



City of San José Advertising Signs Visual Preferences Internet Survey

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Fairbank, Maslin, Maullin & Associates
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Santa Monica, CA – Oakland, CA – Madison, WI – Mexico City

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INTRODUCTION

Between July 23 and August 17, 2009, Fairbank, Maslin, Maullin & Associates (FMM&A) conducted an online survey of 400 San José residents over the age of 18 to assess their views on billboards and other street signs in the City of San José. FMM&A conducted this quantitative survey research on behalf of the Department of Planning, Building and Code Enforcement and it was intended to complement previous qualitative research conducted by the City from April to June 2009. (The prior qualitative research involved numerous focus groups and community meetings with representatives from a variety of stakeholder groups, including property owners, business owners, sign industry representatives, and residents.)

The goals of this survey research project were to assess residents' reactions to a variety of signs and sign locations to provide input to the update of the City's Sign Ordinance. This was primarily achieved by showing survey respondents online images of existing or mocked-up billboards and other signs and asking them to express their reactions to each image. (A more in-depth discussion of this process is described in the following Methodology section of this report.)

This report discusses and analyzes the survey's principal findings. Following the methodology, summary of findings, and conclusions sections, the report is divided into four parts that address the findings in more detail:

- **Part 1** describes San José residents' conceptual impressions of billboards and other signs both generally and in specific locations.
- **Part 2** describes San José residents' reactions to images of traditional non-digital billboards and other signs either facing freeways or in Downtown San Jose.
- **Part 3** describes San José residents' reactions to images of large supergraphic¹ signs and other non-digital signs.
- **Part 4** describes San José residents' conceptual impressions of digital billboards and other digital signs and their reactions to images of specific digital signs at specific locations.

The topline results of the survey are included at the end of the report in **Appendix A**.

¹ Supergraphic signs are large billboards generally consisting of flexible fabric, vinyl or plastic signs stretched across and attached to buildings.

METHODOLOGY

The survey questions and structure were developed in consultation with City staff first offline and then in an online staging environment before respondents were asked to participate in the survey. The images tested in the survey were provided by City staff and typically displayed signs superimposed on actual buildings or streetscapes in San Jose – some were photographs from other cities. For many of the images, City staff replaced the contents of the billboards or signs with one particular Verizon Wireless advertisement. This was not meant as an endorsement of Verizon Wireless; rather, the intent was to, when possible, keep the advertising content a constant between images, enabling survey respondents to focus on the shape and location of the signs and not their content. While this was not possible for all images, keeping content constant was intended to focus respondents on the nature of the advertisements, rather than their content.

For many questions, respondents were presented with a webpage containing a single image – an image containing a sign or collection of signs – and asked to indicate how “acceptable” they found the particular sign to be. Respondents expressed this “acceptability” using a scale of 1 to 7, where “1” meant they felt the sign was “not at all acceptable” and a “7” meant they felt the sign was “completely acceptable.” On this 1 to 7 scale, a score of “4” would be in the middle and corresponded to a neutral reaction to the sign. For each question utilizing a 1 to 7 scale, a mean score was calculated to represent the general reaction of all respondents to the sign. Mean scores greater than 4 suggest that respondents were more accepting of a particular sign, whereas mean scores less than 4 suggest they were less accepting.

To help explain to survey respondents what was special about each sign, short descriptive phrases were typically included in each question. (The actual questions may be found in **Appendix A.**)

Survey respondents were restricted to City of San Jose residents and were asked to answer basic demographic questions prior to taking the survey, including their gender, age and ethnicity. Using responses to these demographic questions, potential respondents were screened to ensure an overall sample largely representative of San Jose’s adult population and the final results were statistically weighted to further conform to demographic data on the City’s population. However, it should be noted that the universe of residents willing and able to participate in an online survey does slightly differ from the overall population. This online population tends to be younger and include fewer men and Latinos. (Additionally, the survey was conducted only in English.) Many of these differences were accounted for through the use of quotas and statistical weighting, but should be kept in mind when interpreting the results or extrapolating them to the general adult population.

Lastly, throughout this report, sums of individual percentages may not add up to the total percentage amounts shown or to exactly 100 percent due to rounding. For example, 2.4 percent and 3.4 percent would be shown as 2 and 3 percent, respectively. While adding 2 and 3 percent yields a total of 5 percent, adding 2.4 percent and 3.4 percent yields a total of 5.8 percent which rounds to 6 percent.

SUMMARY OF MAJOR FINDINGS

- **Most survey respondents expressed neutral to positive feelings about “outdoor advertising” in general.**² Using a scale of 1 to 7, where “1” meant they have strongly negative feelings toward “outdoor advertising” and a “7” meant they have strongly positive feelings toward “outdoor advertising,” respondents’ mean score was 4.6, clearly on the positive side of the scale. (70% submitted neutral scores of 3-5, 25% percent submitted positive scores of 6-7, and only 5% submitted negative scores of 1-2.)

Demographic groups disproportionately likely to view “outdoor advertising” positively:

- Residents who frequently visit Downtown San Jose; and
- Residents who live in neighborhoods with “higher” concentrations of billboards.³

Demographic groups disproportionately likely to view “outdoor advertising” negatively:

- Older residents;
 - Long-term San Jose residents;
 - Residents who infrequently visit downtown; and
 - Residents who live in neighborhoods with fewer billboards.
- **Survey respondents reacted far more negatively to the concept of displaying “outdoor advertising” on “historic buildings” and “residential buildings” than in “Downtown San Jose” and on “storefronts,” “commercial streets,” “highways and freeways,” on “office buildings.”** This was particularly true of older residents living in neighborhoods with “lower” concentrations of billboards. Furthermore, when shown an image displaying a billboard on top of a historic building, over one-third of respondents (37%) expressed serious concerns about this sign type at this location (scores 1-2 on a seven-point scale).

² The term “outdoor advertising” was used to describe the broad universe of signs displayed outdoors as commonly understood by the public. It was not intended to refer to any defined terms used in the advertising industry.

³ Neighborhoods with “higher” and “lower” concentrations of billboards were qualitatively determined through observational research by City staff. Zip codes were assigned the “higher” and “lower” labels relative to other zip codes and not according to any defined standards of “high” and “low” concentrations.

- **In several places in the survey, respondents reacted positively to “way-finding” signs, signs that help potential customers locate a business or other establishment, and understand what goods, services and activities are available at that location:**
 - A majority of respondents (52%) submitted scores of “6” or “7” – with an overall mean score of 5.4 on a seven-point acceptability scale – when asked conceptually about the acceptability of displaying “outdoor advertising” on storefronts.
 - A majority of respondents (54%) found an image of a shopping center pylon sign facing the freeway “completely acceptable” (score 7), with a mean score of 5.9 on a seven-point acceptability scale.
 - Three in five respondents (62%) found the image of a “skyline sign” – described to respondents as a “sign near the top of a tall commercial building including the name and/or logo of one of the building’s primary tenants” – as “completely acceptable” (score 7), with a mean score of 6.2 on a seven-point acceptability scale.
 - When shown two side-by-side images of a billboard on the side of a parking structure, respondents overwhelmingly (78%) preferred the image of the billboard advertising the parking structure itself (“on-site” services) versus the billboard advertising Verizon Wireless (“off-site” services).
- **Respondents saw all four images of advertising signs facing freeways as generally acceptable, particularly the shopping center pylon sign.** The mean scores of roughly “5” on a seven-point acceptability scale for three images of billboards facing a freeway – including a single free-standing billboard, a single billboard on a building, and multiple free-standing billboards along a freeway – suggest that residents are generally comfortable with freeway-facing billboards. However, the mean score for the image of a shopping center pylon sign facing a freeway was notably higher (5.9), with 70 percent of respondents seeing that type of sign as largely acceptable (scores 6-7).
- **Respondents also saw several types of traditional billboards displayed in Downtown San Jose as generally acceptable (with the exception of a billboard located on top of a historic building), though with slightly less intensity as freeway-facing billboards.** These types of signs included billboards on a parking structure, on a low commercial building, and on top of a mixed-use commercial/residential building.
- **Respondents were of mixed opinions about “supergraphics” – large fabric, vinyl or plastic signs stretched across the sides of buildings – and it appears that the exact circumstances of how and where supergraphics are displayed played an important role.** For example, respondents were generally accepting of supergraphics located on a blank wall on the side of a Downtown building, but less accepting of supergraphics on historic buildings or that covered the windows of a commercial building.

- **Respondents were essentially evenly divided on the concept of installing digital billboards and signs in San Jose.** On a seven-point acceptability scale, the mean score was close to neutral (4.2) and somewhat similar numbers of respondents expressed more extreme opinions (23% scores 1-2 and 28% scores 6-7).

- **Respondents' reactions to a series of images of digital signs mirrored their overall feeling about digital billboards and signs in general – a fairly even distribution of opinions, but few strong feelings.** These images included a free-standing digital sign on the ground in Downtown San Jose, several free-standing digital signs along a commercial street, and a free-standing digital sign in front of a church or place of worship.
 - The one exception was a digital stadium sign (in this case an image of the large digital sign next to the Oracle Arena in Oakland). Two-thirds of respondents (67%) found this kind of sign to be largely acceptable (scores 6-7), resulting in the relatively high mean score of 5.7 on a seven-point acceptability scale. Furthermore, only five percent saw this kind of sign as decidedly unacceptable (scores 1-2).

- **When asked to indicate their preference between three different pairs of digital and non-digital signs, respondents expressed varying opinions.** In the cases of a billboard shown low to the ground in downtown and a digital billboard next to the freeway, respondents expressed a preference for the digital billboards. However, preferences flipped when asked about the pair of shopping center pylon signs. In this case, one-half (50%) preferred the non-digital pylon sign, compared to 38 percent who favored the digital pylon sign.

