

2011 Signs Regulations Research

Final Report



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Research Overview

Study Background & Objectives

The City of Calgary's Land Use Bylaw is a tool used by Administration and Council to regulate land use and development within the City's municipal boundaries. The current bylaw, 1P2007, serves as a guiding document (that can be amended by Council) to manage four key areas, two of which include being used to affect the types of communities Calgarians live in by designating the uses and development that may be allowed on each parcel of land and to provide rules to guide uses and development on a parcel. Also contained in this bylaw, are specific rules regarding signage throughout The City of Calgary.

This includes a variety of sign types like road signs, identification signs, advertising signs, and third party advertising. The City of Calgary believes that the current rules for signs are out of context with current sign development and technology.

As such, The City has begun a Sign Regulation and Policy Review that will look to simplify these rules so that Calgary residents and businesses can easily access and understand the policy.

The overarching objective of this research was to gauge general public opinion related to signage in Calgary. Specifically, this survey strived to better understand the following:

- Calgarians general views and perceptions related to signage overall in the City;
- Awareness of signage regulation and evaluating The City's role and responsibility in managing and regulating signage;
- To gauge citizen views and perceptions related to specific sign types in our city;
- To better understand support for digital signage in Calgary; and,
- To gauge support for potential taxation or licensing of digital and third party advertising signage into the future.

Methodology

Focus Groups with Citizens

To better gauge public views about signs in Calgary, a series of focus groups were conducted over a two day period. In total, four focus groups were held in downtown Calgary with over 40 citizens recruited to participate in one of the two hour discussions.

Four sessions were held to discuss a number of common themes and unique points related to each of the following groups; Two groups with those residents who currently live within the “downtown area” and two groups with those who live in surrounding communities. Downtown area residents were defined as those living in the Beltline, Downtown Commercial Core, Cliff Bungalow, Chinatown, Downtown West End, Bankview, Downtown East Village, Eau Claire, Mission, Erlton, and Sunalta.

A recruitment screener was developed to ensure that participants represented a broad spectrum of socio-demographics including:

- Age and gender;
- Household income and highest level of education achieved;
- Views about taxation and The City of Calgary as a whole; and,
- Whether participants live in a single-family home, up to and including fourplexes.

Each focus group consisted of approximately 8-10 participants and lasted between 1 ½ - 2 hours and participants received a \$75 incentive for their participation. Groups were held at a local focus group facility where members of The City’s Project Team were able to observe the sessions through a one-way mirror.

Representative Online Survey

An online survey of 879 Calgarians was conducted using the Ipsos Online Panel from June 7th, 2011 to June 13th, 2011.

The margin of error for the total sample of 879 is + 3.3 percentage points, 19 times out of 20.

- The margin of error by quadrant is as follows:

- Northeast: n=170 (MOE \pm 7.5%)
- Northwest: n=255 (MOE \pm 6.1%)
- Southeast: n=205 (MOE \pm 6.8%)
- Southwest: n=249 (MOE \pm 6.2%)



Final data was weighted to ensure the overall sample's quadrant and age/gender composition reflects that of the actual Calgary population aged 18 or older according to 2006 Federal Census data.

Key Findings

Signage is not a key top of mind issue for Calgarians.

In both conversations with research participants and the quantitative online survey, few, if any, respondents outright state that local signage is a top of mind issue that requires local leaders to address immediately. Moreover, when asked to identify key driving distractions, signage is not listed as a significant issue in our city.

The reason? For many, signs in Calgary are simply “part of the landscape.”

“You know what; it’s just something that we see so often, I don’t really think about it.”

(Focus Group Participant)

“Sure, there are a lot of signs everywhere. But that’s not any different from other places I’ve visited either.” (Focus Group Participant)

Participants openly discuss that they are accustomed to seeing many and all types of signs throughout the city, that they’ve accepted them as is. That said, when questioned directly about the number and types of signage in Calgary, results highlight a more divided populous. In fact, close to half of Calgarians (48%) say that there are “too many signs” in the city. And specifically, this group of citizens says that there are too many *temporary mobile signs (88%), third party digital signs (75%), third party billboards (65%) and community temporary signs (43%)*.

Signage regulation is the assumed responsibility of The City; and most are generally satisfied with its performance.

A majority of Calgarians believe that The City of Calgary current regulates signage (83%), though for many in our discussion groups, this was simply an assumption.

Regardless of their certainty as to whom actually regulates signage, there is a strong belief among Calgarians that it's important for

"I'm guessing that it's The City." (Focus Group Participant)

"I don't really know for sure...The City?" (Focus Group Participant)

"It's got to be The City of Calgary." (Focus Group Participant)

The City to play an active regulation role (88%), with nearly half (48%) who say that it is "very important."

Though residents are more divided in their views about The City's performance in regulating signs today. Specifically, half say that The Corporation is doing a "good job"; while 37% provide a "poor" rating. Those residents who say that there are too many signs in Calgary are less happy with The City's overall signs regulation performance.

Citizens express concern with the number of temporary mobile signs; though are less concerned about temporary A-board and community temporary signs.

As part of the signage online survey, respondents were asked to select one of two images depicting various sign scenarios in Calgary, focused primarily on temporary and digital signs.

In scenario A, respondents were given two images; one depicting a pedestrian corridor with A-board signs and another picture of a similar corridor with mobile signs. Overwhelmingly, Calgarians prefer

“It just looks so clutter and tacky.” (Focus Group Participant)

“This one [A-boards] is much better. It makes the neighbourhood look less cluttered and just keeps the area looking orderly.” (Focus Group Participant)

the temporary A-board signs (91%). The reasons? Mostly aesthetics of the neighbourhood and mobility. There was a sense from some in this research that the larger temporary mobile signs on a pedestrian corridor presented a “cluttered” look that was seen to be generally unappealing.

When asked to evaluate the full landscape of signage, temporary mobile signs are the most frequently identified as having “too many” (69%). This is even higher among Calgarians who more broadly say that there are too many signs in Calgary (88%). That said, Calgarians openly discussed the benefits and drawbacks of temporary signage, there is a general acceptance that these types of signs must exist in Calgary. Some comments included:

(Positive) “It gets the advertising out but it’s not overwhelming.”

(Positive) “I like them because they give us a little information and they aren’t there forever.”

(Less Positive) “They are not updated frequently enough. They need to be taken down if they are expired.”

Calgarians are divided about digital signage brightness and are less positive about having more digital signage installed throughout the city.

In both discussions and our online survey, Calgarians echo concerns with some of the digital signs found throughout the city. With close to six-in-ten (58%) who say that they are concerned about the brightness of these signs, most of the issues are cited in evenings from specific signs at specific landmarks.

“That sign at [cited intersection]. It’s blinding at night. It’s just way too bright.”

(Focus Group Participant)

“I’d say that some of those [digital] signs are really too distracting when you’re driving in the dark. It’s blinding almost.” (Focus Group Participant)

There is generally little support among Calgarians for increasing the number of digital signs in Calgary; a minority (39%) is in support, with only 6% “strongly support.” The question in the online survey was posed more broadly to understand general acceptance of these signs, though focus group discussions honed in on specific locations, where participants were more receptive to their placement. These included vehicular corridors and for a handful of participants, along pedestrian corridors like Stephen Avenue. Some spoke quite passionately about the impact of digital signs in creating “urban vibrancy”, though these participants were a minority in the broader context of this work.

The key concern, regardless of their placement, relates to the brightness of the signs as a potential driving distraction at night.

“I’d be fine with them [digital signs] if they weren’t near my house.” (Focus Group Participant)

“If you put them somewhere like Stephen Avenue, I could see that working. Make it like a Times Square in NYC. Bright. Vibrant. I enjoyed it when I was there.” (Focus Group Participant)

When asked, Calgarians are also strongly in favour of a tax or license fee on a landowner that wanted

to install a digital or conventional billboard on their property, with the caveat that money collected from such a program could be designated to fund other City of Calgary Services (e.g. arts and culture, recreation, parks) or be designated to general revenue to offset property taxes.

