

Outdoor Advertising: Local Economic Impact: Tampa

by William Lilley and Laurence J. DeFranco, Principals, iMapData, Inc.

**Local Businesses Advertising on Boards in Tampa--
Map Shows Close Geographic Proximity of Advertiser to Billboards
for Businesses with less than 50 Employees**

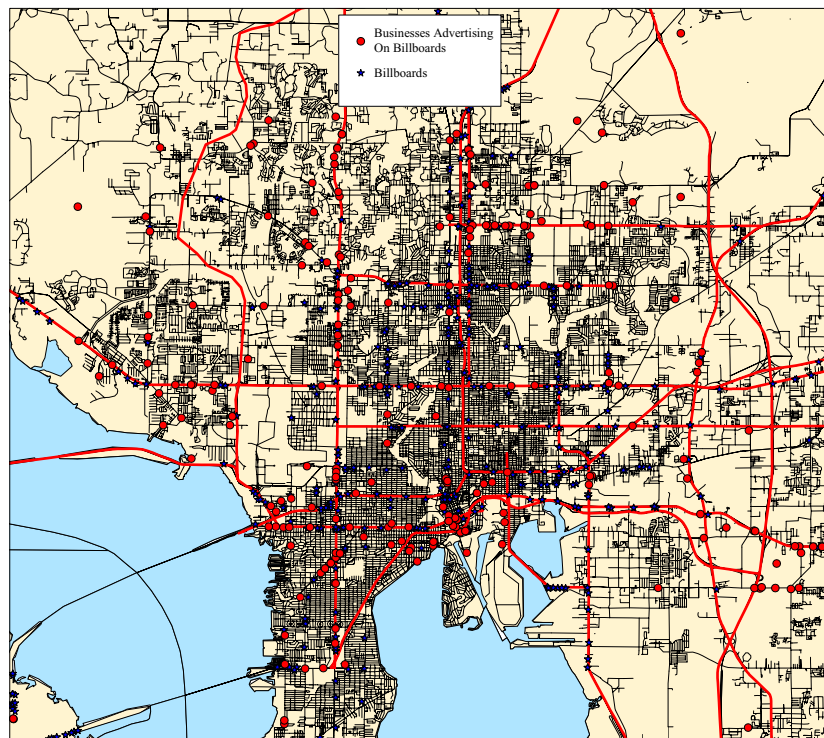


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Executive Summary

Outdoor Advertising = Predominantly Local Businesses

74 percent of the outdoor advertisements are for local businesses.

Outdoor Advertising = Small Businesses

79 percent of the local advertisers are small businesses with less than 50 employees.

Outdoor Advertising = Local Jobs

3.5 percent of the Tampa Metro Area's workforce (Hillsborough, Pasco, and Pinellas Counties), 39,092 local jobs, are in the 911 local businesses using outdoor advertising.

Outdoor Advertising Business Targets = Local Tampa Area Business Strengths—Local Entertainment, Media, Businesses/Financial Services & Local Public Service/Affairs

20 percent of the local outdoor advertising is for local entertainment;

16 percent of the local outdoor advertising is for local media;

11 percent of the local outdoor advertising is for local businesses/financial services;

10 percent of the local outdoor advertising is for local public service/affairs.

Local Outdoor Advertisers Tend Overwhelmingly to Advertise on Billboards on Major Commuter/Tourist Arterials & in Close Geographic Proximity to Their Place of Business

The economic analysis utilizes copyrighted computer mapping software to depict precisely the close spatial relationship between the local business advertiser & the billboard on which the business advertises.

Methodology

The findings for this economic impact analysis are drawn from a systematic survey of the 2,072 outdoor advertising displays in the Tampa area by Eller Media Company. The 2,072 constitute an overwhelmingly large sample—more than 95 percent—of outdoor advertising displays located on bulletins, posters, and wall signs.

Significance of this Analysis of Jobs & Businesses Related to Outdoor Advertising in Tampa Area

The following analysis—which is replete with maps and lists correlating local economics with local billboards—shows that a very large **74 percent of outdoor advertising is done by local businesses employing 3.5 percent of the Tampa Area’s workforce—39,092 jobs of the total 1,122,310 jobs.**¹

The analysis goes through four sophisticated steps to measure the types of economic relationships and geographic relationships that outdoor advertising facilities (typically, billboards) and the local advertisers have on the Tampa area economy and its physical geography.

Who Advertises, Local vs. National Businesses?

The analysis systematically reviewed the content on all 2,072 billboards in the area to determine what percentage of advertisers was national versus local business (or, a local non-profit enterprise). The analysis found that a huge 74 percent of the advertisers were local, not national, advertisers. That the area’s billboards are so dominated by local businesses indicates that local businesses place an added-value relationship on outdoor advertising for audience reach when compared to other local advertising alternative media, such as television, radio, cable, or print. See Section 1.

Local Economic Significance of What Businesses Advertise

The distribution of the local Tampa area businesses that choose to advertise on outdoor advertising billboards shows that a wide spectrum of Tampa’s premium, indigenous local businesses prize outdoor as an advertising medium of choice. Said differently, it is important that the local businesses that choose outdoor advertising are critical growth and support components of the local economy, not the bottom-end, low-value businesses. See Section 2.

