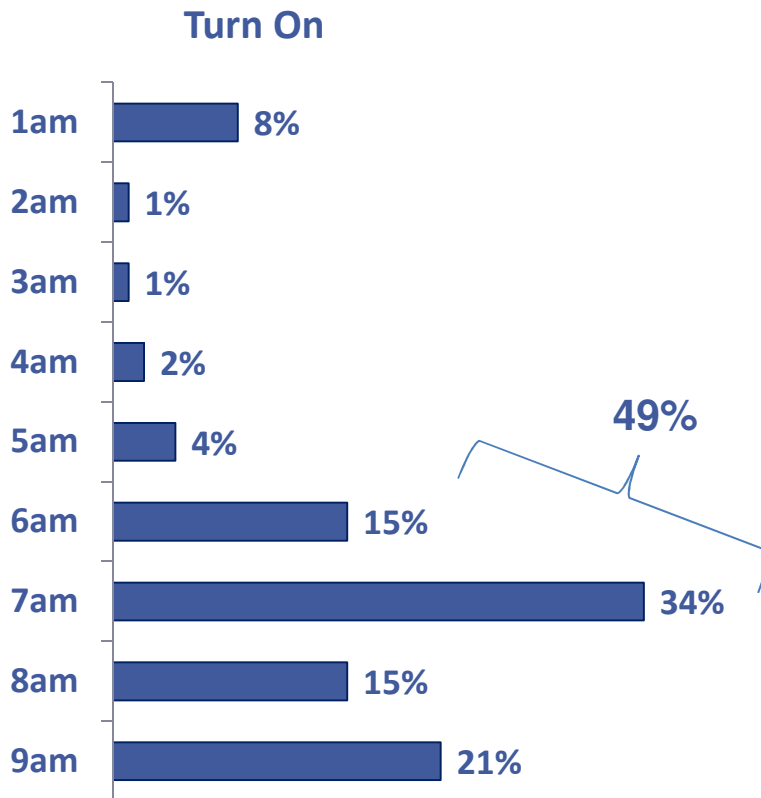
*caution should be used when interpreting results for Etobicoke North due to a small sample size.

Q.28a. Thinking about when you are driving in the City, how distracting do you find the following? Base: All Respondents (n=1504)



Appropriate Time for Electronic Signs to Be Turned On / Off

Half of residents believe that electronic signs should be turned on between 6:00am and 7:00am in the morning (49%) and turned off between 10:00pm and 11:00pm at night (45%).



4. Electronic and illuminated signs can be turned on and off at specific times in the morning and at night. Currently, in the City of Toronto signs are allowed to be turned on at 7am in the morning and turned off at 11pm at night.

- What do you believe is the most appropriate time to turn on electronic signs in the morning? [Drop-down 1am to 9am]
- What do you believe is the most appropriate time to turn off electronic signs in the evening? [Drop-down 5pm to 1am]

Base: All respondents (n=1504)

Evaluation of Different Types of Signs: Illuminated Signs

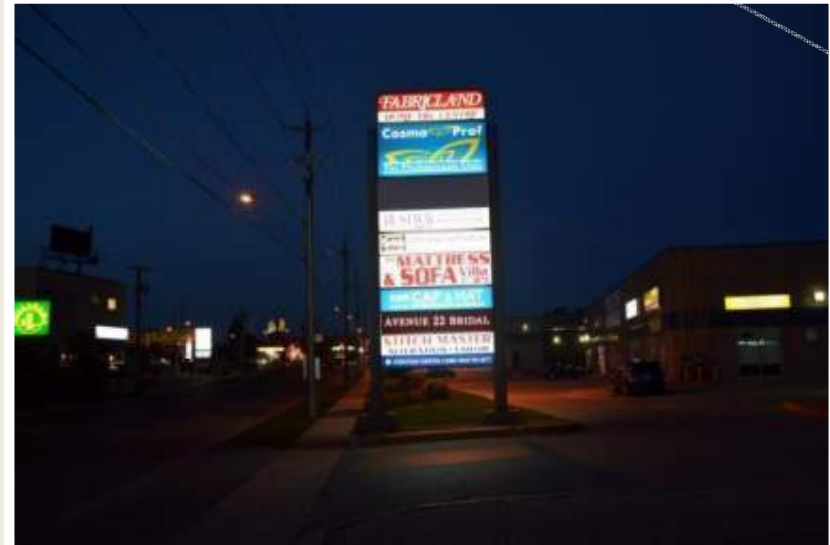
Illuminated signs represent the majority of signs in the City of Toronto which are typically used for advertising, business identification or for providing directions.