Detailed Research Findings

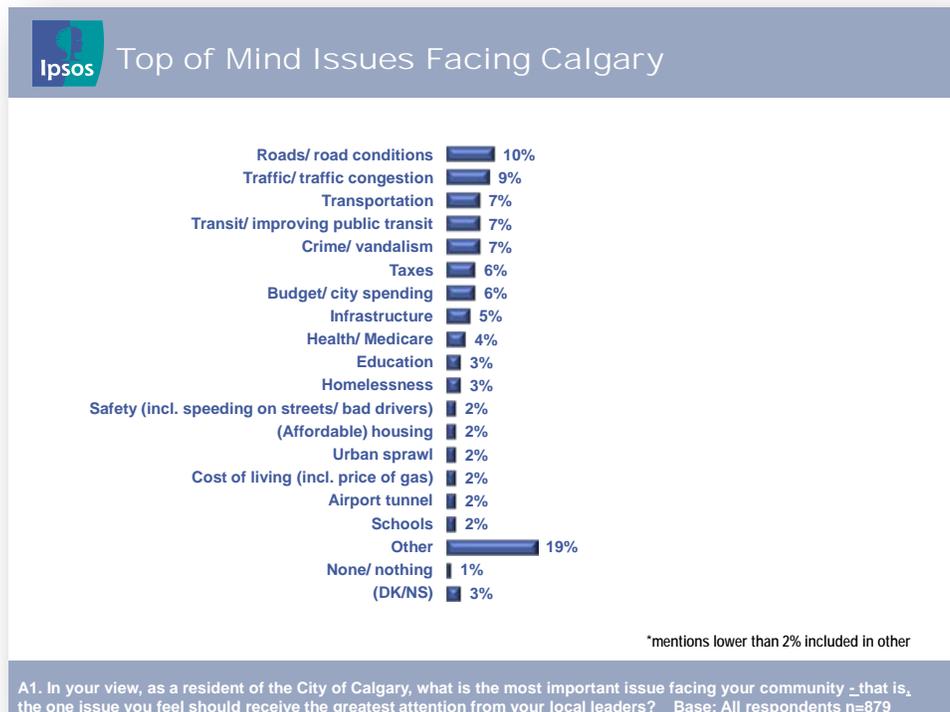
Issues Facing Calgary

Top of Mind Issues Facing Calgary

Local signage not a top of mind issue among Calgarians.

When asked to provide top of mind issues (the most important issues facing the community), Calgarians provide mentions that mirror many other studies conducted on behalf of The City of Calgary and other municipalities in Canada.

Mobility issues (roads, traffic, transportation, and transit) typically dominate the list of most needed attention by local leaders; results from this study highlight the same story. Among all mentions provided by respondents, signage doesn't rank among the top fifteen items.



Respondents more likely to feel that Roads are the most important issue facing Calgary include:

- Residents in the **Northeast quadrant** (16%) compared to those living in the Northwest quadrant (6%).
- Residents who live in a **maturing community** (9%), **established community** (12%) or **new community** (17%) compared to those who live in the inner city (3%).

Respondents more likely to feel that Traffic/Traffic Congestion is the most important issue facing Calgary include:

- Residents in the **Southwest quadrant** (14%) compared to those living in the Southeast quadrant (4%), Northwest quadrant (7%) or Northeast quadrant (6%).

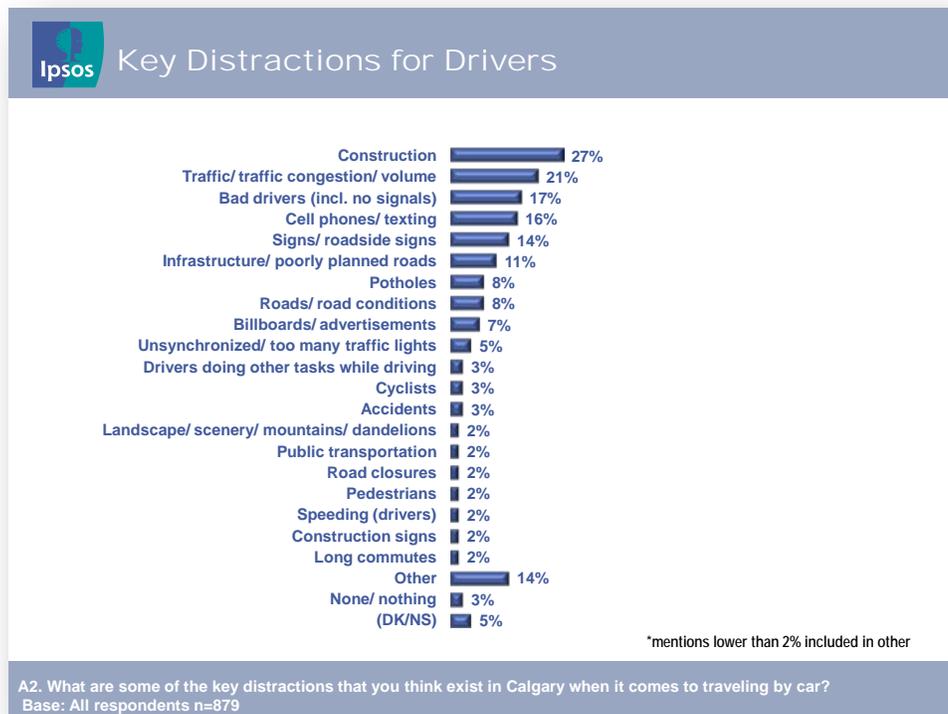
Respondents more likely to feel that Crime/Vandalism is the most important issue facing Calgary include:

- Respondents who have an **education level of high school or less** (15%) compared to those with some post secondary (5%) or who have completed university (5%).

Key Distractions for Drivers

Signage a key top of mind driving distraction for a minority of citizens.

Respondents were asked to provide a list (open-ended) of key distractions when traveling by car throughout Calgary. While “signs/roadside signs” are mentioned by 14% of respondents, other more frequently mentioned distractions include *construction (27%), traffic/traffic congestion/volume (21%), bad drivers (17%), and cell phones/texting (16%).*



Respondents more likely to feel that Traffic/Traffic Congestion/Volume is a key distraction to drivers in Calgary include:

- Calgarians who are **aged 18 to 34** (26%) compared to those who are aged 35 to 54 (16%).
- Residents who live in a **maturing community** (22%), **established community** (25%) or **new community** (23%) compared to those who live in the inner city (11%).

Respondents more likely to feel that Bad Drivers are a key distraction to drivers in Calgary include:

- Residents who live in a **maturing community** (24%) compared to those who live in an established community (14%) or new community (14%).

Respondents more likely to feel that Cell Phones/Texting is a key distraction to drivers in Calgary include:

- Calgarians who are **aged 18 to 34** (22%) compared to those who are aged 55 and older (12%).
- Residents who live in a **new community** (22%) compared to those who live in an established community (11%).

Respondents more likely to feel that Signs/Roadside Signs are a key distraction to drivers in Calgary include:

- Calgarians who have **3 or more vehicles in their household** (22%) compared to those with 2 vehicles (11%).
- Citizens who feel that The City of Calgary is doing a **poor job regulating signage** (23%) compared to those who feel that The City of Calgary is doing a good job regulating signage (10%).
- Calgarians who feel that it is **important to regulate signage** (16%) compared to those who do not feel that it is important to regulate signage (2%).

Respondents more likely to feel that Road/Road Conditions are a key distraction to drivers in Calgary include:

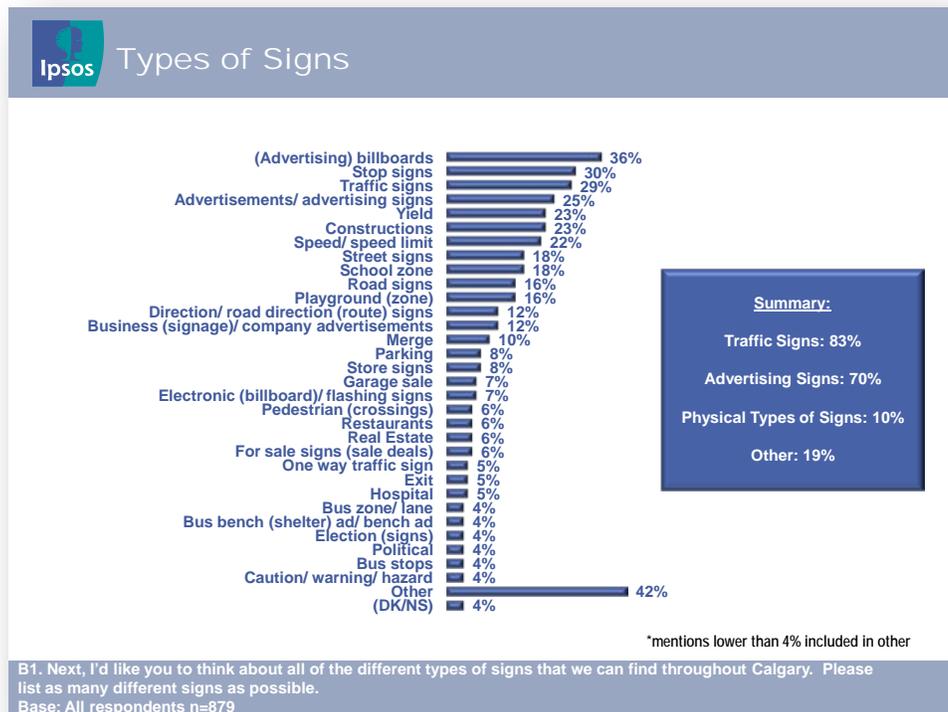
- Calgarians who feel that it is **important to regulate signage** (8%) compared to those who do not feel that it is important to regulate signage (0%).

Signage in Calgary

Types of Signs

Traffic signs are the most frequently recalled types of signs; digital signage as a stated mention is not top of mind.