¹ The Florida Department of Labor and Employment Security Office of Labor Market Statistics

Significance for the Tampa Area Workforce of What Businesses Advertise

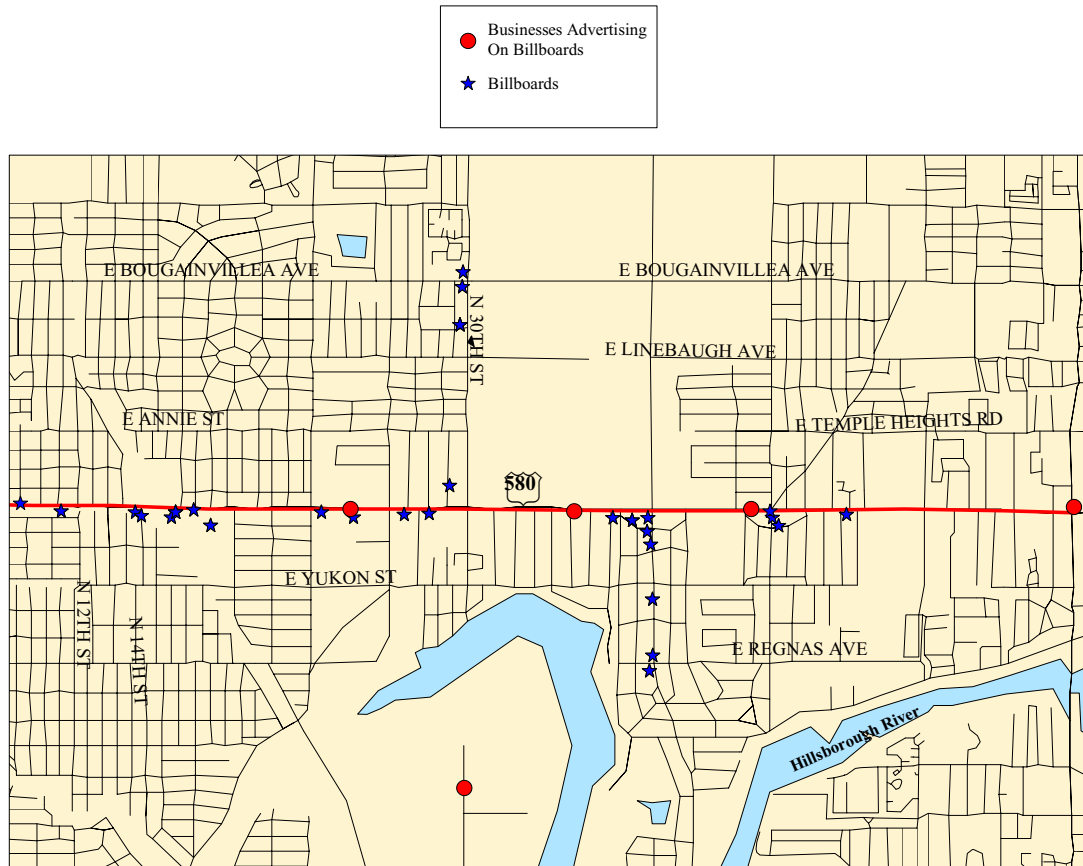
The Tampa area outdoor advertising marketplace is not only dominated by businesses that are local but also by businesses that economists classify as small to medium size (what are called SME's). Economists focus on businesses of this size—generally defined as businesses with fewer than 50 employees—because they constitute the backbone of the nation's business structure and because they constitute the business base responsible for the bulk of new hiring.

In the Tampa area outdoor market, **more than 79 percent** of local businesses choosing outdoor have 50 or fewer employees. The workers employed by these local businesses that choose outdoor constitute one percent of the city's workforce. The analysis will use its mapping capabilities to allocate those jobs across the city's four different Council Districts so as to show the extent of economic benefits conferred on the different parts of the city. See Section 3.

Significance of Where the Local Businesses Advertise on Outdoor

The local advertisers on outdoor availabilities tend overwhelmingly—for the obvious business reason—to advertise on billboards that are in close geographic proximity to their primary place of business. These same advertisers—for another obvious business reason—tend overwhelmingly to advertise on billboards that are situated on major arterial roads that transport the greatest numbers of commuters and tourists through commercially zoned areas of the city. It is in the business interest of both the billboard providers and the billboard advertisers that billboards be concentrated on certain roads in certain parts of the area—the several major, most heavily traveled arterials traversing the commercial parts of the city where the advertising businesses are located. Accordingly, it is against the business interest of the outdoor industry and its primary clients in the Tampa area to locate billboards either on the periphery of the market (far from advertisers) or in residential neighborhoods (where there is relatively little audience for the advertisements). See map on following page and then, in greater detail, Section 4.

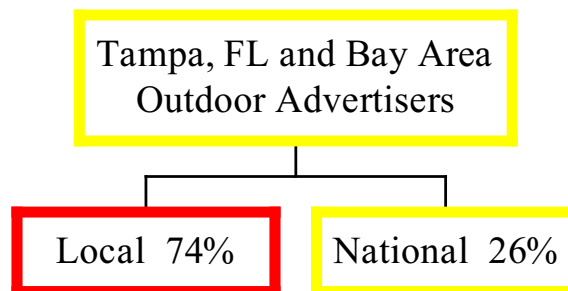
**Local Businesses Advertising on Boards in Tampa--
Map Shows Close Geographic Proximity of Advertiser to Billboards
Along State HWY 580**



Section I: Who Advertises, Local vs. National Businesses?

The analysis systematically reviewed the content on all 2,072 billboards in the area to determine what percentage of advertisers was national versus local business (or, a local non-profit enterprise). The analysis found that a huge 74 percent of the advertisers were local, not national, advertisers. That the Tampa area's billboards are so dominated by local businesses indicates that local businesses place an added value relationship on outdoor advertising for audience reach when compared to other local advertising media, such as television, radio, cable, or print.

