

Scenic Nevada's
Preserving Our Scenic Heritage Project
Reno Billboard Survey Results
An Analysis by M.J. Ross Group, Inc.

Scenic Nevada, a Reno based nonprofit organization affiliated with Scenic America with a mission to preserve and protect Nevada's scenic heritage, commissioned an April survey of Reno voters' attitudes about billboards. The survey findings confirm that the public continues to object to the visual presence of billboards and supports regulations to restrict the proliferation of digital billboards. Scenic Nevada board members believe the survey was necessary for the organization to decide its next steps.

Digital billboards are signs that are computer controlled and can change images every six to eight seconds. The survey results provide Scenic Nevada with assurance that Reno voters remain concerned about billboard signage. The April survey was also seen important as technological advances have radically changed the nature of the sign industry since 2000.

In 2000, Scenic Nevada was instrumental in the passage of a ballot question that banned new billboards within the city. The ballot question was ultimately upheld by the Nevada Supreme Court.

Billboards are generally defined as signs that advertise services and goods not available on the same premises of the property upon which the billboard is located. In addition, political campaign signs and public service announcements are also featured on billboards. Signs that identify businesses available on the premises are not billboards and are defined as "on-premise signs" by the City of Reno zoning ordinance. The ballot question did not apply to on-premise signs.

The City's administration of the billboard ban has been problematic to Scenic Nevada as the City created a "bank program" that allows billboards to be relocated to other permitted locations. Scenic Nevada feels this program is not consistent with the intent of the ballot question. The banking program did not follow the spirit or intent of the law and has proven a failure to protect scenic Reno, according to board members and board chairman James Barnes.

Scenic Nevada's digital billboard survey was conducted on April 16-19, 2011. It was a telephone survey of 600 registered voters who reside within the city of Reno, Nevada. The survey was conducted by call takers working for M. J. Ross Group, Inc., a Portland, Oregon based communications and polling firm. For more information about survey methodology please contact Moses Ross, M. J. Ross Group, Inc. President, at 503-309-7985.

In the overall poll results most responses carry a 4% margin of error at the 95% confidence level (The final question was added on the last day of polling, resulting in fewer respondents, and a plus or minus 5.74% error at 95% confidence). This means there is a 95% probability that the responses of ALL voters would fall within plus or minus 4% of the response gained in this poll. Regarding the demographic profile of poll respondents, respondents were slightly more likely to be women, Democratic, and over 49 than the overall population. The poll responses provided here are not adjusted to

reflect the variance of respondents from the population. An analysis of adjusted numbers shows that the difference from the unadjusted numbers is less than 2% in all cases and less than 1% in nearly all cases so use of the unadjusted numbers is considered reliable.

It is clear to conclude from this survey that a majority of voters oppose changes that would allow digital billboards. The groups most likely to be opposed to digital billboards are women, voters who identify as "Other", college or higher educated voters, voters with an income of \$80,000 to \$99,999 and voters aged 50 to 69. The number of respondents whose race was other than "White" was too few to give a reliable indication of voter differences on this issue by race.

The concerns about digital billboards that appear to resonate most strongly with voters are their strong objection to seeing a digital billboard from their own window (2/3rds would object), and their concern about driver distraction (only 11% felt it was not important).

Respondent Profile:

GENDER	Respondents	Population
Men	46%	49%
Women	54%	51%

POLITICAL AFFILIATION	Respondents	Population
Democratic	31%	39%
Republican	28%	39%
Independent	23%	16%
Other	14%	6%
Declined to Respond	5%	

RACE/ETHNICITY	Respondents
White	83%
Black	3%
Latino	3%
Asian	3%
Other	5%
Declined to Respond	3%

EDUCATION ACHIEVEMENT	Respondents
High School or less	17%
Some College	29%
College Degree	29%
Graduate Degree	22%
Declined to Respond	3%

HOUSEHOLD INCOME	Respondents
\$39,000 or less	36%
\$40,000-\$59,999	25%
\$60,000-\$79,999	16%
\$80,000-\$99,999	11%
\$100,000 or more	11%
Declined to Respond	0%

AGE	Respondents	Population
18-29	7%	19%
30-49	29%	33%
50-69	45%	38%
70+	18%	14%
Declined to Respond	1%	

QUESTION 1: Do you either own billboards, lease property to a billboard company or advertise on billboards? 1966 respondents.