Illuminated Signs Tested



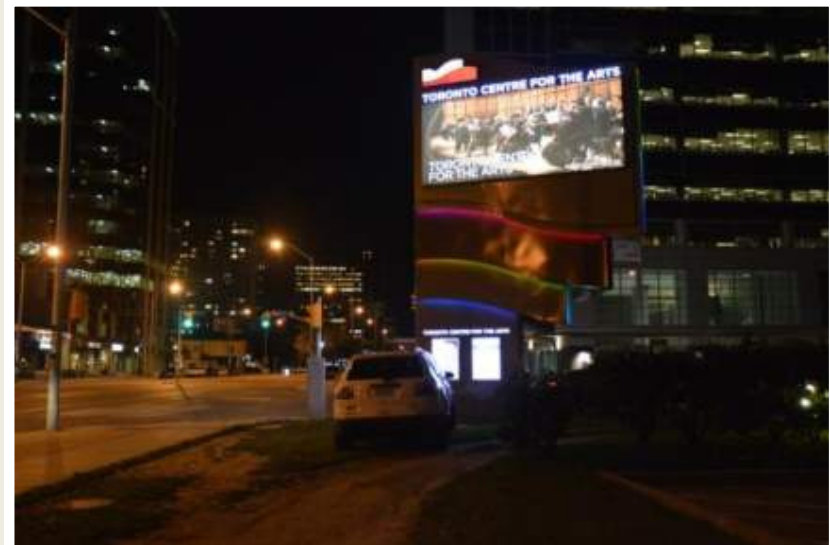
Illuminated Sign 1



Illuminated Sign 2



Illuminated Sign 3

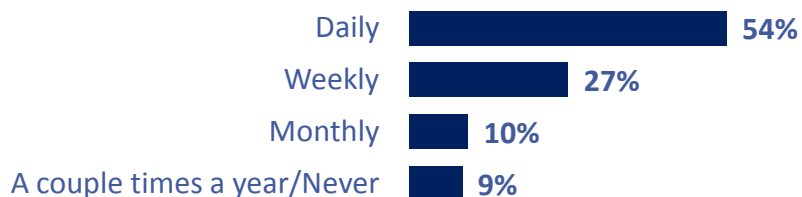


Illuminated Sign 4

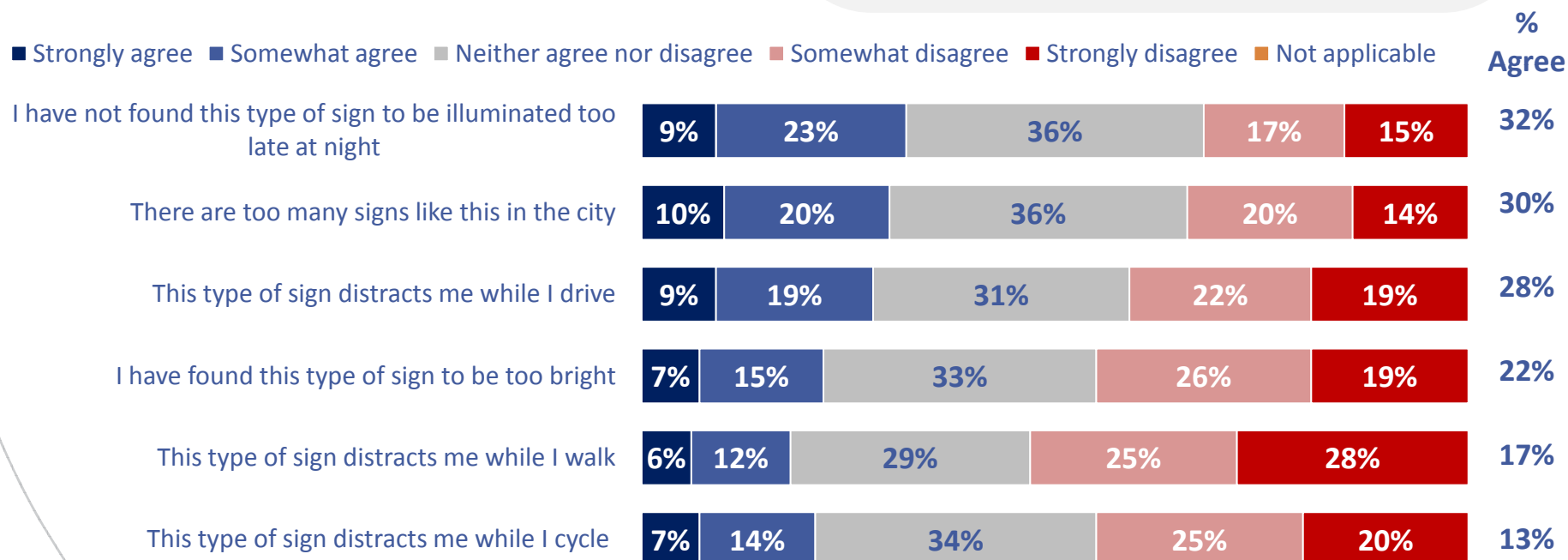


Illuminated Signs

Number of Times Seeing a Sign Like This



- The majority of Torontonians (54%) encounter illuminated signs on a daily basis in the City.
- Only a minority find illuminated signs distracting while driving, walking or cycling and residents are largely undecided on whether these signs are illuminated too late at night or whether there are too many illuminated signs in the City.
- Lighting of these signs is not a major issue for residents - only 22% find such signs too bright.



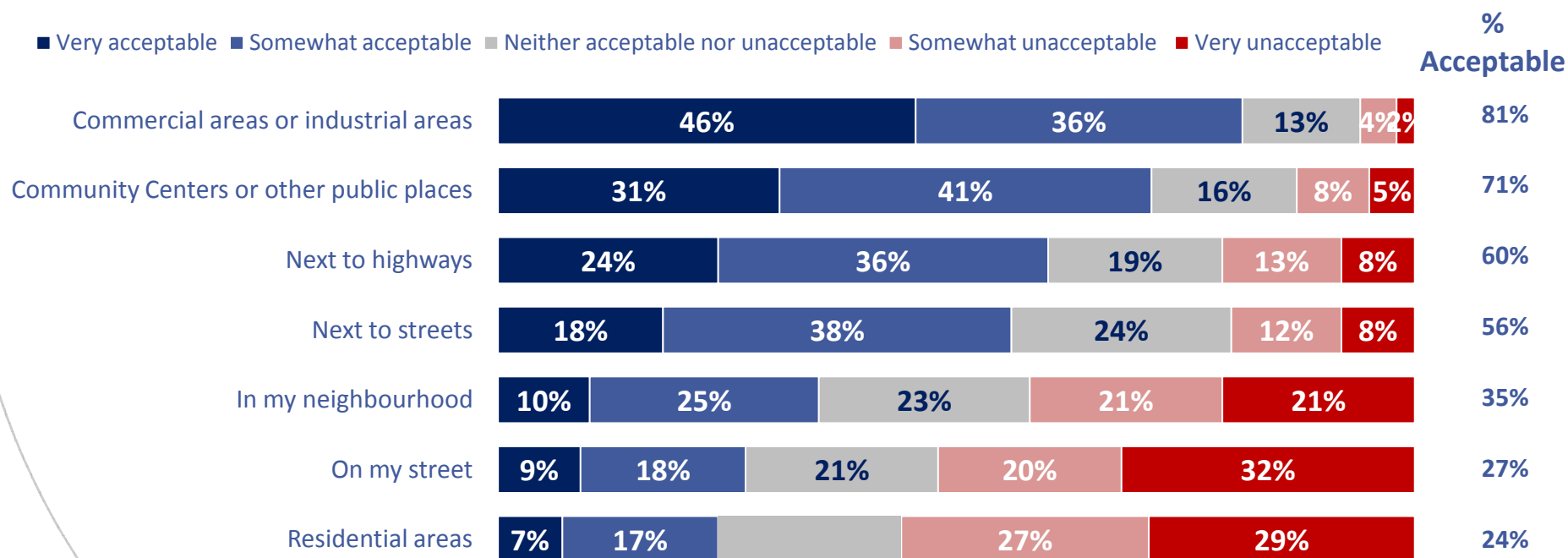
Q.5. How often do you see a sign like this? Base: All Respondents (n=1504)

Q.6. Considering this type of illuminated or electronic sign, indicate whether you strongly agree, somewhat agree, neither agree nor disagree, somewhat disagree, or strongly disagree with the following statements. Base: All Respondents (n=1504)

Illuminated Signs Placement



Support for illuminated signs in commercial or industrial areas is exceptionally high among residents (81%). The majority of Torontonians support these signs in and around community centers (71%), next to highways (60%) and streets (56%). There is little support for illuminated signs in residential areas (24%). About half of residents find it unacceptable to place these signs in residential neighbourhoods (56%) or their own street (52%).



Q.7. Assuming that proper controls and standards would be applied to these types of signs to limit the brightness and the times of day and night when the signs could be illuminated, how acceptable would it be to place a type of electronic sign like this in the following locations?

Base: All Respondents (n=1504)

Acceptance of Illuminated Sign Placement: by Region

Residents North of the 401 are most accepting of illuminated signs on their streets (38%) followed by residents from the downtown core (32%). Residents between the ages of 18 and 34 (34%) and 35 and 54 (28%) are significantly more accepting of these signs on their street compared with those 55 years of age or older (18%).

VERY/ SOMEWHAT ACCEPTABLE	Region									
	Total	Etobicoke North	Etobicoke South	North of 401 (Humber to Victoria Park)	Mid Town	Scarborough North	Scarborough South	East of Downtown	West of Downtown	Downtown
	(n=1504)	(n=35)	(n=135)	(n=233)	(n=339)	(n=119)	(n=223)	(n=124)	(n=116)	(n=180)
Commercial areas or industrial areas	81%	77%	76%	84%	86%	72%	80%	84%	79%	82%
Community Centers or other public places	71%	79%	68%	80%	71%	68%	71%	71%	68%	65%
Next to highways	60%	63%	58%	63%	61%	50%	62%	57%	63%	59%
Next to streets	56%	66%	49%	63%	59%	51%	61%	50%	49%	53%
In my neighbourhood	35%	33%	30%	44%	35%	32%	35%	24%	32%	39%
On my street	27%	29%	19%	38%	22%	24%	27%	21%	26%	32%
Residential areas	24%	46%	18%	31%	23%	25%	25%	15%	24%	22%

*caution should be used when interpreting results for Etobicoke North due to a small sample size.

Q.7. Assuming that proper controls and standards would be applied to these types of signs to limit the brightness and the times of day and night when the signs could be illuminated, how acceptable would it be to place a type of electronic sign like this in the following locations?

Base: All Respondents (n=1504)

Read-o-graph Signs

Read-o-graph signs are commonly found as part of a larger sign structure and typically only display letters and numbers. These signs are used for advertising, providing directions and business identification.



Readograph Images Tested



Readograph Image 1

The following three readograph images were tested.