In an effort to better understand the landscape of memorable/visible signage in Calgary, respondents were asked to provide a list of as many signs as possible that can be found throughout the city. Overall, 83% of all provided responses related to traffic signs, while 70% of mentions related to some form of advertising (*note: participants were asked to provide as multiple responses; percentages will add to more than 100%*). The chart below details the verbatim mentions provided by respondents, including a collapsed summary of the items (box contained within the graphic).



Respondents more likely to mention a Traffic Sign include:

- Citizens who feel that The City of Calgary is doing a **good job regulating signage** (88%) compared to those who feel that The City of Calgary is doing a poor job regulating signage (81%).

Respondents more likely to mention an Advertising Sign include:

- Residents in the **Southeast quadrant** (78%) compared to those living in the Southwest quadrant (68%) or Northeast quadrant (62%).
- Respondents who **are concerned about digital signage** (74%) compared to those who are not concerned about digital signage (64%).
- Residents who **oppose more digital signage** (74%) compared to those who support more digital signage (63%).

Respondents more likely to mention a Physical type of Sign include:

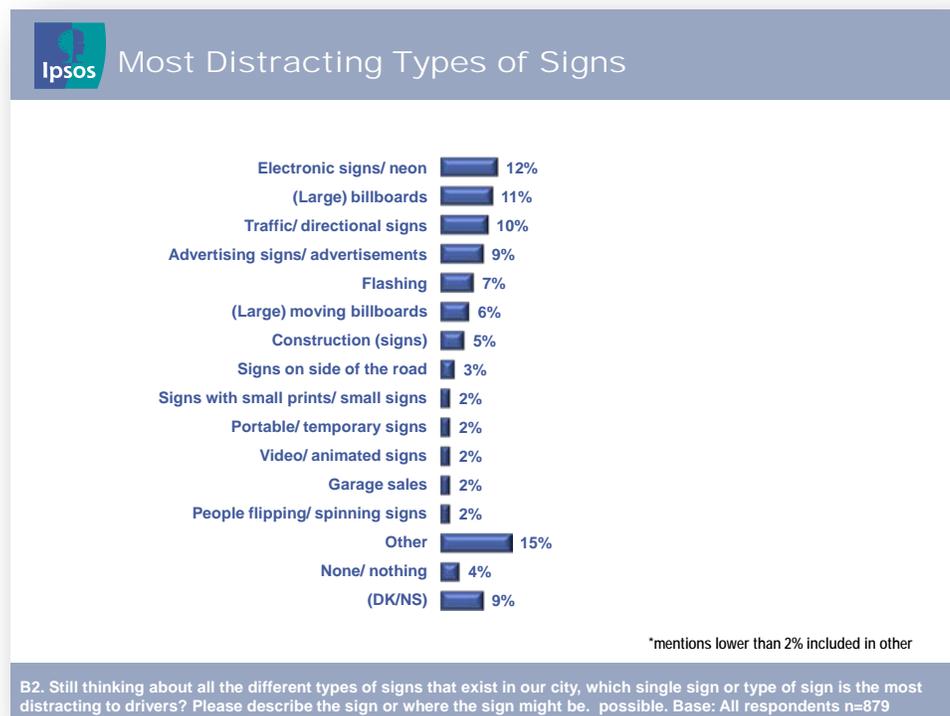
- Respondents who **are concerned about digital signage** (13%) compared to those who are not concerned about digital signage (5%).
- Residents who **oppose more digital signage** (13%) compared to those who support more digital signage (5%).

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Most Distracting Types of Signs

Top of mind, “electronic signs/neon signs” are named as the most distracting to drivers.

Respondents were asked to list top of mind, all the types of signs that are seen to provide a distraction to Calgary drivers.



Respondents more likely to feel that Electronic Signs/Neon Signs are the most distracting type of sign to drivers include:

- Calgaryans who are **aged 18 to 34** (14%) or **35 to 54** (14%) compared to those who are aged 55 and older (7%).
- Respondents who **are concerned about digital signage** (18%) compared to those who are not concerned about digital signage (4%).
- Residents who **oppose more digital signage** (17%) compared to those who support more digital signage (4%).

Respondents more likely to feel that Large Billboards are the most distracting type of sign to drivers include:

- Residents who live in an **apartment/condo with 6 or more units** (18%) compared to those who live in a single-detached house (9%).

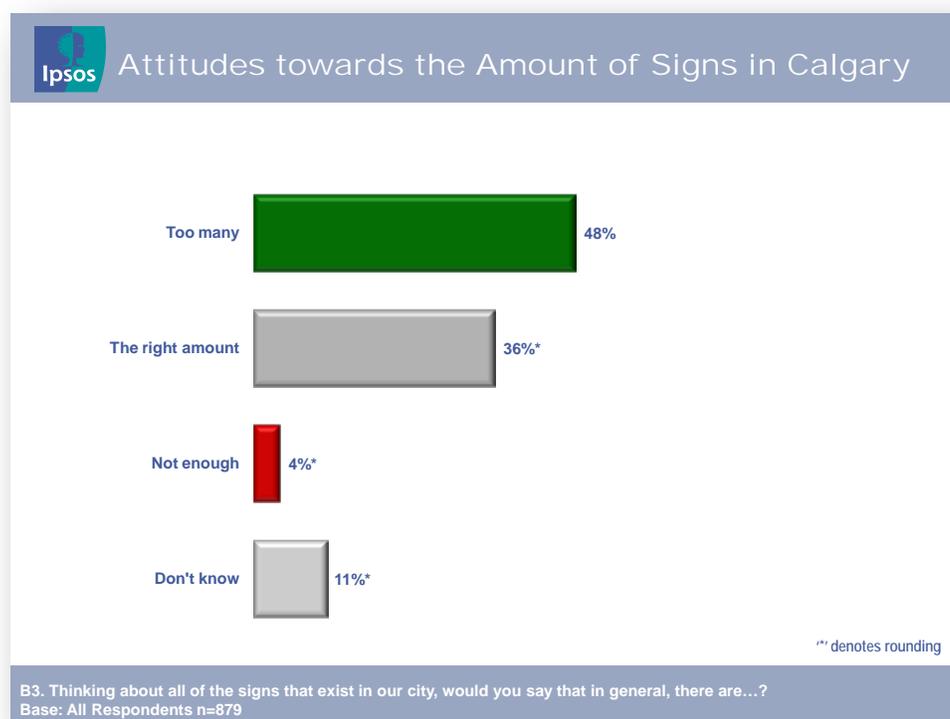
Respondents more likely to feel that Advertising Signs/Advertisements are the most distracting type of sign to drivers include:

- Residents who have lived in Calgary for **less than 5 years** (15%) compared to those who have lived in Calgary for 5 to 10 years (4%).

Attitudes towards the Amount of Signs in Calgary

Just under half of Calgarians say that there are too many signs in Calgary.

Top of mind, 48% of Calgarians say that there are “too many” signs in Calgary, while 36% say that there is just the “right amount.” It’s important to highlight however that one-in-ten (11%) say that they don’t know, which echoes focus group findings for this research as well.



Respondents more likely to feel that there are too many signs that exist in Calgary include:

- Calgarians who are **aged 55 and older** (56%) compared to those who are 18 to 34 (40%).
- Citizens who feel that The City of Calgary is doing a **poor job regulating signage** (83%) compared to those who feel that The City of Calgary is doing a good job regulating signage (28%).
- Calgarians who feel that it is **important to regulate signage** (51%) compared to those who do not feel that it is important to regulate signage (29%).
- Respondents who are **concerned about digital signage** (60%) compared to those who are not concerned about digital signage (32%).
- Residents who **oppose more digital signage** (62%) compared to those who support more digital signage (26%).

Respondents more likely to feel that there are the right amount of signs that exist in Calgary include:

- Calgarians who are **aged 18 to 34** (45%) or **35 to 54** (35%) compared to those who are aged 55 and older (27%).
- Residents who have lived in Calgary for **less than 5 years** (49%) compared to those who have lived in Calgary for over 10 years (33%).
- Citizens who feel that The City of Calgary is doing a **good job regulating signage** (58%) compared to those who feel that The City of Calgary is doing a poor job regulating signage (9%).
- Respondents who **are not concerned about digital signage** (48%) compared to those who are concerned about digital signage (28%).
- Residents who **support more digital signage** (52%) compared to those who oppose more digital signage (27%).

