

Outdoor Advertising Association of America

Mediagenic Billboard Omnibus Questions

December 20, 2012

METHODOLOGY



Audience
Adults age 18+



How Many
n=1,000



Margin of Error
+/- 3.1%



How
Telephone Omnibus Survey



When
December 13-16, 2012



KEY FINDINGS

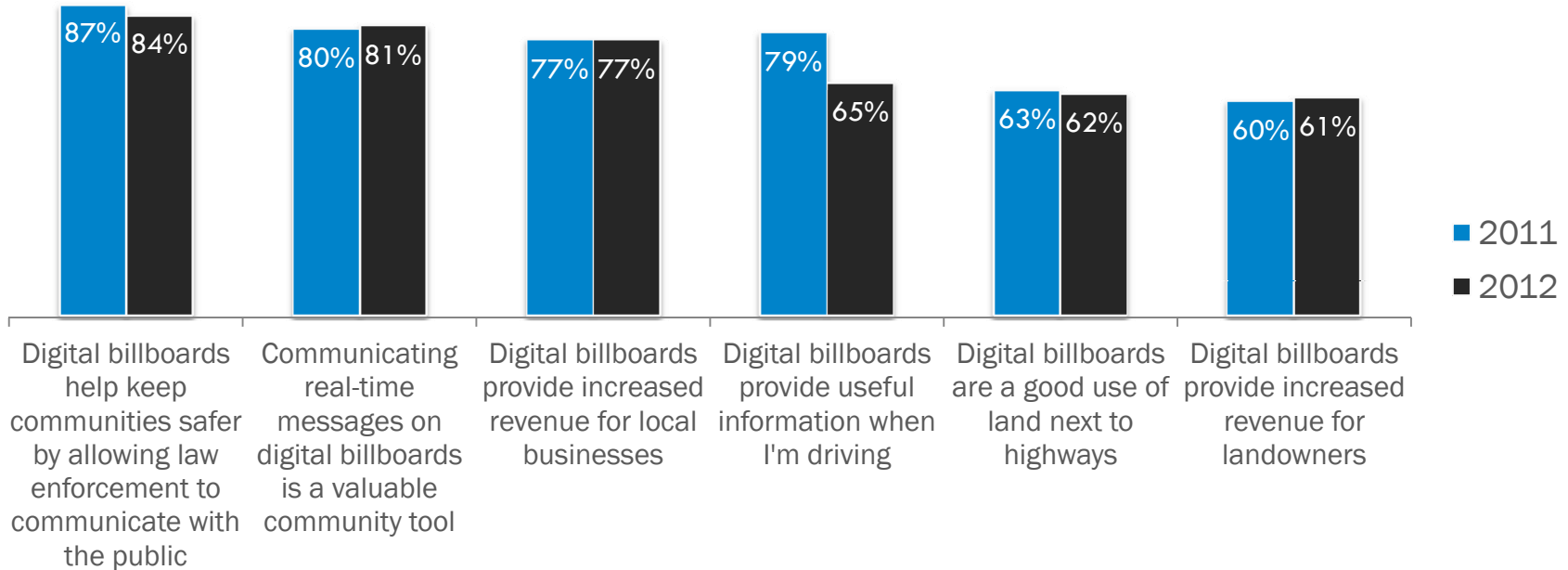
- **Digital billboards are perceived to be valuable to local communities.**
 - Agreement remains strong that digital billboards help keep communities safer by allowing law enforcement to communicate with the public, collect tips about criminals, and help find missing children (84%), and that communicating real-time messages on digital billboards is a valuable community tool (81%).
- **Agreement that digital billboards provide useful information has dropped 14 points from 2011, varying by region.**
 - Adults in the Southern region are more likely to agree that digital billboards are informative (72%), compared to those in the Western region (55%).
- **Adults are more likely to see billboards as increasing revenue for businesses than for landowners.**
 - Most adults (77%) feel digital billboards provide increased revenue for local businesses, while 61% feel they provide increased revenue for landowners.
- **Only one in ten adults are aware that billboard companies donate advertising space for public service messages.**
 - Forty-two percent of adults believe that the non-profit or government organization promoting the message pays for billboard advertising space, and 28% of adults believe it is the local, state or federal government.
 - There is an opportunity to build positive impressions and bolster support for billboards.
- **Opposition for banning industries remains strong and there is even less support for specifically banning digital billboards.**
 - African Americans are more likely than Whites or Hispanics to agree that the government should be able to ban certain industries in order to protect what they believe is in consumers' best interest.
 - Eighty-two percent of adults feel the government should not have the ability to ban digital billboard technology.