CONCLUSIONS

The results of this online survey lead us to draw the following conclusions about residents' opinions toward outdoor advertising, billboards and signs in the City of San Jose:

- City residents have become accustomed to advertising signs in San Jose and few see it as particularly unacceptable. These results do not suggest that they actively like billboards and other signs, but rather they at least see them as an inevitable and unremarkable part of living in an urban environment. However, there are differences between demographic groups, with older, longer-term residents less accepting of billboards and other signs than other residents.
- When it comes to advertising signs, familiarity does appear to breed acceptance. Residents who frequently visit Downtown San Jose – and presumably see such signs in downtown or when traveling to and from downtown – or who live in neighborhoods with “higher” concentrations of billboards are generally more comfortable with many of the types of signs tested in this survey, including billboards, digital signs and even the general concept of “outdoor advertising.”
- Residents appear to view “way-finding” signs – signs that not only provide advertising for a business, but also help potential customers locate the business – as particularly useful and more acceptable than billboards and signs advertising off-site products and services. This suggests that residents will be far less likely to oppose signs that advertise an on-site business or service, assuming that the sign helps residents navigate to that business and understand what goods and services are available at that location.
- In the abstract residents are wary of advertising on historic or residential buildings, and many flatly oppose the concept of placing billboards or supergraphics on such buildings. However, the research suggests that when shown specific examples, residents may be more accepting. Additionally, other types of signs generally seen as more acceptable (e.g. “way-finding” signs) may be seen as more acceptable on historic or residential buildings than billboards and supergraphics, though this was not specifically tested in this survey.
- Residents are evenly divided on the concept of installing digital billboards and signs in San Jose. However, there do appear to be circumstances in which digital signs are seen as more or less acceptable. For example, residents are quite comfortable with digital stadium signs, but are more skeptical about digital pylon signs in shopping centers.

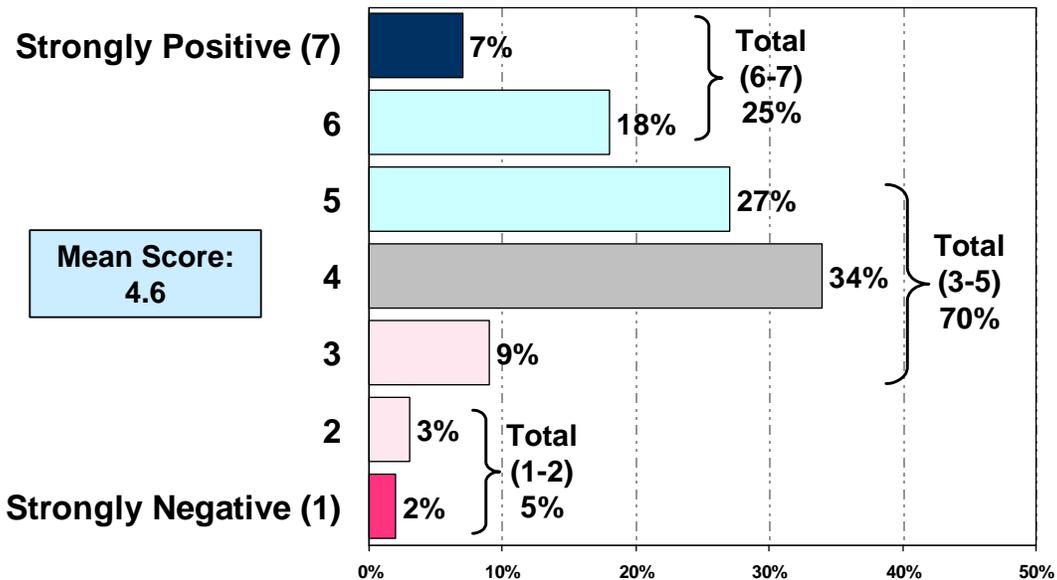
The remainder of this report presents the results of the survey in more detail.

PART 1: GENERAL FEELINGS ABOUT “OUTDOOR ADVERTISING”

Before asking survey respondents to react to specific street sign images, they were asked a series of opening questions to gauge their overall opinions about “outdoor advertising.” First, respondents were asked to indicate their “general feelings about outdoor advertising, including billboards, storefront signs, and other signs used for advertising,” using a scale of 1 to 7, where “1” meant they have strongly negative feelings toward outdoor advertising and a “7” meant they have strongly positive feelings toward outdoor advertising. As shown in **Figure 1**, survey respondents did not appear to harbor negative feelings about “outdoor advertising” – only five percent of respondents expressed strongly negative feelings (scores 1-2). In fact, one-quarter (25%) expressed genuinely positive feelings (scores 6-7) about outdoor advertising, with the majority (70%) falling somewhere in the middle (scores 3-5). Furthermore, from the mean score of the responses to this question (4.6), it is clear that respondents felt neutral to positive about “outdoor advertising.”

FIGURE 1:
General Feelings about “Outdoor Advertising”

“Please indicate your general feelings about outdoor advertising, including billboards, storefront signs, and other signs used for advertising”



In looking more closely at these results by demographic groups, the data suggest that while there are no major demographic groups who feel negative about advertising signs, there are some notable differences between groups in terms of how positive they feel about them. For example, respondents from neighborhoods with “higher” concentrations of billboards were more likely to feel strongly positive about “outdoor advertising” than those from “lower” concentration neighborhoods (30% to 21% scores 6- 7), suggesting that residents who see such advertising more frequently are generally more accepting of it. Similarly, respondents who visit downtown San Jose “frequently” were far more accepting of “outdoor advertising” than those who visit downtown “rarely” or “never.”

Nearly three times as more “frequent” downtown visitors expressed strongly positive feelings (scores 6-7) than those who “rarely” or “never” visit downtown (37% to 13%).

Figure 2 displays which demographic groups were disproportionately likely to have responded with scores 1-2, 3-5, and 6-7 and groups them together. Those reacting most negatively to “outdoor advertising” (scores 1-2) tended to be older, long-term residents who infrequently visit downtown, and live in neighborhoods with fewer billboards. In contrast, those expressing more positive feelings about “outdoor advertising” tended to be residents who frequently visit downtown and live in neighborhoods with “higher” concentrations of billboards.

**FIGURE 2:
 Demographic Groups Disproportionately Likely to Express Positive, Negative or
 Neutral Opinions about “Outdoor Advertising”**

Strongly Negative (Scores 1-2)	Neutral (Scores 3-5)	Strongly Positive (Scores 6-7)
<ul style="list-style-type: none"> • Ages 45+ • “Higher” Billboard Concentration Zip Codes • Men Ages 45+ • Visit Downtown Rarely/Never • Women Ages 45+ • 31+ Years of Residency 	<ul style="list-style-type: none"> • Ages 18-29 • Ages 65+ • “Lower” Billboard Concentration Zip Codes • Visit Downtown Occasionally • Visit Downtown: Rarely/Never • Women Ages 45+ • 21-30 Years of San Jose Residency 	<ul style="list-style-type: none"> • Ages 30-39 • “Higher” Billboard Concentration Zip Codes • Visit Downtown Frequently • Women Ages 18-44 • 11-20 Years of San Jose Residency

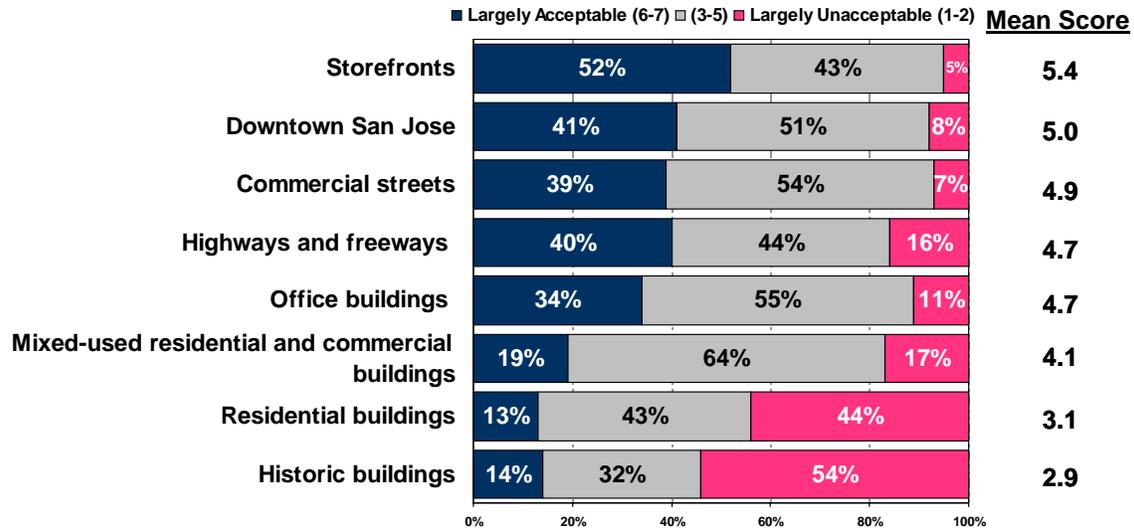
Next, respondents were presented with a list of different locations and building types, and asked to indicate “how appropriate” they felt it was to have “outdoor advertising” displayed in each situation using a scale of 1 to 7, where “1” meant they felt that outdoor advertising on or near that item was “not at all acceptable” and a “7” meant they felt that outdoor advertising on or near that item was “completely acceptable.” As shown in **Figure 3**, survey respondents indicated that “outdoor advertising” was generally acceptable in many locations, including in “Downtown San Jose” and on “storefronts,” “commercial streets,” “highways and freeways,” and “office buildings.” In all of these cases, at least one-third of respondents submitted scores of “6” or “7” on a seven-point acceptability scale, with mean scores of at least 4.7.

It is worth further noting that “storefronts” were clearly seen as the most acceptable location to display “outdoor advertising,” with a majority of respondents (52%) submitting scores of “6” or “7” and an overall mean score of 5.4. This suggests that while displaying “outdoor advertising” in these other locations is generally acceptable, there is a hierarchy of preferences among residents, and displaying such signs on storefronts may sit at the top of that list. Furthermore, as we shall see in subsequent results, this appears to highlight a theme of respondents viewing advertising signs as

more acceptable if they are directly useful in locating businesses “way-finding” and not just advertising off-site goods and services.

FIGURE 3:
Acceptability of Display “Outdoor Advertising” in Various Locations

For each of the following items, please indicate how appropriate you feel it is to have outdoor advertising displayed in the location indicated.



The obvious exceptions shown in **Figure 3** were “historic buildings” (mean score of 2.9) and “residential buildings” (mean score of 3.1). With regards to historic buildings, 54 percent of respondents submitted scores of “1” or “2” on a seven-point acceptability scale, suggesting that residents are uncomfortable displaying advertising on buildings that are known to be historic. Similarly, though with slightly less intensity, 44 percent of respondents submitted scores of “1” or “2” when asked about displaying advertising on residential buildings. This likely contributed to respondents’ ambivalent feelings about “outdoor advertising” on “mixed-use resident and commercial buildings,” with a mean score of 4.1, essentially right in the middle of a seven-point acceptability scale. These results suggest that residents view the acceptability of displaying “outdoor advertising” in different locations across a wide spectrum, with storefronts as most acceptable and historic and residential buildings as least acceptable.

The results to these questions suggest that there were many respondents who generally saw “outdoor advertising” in a neutral to positive light, but frowned upon it on historic or residential buildings. **Figure 4** shows the demographic groups most likely to fit this profile are older residents living in neighborhoods with “lower” concentrations of billboards.