Readograph Image 2

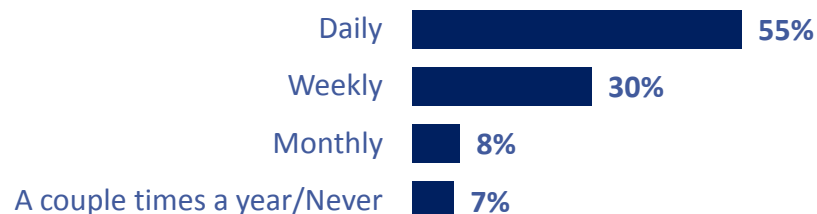


Readograph Image 3

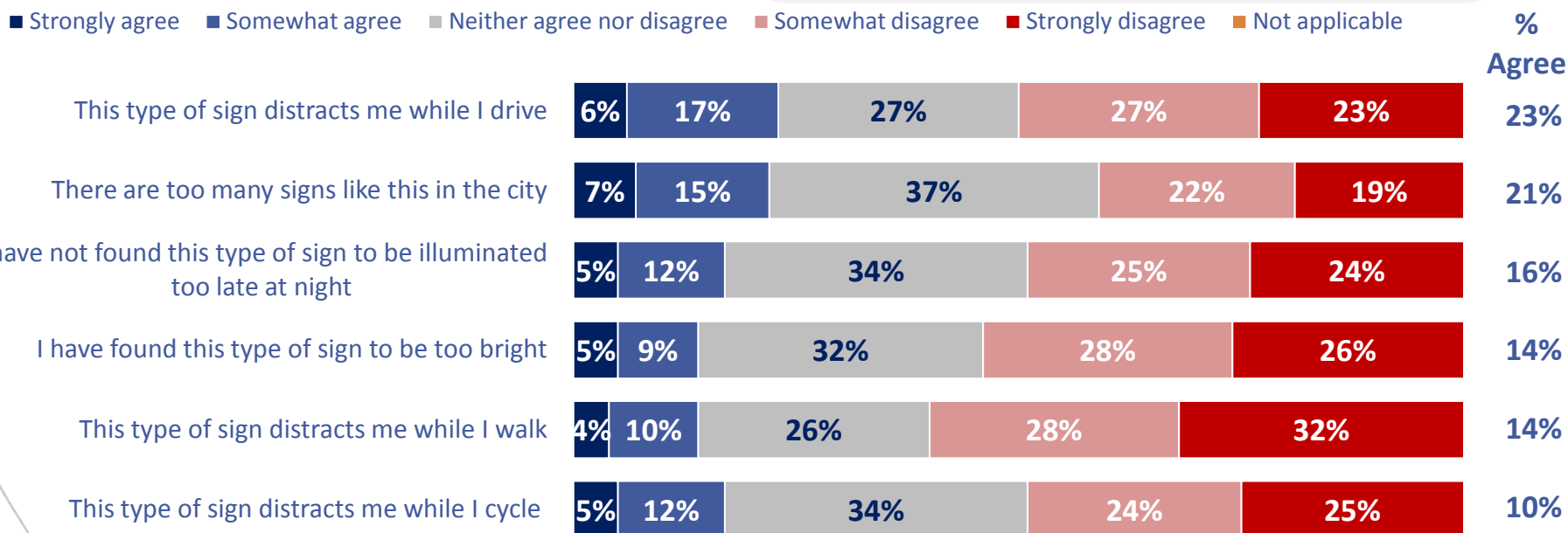


Read-o-graph Signs

Number of Times Seeing a Sign Like This



- The majority of Torontonians (55%) encounter read-o-graphs signs on a daily basis in the City.
- One in five (23%) residents do not find these signs distracting.
- Residents do not find them particularly bright (54%) or that they are on too late at night (49%).
- Only two-in-ten residents believe that there are too many readograph signs in Toronto.
- Scarborough North residents are most critical of read-o-graph signs finding them distracting while driving (33%), that there are too many of them in the City (31%) and that these signs are too bright (21%).



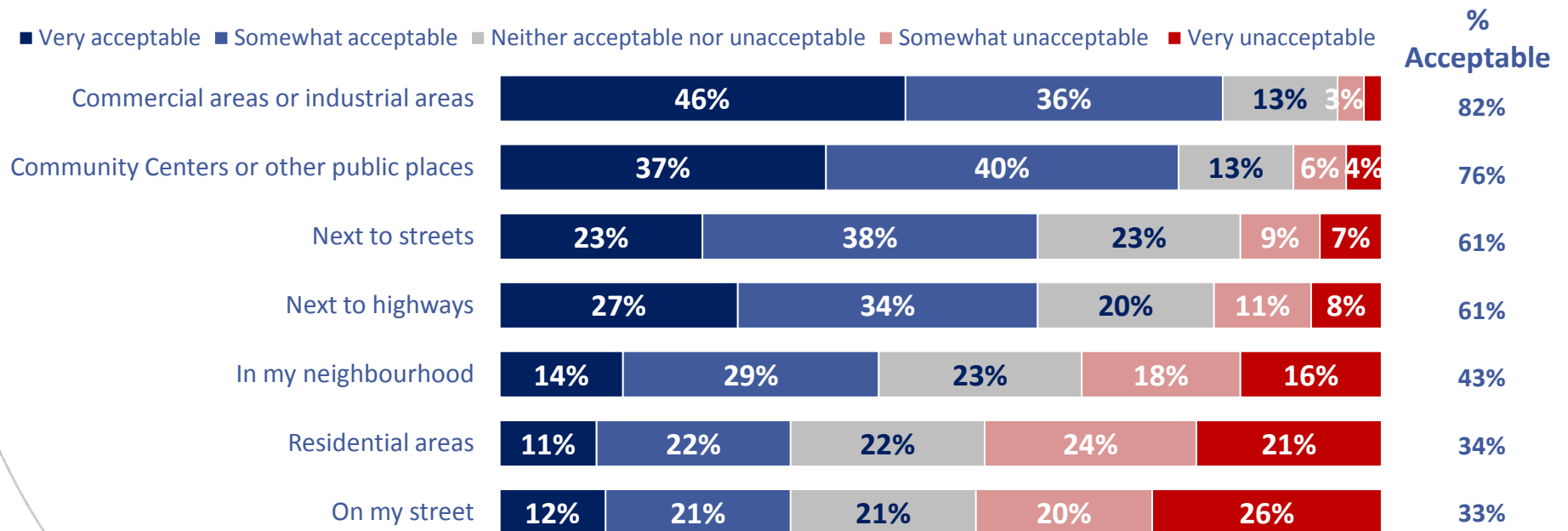
Q.8. How often do you see a sign like this? Base: All Respondents (n= 1504)

Q.9. Considering this type of illuminated or electronic sign, indicate whether you strongly agree, somewhat agree, neither agree nor disagree, somewhat disagree, or strongly disagree with the following statements. Base : All Respondents (n= 1504)

Acceptance of Read-o-graph Sign Placement



Similar to illuminated signs, support for readograph signs in commercial or industrial areas is very high among residents (82%). The majority of residents support these signs in and around community centers (76%), next to highways (61%) and streets (61%). Overall, roughly half of residents oppose these signs in residential areas (45%).



Q.10. Assuming that proper controls and standards would be applied to these types of signs to limit the brightness and the times of day and night when the signs could be illuminated, how acceptable would it be to place a type of electronic sign like this in the following locations?

Base: All Respondents (n=1504)



Acceptance of Read-o-graph Sign Placement: by Region

Torontonians residing North of the 401 are significantly more accepting of read-o-graph signs on their own street (43%) compared to most other regions. Downtown residents are significantly more accepting of these signs on their own street (37%) compared to Etobicoke South residents (24%) and those East of downtown (25%). Similarly, Torontonians between the ages of 18-54 are significantly more accepting of these signs on their street (37%) compared with those 55 years of age and older (24%).

VERY/ SOMEWHAT ACCEPTABLE	Region									
	Total	Etobicoke North	Etobicoke South	North of 401 (Humber to Victoria Park)	Mid Town	Scarborough North	Scarborough South	East of Downtown	West of Downtown	Downtown
		(A)	(B)	(C)	(D)	(E)	(F)	(G)	(H)	(I)
	(n=1504)	(n=35)	(n=135)	(n=233)	(n=339)	(n=119)	(n=223)	(n=124)	(n=116)	(n=180)
Commercial areas or industrial areas	82%	79%	79%	87%	86%	76%	79%	82%	83%	82%
Community Centers or other public places	76%	72%	79%	80%	77%	75%	75%	77%	73%	74%
Next to highways	61%	62%	60%	63%	62%	58%	62%	60%	64%	60%
Next to streets	61%	64%	53%	69%	60%	62%	62%	56%	56%	58%
In my neighbourhood	43%	57%	34%	49%	45%	43%	44%	36%	37%	46%
Residential areas	34%	45%	27%	42%	34%	35%	32%	27%	26%	32%
On my street	33%	37%	24%	43%	33%	35%	31%	25%	27%	37%

*caution should be used when interpreting results for Etobicoke North due to a small sample size.

Q.10. Assuming that proper controls and standards would be applied to these types of signs to limit the brightness and the times of day and night when the signs could be illuminated, how acceptable would it be to place a type of electronic sign like this in the following locations?

Base: All Respondents (n=1504)

Electronic Static Signs

Electronic static signs change from one message to the next, in a fashion similar to a PowerPoint presentation or a picture slide show. These signs can be used for advertising, business identification and community messages.



