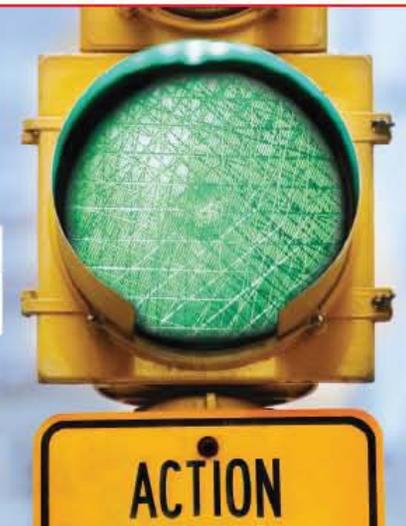


Outdoor Advertising Association of America

Mediagenic Billboard Survey

October 2011





Research Methodology

Who

Adults ages 18+

How many

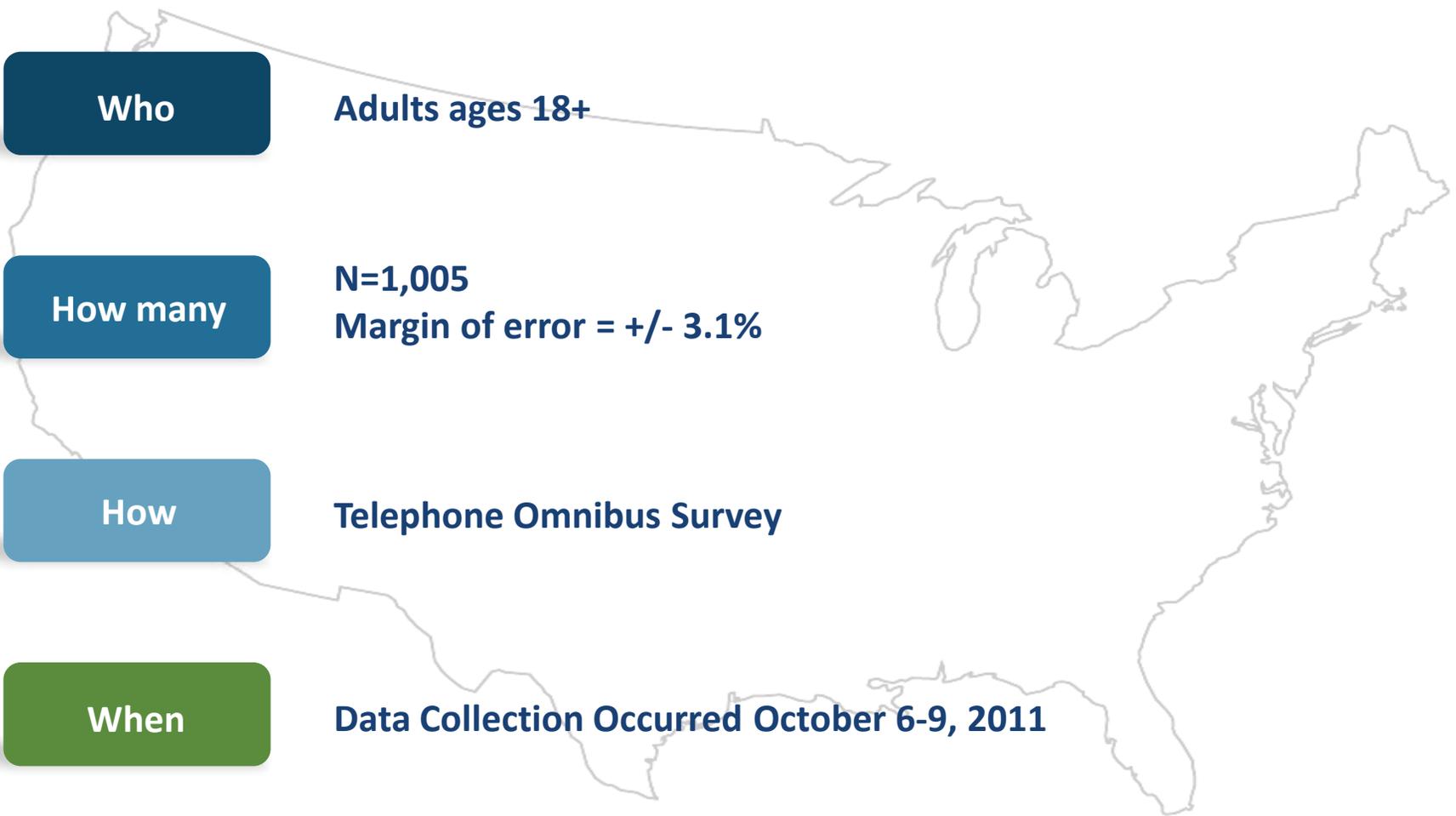