While the majority of adults find billboards to be valuable, the perceived relevance of the information is down 14 points since 2011.

Digital Billboards Perceptions

(Shown: Top 2 Box %, "Strongly Agree," "Somewhat Agree")



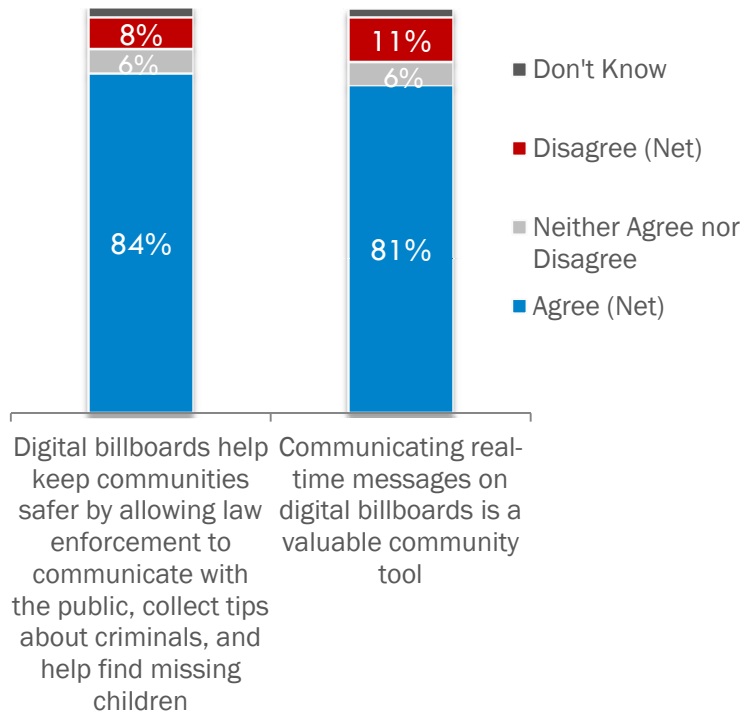
Thinking about digital billboards, how much do you agree or disagree with each of the following statements? [SHOWN: Top 2 Box %, "Strongly Agree," "Somewhat Agree"]



A strong majority believe digital billboards are valuable to the community.

In fact, 88% of those without a college education agree that digital billboards help keep communities safer. College graduates, however, are slightly less likely to see them as valuable compared to 2011.

Value to Communities



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

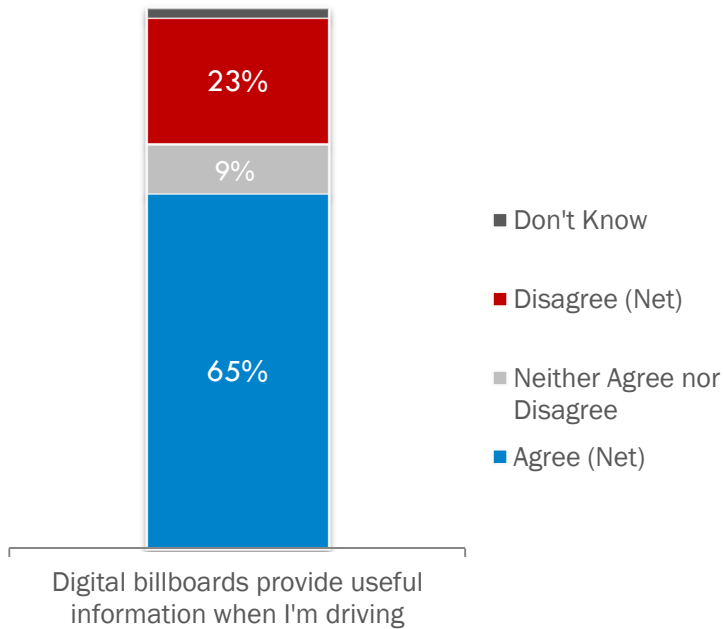
		Digital billboards help keep communities safer		Digital billboards are a valuable community tool	
		2011	2012	2011	2012
Total Sample: % Agree		87%	84%	81%	81%
Age	18-34	86%	83%	76%	86%
	35-54	89%	86%	85%	82%
	55+	85%	83%	79%	77%
Education	HS or Less	88%	88%	78%	83%
	Some College	89%	84%	83%	83%
	College Graduate	82%	76%	82%	77%



Despite a decrease since 2011, about two thirds of US adults agree that digital billboards provide useful information while they are driving.