Electronic Static Images Tested

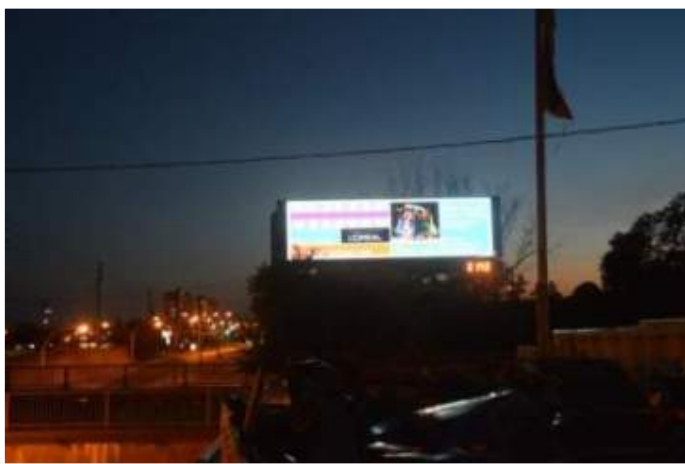


Electronic Static Image 1



Electronic Static Image 2

The following four electronic static images were tested along with one video.



Electronic Static Image 3



Electronic Static Image 4

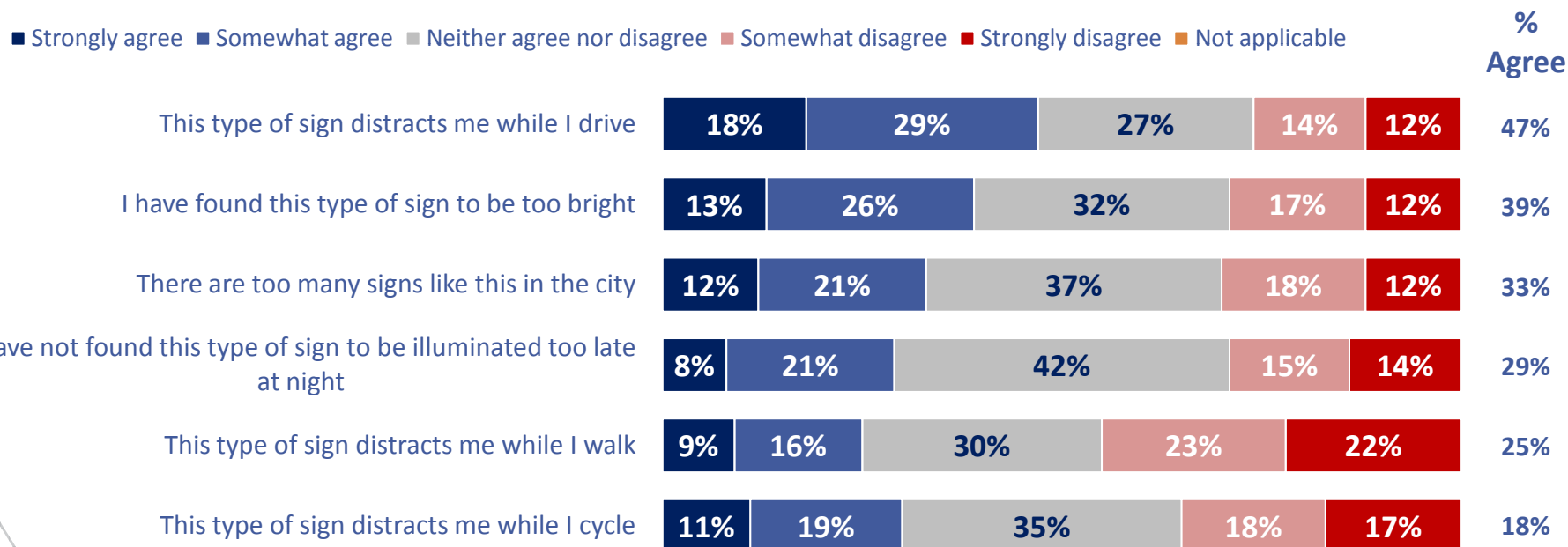


Electronic Static Signs

Number of Times Seeing a Sign Like This



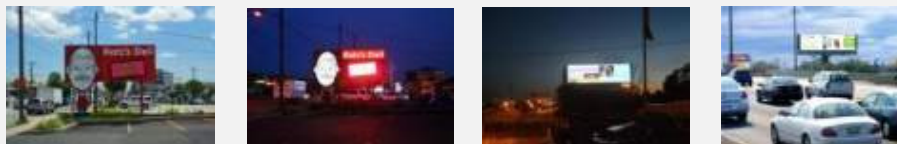
- Three-in-ten residents (33%) see electronic signs on a weekly basis with 29% encountering them daily.
- Half of residents (48%) find the moving images of electronic static signs distracting (in general) with 47% finding these distracting while they drive.
- Four-in-ten (39%) find these signs too bright, 33% feel there are too many signs like this in Toronto and 43% are undecided on whether electronic static images are illuminated too late at night.
- Six-in-ten (58%) of East York residents find electronic static signs to be too bright – a significantly higher figure compared with all other Toronto regions.



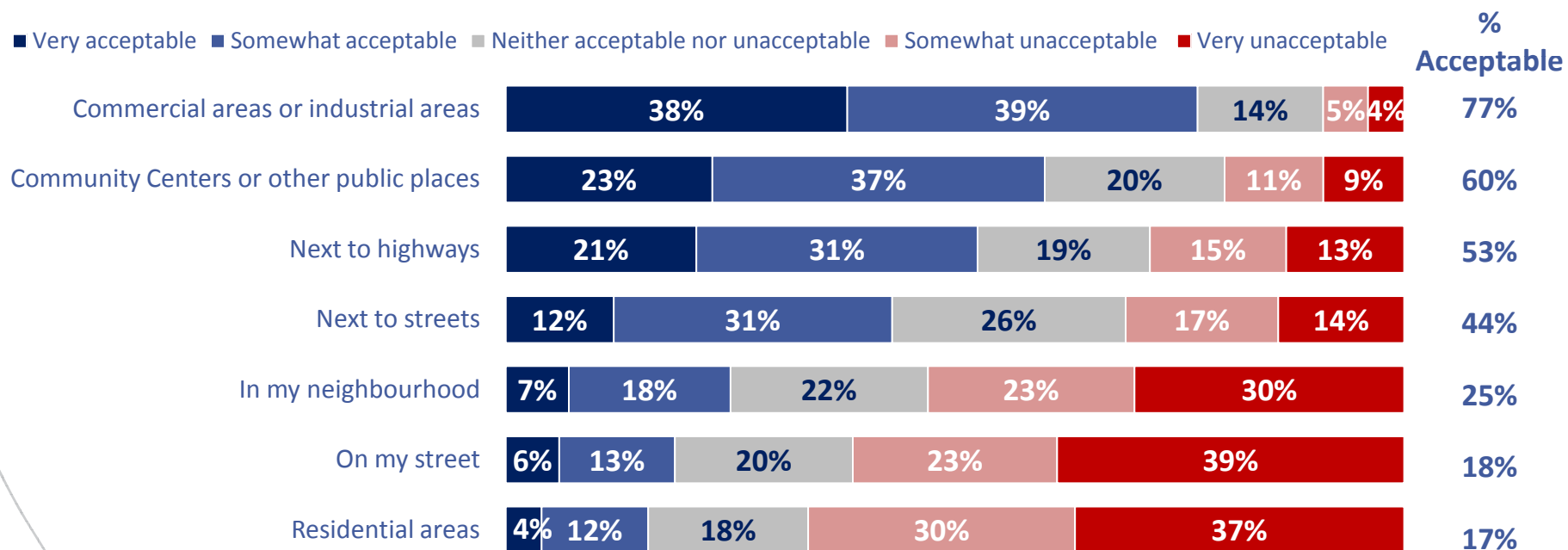
Q.11. How often do you see a sign like this? Base: All Respondents (n= 1504)

Q.12. Considering this type of illuminated or electronic sign, indicate whether you strongly agree, somewhat agree, neither agree nor disagree, somewhat disagree, or strongly disagree with the following statements. Base: All Respondents (n= 1504)

Acceptance of Electronic Static Sign Placement



There is strong support for electronic static signs in commercial or industrial areas (77%). The majority of Torontonians support these signs in and around community centers (60%) and next to highways (53%). Only 44% of residents support these signs next to streets. There is very strong opposition to electronic static signs in residential areas in general (67% unacceptable), on residents' own street (62% unacceptable) and their neighbourhood (53% unacceptable).



Q.13. Assuming that proper controls and standards would be applied to these types of signs to limit the brightness and the times of day and night when the signs could be illuminated, how acceptable would it be to place a type of electronic sign like this in the following locations?