YES 3%	NO 28%	Declined to Say 32%	No Surveys 37%
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Note: Only those who responded Yes or No to Question 1 continued with the remaining questions.

QUESTION 2: Did you know that electronic or digital billboards are outdoor advertisements displayed on a screen that flip every 6 to 8 seconds night and day? 600 respondents.

YES 64%	NO 33%	NOT SURE 3%
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QUESTION 3: If you were looking outside your window, either from home or your work place, would you object to seeing a digital billboard. 600 respondents.

YES 66%	NO 28%	NOT SURE 6%
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QUESTION 4: Generally speaking, do you think Reno has enough, too many, or not enough billboards now. 600 respondents.

ENOUGH 54%	TOO MANY 26%	NOT ENOUGH 6%	NOT SURE 14%
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QUESTION 5: As you may know, except for land designated to Native Americans, digital billboards are not allowed in the Reno city limits. The City of Reno is considering changing the law to allow new construction of digital billboards. Do you think the City of Reno should change the law and allow digital billboards within the Reno city limits? 600 respondents.

YES 28%	NO 55%	NOT SURE 17%
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QUESTION 6: How important is it to you that you and other drivers are not distracted while driving? 600 respondents.

IMPORTANT 36%	VERY IMPORTANT 53%	NOT IMPORTANT 11%
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QUESTION 7: How important is it for Reno to strive to preserve, protect and enhance its scenic character similar to communities such as Santa Barbara or Carmel? 600 respondents.

IMPORTANT 40%	VERY IMPORTANT 40%	NOT IMPORTANT 21%
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Note: Question Number 8 was only asked on the last day of calling so the number of respondents is lower than for the other questions.

QUESTION 8: Digital billboards use far more energy than traditional billboards. In fact, the carbon footprint of one digital billboard is equal to 49 traditional billboards, according to a recent study. How important is it for the City of Reno to adopt energy efficient billboard sign laws? 291 respondents.

IMPORTANT 40%	VERY IMPORTANT 41%	NOT IMPORTANT 19%
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In reviewing these results the following conclusions are reasonable to infer:

- 1) Two thirds of Reno voters are familiar with electronic billboards.

- 2) Two thirds also would object to seeing an electronic billboard from their home or office window.
- 3) 80% of Reno voters feel that Reno already has enough or too many billboards. Over half state that Reno has enough billboards, while roughly one quarter feel there are too many billboards. Less than 10% state that there are not enough billboards.
- 4) 55% stated that Reno should NOT allow new construction of digital billboards.
- 5) Only 11% said driver distraction is not an important concern.
- 6) 80% said it is either important or very important for Reno to preserve, protect or enhance its scenic character.
- 7) Over 80% support energy efficient billboard sign laws.
- 8) While roughly equal percentages of women and men feel Reno has "too many" (26% and 27%) or "not enough" (6% and 5%) billboards, a larger percentage of women than men feel Reno has "enough" (58% vs 49%) billboards, as opposed to being unsure (10% and 19%). Women appear to be more certain in their feeling about billboards.
- 9) Men were more likely than women to support changing the law to allow digital billboards within the Reno city limits, although still more than half of all men opposed the change.
- 10) Among all respondents, Republicans were least likely to consider driver distraction to be "Very Important" and most likely to rate it "Not Important".
- 11) Those identifying themselves as Independent were the most likely to state that Reno should "strive to preserve, protect and enhance its scenic character" is "Important", and the least likely to rank it as "Not Important".
- 12) The higher the level of education, the more likely the respondent is to object to digital billboards.
- 13) Those with higher education are more likely to consider driver distraction "Very Important" and to feel it is "Very Important" that Reno "strive to preserve, protect and enhance its scenic character".
- 14) Those 70 or older are least likely to be aware of digital billboards.
- 15) While no age category significantly felt there were "Not Enough" billboards, those Under 30 were the most likely to say there are "Enough" as opposed to "Too Many".
- 16) Those voters Under 30 were less likely than older age groups to state that Reno should not change the law to allow digital billboards.
- 17) Regarding both driver distraction and scenic character, voters Under 30 more often ranked these as "Important" while older voters more often ranked them as "Very Important".