The decrease is largely attributed to drivers in the Northeast and West, as well as Hispanics. Drivers in the Southern region and higher income residents are more likely to see the billboards as very informative.

Provide Useful Information



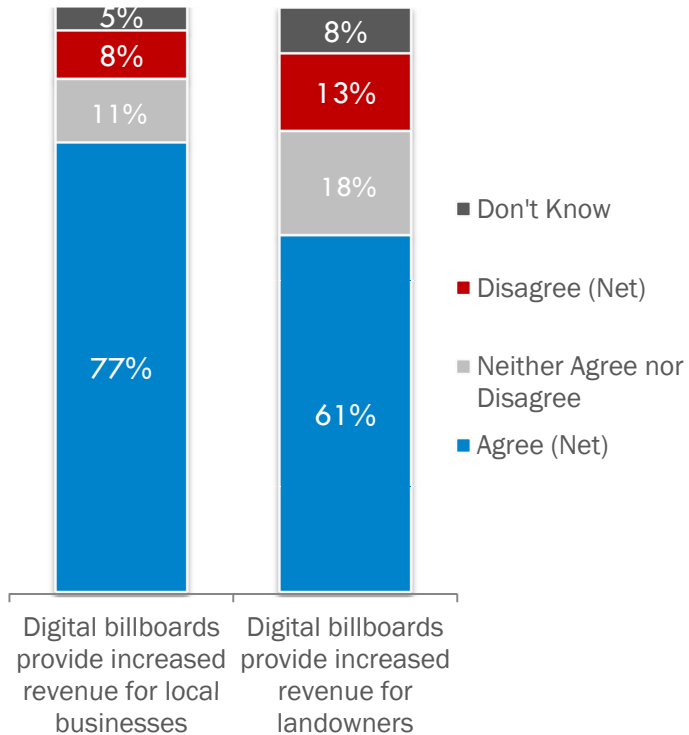
How much do you agree or disagree with each of the following statements?

		Provide useful information while driving		
		2011	2012	Change
Total Sample: % Agree		79%	65%	-14%
Region	Northeast	85%	60%	-25%
	Midwest	80%	69%	-11%
	South	77%	72%	-5%
	West	77%	55%	-22%
Race	White	79%	67%	-12%
	African-American	78%	68%	-10%
	Hispanic	81%	56%	-25%
Household Income	<\$35,000	81%	68%	-13%
	\$35,000-<\$50,000	75%	68%	-7%
	\$50,000-<\$75,000	88%	60%	-28%
	\$75,000-<\$100,000	83%	75%	-8%
	\$100,000+	78%	69%	-9%

Consumers are more likely to see digital billboards as providing revenue for local businesses rather than landowners.

This gap is especially prominent among adults age 18-34 and lower income adults. Respondents from the Midwest are more likely to see digital billboards as providing increased revenue for both landowners and businesses.

Increase Revenue



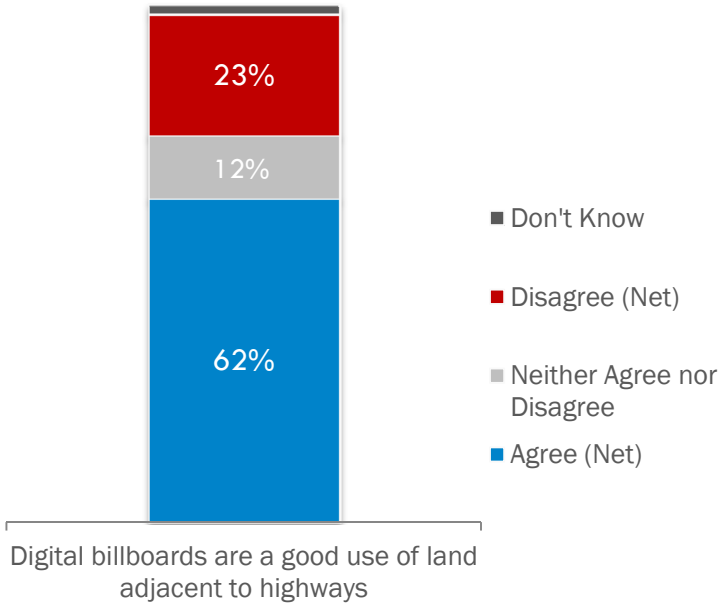
How much do you agree or disagree with each of the following statements?