Base: All Respondents (n=1504)



Acceptance of Electronic Static Sign Placement: by Region

Although the majority of Torontonians are not accepting of electronic static signs in residential areas (including their own neighbourhoods and streets) there are varying degrees of acceptance by region within the City. Residents North of the 401 (28%) and in the downtown core (24%) are most accepting of electronic static signs on their own street. Residents between the ages of 18-34 (21%) are significantly more accepting of these signs on their own street compared with residents over the age of 55 (15%). Men are significantly more accepting of these signs in residential areas in general (19%) compared with women (15%).

VERY/ SOMEWHAT ACCEPTABLE	Region									
	Total	Etobicoke North	Etobicoke South	North of 401 (Humber to Victoria Park)	Mid Town	Scarborough North	Scarborough South	East of Downtown	West of Downtown	Downtown
	(n=1504)	(n=35)	(n=135)	(n=233)	(n=339)	(n=119)	(n=223)	(n=124)	(n=116)	(n=180)
Commercial areas or industrial areas	77%	83%	75%	82%	79%	73%	75%	72%	78%	76%
Community Centers or other public places	60%	56%	62%	65%	59%	61%	66%	54%	53%	58%
Next to highways	53%	55%	59%	55%	49%	53%	54%	44%	57% _G	53%
Next to streets	44%	51%	39%	54%	43%	47%	43%	33%	37%	40%
In my neighbourhood	25%	28%	21%	31%	24%	29%	21%	13%	22%	32%
On my street	18%	20%	10%	28%	14%	21%	18%	13%	16%	24%
Residential areas	17%	26%	10%	25%	14%	19%	14%	10%	18%	19%

*caution should be used when interpreting results for Etobicoke North due to a small sample size.

Q.13. Assuming that proper controls and standards would be applied to these types of signs to limit the brightness and the times of day and night when the signs could be illuminated, how acceptable would it be to place a type of electronic sign like this in the following locations?

Base: All Respondents (n=1504)

Electronic Moving Signs

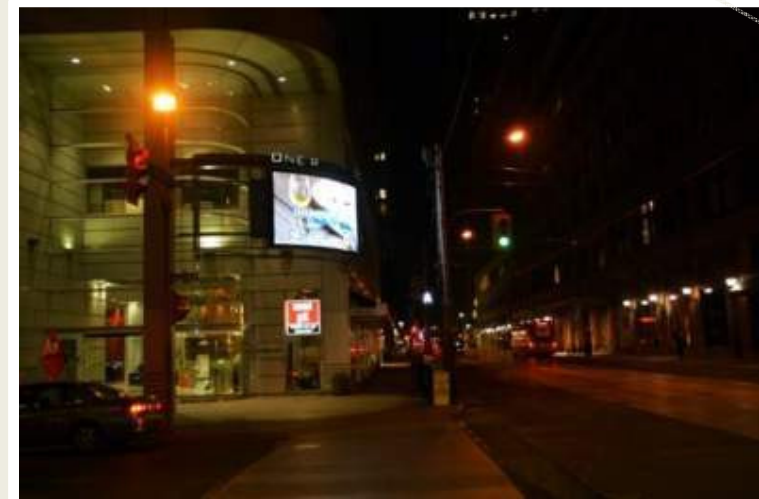
Similar to a TV screen, electronic moving signs are typically used for advertising and business identification to display an image that moves and changes from one message to the next. Many of these signs are found at Dundas Square as well as other landmarks such as the ACC and the CN Tower.



Electronic Moving Images Tested



Electronic Moving Image 1



Electronic Moving Image 2



Electronic Moving Image 3

The following three electronic moving images were tested along with one video.

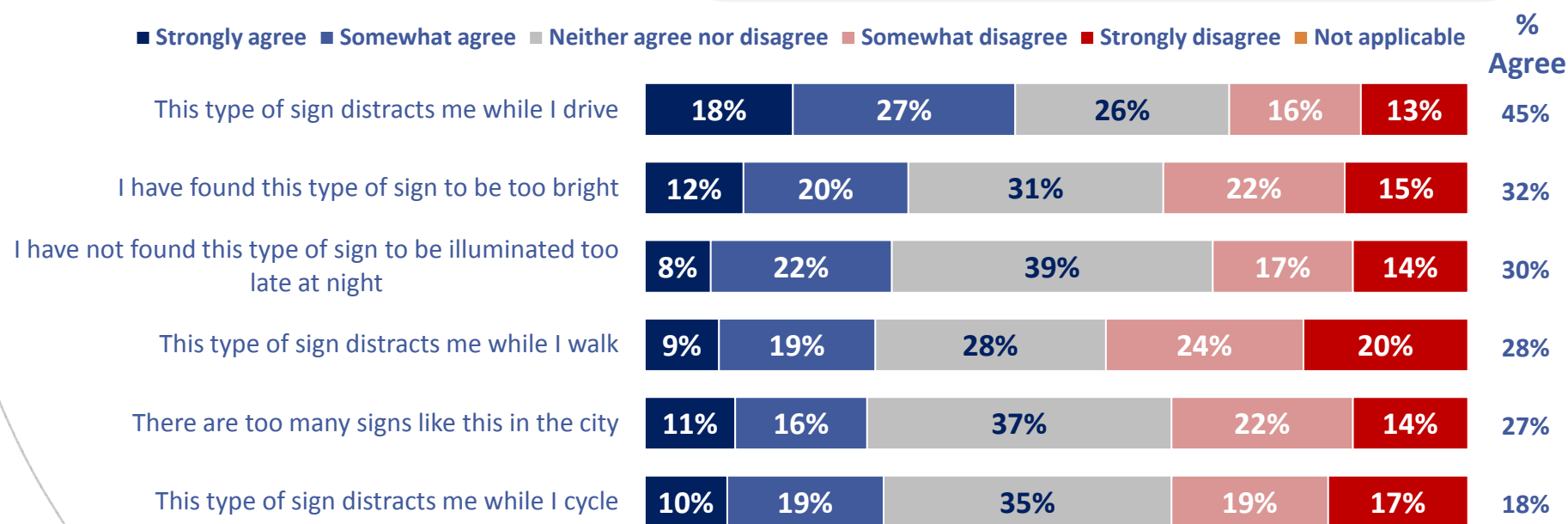


Electronic Moving Signs

Number of Times Seeing a Sign Like This



- Three-in-ten residents (33%) see electronic moving signs on a weekly basis with 25% encountering them daily.
- About half of residents (45%) find the moving video of electronic static signs distracting while they drive with another 44% saying that they find them distracting in general.
- Only three-in-ten (32%) residents find these signs too bright and 27% find there are too many signs like this in the City.
- Torontonians are generally undecided as to whether or not these signs are illuminated too late at night.
- Residents who live in the East of downtown area are the most likely to find these signs too distracting (59%), too bright (47%) and that there are too many in the City (44%).



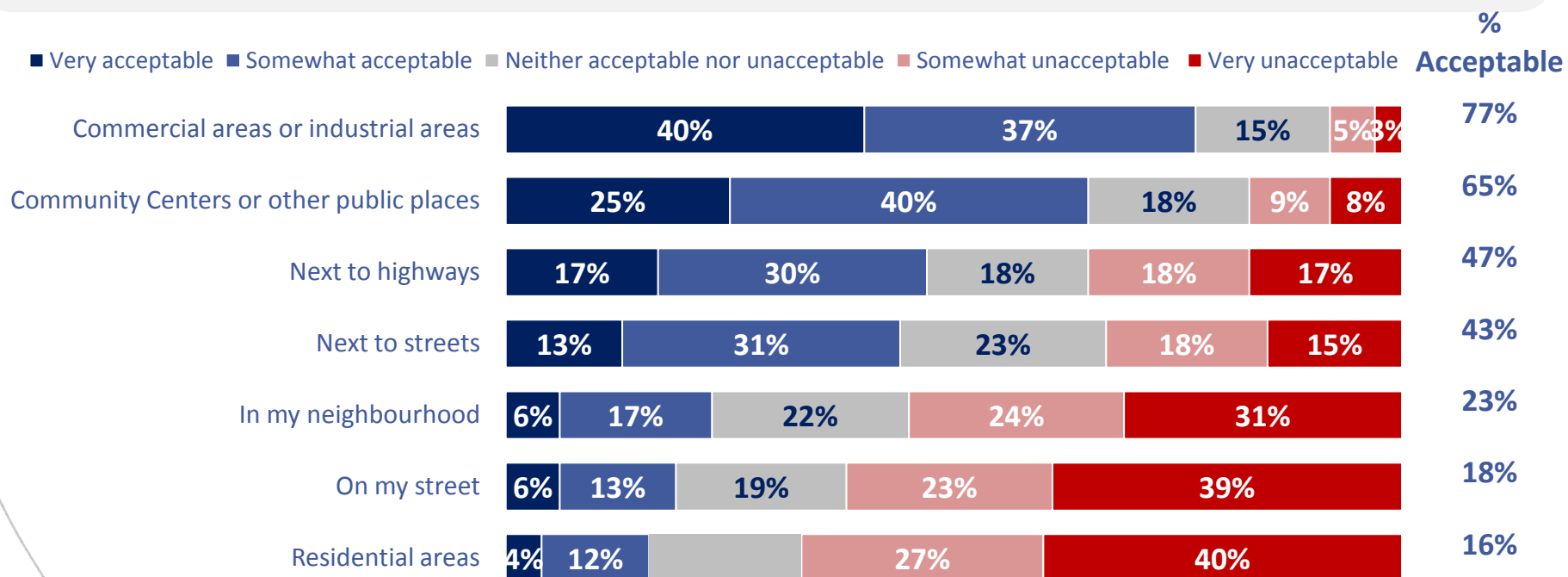
Q.14. How often do you see a sign like this? [Single punch] Base: All Respondents (n=1504)