**FIGURE 4:
 Demographic Groups Disproportionately Likely to Oppose Outdoor Advertising on
 Historic or Residential Buildings but Feel Neutral to Positive about Outdoor
 Advertising in General**

Neutral to Positive Feeling (Scores 3-7) about Outdoor Advertising in General, but See Outdoor Advertising as Largely Unacceptable (Scores 1-2) on...	
Historic Buildings	Residential Buildings
<ul style="list-style-type: none"> • Ages 50+ • “Lower” Billboard Concentration Zip Codes • Men • Men Ages 45+ • Visit Downtown Occasionally • 11-20 Years of San Jose Residency 	<ul style="list-style-type: none"> • Ages 45+ • “Lower” Billboard Concentration Zip Codes • Women Ages 45+ • 21-30 Years of San Jose Residency

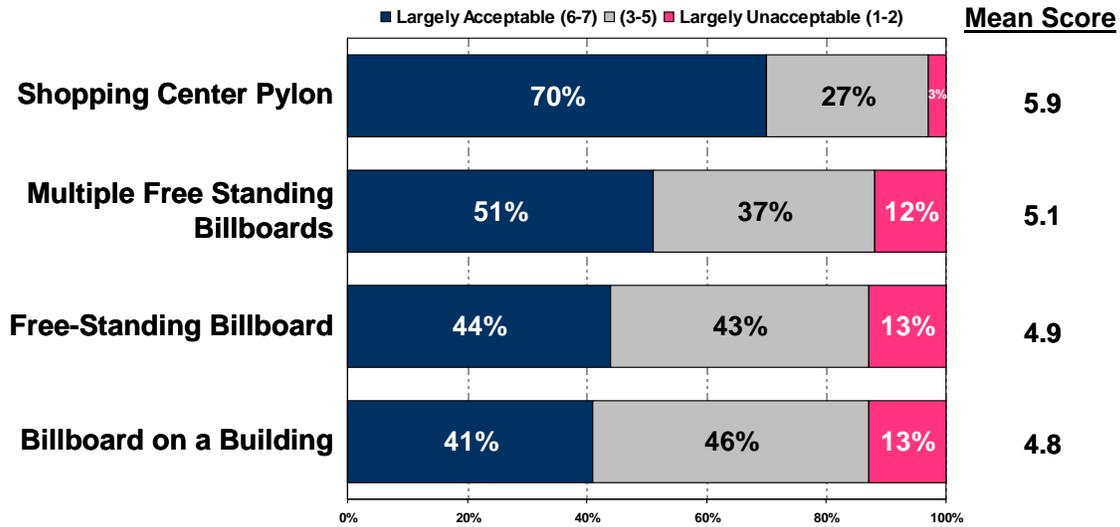
PART 2: TRADITIONAL NON-DIGITAL BILLBOARDS AND SIGNS

Survey respondents were presented with two different blocks of traditional, non-digital billboard and sign images – those facing freeways and those in Downtown San Jose – and asked to indicate their reaction to each image using a scale of 1 to 7, where “1” meant they felt that type of sign was “not at all acceptable” and a “7” meant they felt that type of sign was “completely acceptable.” In each block of images, respondents saw the images one-at-a-time and in random order.

2.1 TRADITIONAL BILLBOARDS AND SIGNS FACING FREEWAYS

In first looking at the reactions to the traditional billboards and signs facing freeways, we see that respondents generally found all four images generally acceptable. Keeping in mind that a “4” represents the middle of a seven-point acceptability scale, all four images – a single free-standing billboard, a single billboard on a building, a shopping center pylon sign, and multiple free-standing billboards along a freeway (**Images 1-4**) – had mean scores of at least 4.8 or higher, clearly on the more “acceptable” side of the scale (**Figure 5**). Furthermore, less than 15 percent of respondents expressed strongly negative feelings (scores 1-2) about any of these images, suggesting that very few residents view these kinds of signs facing freeways as unacceptable.

FIGURE 5:
Acceptability of Various Freeway-Facing Signs



It is worth highlighting the intensity with which respondents found the shopping center pylon sign facing the freeway acceptable – a majority (54%) found it “completely acceptable” (score 7) and seven in ten (70%) found it largely acceptable (scores 6-7). In addition to being shaped differently than the traditional billboards displayed in the other images, the other notable difference is that shopping center pylon signs are navigationally helpful in that they provide message regarding businesses, goods and services located on the site. Nearly all freeway-facing billboards advertise something that a driver will need to remember and take action on at a later date (e.g. drivers can only investigate Verizon’s cell phone services after they have reached their destination). In contrast, drivers use pylon signs to help locate a shopping center or stores within a shopping center while they are driving. Consistent with respondents’ general feeling about displaying advertising on storefronts, these results suggest that residents view “way-finding” signs as more acceptable than other types of signs.

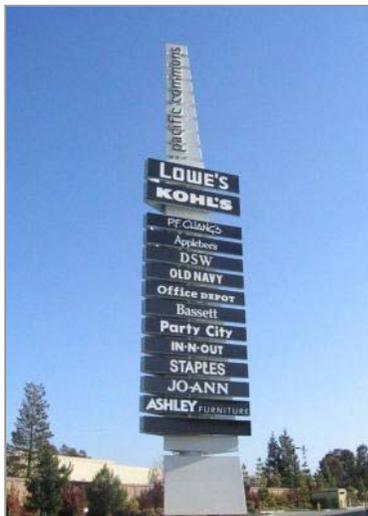
**IMAGE 1:
A Free-Standing Billboard
Facing a Freeway**



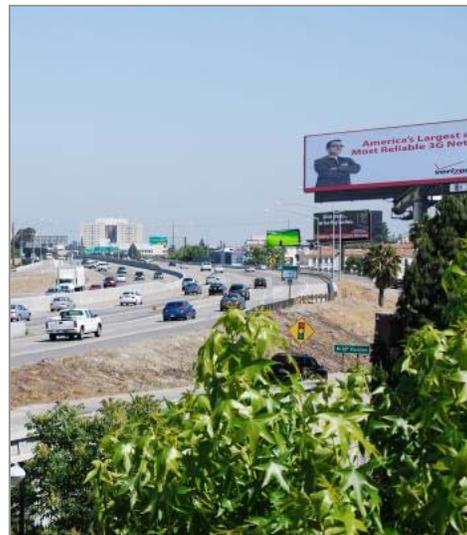
**IMAGE 2:
A Billboard on Top of a
Building Facing a Freeway**



**IMAGE 3:
A Pylon Facing a Freeway
Advertising a Shopping Center**



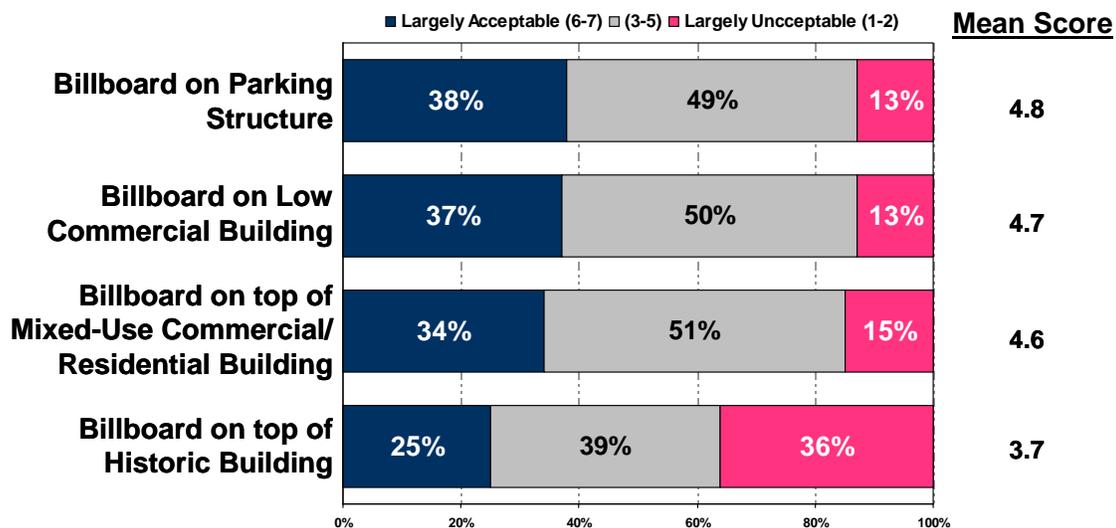
**IMAGE 4:
Several Free-Standing
Billboards along a Freeway**



2.2 TRADITIONAL BILLBOARDS IN DOWNTOWN SAN JOSE

Another block of traditional billboards tested included four images of billboards in Downtown San Jose. As shown in **Figure 6**, most of these types of billboards were also seen as generally acceptable – mean scores of at least 4.6 on a seven-point acceptability scale – though with slightly less intensity than were billboards facing freeways. The images with positive scores (greater than 4) included images of traditional billboards on a parking structure, on a low commercial building, and on top of a mixed-use commercial/residential building (**Images 5-8**).

FIGURE 6:
Acceptability of Various Traditional Billboards in Downtown San Jose



The notable outlier in this block was the image displaying a billboard on top of a historic building. Over one-third of respondents (36%) expressed serious concerns about these types of billboards (scores 1-2). In contrast, only one-quarter (25%) submitted scores on the other end of the spectrum (scores 6-7). Cumulatively, respondents’ reactions to this image resulted in a mean score of 3.7, slightly below the “4” midpoint.

As previously mentioned, short text descriptions of what respondents were seeing accompanied each image. In this particular case, the exact description was “a billboard on top of a historic building,” and including the word “historic” could have swayed respondents to submit the more negative responses. However, recall that when asked in the abstract – and without the benefit of an image – a majority of respondents indicated that displaying “outdoor advertising” on “historic buildings” was largely unacceptable (54% scores 1-2). Comparing these results, when asked about historic buildings without seeing an image, the mean score was 2.9, less than the 3.7 mean score when they saw an image and were told that the building was historic.

While this does not dismiss the possibility that respondents could have found the image more acceptable if they had not been told that the building was historic, it does suggest that seeing an example made respondents more comfortable with the idea of billboards on a historic building. Other results from this block of images are consistent with this

observation. When asked in the abstract and without seeing an image, the mean “acceptability” score for “mixed-use residential and commercial buildings” was 4.1 – right around the midpoint of a seven-point scale. However, when respondents were shown an image of billboard on a mixed-use building – and told that it was “a billboard on top of a mixed-use commercial/residential building” – the mean score was the slightly higher 4.6. Together, these findings suggest that some residents have negative preconceived notions about displaying advertising on historic and mixed-use buildings that can be partially allayed by showing them how such advertising would look in practice.