		Provide increased revenue for local businesses		Provide increased revenue for landowners	
		2011	2012	2011	2012
Total Sample: % Agree		77%	77%	60%	61%
Age	18-34	83%	87%	57%	60%
	35-54	77%	76%	66%	66%
	55+	71%	71%	58%	57%
Region	Northeast	80%	80%	65%	60%
	Midwest	81%	77%	56%	69%
	South	73%	78%	60%	62%
	West	75%	73%	62%	52%
Education	HS or Less	77%	82%	58%	62%
	Some College	77%	79%	62%	60%
	College Graduate	77%	68%	63%	60%
Household Income	<\$35,000	77%	85%	59%	57%
	\$35,000-<\$50,000	75%	76%	54%	66%
	\$50,000-<\$75,000	87%	74%	68%	63%
	\$75,000-<\$100,000	73%	78%	68%	75%
	\$100,000+	79%	78%	69%	63%

Three in five deem billboards a good use of land.

Younger consumers, African-Americans and Hispanics are more likely to agree with this statement, while adults in the median income bracket are least likely to support this land use.

Good Use of Land



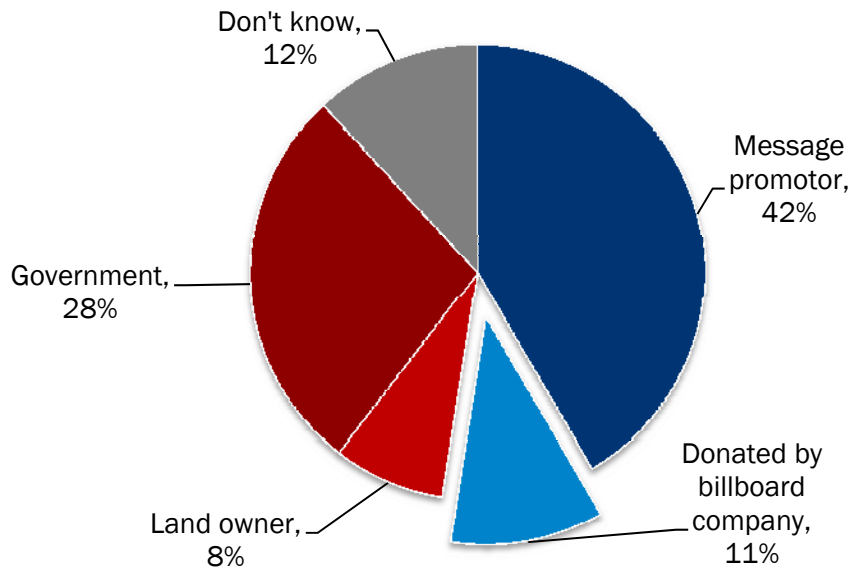
How much do you agree or disagree with each of the following statements?

		Digital billboards are a good use of land adjacent to highways		
		2011	2012	Change
Total Sample: % Agree		63%	62%	-1%
Age	18-34	61%	76%	+15%
	35-54	70%	62%	-8%
	55+	59%	52%	-7%
Ethnicity	White	61%	57%	-4%
	African-American	69%	79%	+10%
	Hispanic	69%	74%	+5%
Education	HS or Less	64%	69%	+5%
	Some College	67%	63%	-4%
	College Graduate	58%	52%	-6%
Children in Household	Yes	61%	68%	+7%
	No	66%	59%	-7%
Household Income	<\$35,000	65%	71%	+6%
	\$35,000-<\$50,000	59%	66%	+7%
	\$50,000-<\$75,000	69%	45%	-24%
	\$75,000-<\$100,000	71%	67%	-4%
	\$100,000+	64%	66%	+2%

Only 11% of adults are aware that billboard companies sponsor public service advertising.

This could be an opportunity to bolster support for billboards and generate more positive impressions.

Who do you believe pays for advertising space?