Q.15. Considering this type of illuminated or electronic sign, indicate whether you strongly agree, somewhat agree, neither agree nor disagree, somewhat disagree, or strongly disagree with the following statements. Base: All Respondents (n=1504)

Acceptance of Electronic Moving Sign Placement



On par with other types of signs, there is strong support for electronic moving signs in commercial or industrial areas (77%) and in and around community centers (65%). While support for electronic moving signs next to highways and streets is less than other types of signs, it is still substantial at 47% and 43% respectively. The majority of residents find it unacceptable to place these types of signs in residential areas (67%), on their street (62%) and in their neighbourhood (55%).



Q.16. Assuming that proper controls and standards would be applied to these types of signs to limit the brightness and the times of day and night when the signs could be illuminated, how acceptable would it be to place a type of electronic sign like this in the following locations?
Base: All Respondents (n=1504)

Acceptance of Electronic Moving Sign Placement: by Region

Regionally, there is consensus among Torontonians that they do not want electronic moving signs in residential areas and neighbourhoods. Although, on the other hand a major of residents find it acceptable to place these types of signs near community centres of other public places. Residents North of the 401 (30%), Scarborough North (28%) and downtown (29%) are also more accepting of these signs in their neighbourhood.

VERY/ SOMEWHAT ACCEPTABLE	Region									
	Total	Etobicoke North	Etobicoke South	North of 401 (Humber to Victoria Park)	Mid Town	Scarborough North	Scarborough South	East of Downtown	West of Downtown	Downtown
		(A)	(B)	(C)	(D)	(E)	(F)	(G)	(H)	(I)
	(n=1504)	(n=35)	(n=135)	(n=233)	(n=339)	(n=119)	(n=223)	(n=124)	(n=116)	(n=180)
Commercial areas or industrial areas	77%	76%	70%	80%	78%	75%	79%	73%	79%	79%
Community Centers or other public places	65%	79%	61%	69%	64%	68%	70%	53%	61%	64%
Next to highways	47%	60%	49%	51%	43%	44%	49%	41%	51%	49%
Next to streets	43%	45%	38%	50%	43%	48%	44%	35%	41%	42%
In my neighbourhood	23%	39%	14%	30%	19%	28%	22%	14%	21%	29%
On my street	18%	15%	14%	26%	14%	20%	18%	11%	18%	24%
Residential areas	16%	26%	11%	24%	13%	18%	16%	11%	18%	12%

*caution should be used when interpreting results for Etobicoke North due to a small sample size.

Q.16. Assuming that proper controls and standards would be applied to these types of signs to limit the brightness and the times of day and night when the signs could be illuminated, how acceptable would it be to place a type of electronic sign like this in the following locations?
Base: All Respondents (n=1504)

Projected Images

Projected signs are images that are projected from a nearby projector onto a building wall at night for advertising, business identification and art installations/projects.



Projected Images Tested

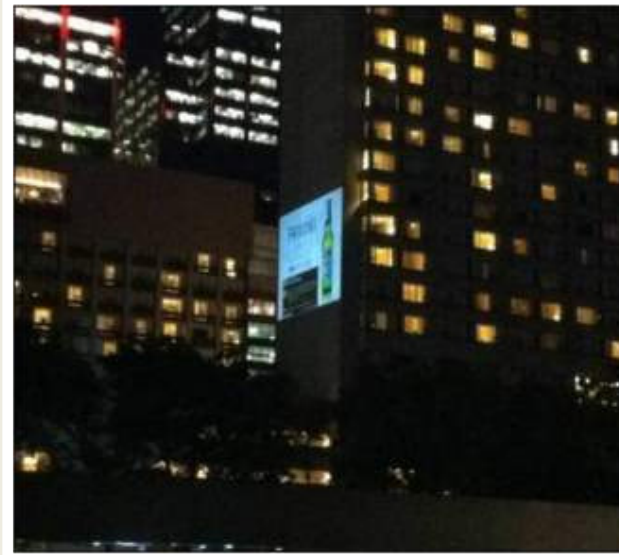


Projected Image 1

The following three projected images were tested.



Projected Image 2

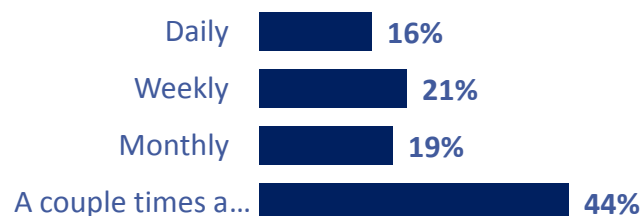


Projected Image 3

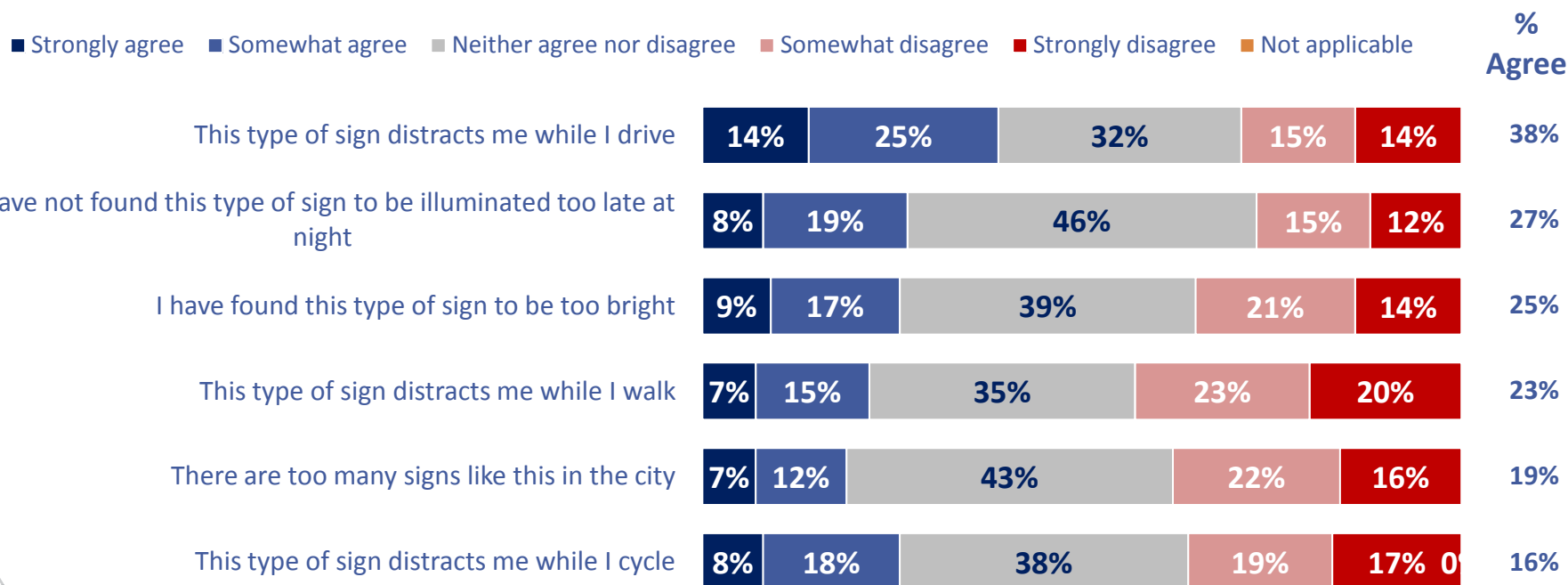


Projected Signs

Number of Times Seeing a Sign Like This



- Overall, one-in-five residents have never seen a sign like this.
- Four-in-ten residents (39%) find projected signs distracting in general as well as when they drive (39%).
- About half of residents (46%) are undecided on whether or not projected signs are illuminated too late.
- Only a small minority of residents (19%) believe there are too many projected signs in the city, while most are either indifferent (44%) or disagree entirely (38%).
- Residents from Etobicoke South find these signs significantly more distracting while they drive (46%) compared to downtown residents (33%).