Local vs. National

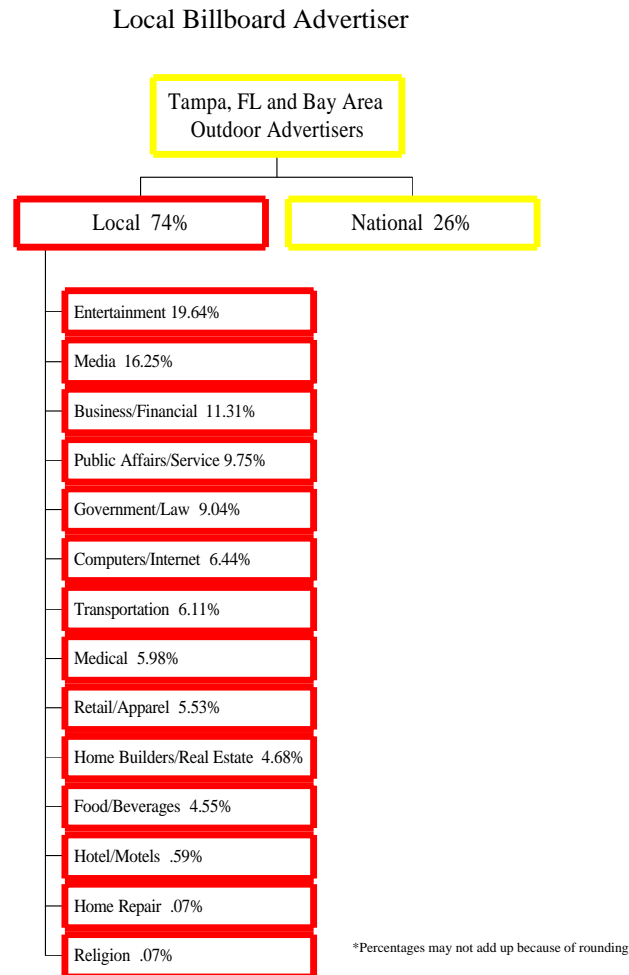


The diagram above displays the huge 74 percent local advertiser bias of Tampa's outdoor advertising marketplace. That the Tampa area outdoor market is locally oriented underscores the tendency—reflected across the nation, regardless of market type and size—of outdoor advertising to be oriented to local businesses. The authors have done a number of analyses like this and have concluded that the Tampa area's 74 percent local dominance of the outdoor advertising market represents a national norm. A recent analysis of San Francisco's outdoor market revealed a 70 percent dominance by local advertisers—notwithstanding that the city's status as an internationally oriented financial and tourist center might have lured more national advertisers. Three earlier studies of large inland cities—Charlotte, Indianapolis, and San Antonio—found that 77 percent of Charlotte's advertisements, 76 percent of Indianapolis's, and 74 percent of San Antonio's were by local businesses—not much different from Tampa's 74 percent, or San Francisco's 70 percent.¹

¹ See: William Lilley III and Laurence J. DeFranco, *Outdoor Advertising in Charlotte, NC* (1994); *Outdoor Advertising in Indianapolis, IN* (1995); *Outdoor Advertising in San Francisco, CA* (2001); *Outdoor Advertising in San Antonio* (2001). All published in Washington, DC, Outdoor Advertising Association of America.

Section II: Local Economic Significance of What Businesses Advertise

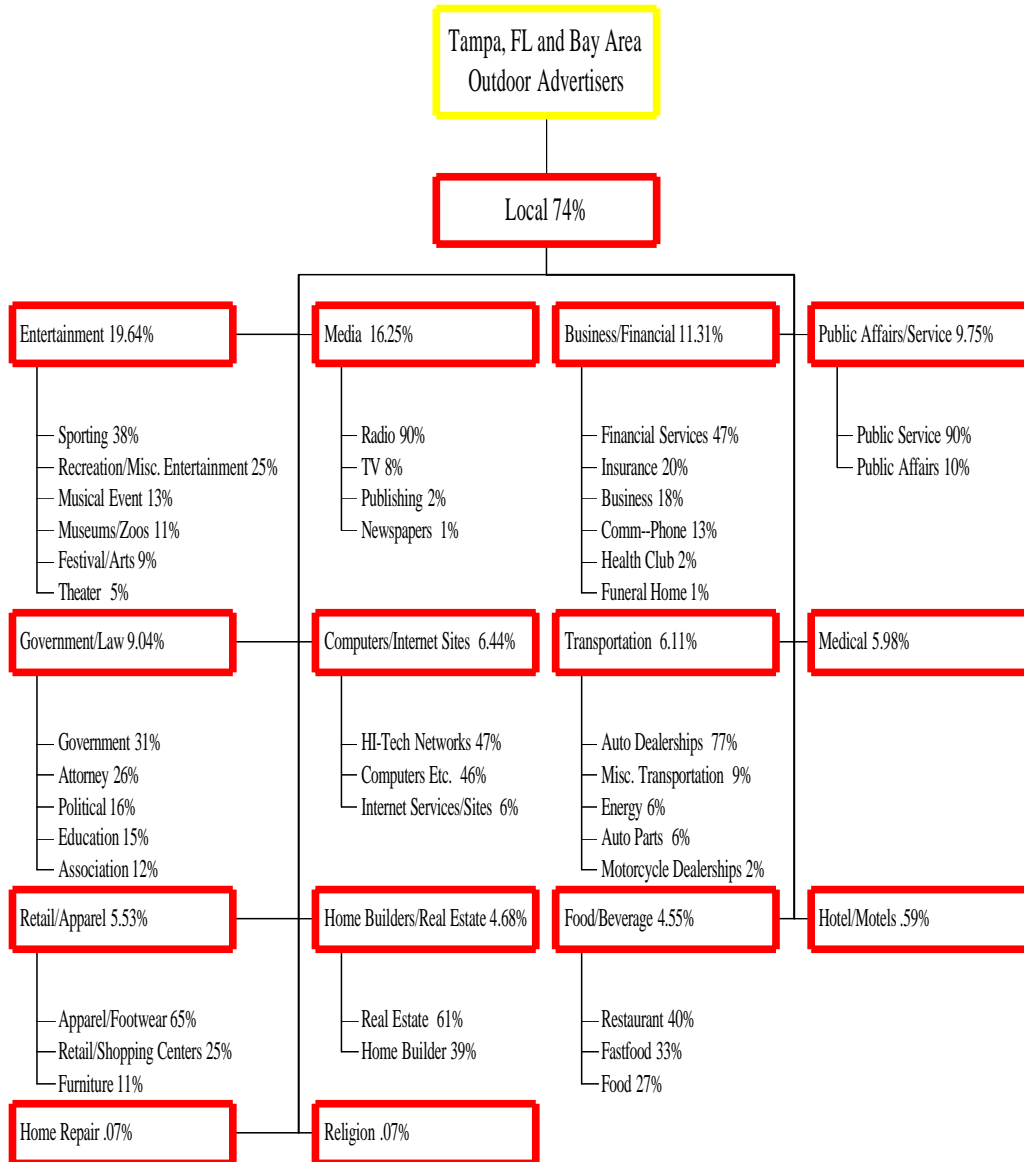
The distribution of the local Tampa area businesses that choose to advertise on outdoor shows that a wide spectrum of Tampa's premium, indigenous local businesses prize outdoor as an advertising medium of choice. Said differently, it is important that the local businesses that choose outdoor advertising are critical growth and support components of the local economy, not the bottom-end, low value businesses. For example, the Tampa area outdoor market is dominated by three "growth" local business segments—entertainment, media, and businesses/financial services.