**IMAGE 5:
On Low Commercial Building**



**IMAGE 6:
Top of Mixed-use Commercial/
Residential Building**



**IMAGE 7:
Top of Historic Building**



**IMAGE 8:
On Parking Structure**



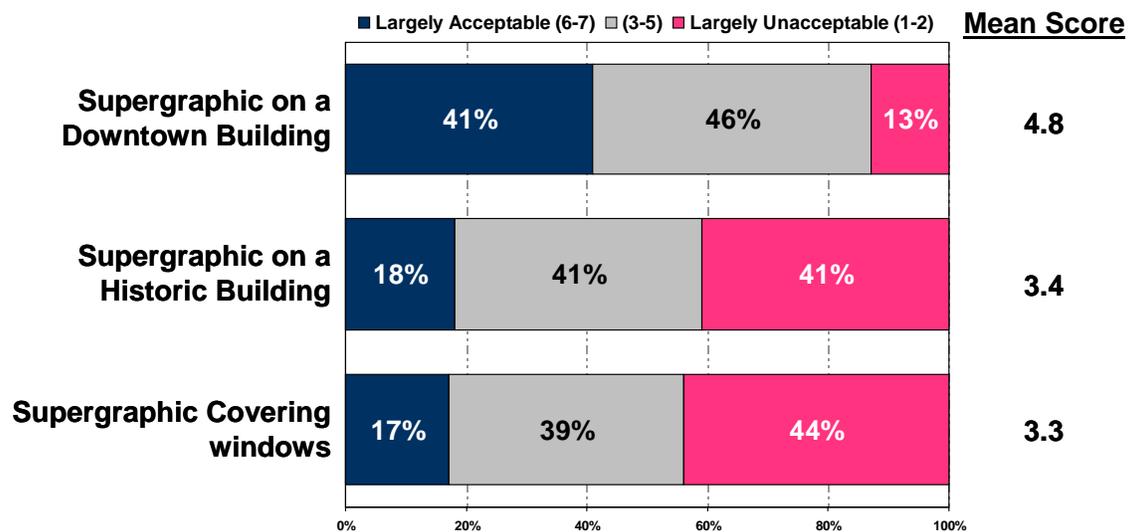
PART 3: OTHER NON-DIGITAL SIGNS

Survey respondents were also presented with images displaying several other types of non-digital signs and asked to express their opinions regarding them. This included a block of three “supergraphics” (large vinyl or plastic signs stretched across the sides of buildings), a “skyline sign,” and a comparison of signs advertising on-site and off-site services.

3.1 SUPERGRAPHICS

Respondents were presented with a block of three different supergraphics (**Images 9-11**) – presented one-at-a-time and in random order – and asked to indicate their reaction to each image using a scale of 1 to 7, where “1” meant they felt that type of sign was “not at all acceptable” and a “7” meant they felt that type of sign was “completely acceptable.” As shown in **Figure 7**, respondents were somewhat less accepting of supergraphics than they were of traditional billboards, though it appears that the exact circumstances of how and where supergraphics are displayed played an important role.

**FIGURE 7:
 Acceptability of Various Supergraphics**



Respondents saw the supergraphic shown on a downtown building – and described as “a sign on the side of a building that has no windows located in Downtown San Jose” – as similarly acceptable to other traditional billboards in Downtown San Jose, with a mean score of 4.8 on a seven-point acceptability scale and 41 percent respondents viewing it as largely acceptable (scores 6-7). However, respondents’ reactions were far cooler to supergraphics that either covered windows or were on the side of historic buildings. In both cases, at least 40 percent of respondents saw these signs as largely unacceptable (scores 1-2) and consequently the mean scores for both images were less than “4.” Given respondents’ other less-accepting reactions to advertising on historic buildings, this is not surprising. Consequently, these results suggest that residents are accepting of supergraphics on downtown buildings as long as they do not cover windows are or placed

on historic buildings. These findings are consistent with prior qualitative research conducted by the City in which community members indicated that signs should not cover or replace building architecture nor reduce the light and views for building occupants.

IMAGE 9:
Supergraphic Covering Windows

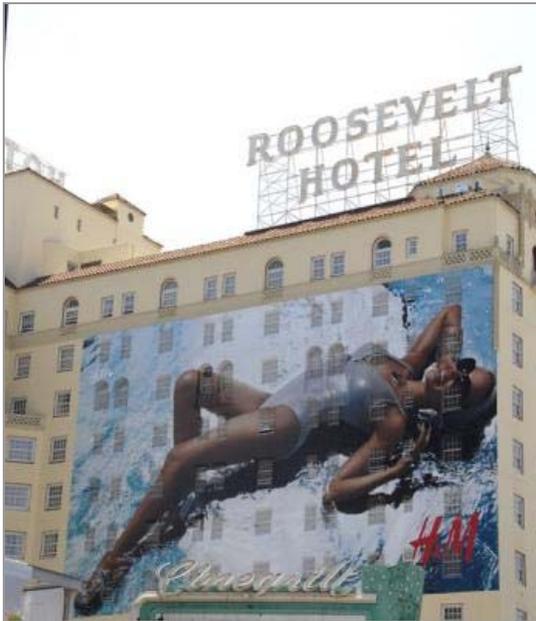


IMAGE 10:
Supergraphic on a Historic Building



IMAGE 11:
Supergraphic on a Downtown Building



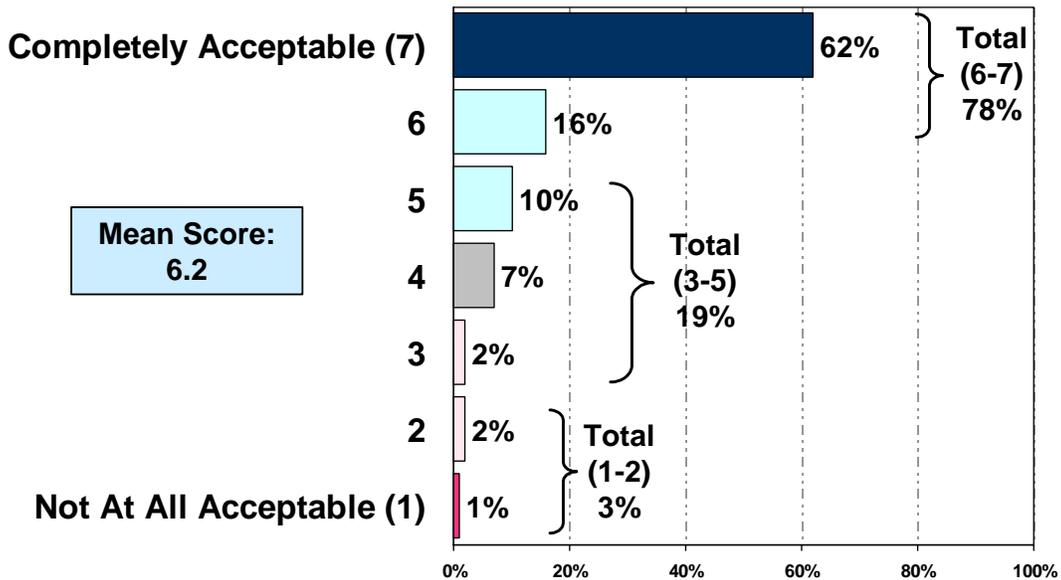
3.2 SKYLINE SIGNS

Respondents were also presented with a single image of a “skyline sign” – described to respondents as a “sign near the top of a tall commercial building including the name and/or logo of one of the building’s primary tenants” (**Image 12**). As shown in **Figure 8**, respondents overwhelmingly found this kind of sign acceptable. In fact, three in five (62%) found it completely acceptable (score 7) and the mean score was 6.2 on a seven-point acceptability scale. These kinds of signs also share something in common with storefront signs and pylon signs for shopping centers – they are “way-finding” signs that help residents navigate to businesses. In general, respondents found these kinds of signs more acceptable than off-site advertising signs.

IMAGE 12:
Skyline Sign



FIGURE 8:
Acceptability of Skyline Signs



3.3 ON-SITE AND OFF-SITE SIGNS

Prior City qualitative research suggested that residents were more supportive of signs advertising a business “on-site” rather than “off-site” (i.e. a sign advertising something in the same building or near the sign instead of a sign advertising something not geographically near the sign). To further test this finding, survey respondents were presented with two side-by-side images of a billboard on the side of the same parking structure (Images 13 and 14). The distinguishing factor between the two images was that in one image the billboard advertised the parking structure (on-site) and in one image the billboard advertised Verizon (off-site). Respondents were then asked to indicate which image they preferred.

**IMAGE 13:
On-site Sign**

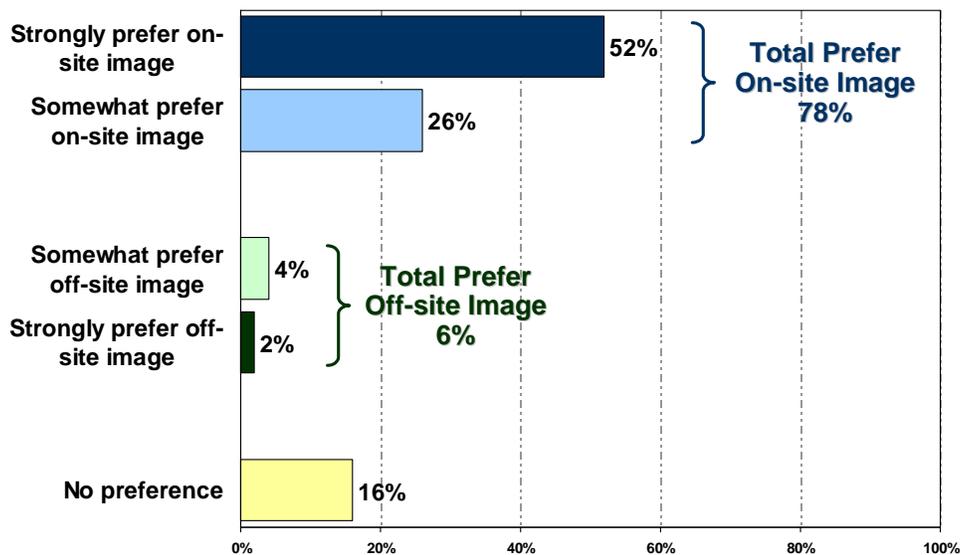


**IMAGE 14:
Off-site Sign**



As shown in **Figure 9**, respondents overwhelmingly preferred the billboard advertising the on-site services – in this case a billboard on the side of a parking structure advertising the same parking structure. Nearly four in five (78%) preferred the on-site sign, including one-half (52%) who “strongly” preferred it. Again, this is consistent with other results suggesting residents’ preferences for signs that serve a “way-finding” purpose or are otherwise useful in locating businesses.