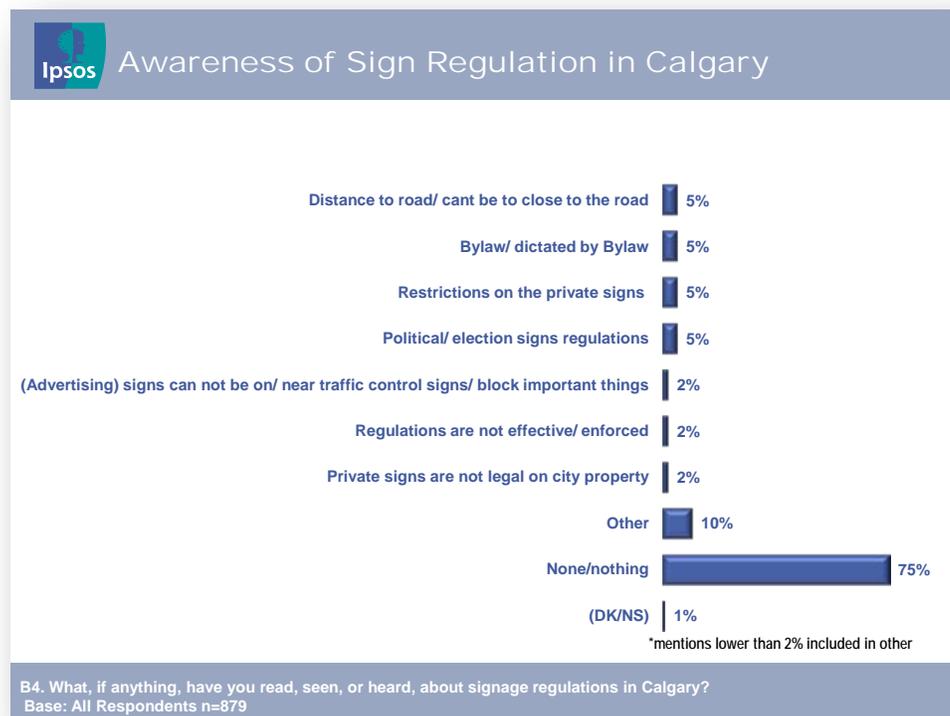
Respondents more likely to feel that there are not enough signs that exist in Calgary include:

- Calgarians who have **3 or more vehicles in their household** (10%) compared to those with 1 vehicle (4%) or 2 vehicles (3%).

Awareness of Sign Regulations

Calgarians are generally unaware of sign regulations in Calgary.

Three-quarters of Calgarians could not provide a response or said “none/nothing” when asked to describe anything that they have read, seen, or heard anything about signage regulation in Calgary.



Respondents more likely to have read, seen, or heard about Restrictions on Private Signs (incl. garage sale signs) include:

- Calgarians who are **aged 55 and older** (8%) or **35 to 54** (7%) compared to those who are aged 18 to 34 (0%).

Respondents more likely to have read, seen, or heard about Political/Election Signs Regulations include:

- Residents in the **Southeast quadrant** (10%) compared to those living in the Southwest quadrant (4%) or Northeast quadrant (3%).

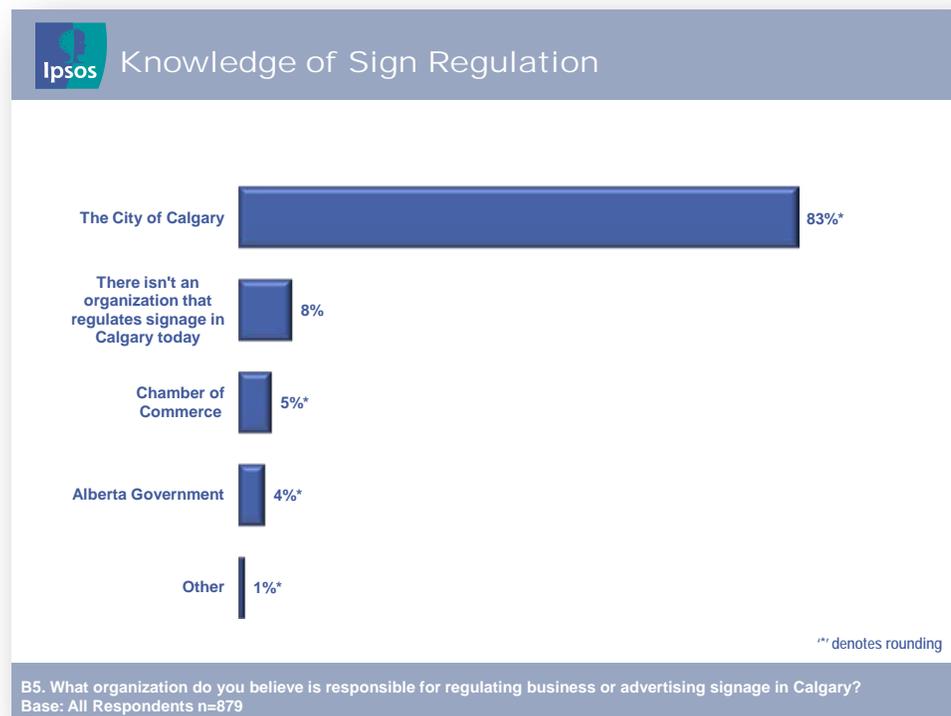
Respondents more likely to have read, seen, or heard about nothing include:

- Calgarians who are **aged 18 to 34** (89%) compared to those who are aged 35 to 54 (70%) or 55 and older (65%).
- Residents who have lived in Calgary for **less than 5 years** (88%) or for **5 to 10 years** (85%) compared to those who have lived in Calgary for over 10 years (71%).
- Residents who **support more digital signage** (80%) compared to those who oppose more digital signage (72%).
- Respondents who **support a fee/levy/tax** (77%) compared to those who oppose a fee/levy/tax (67%).

Knowledge of Sign Regulations

Calgarians generally assume that The City of Calgary regulates signage in the City.

When asked to select one organization from a list of four, a majority (83%) say that it is The City of Calgary who is responsible for signage regulations in our communities.



Respondents more likely to think that The City of Calgary is responsible for regulating signage in Calgary include:

- Calgarians who are **aged 55 and older** (92%) compared to those who are aged 18 to 34 (75%) or 35 to 54 (84%). Additionally, between those **aged 35 to 54** (84%) compared to those who are aged 18 to 34 (75%).
- Calgarians who have **3 or more vehicles in their household** (90%) compared to those with 1 vehicle (80%).

Respondents more likely to think that there isn't an organization responsible for regulating signage in Calgary include:

- Calgarians who are **aged 18 to 34** (12%) compared to those who are aged 55 and older (4%).

- Residents who live in an **established community** (11%) compared to those who live in a maturing community (4%).

Respondents more likely to think that the Chamber of Commerce is responsible for regulating signage in Calgary include:

- Residents who have lived in Calgary for **less than 5 years** (11%) compared to those who have lived in Calgary for 5 to 10 years (2%).
- Calgarians who have **1 vehicle in the household** (8%) compared to those who have 2 vehicles in the household (2%).

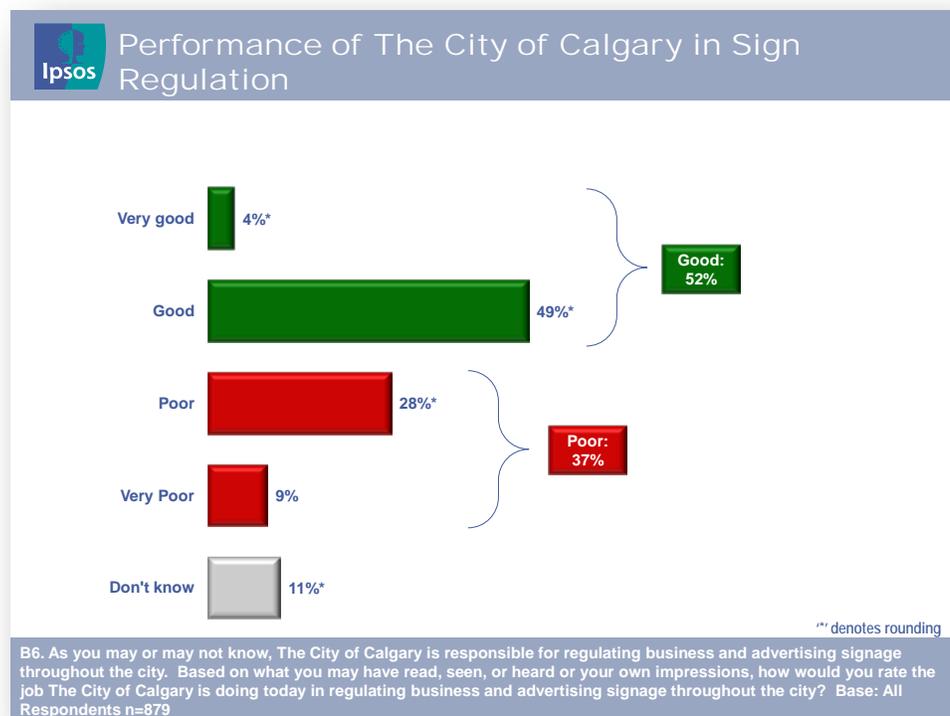
Respondents more likely to think that the Alberta Government is responsible for regulating signage in Calgary include:

- Calgarians who feel that it is **not important to regulate signage** (10%) compared to those who do feel that it is important to regulate signage (3%).