Local Billboard Advertiser

TYPE OF BUSINESS	BILLBOARD COUNT	% of LOCAL
Entertainment	302	19.64%
Media	250	16.25%
Business/Financial	174	11.31%
Public Affairs/Service	150	9.75%
Government/Law	139	9.04%
Computers/Internet Sites	99	6.44%
Transportation	94	6.11%
Medical	92	5.98%
Retail/Apparel	85	5.53%
Home Builders/Real Estate	72	4.68%
Food/Beverages	70	4.55%
Hotel/Motels	9	.59%
Home Repair	1	.07%
Religion	1	.07%

Detail Breakdown of Local Billboard Advertisers



*Percentages may not add up because of rounding

Section III: Significance for the Tampa Area Workforce of What Businesses Advertise

The Tampa area outdoor advertising marketplace is not only dominated by businesses that are local but also by businesses that economists classify as small to medium size (what are called SME's). Economists focus on businesses of this size—generally defined as businesses with fewer than 50 employees—because they constitute the backbone of the nation's business structure and because they are the business base responsible for the bulk of new hiring. In the Tampa area outdoor market, more than 79 percent of local businesses choosing outdoor have 50 or fewer employees. The workers employed by these local businesses that choose outdoor constitute one percent of the area's workforce. The analysis uses its mapping capabilities to allocate those jobs across the city's four different council districts so as to show the extent of economic benefits conferred on the different parts of the city.

The table below shows a sample of Tampa's SME's that use outdoor advertising. While many could have been chosen, we selected a representative sample of these businesses, chosen by type of business and city council location.

Sample Businesses Using Outdoor Advertising in Tampa			
(City council districts one, two, and three are at-large)			
Name	Address	Employees	Council District
Dolphin Pointe Apartments (Camden Property)	6301 S Westshore Blvd	9	4
McDonalds	23837 US HWY 19 N	20	4
Napa Auto Parts Store 06	4005a W Gandy Blvd	7	4
Post Walk Apartments (Post Properties)	800 S Dakota Ave	5	4
Schooner Bay Apartments	4800 S West Shore Blvd	6	4
Kentucky Fried Chicken	3202 E Hillsborough Ave	30	5
Wendys Old Fashioned Hamburgers 512	2015 N 50th Street	35	5
NAPA Auto Parts	217 N 20th Street	6	5
Prudential Securities Inc	101 E Kennedy Blvd	40	5
United Way of Hillsborough County	1000 N Ashley Drive	36	5
American Heart Association	1411 N West Shore Blvd	7	6
Bay Area Imaging Service Inc	P O Box 15065	10	6
Camden Propt Trust	5100 W Lemon Street	20	6
Gateway Country Store	2907 N Dale Mabry Hwy	20	6
George Ltd - Tampa Inc	4315b W Kennedy Blvd	3	6
Beef O'Brady's	5025 E Fowler Ave	15	7
Exxon Mobil on the Run	4242 E Busch Blvd	7	7
Petland (University Square)	2103 E Fowler Ave	9	7
Sports Authority	1730 E Fowler Ave	49	7
Steak N Shake Inc	1450 E Fowler Ave	35	7