Q.17. How often do you see a sign like this? Base: All Respondents (n=1504)

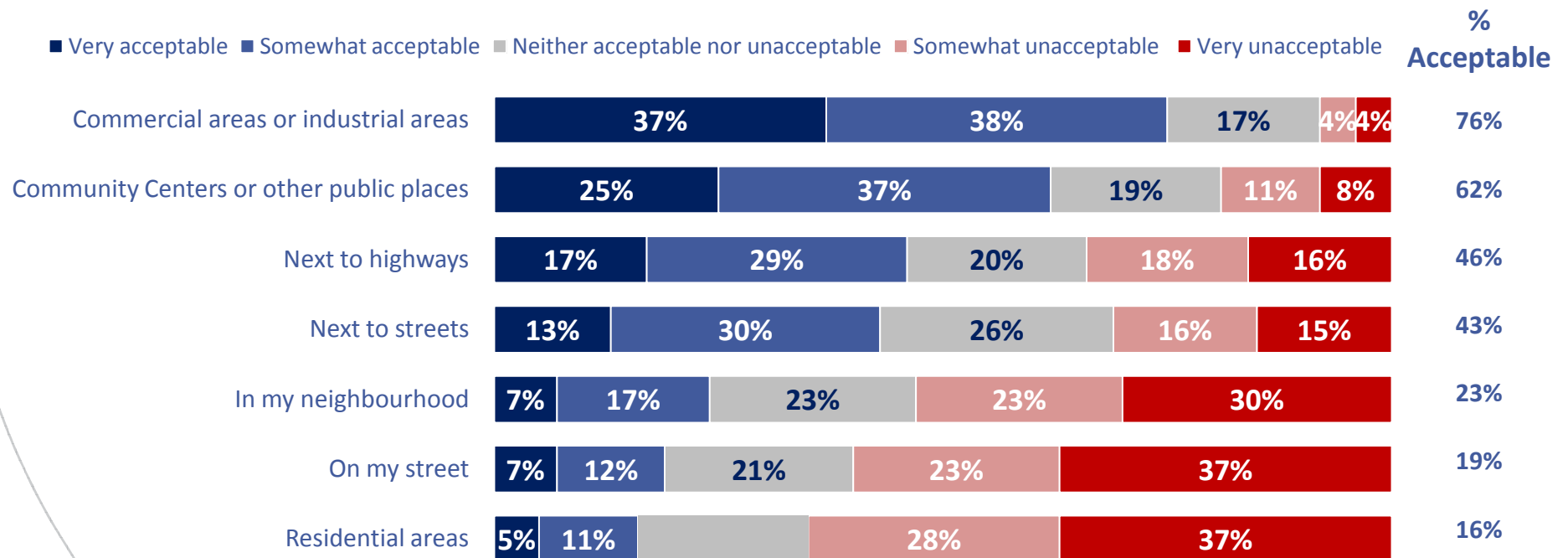
Q.18. Considering this type of illuminated or electronic sign, indicate whether you strongly agree, somewhat agree, neither agree nor disagree, somewhat disagree, or strongly disagree with the following statements. Base: All Respondents (n=1504)



Acceptance of Projected Sign Placement



There is strong support for projected signs in commercial or industrial areas (77%). The majority (62%) of Torontonians support these signs in and around community centers, 46% support them next to highways and 43% support them next to streets in general. There is very little acceptability for these signs in residential areas (65% unacceptable), on residents' street (60% unacceptable) and in residents' neighbourhood (53% unacceptable).



Q.19. Assuming that proper controls and standards would be applied to these types of signs to limit the brightness and the times of day and night when the signs could be illuminated, how acceptable would it be to place a type of electronic sign like this in the following locations?

Base: All Respondents (n=1504)

Acceptance of Projected Sign Placement: by Region

Residents in the downtown core are significantly more accepting of projected signs in their neighbourhood (34%) and on their street (29%) compared to all other regions of the City, regardless the majority find this type of sign unacceptable in these locations. Residents 18-34 and 35-54 are significantly more accepting of projected signs placed in their neighbourhood (26% and 25% respectively), on their street (20% and 21% respectively) and in residential areas in general (20% and 17% respectively) compared with Torontonians over the age of 55.

VERY/ SOMEWHAT ACCEPTABLE	Region									
	Total	Etobicoke North	Etobicoke South	North of 401 (Humber to Victoria Park)	Mid Town	Scarborough North	Scarborough South	East of Downtown	West of Downtown	Downtown
		(A)	(B)	(C)	(D)	(E)	(F)	(G)	(H)	(I)
	(n=1504)	(n=35)	(n=135)	(n=233)	(n=339)	(n=119)	(n=223)	(n=124)	(n=116)	(n=180)
Commercial areas or industrial areas	76%	68%	75%	74%	80% _G	72%	78%	70%	74%	77%
Community Centers or other public places	62%	71% _G	65% _G	63% _G	61% _G	61%	64% _G	51%	53%	68% _{GH}
Next to highways	46%	57% _G	55% _{CDEG}	44%	45% _G	38%	46% _G	34%	46% _G	49% _G
Next to streets	43%	57% _G	39%	45% _G	42%	42%	44%	34%	41%	46% _G
In my neighbourhood	23%	25%	18%	29% _{BDG}	21%	21%	23%	15%	20%	34% _{BDEFGH}
On my street	19%	11%	15%	24% _{BDG}	15%	22% _G	18%	11%	16%	29% _{ABDEFGH}
Residential areas	16%	23% _G	13%	22% _{DG}	14%	18% _G	16% _G	7%	14%	18% _G

*caution should be used when interpreting results for Etobicoke North due to a small sample size.

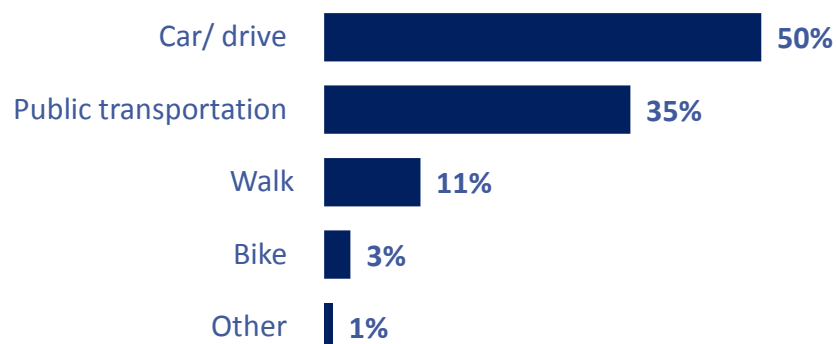
Q.19. Assuming that proper controls and standards would be applied to these types of signs to limit the brightness and the times of day and night when the signs could be illuminated, how acceptable would it be to place a type of electronic sign like this in the following locations?