Performance of The City of Calgary in Sign Regulation

A majority rate The City's signage regulation performance as good.

To better understand citizen views related to perceptions about how The City regulates signage, respondents were asked to rate The Corporation on a four-point scale. Overall, just over half (52%) say that The City is doing a good job of managing signage, though the bulk of these individuals are in the second box, indicating perhaps that Calgarians are not confident or do not fully understand the area as much as they could.



Respondents more likely to feel that The City of Calgary is doing a very good job in regulating signage include:

- Calgarians who feel that there is the **right amount of signs in Calgary** (9%) compared to those who feel that there are too many signs in Calgary (0%).

Respondents more likely to feel that The City of Calgary is doing a good job in regulating signage include:

- Calgarians who feel that there are the **right amount of signs in Calgary** (74%) compared to those who feel that there are too many signs in Calgary (31%).
- Respondents who **are not concerned about digital signage** (59%) compared to those who are concerned about digital signage (41%).
- Residents who **support more digital signage** (62%) compared to those who oppose more digital signage (41%).

Respondents more likely to feel that The City of Calgary is doing a poor job in regulating signage include:

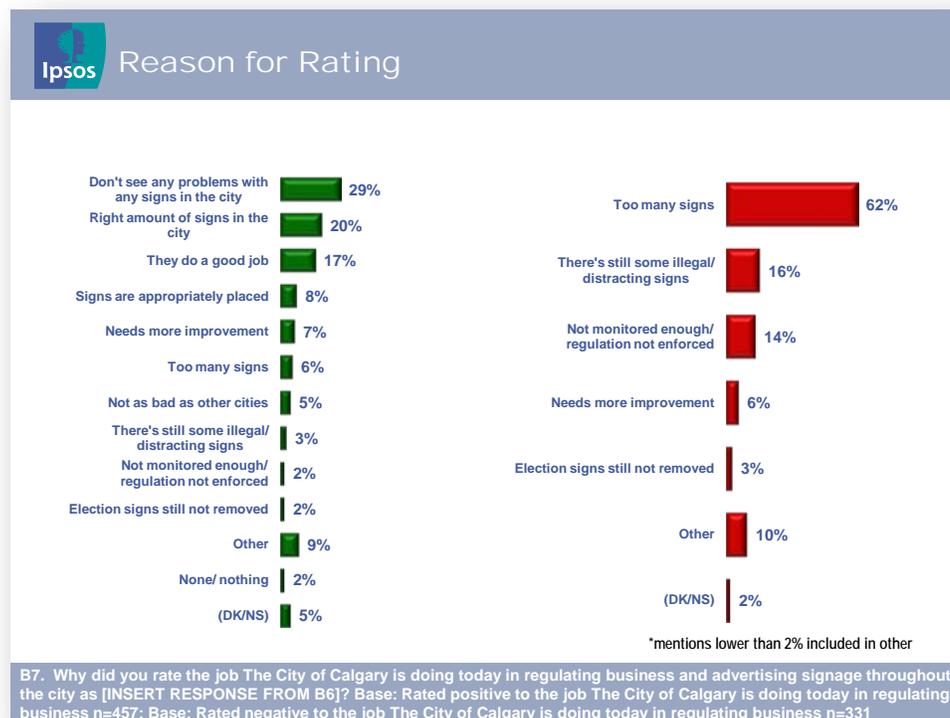
- Calgarians who are **aged 55 and older** (33%) or **35 to 54** (31%) compared to those who are aged 18 to 34 (19%).
- Residents who live in an **apartment/condo with 6 or more units** (33%) compared to those who live in a semi-detached house (19%).
- Calgarians who feel that there are **too many signs in Calgary** (48%) compared to those who feel that there are the right amount of signs in Calgary (7%).
- Calgarians who feel that it is **important to regulate signage** (30%) compared to those who do not feel that it is important to regulate signage (16%).
- Respondents who **are concerned about digital signage** (34%) compared to those who are not concerned about digital signage (19%).
- Residents who **oppose more digital signage** (35%) compared to those who support more digital signage (16%).

Respondents more likely to feel that The City of Calgary is doing a very poor job in regulating signage include:

- Calgarians who feel that there are **too many signs in Calgary** (16%) compared to those who feel that there are the right amount of signs in Calgary (3%).
- Residents in the **Southeast quadrant** (14%) compared to those living in the Northwest quadrant (7%).

Reason for Rating of City Performance

General acceptance of how The City regulates signage or saying that there are enough signs are key drivers for positive ratings about The City’s performance. Conversely, those who provide a negative rating are more likely to attribute it to an over abundance of signs in the community.



Respondents more likely to state that they ‘don’t see any problems with any signs in the city’ (rated positively) include:

- Respondents who have **completed university** (36%) compared to those who have an education level of high school or less (18%).
- Calgarians who feel that there are the **right amount of signs in Calgary** (36%) compared to those who feel that there are too many signs in Calgary (15%).
- Respondents who **are not concerned about digital signage** (36%) compared to those who are concerned about digital signage (22%).
- Residents who **support more digital signage** (36%) compared to those who oppose more digital signage (23%).

Respondents more likely to state that ‘they do a good job’ (rated positively) include:

- Residents who live in an **inner city** (21%) or **established community** (23%) compared to those who live in a maturing community (9%).

Respondents more likely to state that it 'needs more improvement' (rated positively) include:

- Calgarians who feel that there are **too many signs in Calgary** (18%) compared to those who feel that there are the right amount of signs in Calgary (2%).
- Respondents who **are concerned about digital signage** (13%) compared to those who are not concerned about digital signage (2%).

Respondents more likely to state that there are 'too many signs' (rated negatively) include:

- Respondents who **support a fee/levy/tax** (65%) compared to those who oppose a fee/levy/tax (48%).

Respondents more likely to state that 'there's still some illegal/ distracting signs' (rated negatively) include:

- Residents who live in an **inner city community** (28%) compared to those who live in a new community (7%).
- Respondents who have **completed university** (18%) or who have **some post secondary** (18%) compared to those who have an education level of high school or less (3%).

Respondents more likely to state that it 'needs more improvement' (rated negatively) include:

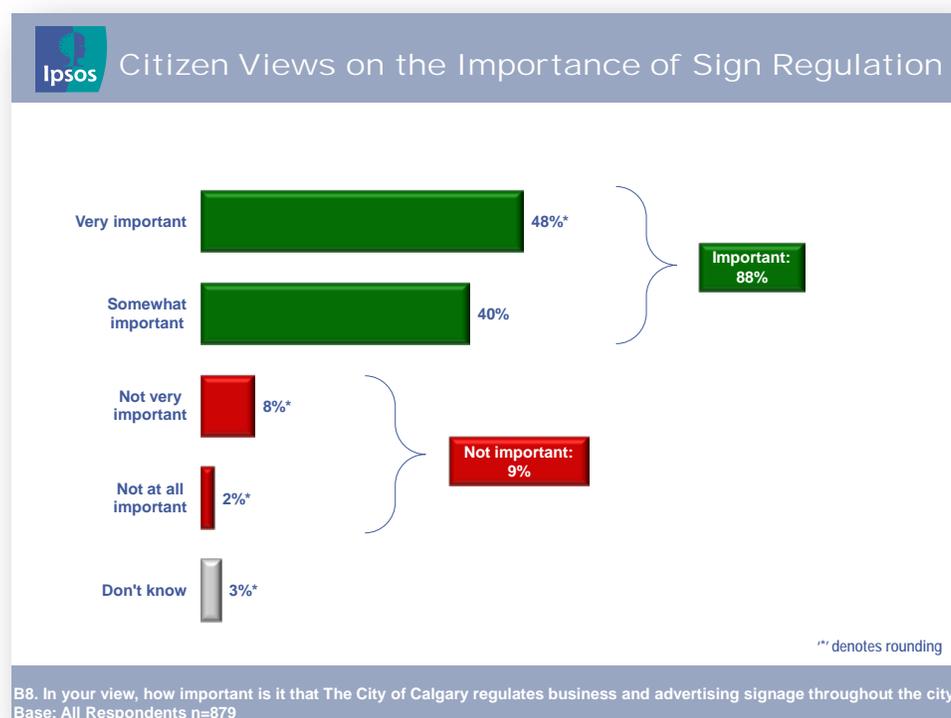
- Residents in the **Northeast quadrant** (11%) or **Southeast quadrant** (11%) compared to those living in the Northwest quadrant (0%).
- Residents who live in a **new community** (11%) compared to those who live in an inner city community (0%).
- Calgarians who have **3 or more vehicles in their household** (15%) compared to those with 2 vehicles (3%).

Citizen Views on the Importance of Sign Regulation

There is general acceptance among Calgarians that regulation of signage should exist.

Respondents were asked their views about whether The City should be regulating signage in Calgary.

A strong majority (88%) say that it is important, with nearly half (48%) who say that it is “very important.”