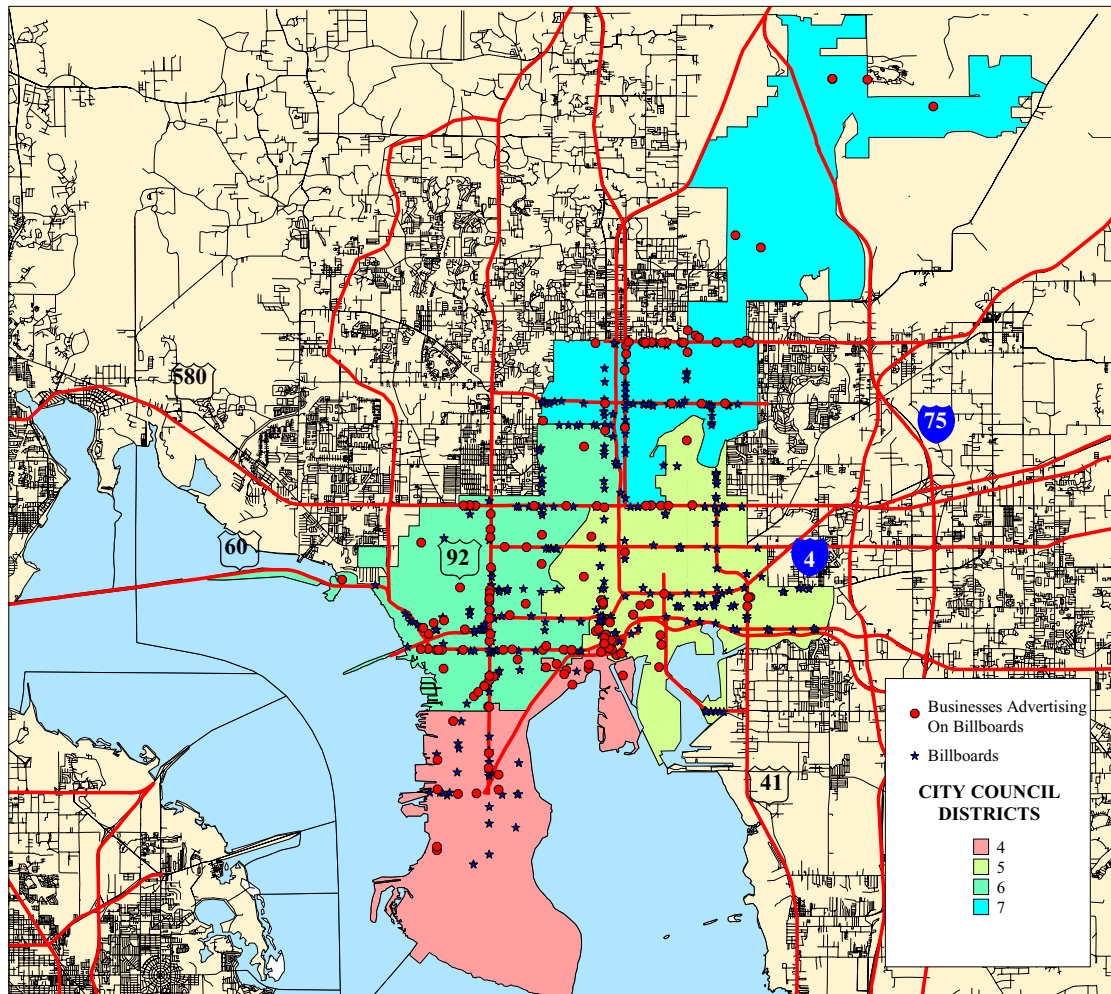
The table and map on the two following pages show the distribution of billboards and their local advertisers according to **City Council Districts**—and the local jobs in those businesses. Not surprisingly, the table shows that the distribution is uneven with districts five and six accounting for almost 70 percent of all billboards where as district four has only eight percent of all billboards.

City of Tampa

Boards, Businesses, and Jobs by Tampa City Council Districts

COUNCIL DISTRICT	BILLBOARDS/ PERCENT	BUSINESSES	JOBS
District 4	55 (8%)	19	431
District 5	228 (35%)	45	3012
District 6	219 (34%)	59	2826
District 7	150 (23%)	39	2003

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Map Shows Close Geographic Proximity of Advertiser to Billboards
Within Tampa City Council District**



*Color area denotes just the City of Tampa and city council districts

*Thick red lines are major arterials (Interstates, US Hwys, and State Hwys)

*The areas depicting local street grids encompass Hillsborough and Pinellas Counties surrounding Tampa

The charts and tables displayed below depict the orientation of the Tampa area local business outdoor advertisers to the small and medium size segment of the area's business structure.

Employment Statistics for All Local Businesses Using Outdoor Advertising

CATEGORY	EMPLOYMENT COUNT	PERCENT
Retail/Apparel	8639	22.10%
Food/Beverages	6523	16.69%
Transportation	6477	16.57%
Medical	5455	13.95%
Public Affairs/Service	2406	6.15%
Entertainment	2259	5.78%
Business/Financial	2209	5.65%
Government/Law	1643	4.20%
Home Builder/Real Estate	1631	4.17%
Media	1359	3.48%
Computers/Internet Sites	300	0.77%
Hotel/Motels	171	0.44%
Home Repair	10	0.03%
Religion	10	0.03%

Employment Statistics for Businesses Using Outdoor Advertising and have less than 50 Employees

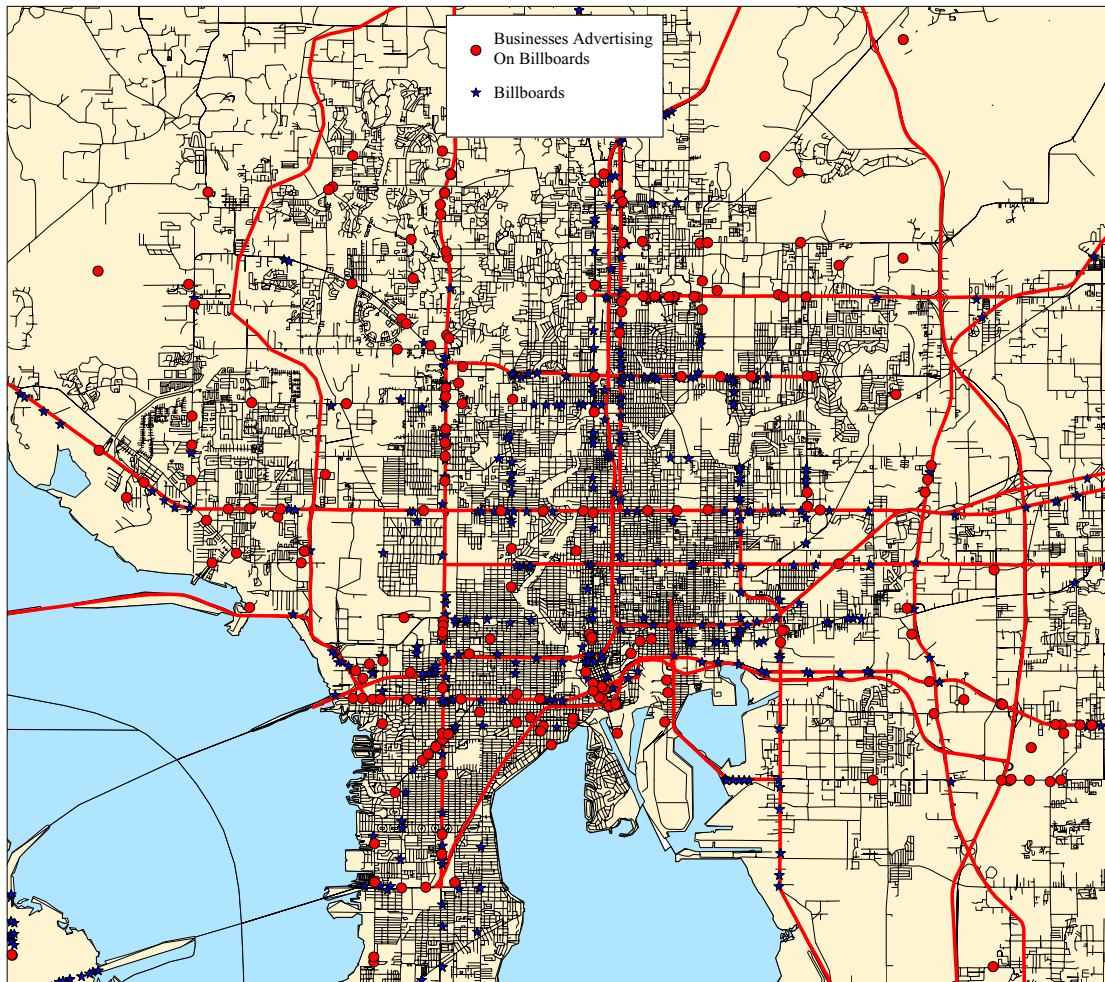
CATEGORY	BUSINESS COUNT	EMPLOYMENT COUNT
Food/Beverages	166	4081
Retail/Apparel	158	2624
Business/Financial	100	1067
Home Builder/Real Estate	99	1002
Transportation	50	705
Public Affairs/Service	41	695
Medical	39	481
Entertainment	19	362
Government/Law	17	257
Media	13	274
Computers/Internet Sites	6	130
Hotel/Motels	6	171
Home Repair	1	10
Religion	1	10