**N=1,005
Margin of error = +/- 3.1%**

How

Telephone Omnibus Survey

When

Data Collection Occurred October 6-9, 2011





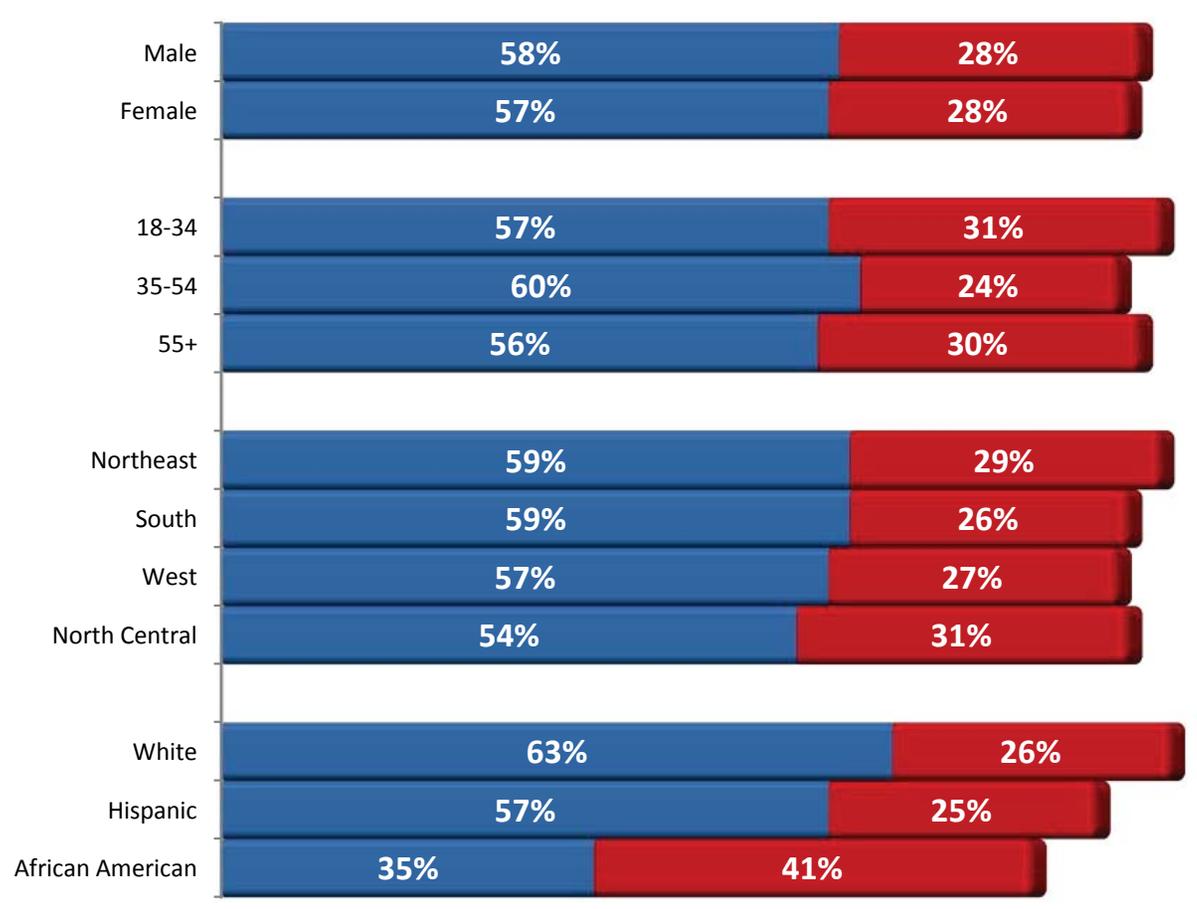
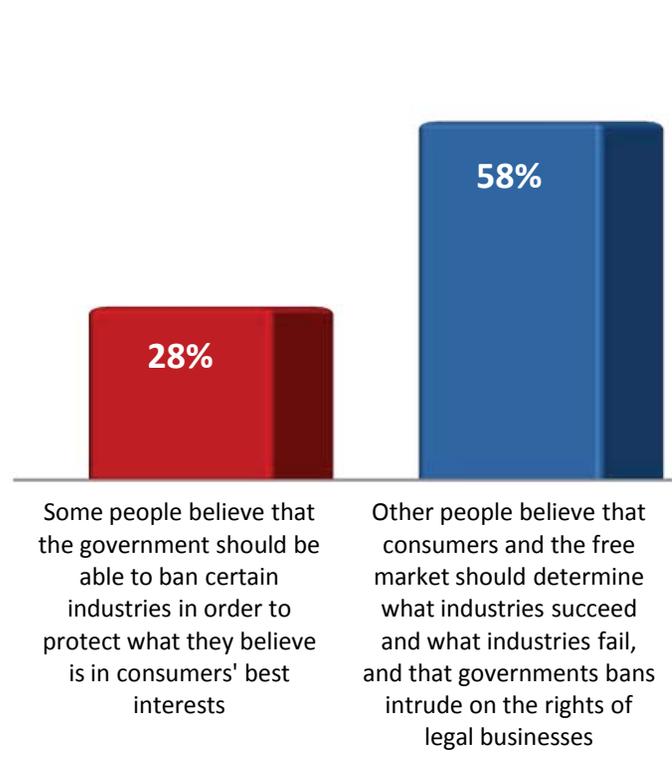
Key Findings