Respondents more likely to feel that it is very important that The City of Calgary regulate business and advertising signage throughout the city include:

- Residents in the **Southwest quadrant** (56%) compared to those living in the Northeast quadrant (38%).
- Calgarians who are **aged 55 and older** (64%) or **35 to 54** (49%) compared to those who are aged 18 to 34 (36%). Additionally, between those **aged 55 and older** (64%) compared to those who are aged 35 to 54 (49%).
- Residents who live in an **established community** (53%) or **new community** (54%) compared to those who live in a maturing community (40%).
- Calgarians who have **1 vehicle in the household** (57%) compared to those who have 2 vehicles in the household (42%).

- Calgarians who feel that there are **too many signs in Calgary** (57%) compared to those who feel that there are the right amount of signs in Calgary (44%).
- Citizens who feel that The City of Calgary is doing a **poor job regulating signage** (58%) compared to those who feel that The City of Calgary is doing a good job regulating signage (48%).
- Respondents who **are concerned about digital signage** (56%) compared to those who are not concerned about digital signage (38%).
- Residents who **oppose more digital signage** (53%) compared to those who support more digital signage (41%).
- Respondents who **support a fee/levy/tax** (52%) compared to those who oppose a fee/levy/tax (32%).

Respondents more likely to feel that it is somewhat important that The City of Calgary regulate business and advertising signage throughout the city include:

- Residents in the **Northeast quadrant** (47%) compared to those living in the Northwest quadrant (35%).
- Calgarians who are **aged 18 to 34** (46%) or **35 to 54** (40%) compared to those who are aged 55 and older (31%).
- Calgarians who have **2 vehicles in the household** (44%) compared to those who have 1 vehicle in the household (33%).
- Respondents who **support a fee/levy/tax** (51%) compared to those who oppose a fee/levy/tax (38%).

Respondents more likely to feel that it is not very important that The City of Calgary regulate business and advertising signage throughout the city include:

- Residents who live in a **semi-detached house** (14%) compared to those who live in an apartment/condo with 6 or more units (3%).

Evaluating Specific Signage Types in Calgary

Citizen Views on the Importance of Sign Regulation

It is seen by many that there are too many temporary mobile signs in Calgary.

Ipsos Types of Signs



A This is a fascia sign or wall sign.
It is a sign that is affixed directly to the wall of the building where the business is located. It is usually directly above the business for a multi-tenant building.



B This is a freestanding identification sign or ground sign.
This sign is freestanding and not attached to a building. The sign is meant to identify a tenant or tenants that are located on the site. The position of the sign is close to the roadway in order for the businesses to have some sign visibility for the traveling public.



C This is a community temporary sign.
This sign is a structure that is easily movable and meant to occupy a space on a temporary basis.
These are NOT meant for businesses, but are to advertise community events and information.



D This is a temporary mobile sign.
This sign is a structure that is easily movable and meant to occupy a site on a temporary basis to advertise business activities or sales events.
These are not the same as Community signs that you see in your neighbourhood. These are specific to a business.



E This is a temporary A-board sign.
These signs are easily movable signs that are typically used to identify a business and/or advertise sales/events. They are generally located in areas with higher pedestrian activity as they tend to be smaller than mobile signs.



F These are window identification signs.
The purpose of window signs is that they allow for short term messages for events or sales.

They are also used to expand the amount of total signage available for business.

Ipsos Types of Signs (continued)



G These are examples of electronic message signs.
This sign communicates information using electronic technology such as LED lights or TV screens.
These signs advertise products or services which typically occur on the same property where the sign is located.



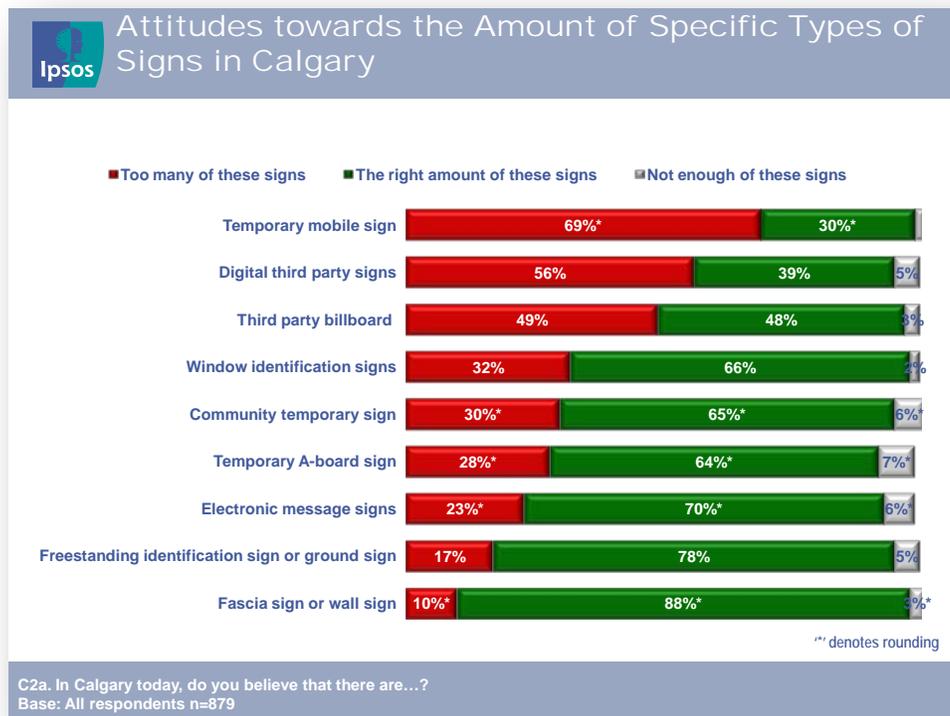
I These are examples of digital third party signs.
These signs present information, advertising and information on a digital screen that changes, or moves.
It does not always advertise specifically for the business where the sign is located, but for any business that wishes to purchase advertising using this type of sign.
Some people might describe them as a large television style screen showing advertising for different companies.



J This is a third party billboard.
This sign may be stationary or some versions rotate and show up to three different advertisements every few seconds.



K They are typically along roadways and communicate advertising for a business or product not located on the same property as the sign.



Attitudes towards the Amount of Specific Types of Signs in Calgary

Sign Type	Total	Calgarians who feel there are too many signs in Calgary
Temporary mobile sign	69%	88%
Digital third party signs	56%	75%
Third party billboard	49%	65%
Window identification signs	32%	38%
Community temporary sign	30%	43%
Temporary A-board sign	28%	38%
Electronic message signs	23%	39%
Freestanding identification sign or ground sign	17%	29%
Fascia sign or wall sign	10%	15%

C2a. In Calgary today, do you believe that there are...?
Base: All respondents n=879

Respondents more likely to feel that there are too many Temporary Mobile Signs include:

- Residents in the **Southeast quadrant** (76%) compared to those living in the Northeast quadrant (63%).
- Residents who have lived in Calgary for **over 10 years** (71%) compared to those who have lived in Calgary for less than 5 years (55%).
- Calgarians who have **some post secondary** (72%) compared to those who have an education level of high school or less (60%).
- Citizens who feel that The City of Calgary is doing a **poor job regulating signage** (89%) compared to those who feel that The City of Calgary is doing a good job regulating signage (57%).
- Calgarians who feel that it is **important to regulate signage** (71%) compared to those who do not feel that it is important to regulate signage (48%).
- Respondents who **are concerned about digital signage** (77%) compared to those who are not concerned about digital signage (57%).
- Residents who **oppose more digital signage** (78%) compared to those who support more digital signage (55%).

Respondents more likely to feel that there are the right amount of Temporary Mobile Signs include:

- Residents in the **Northeast quadrant** (35%) compared to those living in the Southeast quadrant (23%).
- Citizens who feel that The City of Calgary is doing a **good job regulating signage** (41%) compared to those who feel that The City of Calgary is doing a poor job regulating signage (10%).
- Calgarians who feel that it is **not important to regulate signage** (48%) compared to those who do feel that it is important to regulate signage (28%).
- Respondents who **are not concerned about digital signage** (41%) compared to those who are concerned about digital signage (22%).
- Residents who **support more digital signage** (42%) compared to those who oppose more digital signage (22%).

Respondents more likely to feel that there are too many Digital Third Party Signs include:

- Calgarians who are **aged 55 and older** (64%) compared to those who are 18 to 34 (50%).
- Respondents who have a **household income that is under \$60,000** (63%) compared to those who have a household income that is over \$120,000 (50%).
- Citizens who feel that The City of Calgary is doing a **poor job regulating signage** (74%) compared to those who feel that The City of Calgary is doing a good job regulating signage (46%).
- Calgarians who feel that it is **important to regulate signage** (58%) compared to those who do not feel that it is important to regulate signage (35%).
- Respondents who **are concerned about digital signage** (75%) compared to those who are not concerned about digital signage (29%).
- Residents who **oppose more digital signage** (75%) compared to those who support more digital signage (26%).