These small and medium size businesses employ 11,869 workers, or one percent of the area's 1,122,310 size workforce.¹ If the analysis was to add the several larger local Tampa area businesses that advertise on outdoor, then the total number of impacted local workers comes to 39,092, or 3.5 percent of the area's workforce.

The analysis also uses copyrighted mapping software technology to allocate the relevant billboards and the impacted jobs in the local business advertisers to the four city council district areas that were digitized for this study. The uneven configuration of billboards and impacted jobs across the four council district geography flows from the fact that billboards are concentrated in commercial districts close to the businesses that want to advertise and on major arterials in those commercial districts. Thus some council districts have an abundance of impacted businesses and jobs, others have less. This is to be expected given the economic incentives in the outdoor advertising business, as explained in greater detail in the following section.

1 The Florida Department of Labor and Employment Security Office of Labor Market Statistics

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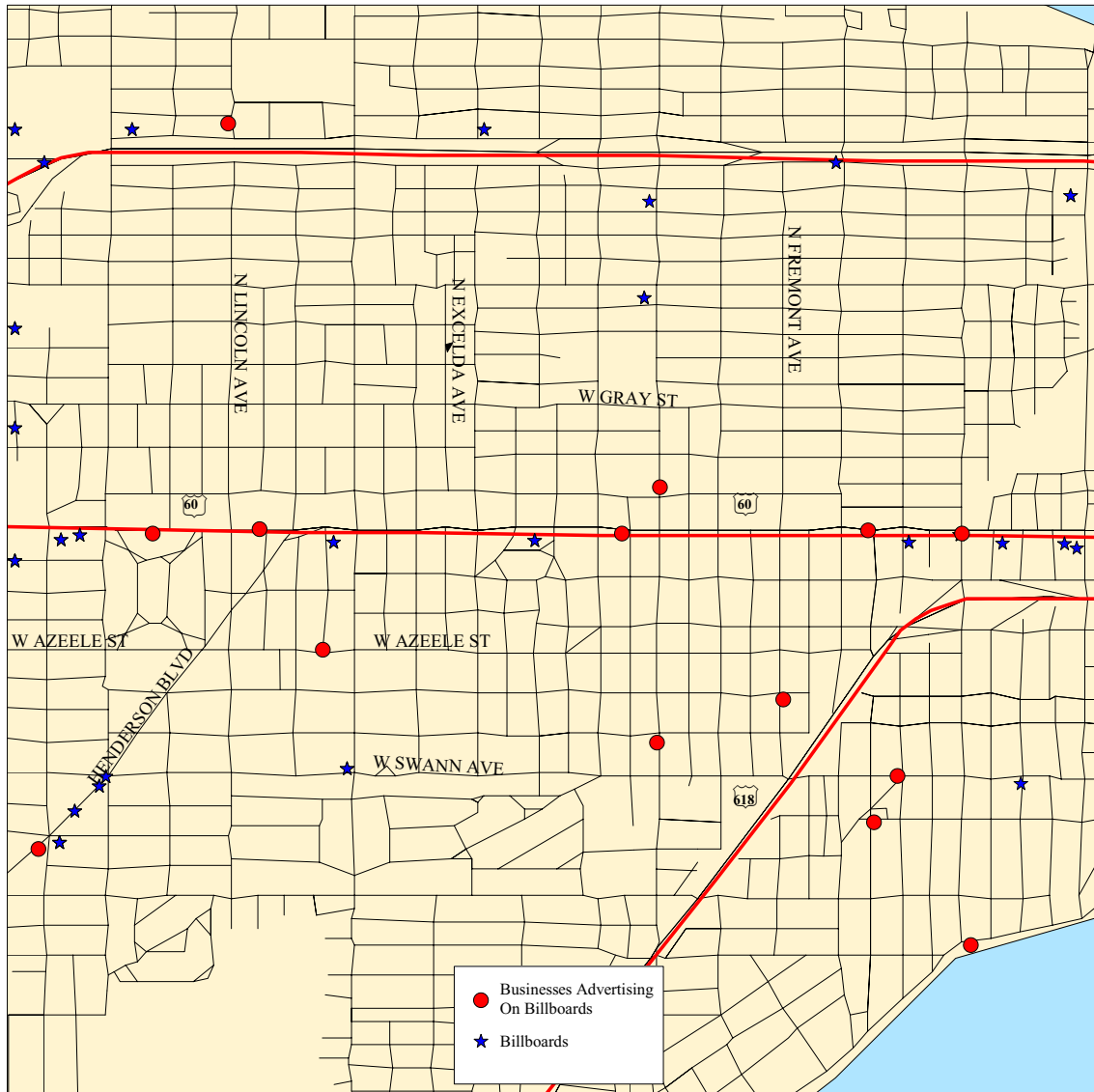