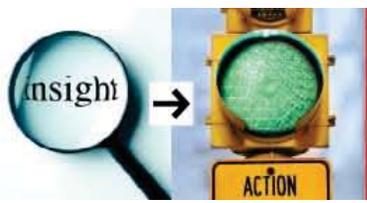
- Individuals do not believe that governments should be able to ban entire industries, and this opposition to bans is even stronger regarding digital billboards.
 - African Americans are significantly more likely to agree with broad government bans in order to protect what they believe is in consumers' best interest, but they are no more likely to believe they should ban digital billboards.
 - 79% of adults feel the government should not have the ability to ban digital billboard technology while 16% feel the government should be able to do so.
- Overall, US adults recognize the value digital billboards provide.
 - Digital billboards are valuable to local communities.
 - Most adults (87%) agree digital billboards help keep communities safer by allowing law enforcement to communicate with the public, collect tips about criminals, and help find missing children.
 - Digital billboards provide useful information.
 - This is most evident in the Northeast, where 85% of adults agree that digital billboards are informative.
 - Digital billboards are good to help increase revenue for local businesses.
 - Most adults (77%) feel digital billboards provide increased revenue for local businesses.
 - Males are significantly more likely to agree that digital billboards help increase revenue for landowners than females.



Free Market vs. Government Bans

More than half of respondents feel the free market should determine which industries fail and succeed, seeing government intervention as intruding on the rights of businesses. However, more than a quarter feel the government should enact bans on industries for the best interest of consumers. African Americans are more likely to favor government intervention.