Base: All Respondents (n=1504)

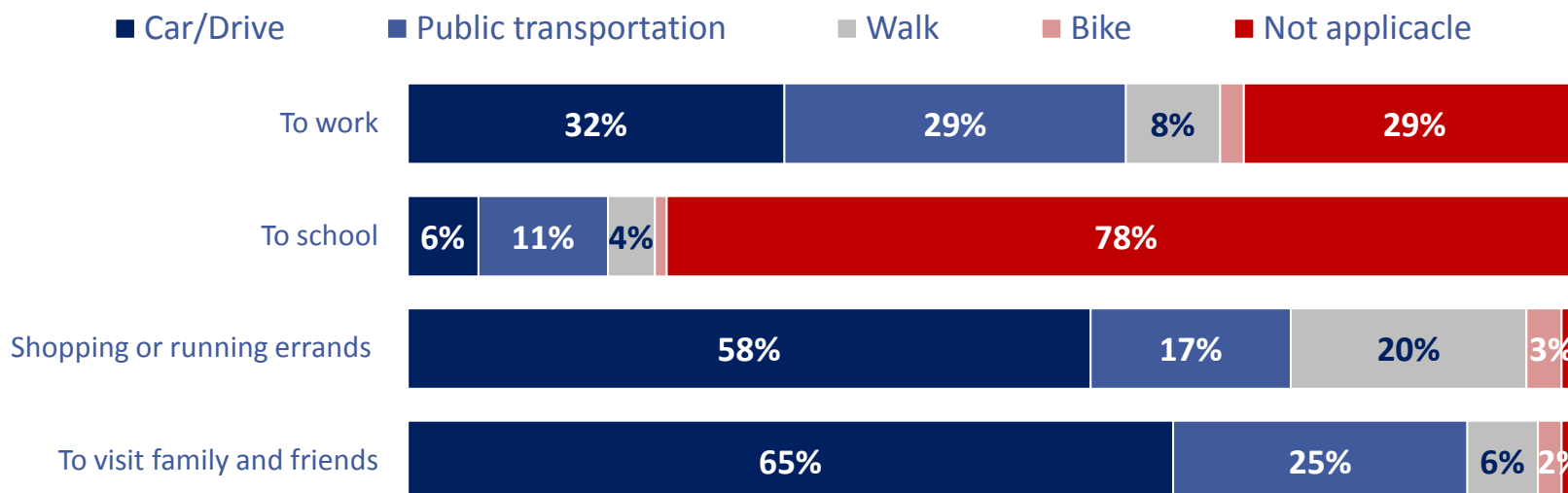
Demographics

Primary Mode of Transportation

Primary Transportation



- The primary mode of transportation for half of residents is their car/driving (50%).
- Thirty five percent use public transit as their main mode of transportation.
- Residents most likely to drive live outside downtown, while downtown dwellers are more likely to walk, bike or take public transit.
- Overall, Torontonians are most likely to drive to when shopping and running errands (58%) or visiting family and friends (65%) versus commuting to work (32%).



Q.27. What is your primary means of transportation? Base: All Respondents (n= 1504)

Q.28. How do you most often travel to the following destinations? Base : All Respondents (n= 1504)



Demographics

Gender

Male	47%
Female	53%

Born in Canada

Yes	68%
No	32%

Age

18-34	31%
35-54	37%
55+	32%
Mean	46.3

Tenure in Toronto

Less than 1 year	1%
1 to just under 5 years	7%
5 to just under 10 years	9%
10 to just under 20 years	17%
20 years or more	66%

Type of Home

Single family detached house	35%
Single family semi-detached	8%
Townhouse or rowhouse	7%
Duplex, triplex, or fourplex	2%
Condominium/apartment	47%
Other	1%

Number of People in Household

1	29%
2	36%
3 to 4	30%
5 or more	5%
Mean	2.3

Education

Grade school or some high school	2%
Complete high school	8%
Complete technical or trade school/Community college	18%
Some community college or university, but did not finish	18%
Complete university degree, such as a Bachelor's	39%
Post-graduate degree, such as a Master's or Ph.D.	15%

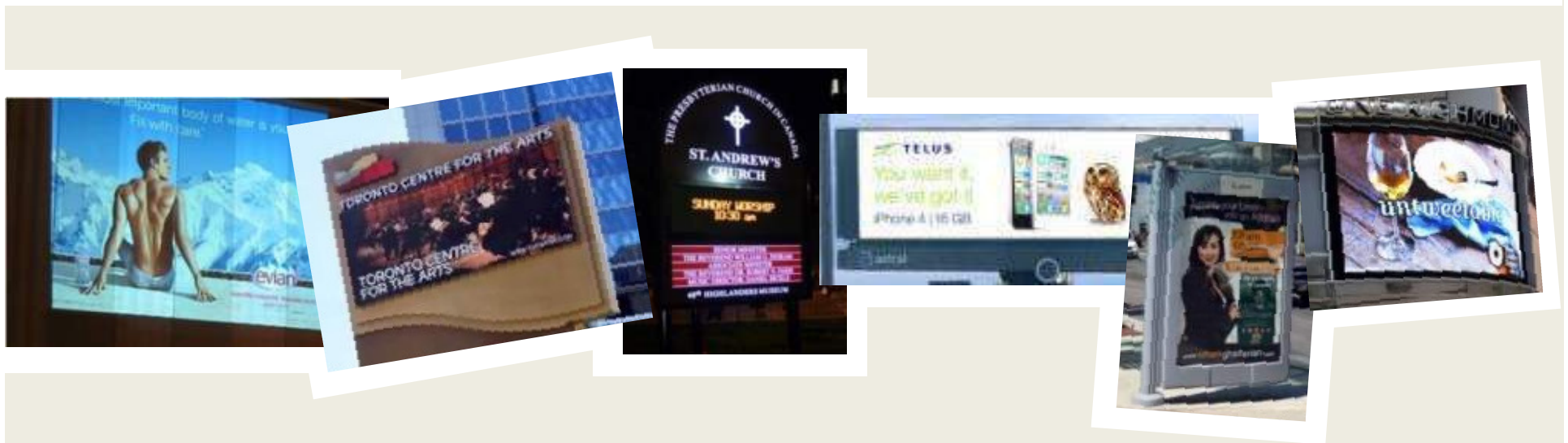
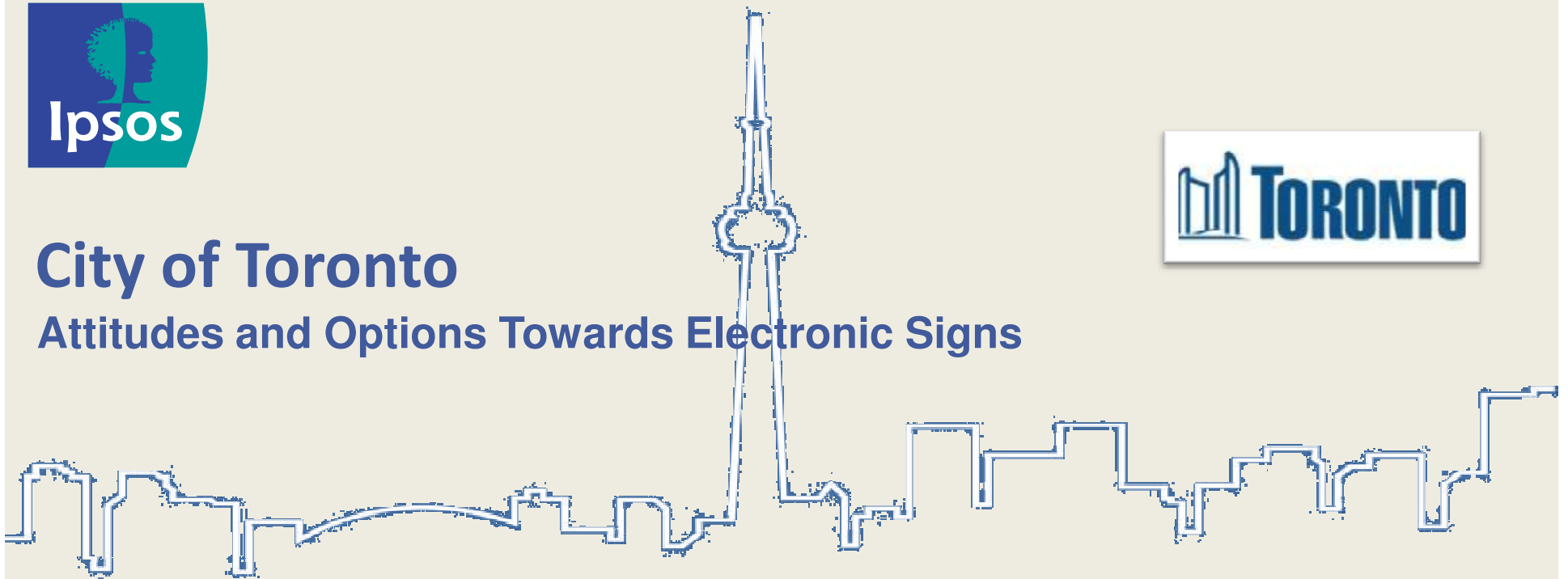
Income

Less than 40,000	25%
40,000 - under 80,000	36%
80,000 - under 120,000	23%
120,000 - under 160,000	9%
160,000 or more	7%



City of Toronto

Attitudes and Options Towards Electronic Signs



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