Section IV: Significance of Where the Local Businesses Advertise on Outdoor Billboards

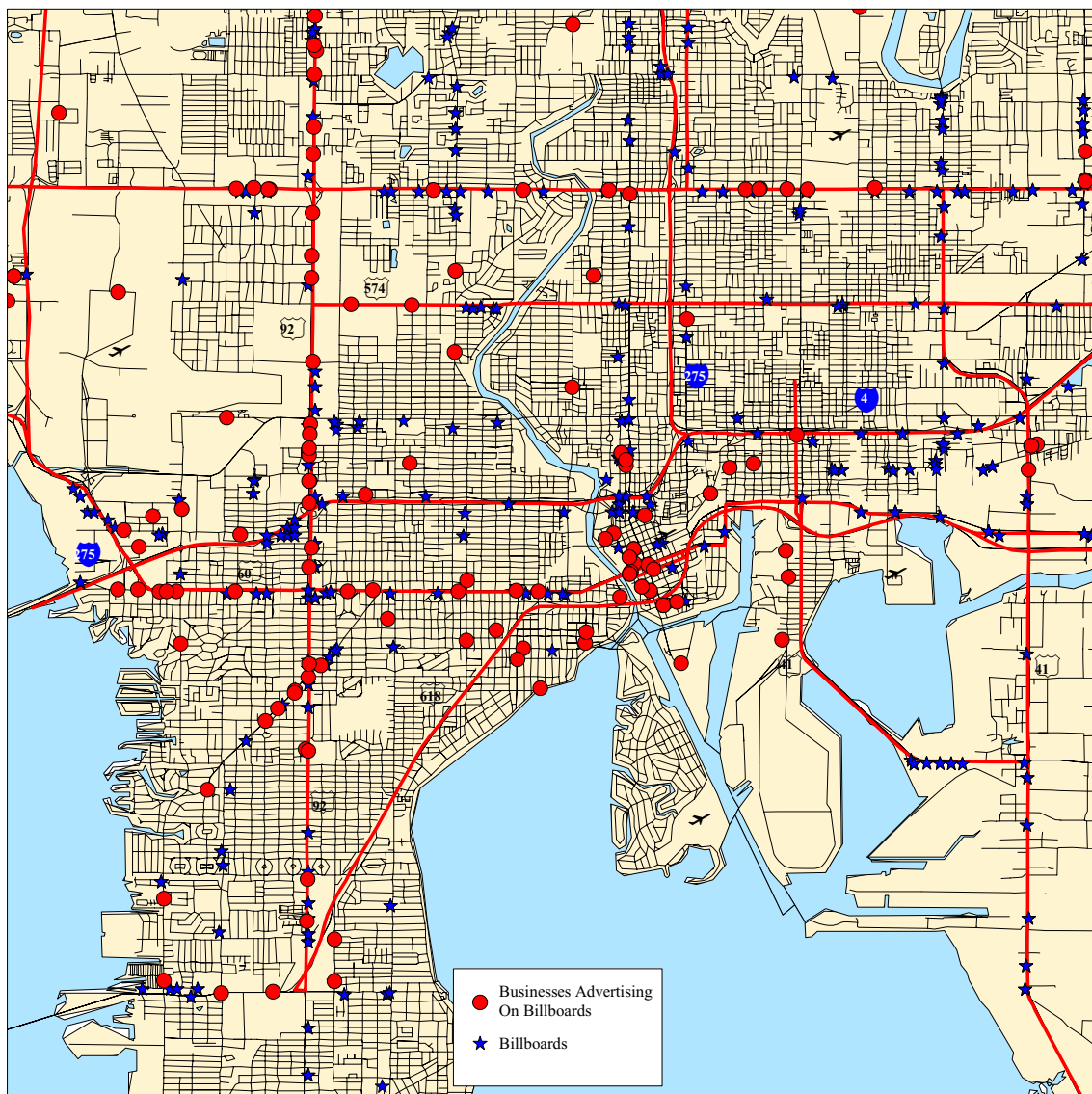
The local advertisers on outdoor availabilities tend overwhelmingly—for the obvious business reason—to advertise on boards that are in close geographic proximity to their primary place of business. These same advertisers—for another obvious business reason—tend overwhelmingly to advertise on billboards that are situated on major arterial roads that transport the greatest numbers of commuters and tourists through commercially zoned areas of the city. It is in the business interest of both the billboard providers and the billboard advertisers that billboards be concentrated on certain roads in certain parts of the city—the several major, most heavily traveled arterials traversing the commercial parts of the city where the advertising businesses are located. Accordingly, it is against the business interest of the outdoor industry and its primary clients in Tampa to locate billboards either on the periphery of the market (far from advertisers) or in residential neighborhoods (where there is relatively little audience for the advertisements).

While the preceding section showed how billboards tend to cluster in certain political districts in the city, this section shows how the same billboards—and the local businesses that advertise on them—all tend to cluster tightly together in a two-step sequence of great importance for local urban geography. The maps shown on successive pages demonstrate the almost remorseless tendency of the local advertisers—for obvious business reasons—to advertise on the boards closest to their place of business. That is step one in the sequence. Step two in the sequence shows that the boards—and their advertising businesses—tend to cluster in the commercial sections of the local urban marketplace and in those commercial zones along the major arterials carrying the greatest daily flows of commuters and tourists. The urban geographical significance of this two-step sequence is that the spatial process inherent in the outdoor advertising business is one of clustering—first clustering nearest the preferred local advertisers and second clustering along certain business-relevant major roads. Hence the underlying force governing the outdoor business is the antithesis of sprawl, especially sprawl into residential and even quasi-residential neighborhoods.