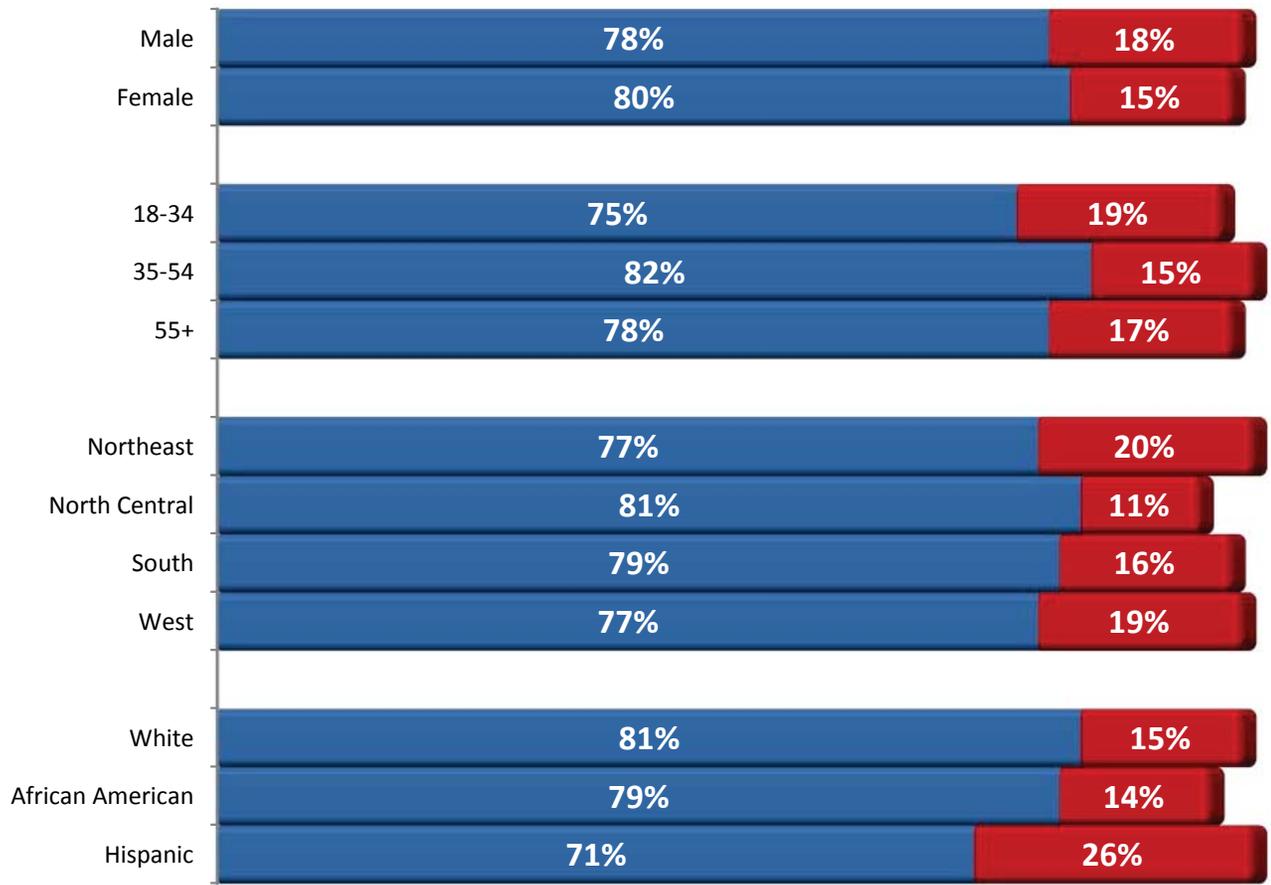
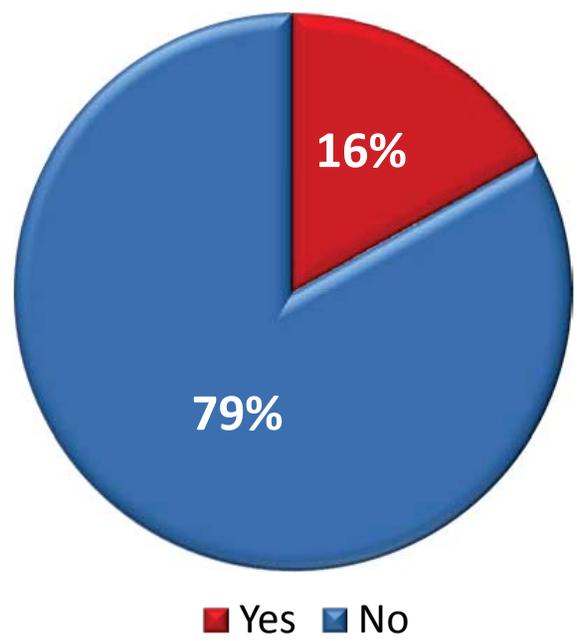




Government bans on digital billboards

79% of respondents feel the government should not have the ability to ban digital billboards, with only 16% opting for government intervention. Hispanic respondents are most like to support government bans.