FIGURE 9:
Preferences between Signs Advertising On-site and Off-site Services



PART 4: DIGITAL SIGNS

In the final portion of the survey, respondents were asked several questions specifically regarding digital billboards and signs. They were first shown a short video clip of a digital billboard and asked to share their opinions about installing similar signs in San Jose. Additionally, they were asked to compare similarly-situated digital and non-digital signs and to comment on several specific types of digital signs.

4.1 GENERAL ACCEPTABILITY OF DIGITAL SIGNS IN SAN JOSE

At the beginning of the section of questions regarding digital signs, respondents were shown a short 15 second video clip of an existing digital billboard – on the eastern approach to the Bay Bridge – and then asked to indicate “how acceptable” they thought it would be to install “similar digital billboards and signs in the City of San Jose. Once again, they were asked to use a scale of 1 to 7, where “1” meant they felt that installing digital billboards and signs in San Jose was “not at all acceptable” and a “7” meant they felt that installing digital billboards and signs in San Jose was “completely acceptable.”

As shown in **Figure 10**, respondents were essentially evenly divided on the acceptability of digital billboards and signs in San Jose. The mean score of 4.2 on a seven-point acceptability scale is close to neutral and somewhat similar numbers of respondents expressed more extreme opinions (23% scores 1-2 and 28% scores 6-7).

**FIGURE 10:
 General Feelings about Digital Signs**

“After seeing this video, please indicate how acceptable you think it is to install similar digital billboards and signs in the City of San Jose.”

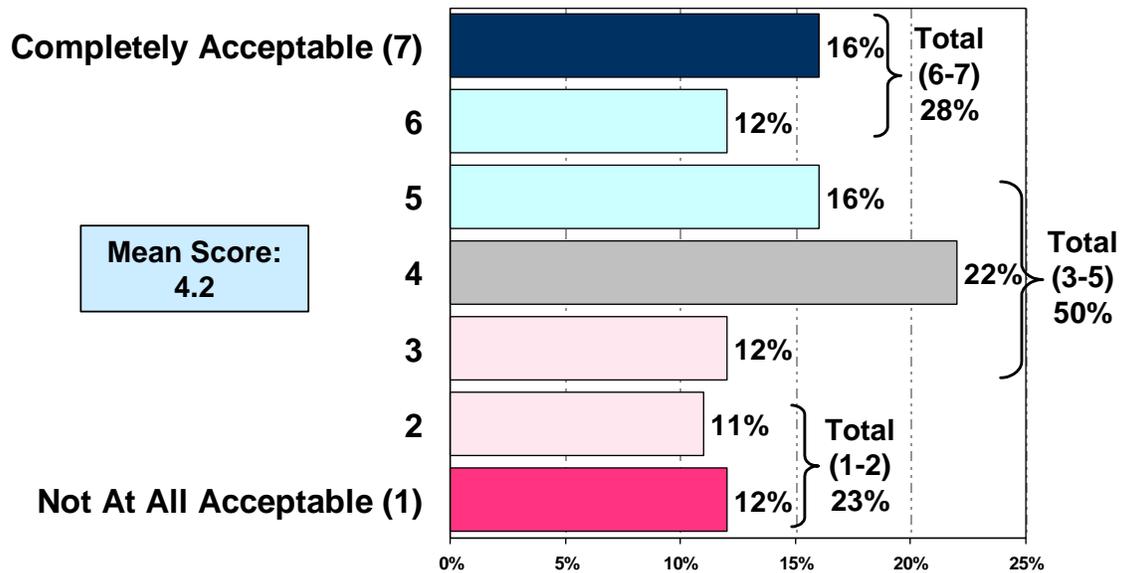


Figure 11 shows responses to this question by demographic group. Though the overall results suggest a population that is somewhat neutral on the topic of digital billboards, drawing that conclusion masks several notable differences between demographic groups. For example, while there appears to be little difference between respondents from neighborhoods with “higher” or “lower” concentrations of billboards, there were interesting differences between genders and respondents of different age groups. Male respondents (mean score of 4.5) appeared more accepting of digital signs than female respondents (mean score of 3.9), with roughly one-third of male respondents (34%) indicating that digital signs were largely acceptable (scores 6-7) compared to only 23 percent of female respondents.

These differences were more pronounced when looking at different age groups. Younger respondents were generally more accepting of digital signs than older respondents, as demonstrated by a mean score of 4.6 for respondents ages 18-29 versus a mean score of 3.5 for respondents age 65 or older. (Though the sample of respondents age 65 or older was somewhat small – 8% – it was consistent with this overall trend. Additionally, respondents in the next oldest age category – ages 50-64 – were similarly less accepting of digital signs with a mean score of 3.7). Further evidence of this trend appears in the intensity of respondents’ answers to this question. While one-third of respondents ages 18-29 (34%) found digital signs largely acceptable (scores 6-7), over one-third of respondents age 50 or older (37%) saw them as essentially unacceptable (scores 1-2).

These differences also hold up when age and gender are looked at in combination. Younger men (ages 18-44) were the most accepting of digital signs (mean score of 4.7 and 34% scores 6-7), while older women (age 45 or older) expressed less positive reactions to digital signs (mean score of 3.5 and 36% scores 1-2).

Some of the more striking differences can be seen between the frequencies that respondents visit downtown and their lengths of residency in San Jose. For example, those who visit downtown San Jose more frequently were more accepting of digital signs than those who virtually never visit downtown, results that paralleled respondents’ feelings towards “outdoor advertising” in general when initially asked in the survey.

Interestingly, while there wasn’t as much of a discernable pattern among long- and short-term residents regarding their general feelings about outdoor advertising, their opinions were more differentiated when it came to digital signs. The mean scores for respondents who have lived in San Jose for less than 20 years were around 4.5, whereas longer-term residents (31 years or more) submitted a mean score of 3.7. Also, there was a steady decrease in how intensely respondents thought digital signs were acceptable – from 35 to 32 to 26 to 20 percent as respondents’ length of residence increases from less than 10 years, 11-20 years, 21-30 years, and 31 or more years.

**FIGURE 11:
 General Feelings about Digital Signs by Demographic Group**

Demographic	Mean	Total 1-2 (%)	Total 3-5 (%)	Total 6-7 (%)	Percent of Sample (%)
ALL RESPONDENTS	4.2	22	50	28	100
LOCAL BILLBOARD CONCENTRATION					
Higher	4.2	24	48	28	49
Lower	4.2	20	52	28	51
GENDER					
Men	4.5	18	48	34	45
Women	3.9	26	51	23	55
AGE					
18-29	4.6	16	50	34	27
30-39	4.4	13	59	28	24
40-49	4.3	21	47	31	20
50-64	3.7	37	39	24	21
65+	3.5	37	52	11	8
AGE BY GENDER					
Men ages 18-44	4.7	13	49	38	29
Men ages 45+	4.1	28	46	26	16
Women ages 18-44	4.2	19	54	27	33
Women ages 45+	3.5	36	46	18	22
DOWNTOWN VISITING FREQUENCY					
Frequently	4.6	19	44	37	38
Occasionally	4.2	20	56	24	48
Rarely/Never	3.3	40	43	17	14

Demographic	Mean	Total 1-2 (%)	Total 3-5 (%)	Total 6-7 (%)	Percent of Sample (%)
ALL RESPONDENTS	4.2	22	50	28	100
LENGTH OF RESIDENCE IN SAN JOSÉ					
0-10 years	4.5	21	44	35	26
11-20 years	4.6	12	56	32	25
21-30 years	4.1	21	53	26	21
31+ years	3.7	34	46	20	28

This information is displayed in a different format in **Figure 12**, in which the demographic groups disproportionately likely to have responded with scores 1-2, 3-5, and 6-7 are grouped together. Those who saw installing digital signs in San Jose as largely unacceptable (scores 1-2) tended to be older, long-term residents who infrequently visit downtown – similar demographic groups to those who generally viewed “outdoor advertising” negatively. In contrast, those expressing more positive feelings about digital signs tended to be younger men who are shorter-term residents and visit downtown frequently. Also, those expressing more neutral feelings visit downtown occasionally and are more medium-term residents.

FIGURE 12:
Demographic Groups Disproportionately Likely to Express Positive, Negative or Neutral Opinions about Installing Digital Billboards and Signs in San Jose

Largely Unacceptable (Scores 1-2)	Neutral (Scores 3-5)	Largely Acceptable (Scores 6-7)
<ul style="list-style-type: none"> • Ages 45+ • Men Ages 45+ • Visit Downtown Rarely/Never • Women Ages 45+ • 31+ Years of San Jose Residency 	<ul style="list-style-type: none"> • Ages 30-39 • Visit Downtown Occasionally • Women Ages 18-44 • 11-20 Years of San Jose Residency 	<ul style="list-style-type: none"> • Ages 18-29 • Men • Men Ages 18-44 • Visit Downtown Frequently • 0-10 Years of San Jose Residency

In comparing respondents’ responses to the general questions about “outdoor advertising” and installing digital signs, essentially one in five (19%) were neutral to positive (scores 3-7) about general “outdoor advertising,” but saw digital billboards and signs in San Jose as largely unacceptable (scores 1-2). **Figure 13** shows which demographic groups were disproportionately likely to fall into this category. These respondents tended to be older, longer-term residents who infrequently visit Downtown San Jose, and are women.