**Local Businesses Advertising on Boards in Tampa--
Map Shows Close Geographic Proximity of Advertiser to Billboards
Along State HWY 60**



**Local Businesses Advertising on Boards in Tampa--
Map Shows Close Geographic Proximity of Advertiser to Billboards
in Downtown Tampa**



Methodology

The methodologies employed in this study encompass a number of sophisticated computer software and computer software mapping techniques. All of these relatively high technology tools were subordinated to the underlying methodological principle shaping the study that all findings came from the bottom up, not top down. Thus the study's methodology and its findings are entirely empirical; said differently, this is the antithesis of a theoretical study. Equally important, the study is intensely oriented to the **local** perspective—in descending order, the city first, then city council districts and then neighborhoods.

The study followed the following interrelated methodological steps:

- Created a database of all billboards in the city;
- Geocoded each billboard to its precise latitudinal-longitudinal point;
- Created a database recording the content of each billboard;
- Created a database of billboard advertisers;
- Assigned local versus national designations to each advertiser;
- Assigned industry type designations to each advertiser;
- Linked the advertisers with the type of business database;
- Geocoded the advertising businesses based on their precise latitudinal-longitudinal points;
- Inventoried the number of businesses and their employees;
- Disaggregated the advertising businesses and their employees by size of business;
- Digitized the four city council district boundaries;
- Aggregated businesses and employees by council district.
- Calculated the average distance from billboard to local advertising business to ascertain fact that local businesses chose billboards in proximity to their business.

About iMapData, Inc. and its Principals

iMapData Inc. is a dynamic, high profile provider of sophisticated Economic and Political impact information. iMapData (formerly InContext) specializes in geo-economic analysis – both hard copy and web-based interactive format – that takes either economic data (such as numbers of jobs in specific types of local businesses, or the rates of different taxes in different jurisdictions) and/or demographic data (such as income, occupation, age, race or crime data) and juxtaposes those data with local geographic areas defined by an almost infinite variety of geographic “envelopes”—e.g., by a political jurisdiction (such as a congressional district, a parliamentary district, a state assembly district or a city council district), or by an economic service jurisdiction (such as a local cable system area, a daily newspaper service area, a local gas utility service area, or a *Yellow Pages* market area) or by a particular local/regional market area impacted by a major entertainment/sports event, sports facility or a major economic force/magnet (e.g., a regional airport, an interstate highway, a natural disaster).

iMapData’s work is distinguished by extensive and creative uses of digital computer software for multicolor mapping and charting coupled with thirteen years of working business experience. **iMapData’s** geo-economic analyses rely on the age-old adage that a picture is worth a thousand words. Using a revolutionary web-based platform that simplifies the delivery of high-quality GIS information, users need only a standard browser to quickly produce crisp, revealing maps and reports that customize and combine business, economic, demographic, geographic and political information. **iMapData** does away with complex GIS applications, expensive hardware, database acquisition and years of training. The **iMapData** platform has been deployed as a specialized enterprise solution, enabling our customers to distribute their data throughout the organization and make it available to senior executives.

Clients using **iMapData’s** products include: Anheuser-Busch, the Regional Bell Operating Companies (including GTE/Verizon), British Telecom (BT), Telecom Italia, America Online, the Federal Reserve Bank of Chicago, Federal law enforcement agencies, National Crime Insurance Bureau, Penske Corporation, International Speedway Corporation, Eli Lilly, Pharmaceutical Research & Manufacturers of America (PhRMA), Philip Morris Companies, Cellular Telephone Industry Association (CTIA), Federation Internationale de l’Automobile (Formula One), & the Motor Sports Association/UK.

William Lilley III, Chairman, CEO and co-founder of **iMapData**, is a former economic historian who was a senior corporate official of CBS Inc, the media company in New York. He has served as Director of the U.S. Council on Wage and Price Stability and as Staff Director of the Budget Committee for the U.S. House of Representatives. He received his Ph.D. from Yale University, taught at Yale, and has written widely on how government policies effect local economic activity, on the economics of the professional sports business and on the socio-economic makeup of U.S. state and local political constituencies.

Laurence J. DeFranco, president and co-founder of **iMapData**, is an expert in the new field of geo-economics that merges the disciplines of economics, geography and computer science. He has written, testified and spoken widely on the effects of economic, regulatory, and legislative policy on businesses—especially in a geographic context. Previously he was president of Program Flow, Inc., a computer software, research and consulting firm he founded. Before that, he worked for CBS Inc. as head of the New Technologies Task Force.

Lilley and DeFranco wrote four award-winning books on U.S. state legislative government, all published by Congressional Quarterly Books in Washington, D.C.: *The Almanac of State Legislatures: Changing Patterns 1990-1997* (1998); *State Legislative Elections: Voting Patterns and Demographics* (1997); *The State Atlas of Political and Cultural Diversity* (1996); and *The Almanac of State Legislatures* (1994). They also wrote *The Economic Impact of the European Grands Prix* (Brussels: FIA, 1999); *The Sports That Make Communities Rich: An Inquiry into the Economics of Professional Sports*, published by the American Coalition for Sports Sponsorship (1997); *Impact of Retail Taxes on the Illinois-Indiana Border*, published by the Federal Reserve Bank of Chicago (1997), and *The Case of the Transient Taxpayer: How Tax-Driven Price Differentials for Commodity Goods Can Create Improbable Markets*, published by the Journal of Business Economics (1998). iMapData’s maps of tax, regulatory and socio-demographic configurations, as distributed across US political jurisdictions, appear regularly in *Governing Magazine*.