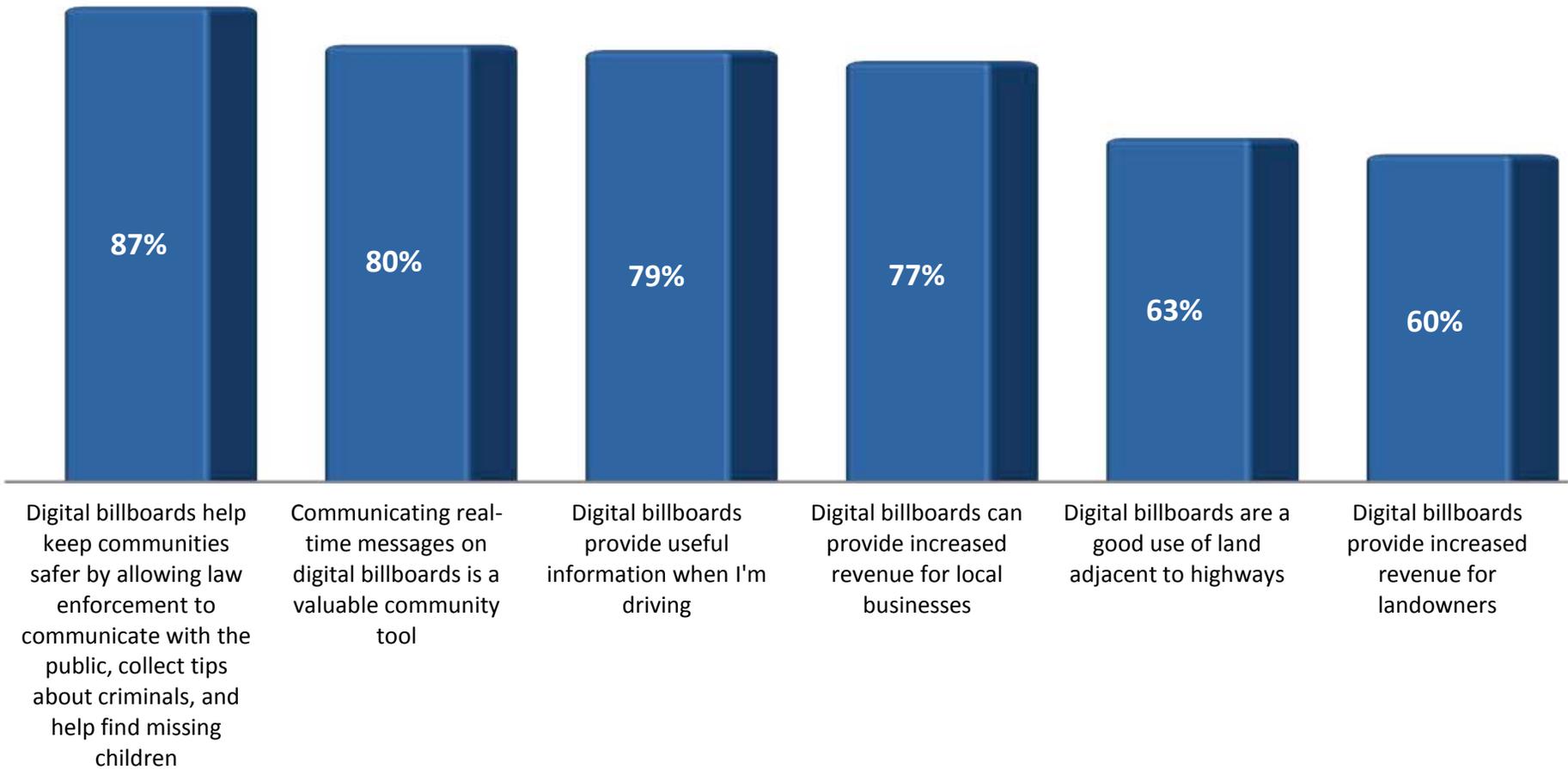
Should the government have the ability to ban digital billboards?