Respondents more likely to feel that there are just the right amount of Digital Third Party Signs include:

- Respondents who have a **household income that is over \$120,000** (46%) compared to those who have a household income that is under \$60,000 (33%).
- Citizens who feel that The City of Calgary is doing a **good job regulating signage** (47%) compared to those who feel that The City of Calgary is doing a poor job regulating signage (24%).
- Calgarians who feel that it is **not important to regulate signage** (58%) compared to those who do feel that it is important to regulate signage (37%).
- Respondents who **are not concerned about digital signage** (62%) compared to those who are concerned about digital signage (23%).
- Residents who **support more digital signage** (62%) compared to those who oppose more digital signage (24%).

Respondents more likely to feel that there are not enough Digital Third Party Signs include:

- Residents who **support more digital signage** (12%) compared to those who oppose more digital signage (1%).

Respondents more likely to feel that there are too many Third Party Billboards include:

- Respondents who have a **household income that is under \$60,000** (56%) compared to those who have a household income that is over \$120,000 (42%).
- Citizens who feel that The City of Calgary is doing a **poor job regulating signage** (64%) compared to those who feel that The City of Calgary is doing a good job regulating signage (40%).
- Calgarians who feel that it is **not important to regulate signage** (51%) compared to those who do feel that it is important to regulate signage (31%).
- Respondents who **are not concerned about digital signage** (60%) compared to those who are concerned about digital signage (32%).
- Residents who **support more digital signage** (63%) compared to those who oppose more digital signage (28%).

Respondents more likely to feel that there are just the right amount of Third Party Billboards include:

- Respondents who have a **household income that is over \$120,000** (57%) compared to those who have a household income that is under \$60,000 (42%).
- Citizens who feel that The City of Calgary is doing a **good job regulating signage** (57%) compared to those who feel that The City of Calgary is doing a poor job regulating signage (34%).
- Respondents who **are not concerned about digital signage** (62%) compared to those who are concerned about digital signage (38%).
- Residents who **support more digital signage** (67%) compared to those who oppose more digital signage (36%).

Respondents more likely to feel that there are too many Window Identification Signs include:

- **Women** (39%) compared to men (24%).
- Calgarians who are **aged 55 and older** (38%) compared to those who are 18 to 34 (27%).
- Calgarians who feel that it is **important to regulate signage** (34%) compared to those who do not feel that it is important to regulate signage (17%).
- Respondents who **are concerned about digital signage** (38%) compared to those who are not concerned about digital signage (23%).
- Residents who **oppose more digital signage** (36%) compared to those who support more digital signage (25%).
- Respondents who **support a fee/levy/tax** (34%) compared to those who oppose a fee/levy/tax (23%).

Respondents more likely to feel that there are just the right amount of Window Identification Signs include:

- **Men** (72%) compared to women (60%).
- Respondents who **are not concerned about digital signage** (74%) compared to those who are concerned about digital signage (60%).

Respondents more likely to feel that there are too many Community Temporary Signs include:

- Residents in the **Southeast quadrant** (37%) compared to those living in the Northwest quadrant (26%).
- Calgarians who are **aged 55 and older** (36%) compared to those who are 18 to 34 (25%).
- Citizens who feel that The City of Calgary is doing a **poor job regulating signage** (48%) compared to those who feel that The City of Calgary is doing a good job regulating signage (20%).
- Respondents who **are concerned about digital signage** (34%) compared to those who are not concerned about digital signage (24%).
- Residents who **oppose more digital signage** (34%) compared to those who support more digital signage (23%).

Respondents more likely to feel that there are just the right amount of Community Temporary Signs include:

- Residents in the **Southwest quadrant** (67%) or **Northwest quadrant** (68%) compared to those living in the Southeast quadrant (56%).
- Citizens who feel that The City of Calgary is doing a **good job regulating signage** (74%) compared to those who feel that The City of Calgary is doing a poor job regulating signage (49%).
- Residents who **support more digital signage** (71%) compared to those who oppose more digital signage (61%).

Respondents more likely to feel that there are too many Temporary A-Board Signs include:

- Calgarians who are **aged 55 and older** (34%) compared to those who are 18 to 34 (22%).

- Respondents who have a **household income that is under \$60,000** (37%) compared to those who have a household income that is between \$60,000 and \$120,000 (23%).
- Citizens who feel that The City of Calgary is doing a **poor job regulating signage** (42%) compared to those who feel that The City of Calgary is doing a good job regulating signage (21%).
- Calgarians who feel that it is **important to regulate signage** (31%) compared to those who do not feel that it is important to regulate signage (8%).
- Respondents who **are concerned about digital signage** (36%) compared to those who are not concerned about digital signage (18%).

Respondents more likely to feel that there are just the right amount of Temporary A-Board Signs include:

- Respondents who have a **household income that is between \$60,000 and \$120,000** (69%) compared to those who have a household income that is under \$60,000 (56%).
- Citizens who feel that The City of Calgary is doing a **good job regulating signage** (71%) compared to those who feel that The City of Calgary is doing a poor job regulating signage (53%).
- Respondents who **are not concerned about digital signage** (76%) compared to those who are concerned about digital signage (56%).

Respondents more likely to feel that there are not enough Temporary A-Board Signs include:

- Calgarians who feel that it is **not important to regulate signage** (23%) compared to those who do feel that it is important to regulate signage (5%).

Respondents more likely to feel that there are too many Electronic Message Signs include:

- Citizens who feel that The City of Calgary is doing a **poor job regulating signage** (38%) compared to those who feel that The City of Calgary is doing a good job regulating signage (15%).
- Respondents who **are not concerned about digital signage** (34%) compared to those who are concerned about digital signage (10%).
- Residents who **support more digital signage** (35%) compared to those who oppose more digital signage (6%).

Respondents more likely to feel that there are just the right amount of Electronic Message Signs include:

- **Women** (76%) compared to men (65%).
- Calgarians who are **aged 55 and older** (76%) or **35 to 54** (75%) compared to those who are aged 18 to 34 (60%).
- Residents who live in a **single detached house** (74%) compared to those who live in an apartment/condo with 6 or more units (61%).
- Citizens who feel that The City of Calgary is doing a **good job regulating signage** (76%) compared to those who feel that The City of Calgary is doing a poor job regulating signage (59%).

- Respondents who **are not concerned about digital signage** (80%) compared to those who are concerned about digital signage (63%).
- Residents who **support more digital signage** (80%) compared to those who oppose more digital signage (64%).

Respondents more likely to feel that there are not enough Electronic Message Signs include:

- Calgarians who are **aged 18 to 34** (12%) compared to those who are aged 55 and older (1%).
- Residents who **support more digital signage** (15%) compared to those who oppose more digital signage (1%).

Respondents more likely to feel that there are too many Freestanding Identification or Ground Signs include:

- Citizens who feel that The City of Calgary is doing a **poor job regulating signage** (29%) compared to those who feel that The City of Calgary is doing a good job regulating signage (9%).
- Respondents who **are concerned about digital signage** (24%) compared to those who are not concerned about digital signage (9%).
- Residents who **oppose more digital signage** (24%) compared to those who support more digital signage (7%).

Respondents more likely to feel that there are just the right amount of Freestanding Identification or Ground Signs include:

- Citizens who feel that The City of Calgary is doing a **good job regulating signage** (86%) compared to those who feel that The City of Calgary is doing a poor job regulating signage (66%).
- Respondents who **are not concerned about digital signage** (86%) compared to those who are concerned about digital signage (72%).
- Residents who **support more digital signage** (87%) compared to those who oppose more digital signage (72%).

Respondents more likely to feel that there are too many Fascia or Wall Signs include:

- Residents who live in an **established community** (16%) compared to those who live in a maturing community (4%).
- Citizens who feel that The City of Calgary is doing a **poor job regulating signage** (16%) compared to those who feel that The City of Calgary is doing a good job regulating signage (5%).

Respondents more likely to feel that there are just the right amount of Fascia or Wall Signs include:

- Citizens who feel that The City of Calgary is doing a **good job regulating signage** (92%) compared to those who feel that The City of Calgary is doing a poor job regulating signage (82%).

Citizen Perceptions of Specific Types of Signs

Temporary mobile signs, third party signs, digital billboards, and community temporary signs are seen as key distractions for drivers.

Ipsos Citizens Perceptions of Specific Types of Signs

% Yes	Fascia sign or wall sign	Freestanding identification sign or ground sign	Temporary mobile sign	Community temporary sign	Temporary A-board sign	Window identification signs	Electronic message signs	Digital third party signs	Third party billboard
A distraction to drivers	10%	38%	80%	65%	23%	21%	54%	80%	68%
Important for a business	97%	93%	62%	40%	85%	85%	88%	57%	72%
Important for Calgarians	80%	74%	23%	76%	45%	40%	61%	22%	26%
A visual eye-sore for the community	15%	30%	82%	52%	34%	41%	31%	64%	62%
Just part of the landscape of living in a City (they need to be here)	88%	79%	28%	63%	57%	59%	70%	34%	44%

C2b. In your own view, is this type of sign ...?
Base: All respondents n=879

Respondents more likely to feel that a Fascia or Wall Sign is a distraction to drivers include:

- Residents who have lived in Calgary for **less than 5 years** (19%) compared to those who have lived in Calgary for over 10 years (9%).
- Citizens who feel that The City of Calgary is doing a **poor job regulating signage** (17%) compared to those who feel that The City of Calgary is doing a good job regulating signage (6%).