FIGURE 13:
Demographic Groups Disproportionately Likely to Oppose Digital Signs but Feel Neutral to Positive about “Outdoor Advertising” in General

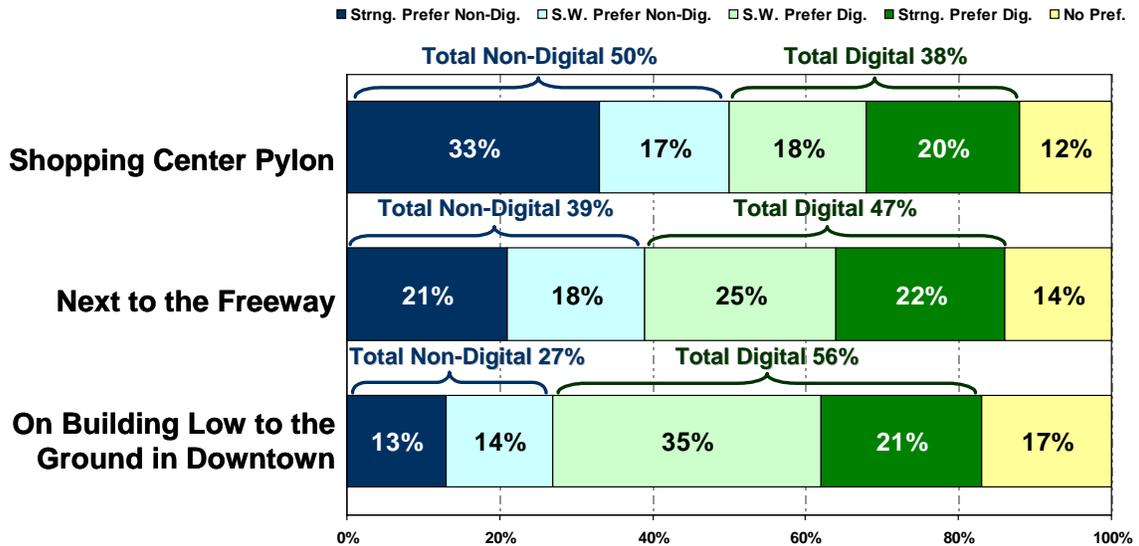
<p>Neutral to Positive Feeling (Scores 3-7) about Outdoor Advertising in General, but See Installing Digital Billboards and Sign in San Jose as Largely Unacceptable (Scores 1-2)</p>
<ul style="list-style-type: none">• Ages 45+• Visit Downtown Rarely/Never• Women• Women Ages 45+• 31+ Years of San Jose Residency

4.2 COMPARING DIGITAL AND NON-DIGITAL SIGNS

Respondents were shown three pairs of images – in random order – each displaying one digital sign and one non-digital sign (**Images 16-21**). For each pair, respondents were asked to indicate which image – either containing the digital or non-digital sign – they preferred. For two of the pairs, the billboards shown were identical, except that the digital billboards were animated so that they would cycle through several different advertisements. The other pair displayed two different shopping center pylon signs – one non-digital and one clearly digital. For all pairs the images containing digital signs were clearly label “digital” to ensure that respondents clearly understood the difference between the images and signs.

Preferences for digital versus non-digital signs are shown in **Figure 14**. In the case of a billboard shown low to the ground in downtown, respondents indicated a preference for the digital billboard by a two to one ratio (56% to 27%), with 17 percent indifferent. Respondents also favored the digital billboard next to the freeway over a similarly situated non-digital, traditional billboard, though by a narrower margin (47% to 38%). However, respondents’ preferences flipped when asked about the pair of shopping center pylon signs. In this case, one-half (50%) preferred the non-digital pylon sign, compared to 38 percent who favored the digital pylon sign.

FIGURE 14:
Preferences between Digital and Non-Digital Signs



The results suggest that residents are open to some types of digital billboards and signs, but that they may not support all types. (Although roughly one in five consistently indicated they “strongly” preferred the digital signs in all three cases.) In the case of shopping center pylon signs, it may not be surprising to see residents more ambivalent given the prior survey results suggesting that residents value the “way-finding” or navigational value provided by such pylon signs. Resident may worry that if the content of a digital shopping center pylon sign changes regularly, they become less useful as a directional tool.

Additionally, it should be noted that all three of these image pairs contained signs displayed during the day when digital signs may look more like non-digital signs. Although not tested in this survey, it is unclear if digital signs might be seen as more visually intrusive when shown at night against dark buildings and skylines.

IMAGE 16:
Traditional Billboard,
Low to the Ground



IMAGE 17:
Digital Billboard,
Low to the Ground



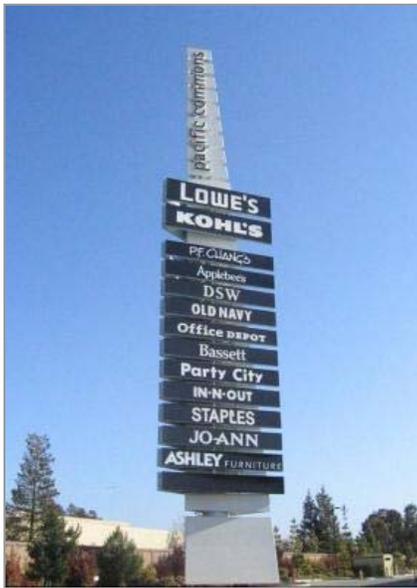
**IMAGE 18:
Traditional Billboard,
Next to the Freeway**



**IMAGE 19:
Digital Billboard,
Next to the Freeway**



**IMAGE 20:
Traditional Sign,
Shopping Center Pylon**



**IMAGE 21:
Digital Sign,
Shopping Center Pylon**



4.3 SPECIFIC TYPES OF DIGITAL SIGNS

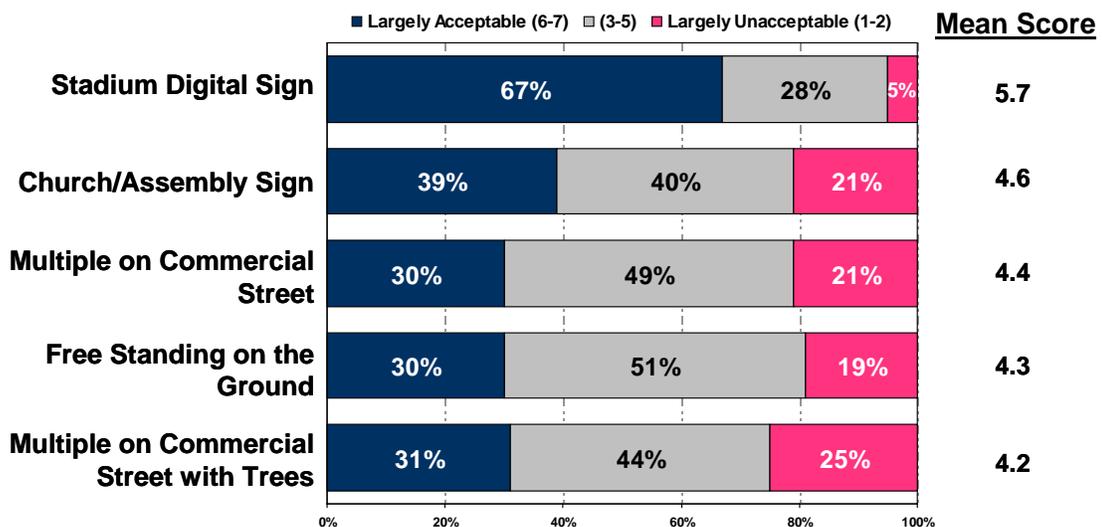
Respondents were presented with a block of five different specific types of digital signs (**Images 22-26**) – again presented one-at-a-time and in random order – and asked to indicate their reaction to each image using a scale of 1 to 7, where “1” meant they felt that type of digital sign was “not at all acceptable” and a “7” meant they felt that type of digital sign was “completely acceptable.”

As shown in **Figure 15**, respondents’ reactions to most of the digital signs – except the stadium digital sign – mirrored their overall feeling about installing digital billboards and signs generally in San Jose – a fairly even distribution of opinions, but few strong feelings. For example, the one image shown of a free-standing digital sign low to the ground in Downtown San Jose (**Image 22**) received a mean score of 4.3, virtually identical to the 4.2 mean score respondents expressed regarding digital signs in general. However, it is also worth noting that the results do suggest a couple of digital signs may be seen as more acceptable than others – the stadium and church/assembly signs – signs which will be discussed in more detail later in this section.

IMAGE 22:
Free-standing Digital Sign on the Ground



FIGURE 15:
Acceptability of Various Digital Signs



Two different images were shown of multiple digital signs on a city street in San Jose (**Images 23 and 24**). In both cases, respondents’ reactions to them were again similar to their overall impressions of digital signs (mean scores marginally higher than “4”).

However, these very similar images were tested in an attempt to test a subtle difference between the streets. In one image the digital signs were displayed on a clearly commercial street (Stevens Creek Boulevard.), while in the other the digital signs were displayed on a street that was also commercial, but included trees situated along the street (Blossom Hill Road). As shown in **Figure 15**, respondents showed virtually no discernable distinction in their opinions regarding whether or not digital signs were more acceptable on one street or the other. While this is suggestive that residents do not differentiate between installing digital signs on these two types of streets, it is possible that respondents had a difficult time comprehending the difference between the tree-lined

**IMAGE 23:
Multiple Digital Signs
on Commercial Street**



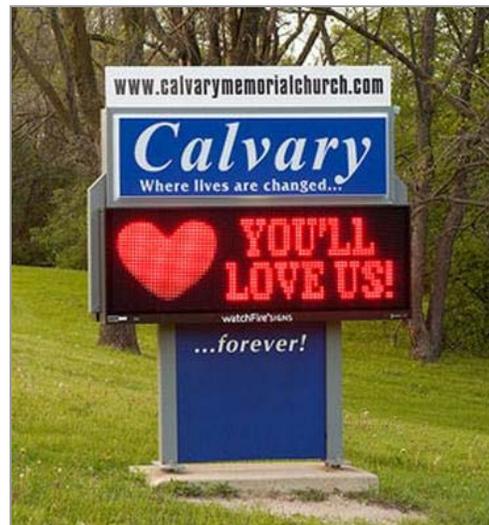
**IMAGE 24:
Multiple Digital Signs
on Commercial Street with Trees**



and traditional commercial streets in these two images. Consequently, these results should be viewed with caution.

Respondents were also shown a digital sign currently used by a church. Reactions to this sign were similar to that of the other digital signs and digital signs in general, though it was seen as marginally more acceptable with a slightly higher mean score (4.6) and more respondents giving it “6’s” and “7’s” on a seven-point acceptability scale. It is possible that these modest differences could be explained by respondents’ positive impressions of churches or other places of assembly, and not the sign design. However, prior qualitative research conducted by the City suggests that residents see additional value in digital signs for assembly uses like churches because they can display messages about the dates and time of different events, another possible explanation for the slightly more positive scores.

**IMAGE 26:
Digital Church/Assembly Sign**



**IMAGE 25:
Stadium Digital Sign**



Finally, the real outlier in this block of digital signs was the stadium sign – in this case a picture of the large digital sign next to the Oracle Arena in Oakland. Two-thirds of respondents (67%) found this kind of sign to be largely acceptable (scores 6-7), contributing to the relatively high mean score of 5.7. Furthermore, only five percent saw this kind of sign as decidedly unacceptable (scores 1-2). One possible explanation for these results is that these signs are seen as functional because they can provide information about the events held at the arena. Additionally, this interpretation

is consistent with respondents' generally positive reactions to "way-finding" signs that provide information about the site where the sign is located.

**APPENDIX A:
TOPLINE SURVEY RESULTS**

SAN JOSE STREET SIGNS INTERNET SURVEY
320-405
N = 400

LANDING PAGE:

Thank you for taking the time to complete this brief, anonymous survey on behalf of the City of San Jose. We are only interested in your opinions and are not trying to sell you anything. The survey will take approximately 5-10 minutes to complete.