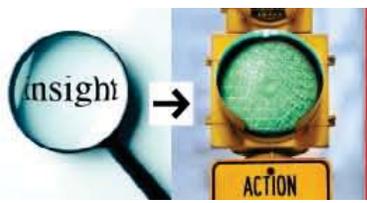




Digital Billboards Summary

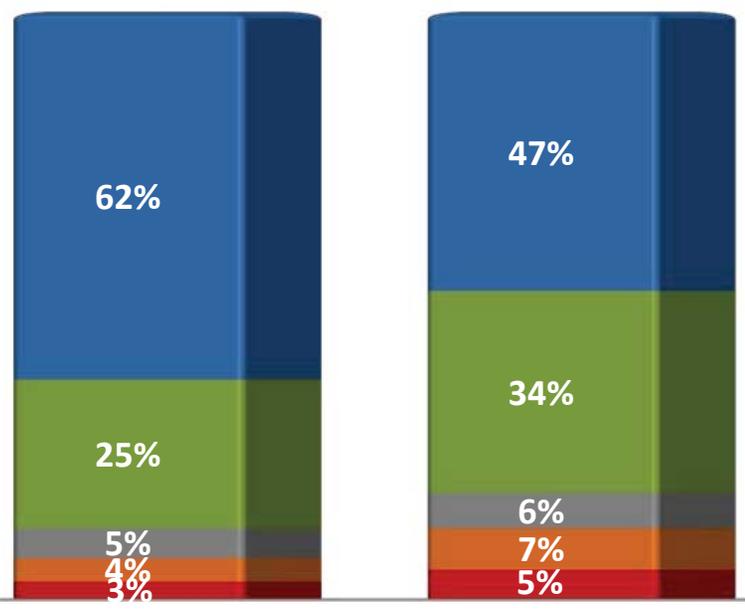
Overall, digital billboards are viewed as providing a favorable service to the community. Most respondents feel digital billboards help keep communities safe and provide information while driving.





Value to Communities

Overall, most adults in the US agree digital billboards are valuable to the community, with 93% of Hispanic adults agreeing the billboards help to make communities safer.



Digital billboards help keep communities safer by allowing law enforcement to communicate with the public, collect tips about criminals, and help find missing children

Communicating real-time messages on digital billboards is a valuable community tool

- Strongly disagree
- Somewhat disagree
- Neither agree nor disagree
- Somewhat agree
- Strongly agree

	Digital billboards help keep communities safer	Digital billboards are a valuable community tool
Gender		
Male	84%	80%
Female	89%	81%
Age		
18-34	86%	76%
35-54	89%	85%
55+	85%	79%
Geography		
Northeast	91%	79%
North Central	90%	82%
South	83%	80%
West	85%	82%
Ethnicity		
White	86%	81%
African-American	86%	77%
Hispanic	93%	79%

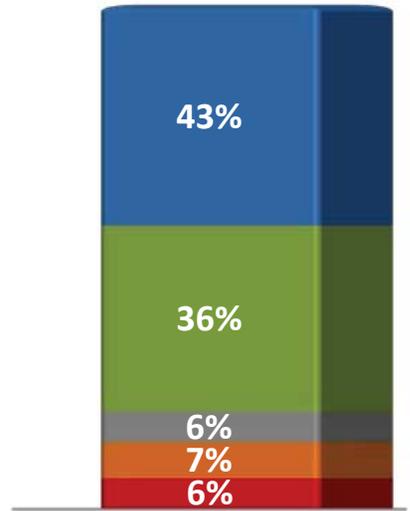


Q: How much do you agree or disagree with each of the following statements?



Provide Useful Information

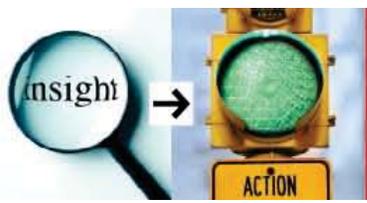
Overall, adults in the US agree that digital billboards provide useful information while they are driving. Drivers in the Northeast region are more likely than those from other regions to recognize the value of these tools.