		The billboard company donates the space for free
Total Sample		11%
Education	HS or Less	10%
	Some College	9%
	College Graduate	15%
Household Income	<\$35,000	11%
	\$35,000-<\$50,000	9%
	\$50,000-<\$75,000	15%
	\$75,000-<\$100,000	11%
	\$100,000+	12%

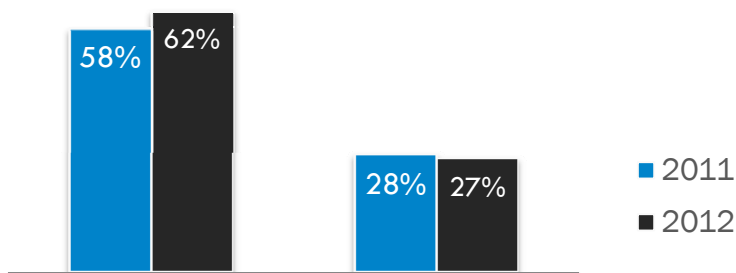
Some advertisements on billboards and other out of home advertising formats promote products or attractions, while others have public service messages, such as the dangers of texting while driving, support for a children's organization, or promoting the use of seat belts. Thinking about these public service advertisements, which one of the following do you believe pays for the advertising space?



Support for a free market increased slightly since 2011.

Government intervention is more accepted among African Americans and consumers in the West.

Free Market vs. Government Bans



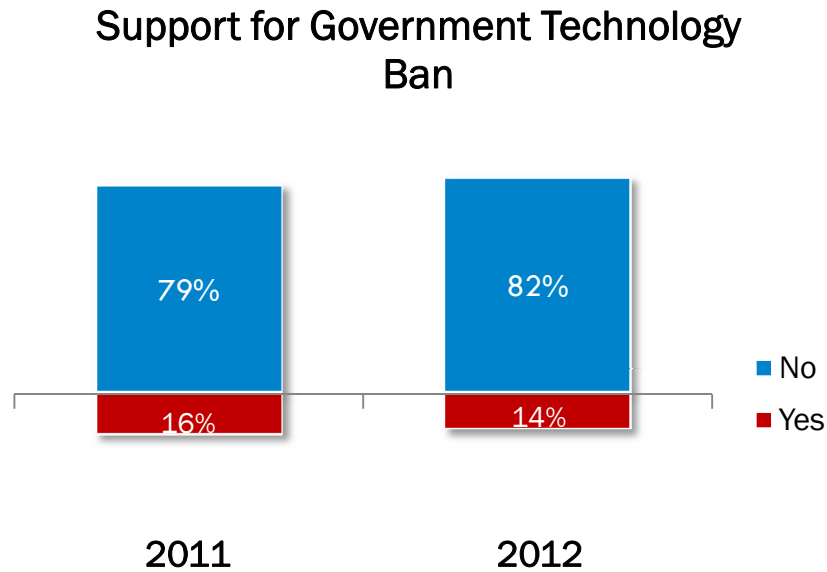
Some people believe that consumers and the free market should determine what industries succeed and what industries fail, and that government bans intrude on the rights of legal businesses.

Other people believe that the government should be able to ban certain industries in order to protect what they believe is in consumers' best interests.

Which of the following statements comes closest to your own opinion?

		Free Market		Government Ban		Difference: Free Market vs. Ban 2012
		2011	2012	2011	2012	
Total Sample: % Agree		58%	62%	28%	27%	35%
Gender	Male	58%	66%	28%	25%	41%
	Female	57%	58%	28%	29%	29%
Region	Northeast	59%	61%	29%	28%	33%
	North Central	54%	66%	31%	24%	42%
	South	59%	62%	26%	24%	38%
	West	57%	58%	27%	33%	25%
Race	White	63%	63%	26%	26%	37%
	African American	35%	51%	41%	38%	13%
	Hispanic	57%	55%	25%	30%	25%
Household Income	<\$35,000	57%	58%	26%	30%	28%
	\$35,000- <\$50,000	51%	63%	26%	27%	36%
	\$50,000- <\$75,000	57%	66%	35%	26%	40%
	\$75,000- <\$100,000	66%	65%	26%	28%	37%
	\$100,000+	65%	68%	30%	25%	43%

Support remains limited for a government ban on digital billboards. Adults age 55+ and college graduates are more likely to support a government technology ban, though still small.



		Yes, Support Ban		No, Do Not Support Ban	
		2011	2012	2011	2012
Total Sample		16%	14%	79%	82%
Age	18-34	19%	7%	75%	89%
	35-54	15%	14%	82%	83%
	55+	17%	19%	78%	77%
Edu- cation	HS or Less	17%	13%	79%	82%
	Some College	13%	9%	82%	87%
	College Graduate	18%	19%	77%	78%

Thinking again about digital billboards, do you think the government should have the ability to ban this technology?