The City of San Jose is currently reviewing its regulations regarding outdoor advertising signs and is seeking input from City residents. In this survey you will be asked about outdoor advertising signs in the City of San Jose, including billboards and other types of signs on private property. In some questions you will be shown an image and asked to provide a general reaction to a specific type of sign. Please keep in mind that you are being asked to react to the type of sign and not the sign's exact dimensions and colors nor the products or companies advertising on the signs.

To best view the questionnaire, please maximize the size of your web browser window. Use the "Next" button at the bottom of the window to move forward in the survey

These first demographic questions are just for statistical purposes.

1. Do you live in the City of San Jose, California?

Yes-----100%
No----- **TERMINATE**

2. Please fill in your zip score below:

95101	-----	0%
95110	-----	1%
95111	-----	4%
95112	-----	4%
95113	-----	0%
95116	-----	1%
95117	-----	4%
95118	-----	3%
95119	-----	1%
95120	-----	4%
95121	-----	4%
95122	-----	3%
95123	-----	7%
95124	-----	7%
95125	-----	8%
95126	-----	5%
95127	-----	6%
95128	-----	5%
95129	-----	6%
95130	-----	1%
95131	-----	2%
95132	-----	5%
95133	-----	4%
95134	-----	1%
95135	-----	1%
95136	-----	6%
95138	-----	1%
95139	-----	2%
95148	-----	3%

3. What is your gender?

Male	-----	45%
Female	-----	55%

4. How often would you say that you visit downtown San Jose?

Frequently	-----	38%
Occasionally	-----	48%
Rarely	-----	12%
Never	-----	2%

5. About how long have you lived in San Jose?

10 years or less-----	26%
11 to 20 years-----	25%
21 to 30 years-----	21%
31 years or more-----	28%

6. What was the last level of school you completed?

Some grade school (1-8)-----	0%
Some high school (9-11)-----	3%
Graduated high school-----	14%
Some college/technical school-----	40%
Graduated college (four years)-----	29%
Post graduate work/ Professional School-----	14%

7. What is your age group?

18-24-----	15%
25-29-----	12%
30-34-----	13%
35-39-----	11%
40-44-----	11%
45-49-----	9%
50-54-----	8%
55-59-----	8%
60-64-----	5%
65 & over-----	8%

8. Please select the category that best describes the ethnic or racial group with which you identify yourself.

Hispanic/Latino-----	22%
African-American-----	3%
Asian/Pacific Islander-----	25%
Caucasian/White-----	46%
Native American/Indian-----	1%
Some other group or identification-----	3%

9. Please indicate your general feelings about outdoor advertising, including billboards, storefront signs, and other signs used for advertising. Use the below scale from 1 to 7, where "1" means you have strongly negative feelings toward outdoor advertising and a "7" means you have strongly positive feelings toward outdoor advertising. You can use any number between one and seven.

MEAN SCORE	STRONGLY NEGATIVE			STRONGLY POSITIVE			
	<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>	<u>5</u>	<u>6</u>	<u>7</u>
4.6-----	2%-----	3%-----	9%-----	34%-----	27%-----	18%-----	7%

10. Next, for each of the following items, please indicate how appropriate you feel it is to have outdoor advertising displayed in the location indicated. Use the below scale from 1 to 7, where "1" means you feel that outdoor advertising on or near that item is "not at all acceptable" and a "7" means you feel that outdoor advertising on or near that item is "completely acceptable." You can use any number between one and seven.

	MEAN SCORE	NOT AT ALL ACCEPT.					COMP. ACCEPT.	
		<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>	<u>5</u>	<u>6</u>	<u>7</u>
[]a. Highways and freeways	4.7	9%	7%	10%	19%	15%	16%	24%
[]b. Office buildings	4.7	4%	7%	12%	21%	22%	15%	19%
[]c. Commercial streets	4.9	2%	6%	10%	19%	25%	20%	19%
[]d. Residential buildings	3.1	26%	18%	18%	15%	10%	7%	6%
[]e. Storefronts	5.4	1%	4%	7%	15%	21%	21%	31%
[]f. Historic buildings	2.9	36%	17%	10%	14%	8%	7%	7%
[]g. Downtown San Jose	5.0	2%	5%	11%	23%	17%	16%	25%
[]h. Mixed-used residential and commercial buildings	4.1	4%	12%	18%	25%	21%	10%	9%

**BLOCK ROTATION INSTRUCTIONS:
ROTATE BLOCKS #1, #2 AND #3 AND THEN CONTINUE WITH BLOCK #4**

BLOCK #1: TRADITIONAL BILLBOARDS FACING FREEWAYS

The following set of images includes billboards shown on local highways and freeways.

(RANDOMIZE Q11, Q12, Q13 AND Q14)

Image #1 – Free-Standing

11. Please indicate your initial reaction to this type of sign: a free-standing billboard facing a freeway. Use the below scale from 1 to 7, where "1" means that type of sign is "not at all acceptable" and a "7" means that type of sign is "completely acceptable." You can use any number between one and seven.

MEAN SCORE	NOT AT ALL ACCEPTABLE					COMPLETELY ACCEPTABLE	
	<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>	<u>5</u>	<u>6</u>	<u>7</u>
4.9	6%	8%	10%	16%	17%	18%	26%

Image #2 – On a Building

12. Please indicate your initial reaction to this type of sign: a billboard on top of a building facing a freeway. Use the below scale from 1 to 7, where “1” means that type of sign is “not at all acceptable” and a “7” means that type of sign is “completely acceptable.” You can use any number between one and seven.

<u>MEAN SCORE</u>	NOT AT ALL ACCEPTABLE						COMPLETELY ACCEPTABLE
	<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>	<u>5</u>	<u>6</u>	<u>7</u>
4.8 -----	6%-----	6%-----	11%-----	17%-----	18%-----	16%-----	25%

Image #3 – Pylon

13. Please indicate your initial reaction to this type of sign: a pylon facing a freeway advertising a shopping center. Use the below scale from 1 to 7, where “1” means that type of sign is “not at all acceptable” and a “7” means that type of sign is “completely acceptable.” You can use any number between one and seven.

<u>MEAN SCORE</u>	NOT AT ALL ACCEPTABLE						COMPLETELY ACCEPTABLE
	<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>	<u>5</u>	<u>6</u>	<u>7</u>
5.9 -----	2%-----	2%-----	5%-----	8%-----	14%-----	16%-----	54%

Image #4 – Multiple Free Standing

14. Please indicate your initial reaction to these types of signs: several free-standing billboards along a freeway. Use the below scale from 1 to 7, where “1” means that type of sign is “not at all acceptable” and a “7” means that type of sign is “completely acceptable.” You can use any number between one and seven.

<u>MEAN SCORE</u>	NOT AT ALL ACCEPTABLE						COMPLETELY ACCEPTABLE
	<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>	<u>5</u>	<u>6</u>	<u>7</u>
5.1 -----	7%-----	5%-----	8%-----	17%-----	12%-----	21%-----	30%

BLOCK #2: SUPERGRAPHICS

The following set of images includes signs that can be superimposed on buildings.

(RANDOMIZE Q15, Q16, AND Q17)

Image #5 – Supergraphic covering windows

15. Please indicate your initial reaction to this type of sign: a sign on the side of a building covering the windows. Use the below scale from 1 to 7, where “1” means that type of sign is “not at all acceptable” and a “7” means that type of sign is “completely acceptable.” You can use any number between one and seven.

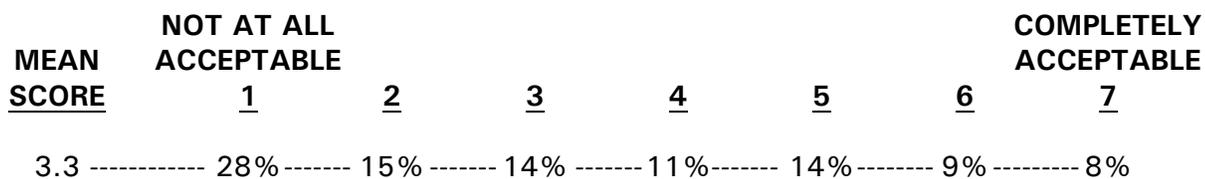


Image #6 – Supergraphic on a Historic Building

16. Please indicate your initial reaction to this type of sign: a sign on the side of a historic building. Use the below scale from 1 to 7, where “1” means that type of sign is “not at all acceptable” and a “7” means that type of sign is “completely acceptable.” You can use any number between one and seven.

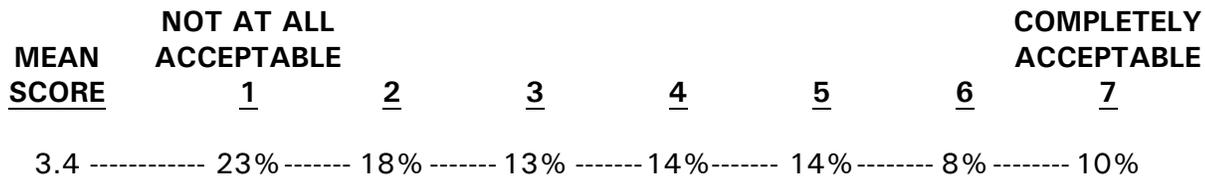


Image #7 – Supergraphic on a Downtown Building

17. Please indicate your initial reaction to this type of sign: a sign on the side of a building that has no windows located in downtown San Jose. Use the below scale from 1 to 7, where “1” means that type of sign is “not at all acceptable” and a “7” means that type of sign is “completely acceptable.” You can use any number between one and seven.



BLOCK #3: TRADITIONAL BILLBOARDS IN DOWNTOWN SAN JOSE

The following set of images includes billboards shown in downtown San Jose.

(RANDOMIZE Q18, Q19, Q20 AND Q21)

Image #8 – On Low Commercial Building

18. Please indicate your initial reaction to this type of sign: a billboard on the side of a three-story commercial building. Use the below scale from 1 to 7, where “1” means that type of sign is “not at all acceptable” and a “7” means that type of sign is “completely acceptable.” You can use any number between one and seven.