Digital billboards provide useful information when I'm driving

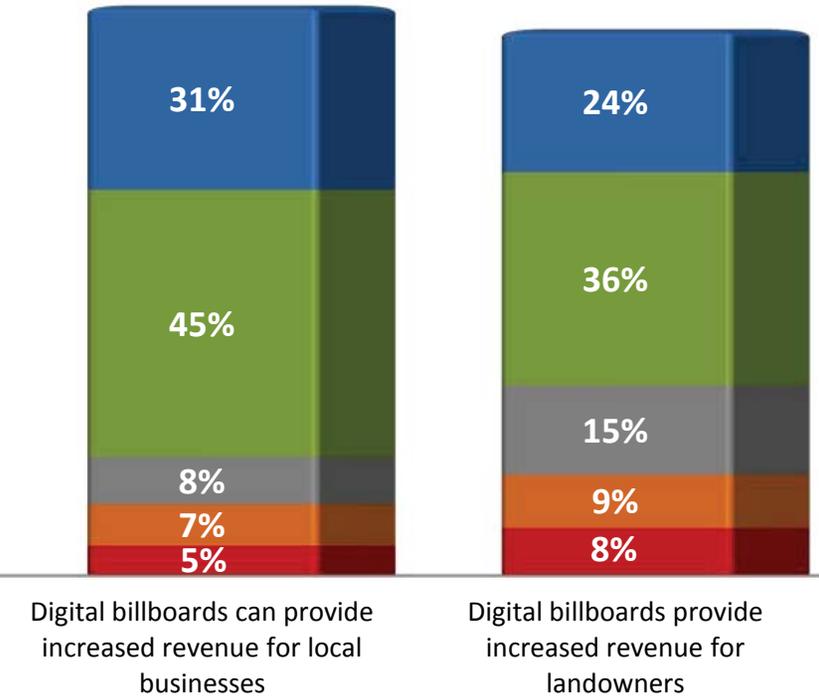
- Strongly disagree
- Somewhat disagree
- Neither agree nor disagree
- Somewhat agree
- Strongly agree

	Provide useful information while driving
Gender	
Male	77%
Female	81%
Age	
18-34	78%
35-54	82%
55+	78%
Geography	
Northeast	85%
North Central	80%
South	77%
West	77%
Ethnicity	
White	79%
African-American	78%
Hispanic	81%



Increase Revenue

The value of digital billboards to local businesses is more recognized than the value of digital billboards to landowners. Female respondents are less likely than males to recognize the revenue benefits.

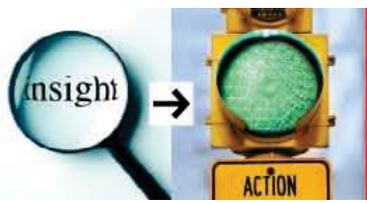


	Digital billboards can provide increased revenue for local businesses	Digital billboards provide increased revenue for landowners
Gender		
Male	82%	68%
Female	72%	54%
Age		
18-34	83%	57%
35-54	77%	66%
55+	71%	58%
Region		
Northeast	80%	65%
North Central	81%	56%
South	73%	60%
West	75%	62%
Ethnicity		
White	77%	61%
African-American	81%	56%
Hispanic	75%	64%

- Strongly disagree
- Somewhat disagree
- Neither agree nor disagree
- Somewhat agree
- Strongly agree

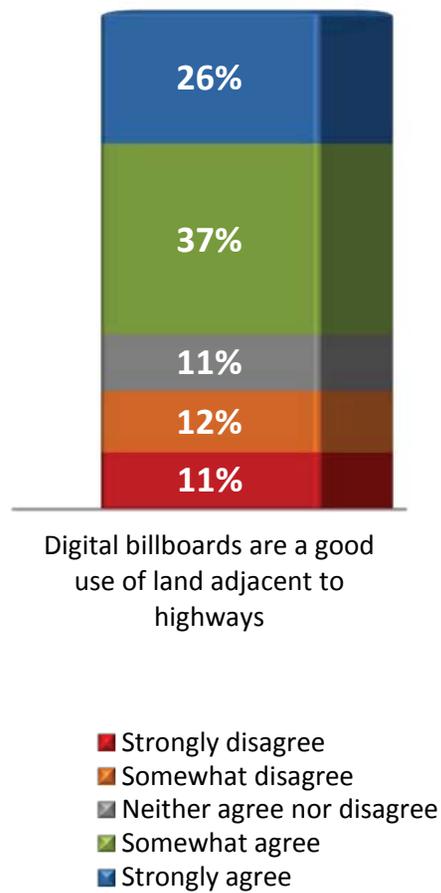


Q: How much do you agree or disagree with each of the following statements?



Good Use of Land

Most adults also believe that these billboards are a good use of land, with those living in the Northeast region and adults ages 35-54 being most likely to agree with this.



	Digital billboards are a good use of land adjacent to highways
Gender	
Male	64%
Female	63%
Age	
18-34	61%
35-54	70%
55+	59%
Geography	
Northeast	71%
North Central	63%
South	63%
West	58%
Ethnicity	
White	61%
African-American	69%
Hispanic	69%

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