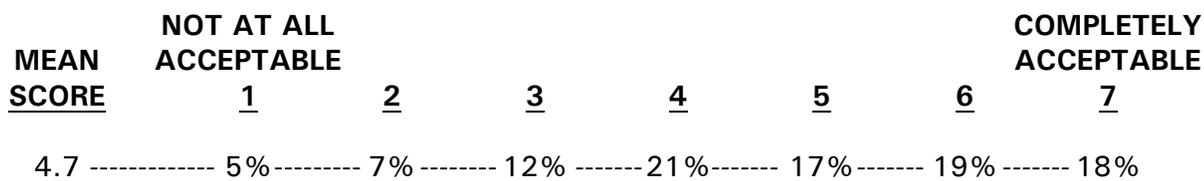


Image #9 – Top of Mixed-Use Commercial/Residential Building

19. Please indicate your initial reaction to this type of sign: a billboard on top of a mixed-use commercial/residential building. Use the below scale from 1 to 7, where “1” means that type of sign is “not at all acceptable” and a “7” means that type of sign is “completely acceptable.” You can use any number between one and seven.

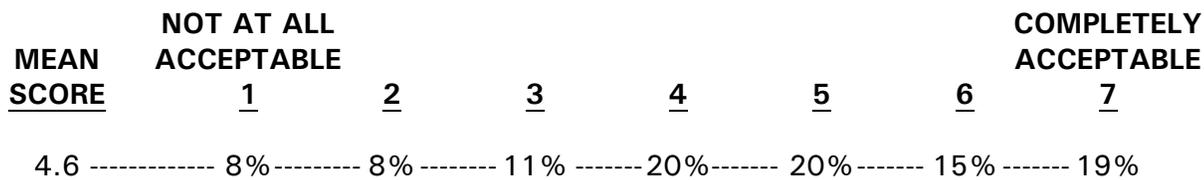


Image #10 – Top of Historic Building

20. Please indicate your initial reaction to this type of sign: a billboard on top of an historic building. Use the below scale from 1 to 7, where “1” means that type of sign is “not at all acceptable” and a “7” means that type of sign is “completely acceptable.” You can use any number between one and seven.

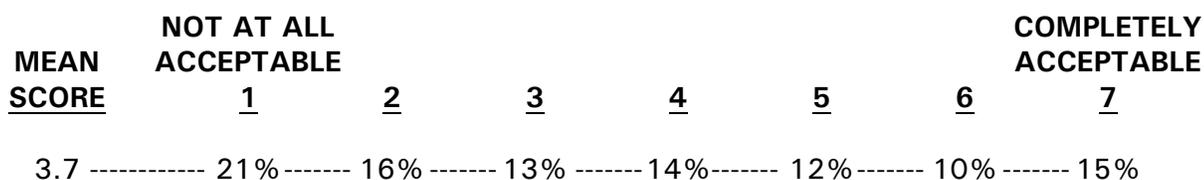


Image #11 – On Parking Structure

21. Please indicate your initial reaction to this type of sign: a billboard on the side of a parking structure. Use the below scale from 1 to 7, where “1” means that type of sign is “not at all acceptable” and a “7” means that type of sign is “completely acceptable.” You can use any number between one and seven.

MEAN SCORE	NOT AT ALL ACCEPTABLE						COMPLETELY ACCEPTABLE
	<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>	<u>5</u>	<u>6</u>	<u>7</u>
4.8 -----	4%-----	9%-----	12%-----	16%-----	21%-----	14%-----	24%

BLOCK #4: SKYLINE SIGNS

Image #12 – Skyline Sign

22. Next you will see an image of a type of sign that can be seen on commercial buildings in San Jose. Please indicate your initial reaction to this type of sign: a sign near the top of a tall commercial building including the name and/or logo of one of the building’s primary tenants. Use the below scale from 1 to 7, where “1” means that type of sign is “not at all acceptable” and a “7” means that type of sign is “completely acceptable.” You can use any number between one and seven.

MEAN SCORE	NOT AT ALL ACCEPTABLE						COMPLETELY ACCEPTABLE
	<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>	<u>5</u>	<u>6</u>	<u>7</u>
6.2 -----	1%-----	2%-----	2%-----	7%-----	10%-----	16%-----	62%

BLOCK #5: ON-SITE AND OFF-SITE SIGNS

Images #13 and #14 – On-site and Off-site Signs on Parking Structure

23. Next you will see two images of the same parking structure, with a billboard in each image. In Image #1 the sign is advertising the parking structure and in Image #2 the sign is advertising something not related to the parking structure. Please indicate if you strongly or somewhat prefer Image #1 or Image #2.

TOTAL PREFER IMAGE #1-----	78%
Strongly prefer image #1 -----	52%
Somewhat prefer image #1-----	26%
TOTAL PREFER IMAGE #2-----	7%
Somewhat prefer image #2-----	4%
Strongly prefer image #2 -----	2%
No preference -----	16%

BLOCK #6: DIGITAL BILLBOARDS AND SIGNS

Now we will ask you some questions about digital billboards and signs. Digital billboards and signs can show static images, or rotate through several different images. Please watch this short 15 second video showing an example of one type of digital billboard.

Images #15 – Video Clip of Digital Freeway Billboard

24. After seeing this video, please indicate how acceptable you think it is to install similar digital billboards and signs in the City of San Jose. Use the below scale from 1 to 7, where “1” means installing digital billboards and signs in San Jose is “not at all acceptable” and a “7” means installing digital billboards and signs in San Jose is “completely acceptable.” You can use any number between one and seven.

<u>MEAN SCORE</u>	NOT AT ALL ACCEPTABLE						COMPLETELY ACCEPTABLE
	<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>	<u>5</u>	<u>6</u>	<u>7</u>
4.2	----- 12%	----- 11%	----- 12%	----- 22%	----- 16%	----- 12%	----- 16%

Next, you will be presented with several pairs of images. One image will show a traditional billboard or sign and one image will show a digital billboard or sign. For each pair, please indicate which image you prefer.

(RANDOMIZE Q25, Q26 AND Q27)

Images #16 and #17 – On Building Low to the Ground in Downtown

25. Please indicate if you strongly or somewhat prefer Image #1 or Image #2.

TOTAL PREFER IMAGE #1	----- 27%
Strongly prefer image #1	----- 13%
Somewhat prefer image #1	----- 14%
TOTAL PREFER IMAGE #2	----- 56%
Somewhat prefer image #2	----- 35%
Strongly prefer image #2	----- 21%
No preference	----- 17%

Images #18 and #19 – Next to the Freeway

26. Please indicate if you strongly or somewhat prefer Image #1 or Image #2.

TOTAL PREFER IMAGE #1----- 38%
 Strongly prefer image #1 ----- 21%
 Somewhat prefer image #1 ----- 18%

TOTAL PREFER IMAGE #2----- 47%
 Somewhat prefer image #2----- 25%
 Strongly prefer image #2 ----- 22%

No preference ----- 15%

Images #20 and #21 – Freeway Pylon

27. Please indicate if you strongly or somewhat prefer Image #1 or Image #2.

TOTAL PREFER IMAGE #1----- 50%
 Strongly prefer image #1 ----- 33%
 Somewhat prefer image #1 ----- 17%

TOTAL PREFER IMAGE #2----- 38%
 Somewhat prefer image #2----- 18%
 Strongly prefer image #2 ----- 20%

No preference ----- 13%

Next, we will ask you a few final questions about some specific digital signs.

(RANDOMIZE Q28, Q29, Q30, Q31 AND Q32)

Image #22 – Free Standing on the Ground

28. Please indicate your initial reaction to this type of sign: a free-standing digital sign low to the ground in downtown San Jose. Use the below scale from 1 to 7, where “1” means that type of sign is “not at all acceptable” and a “7” means that type of sign is “completely acceptable.” You can use any number between one and seven.

MEAN SCORE	NOT AT ALL ACCEPTABLE			COMPLETELY ACCEPTABLE			
	<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>	<u>5</u>	<u>6</u>	<u>7</u>
4.3 -----	8%-----	11% -----	13% -----	23%-----	15%-----	14% -----	16%

Image #23 – Multiple on Commercial Street

29. Please indicate your initial reaction to these types of signs: several free-standing digital signs along a commercial street. Use the below scale from 1 to 7, where “1” means that type of sign is “not at all acceptable” and a “7” means that type of sign is “completely acceptable.” You can use any number between one and seven.

<u>MEAN SCORE</u>	NOT AT ALL ACCEPTABLE						COMPLETELY ACCEPTABLE
	<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>	<u>5</u>	<u>6</u>	<u>7</u>
4.4	7%	13%	13%	17%	19%	13%	17%

Image #24 – Multiple on Commercial Street with Trees

30. Please indicate your initial reaction to these types of signs: several free-standing digital signs along a commercial street. Use the below scale from 1 to 7, where “1” means that type of sign is “not at all acceptable” and a “7” means that type of sign is “completely acceptable.” You can use any number between one and seven.

<u>MEAN SCORE</u>	NOT AT ALL ACCEPTABLE						COMPLETELY ACCEPTABLE
	<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>	<u>5</u>	<u>6</u>	<u>7</u>
4.2	11%	13%	11%	15%	18%	15%	16%

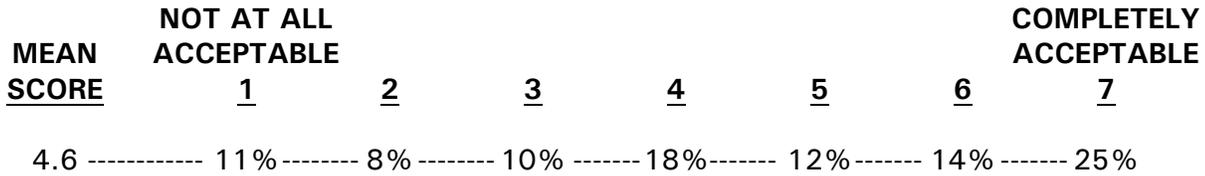
Image #25 – Stadium Digital Sign

31. Please indicate your initial reaction to these types of signs: a large digital sign next to a stadium or arena. Use the below scale from 1 to 7, where “1” means that type of sign is “not at all acceptable” and a “7” means that type of sign is “completely acceptable.” You can use any number between one and seven.

<u>MEAN SCORE</u>	NOT AT ALL ACCEPTABLE						COMPLETELY ACCEPTABLE
	<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>	<u>5</u>	<u>6</u>	<u>7</u>
5.7	2%	3%	6%	9%	13%	25%	42%

Image #26 – Church/Assembly Sign

32. Please indicate your initial reaction to these types of signs: a free-standing digital sign in front of a church or place of worship. Use the below scale from 1 to 7, where “1” means that type of sign is “not at all acceptable” and a “7” means that type of sign is “completely acceptable.” You can use any number between one and seven.



THANK YOU PAGE:

Thank you for completing the survey.

To learn more about the City of San Jose's sign score update, please click here to visit their website.

[\[http://www.sanjoseca.gov/planning/zoning/sign.asp\]](http://www.sanjoseca.gov/planning/zoning/sign.asp)