Respondents more likely to feel that a Fascia or Wall Sign is important for Calgarians include:

- Respondents who have an **education level of high school or less** (89%) compared to those with some post secondary (80%) or who have completed university (78%).
- Calgarians who feel that there are the **right amount of signs in Calgary** (88%) compared to those who feel that there are too many signs in Calgary (74%).
- Citizens who feel that The City of Calgary is doing a **good job regulating signage** (88%) compared to those who feel that The City of Calgary is doing a poor job regulating signage (73%).

Respondents more likely to feel that a Fascia or Wall Sign is a visual eye-sore for the community include:

- Residents who live in an **inner city** (17%), **established community** (18%) or **new community** (18%) compared to those who live in a maturing community (9%).
- Calgarians who feel that there are **too many signs in Calgary** (23%) compared to those who feel that there are the right amount of signs in Calgary (7%).
- Citizens who feel that The City of Calgary is doing a **poor job regulating signage** (24%) compared to those who feel that The City of Calgary is doing a good job regulating signage (9%).
- Respondents who **are concerned about digital signage** (21%) compared to those who are not concerned about digital signage (7%).
- Residents who **oppose more digital signage** (20%) compared to those who support more digital signage (8%).

Respondents more likely to feel that a Fascia or Wall Sign is just part of the landscape of living in a City (they need to be here) include:

- Residents in the **Southeast quadrant** (93%) compared to those living in the Northeast quadrant (81%).

Respondents more likely to feel that a Freestanding Identification or Ground Sign is a distraction to drivers include:

- Residents in the **Northwest quadrant** (41%) compared to those living in the Southwest quadrant (31%).
- Calgarians who are **aged 18 to 34** (46%) compared to those who are aged 35 to 54 (31%).
- Calgarians who feel that there are **too many signs in Calgary** (50%) compared to those who feel that there are the right amount of signs in Calgary (23%).
- Citizens who feel that The City of Calgary is doing a **poor job regulating signage** (50%) compared to those who feel that The City of Calgary is doing a good job regulating signage (30%).
- Respondents who **are concerned about digital signage** (43%) compared to those who are not concerned about digital signage (30%).
- Residents who **oppose more digital signage** (45%) compared to those who support more digital signage (26%).

Respondents more likely to feel that a Freestanding Identification or Ground Sign is important for Calgarians include:

- Calgarians who feel that there are the **right amount of signs in Calgary** (86%) compared to those who feel that there are too many signs in Calgary (65%).
- Citizens who feel that The City of Calgary is doing a **good job regulating signage** (83%) compared to those who feel that The City of Calgary is doing a poor job regulating signage (62%).

- Residents who **support more digital signage** (83%) compared to those who oppose more digital signage (68%).

Respondents more likely to feel that a Freestanding Identification or Ground Sign a visual eye-sore for the community include:

- Calgarians who are **aged 18 to 34** (37%) compared to those who are aged 35 to 54 (25%).
- Residents who live in an **established community** (36%) compared to those who live in a maturing community (25%).
- Citizens who **live with one or more persons** (32%) compared to those who are living alone (21%).
- Calgarians who feel that there are **too many signs in Calgary** (42%) compared to those who feel that there are the right amount of signs in Calgary (16%).
- Citizens who feel that The City of Calgary is doing a **poor job regulating signage** (44%) compared to those who feel that The City of Calgary is doing a good job regulating signage (20%).
- Respondents who **are concerned about digital signage** (37%) compared to those who are not concerned about digital signage (20%).
- Residents who **oppose more digital signage** (39%) compared to those who support more digital signage (16%).

Respondents more likely to feel that a Freestanding Identification or Ground Sign is just part of the landscape of living in a City (they need to be here) include:

- Calgarians who feel that there are the **right amount of signs in Calgary** (85%) compared to those who feel that there are too many signs in Calgary (72%).
- Citizens who feel that The City of Calgary is doing a **good job regulating signage** (85%) compared to those who feel that The City of Calgary is doing a poor job regulating signage (70%).
- Respondents who **are not concerned about digital signage** (85%) compared to those who are concerned about digital signage (74%).
- Residents who **support more digital signage** (85%) compared to those who oppose more digital signage (75%).

Respondents more likely to feel that a Temporary Mobile Sign is a distraction to drivers include:

- Calgarians who are **aged 55 and older** (86%) compared to those who are 18 to 34 (75%).
- Calgarians who feel that there are **too many signs in Calgary** (89%) compared to those who feel that there are the right amount of signs in Calgary (72%).
- Citizens who feel that The City of Calgary is doing a **poor job regulating signage** (91%) compared to those who feel that The City of Calgary is doing a good job regulating signage (74%).
- Calgarians who feel that it is **important to regulate signage** (83%) compared to those who do not feel that it is important to regulate signage (54%).
- Respondents who **are concerned about digital signage** (86%) compared to those who are not concerned about digital signage (71%).

- Residents who **oppose more digital signage** (86%) compared to those who support more digital signage (69%).

Respondents more likely to feel that a Temporary Mobile Sign is important to a business include:

- Calgarians who feel that there are the **right amount of signs in Calgary** (77%) compared to those who feel that there are too many signs in Calgary (49%).
- Citizens who feel that The City of Calgary is doing a **good job regulating signage** (72%) compared to those who feel that The City of Calgary is doing a poor job regulating signage (44%).
- Respondents who **are not concerned about digital signage** (73%) compared to those who are concerned about digital signage (54%).
- Residents who **support more digital signage** (72%) compared to those who oppose more digital signage (55%).

Respondents more likely to feel that a Temporary Mobile Sign is important to Calgarians include:

- Calgarians who feel that there are the **right amount of signs in Calgary** (36%) compared to those who feel that there are too many signs in Calgary (12%).
- Citizens who feel that The City of Calgary is doing a **good job regulating signage** (31%) compared to those who feel that The City of Calgary is doing a poor job regulating signage (9%).
- Respondents who **are not concerned about digital signage** (31%) compared to those who are concerned about digital signage (17%).
- Residents who **support more digital signage** (35%) compared to those who oppose more digital signage (15%).

Respondents more likely to feel that a Temporary Mobile Sign are a visual eye-sore for the community include:

- Residents in the **Southeast quadrant** (91%) compared to those living in the Southwest quadrant (82%), Northwest quadrant (78%) or Northeast quadrant (77%).
- Calgarians who feel that there are **too many signs in Calgary** (91%) compared to those who feel that there are the right amount of signs in Calgary (72%).
- Citizens who feel that The City of Calgary is doing a **poor job regulating signage** (91%) compared to those who feel that The City of Calgary is doing a good job regulating signage (76%).
- Calgarians who feel that it is **important to regulate signage** (83%) compared to those who do not feel that it is important to regulate signage (70%).
- Respondents who **are concerned about digital signage** (89%) compared to those who are not concerned about digital signage (72%).
- Residents who **oppose more digital signage** (89%) compared to those who support more digital signage (71%).

Respondents more likely to feel that a Temporary Mobile Sign is just part of the landscape of living in a City (they need to be here) include:

- Calgarians who feel that there are the **right amount of signs in Calgary** (40%) compared to those who feel that there are too many signs in Calgary (17%).
- Citizens who feel that The City of Calgary is doing a **good job regulating signage** (37%) compared to those who feel that The City of Calgary is doing a poor job regulating signage (15%).
- Calgarians who feel that it is **not important to regulate signage** (43%) compared to those who do feel that it is important to regulate signage (26%).
- Respondents who **are not concerned about digital signage** (40%) compared to those who are concerned about digital signage (20%).
- Residents who **support more digital signage** (42%) compared to those who oppose more digital signage (20%).

Respondents more likely to feel that a Community Temporary Sign is a distraction to drivers include:

- Calgarians who feel that there are **too many signs in Calgary** (79%) compared to those who feel that there are the right amount of signs in Calgary (51%).
- Citizens who feel that The City of Calgary is doing a **poor job regulating signage** (80%) compared to those who feel that The City of Calgary is doing a good job regulating signage (56%).
- Calgarians who feel that it is **important to regulate signage** (67%) compared to those who do not feel that it is important to regulate signage (45%).
- Respondents who **are concerned about digital signage** (70%) compared to those who are not concerned about digital signage (57%).
- Residents who **oppose more digital signage** (71%) compared to those who support more digital signage (55%).

Respondents more likely to feel that a Community Temporary Sign is important to a business include:

- Residents who live in an **established community** (45%) compared to those who live in an inner city community (31%).
- Calgarians who feel that there are the **right amount of signs in Calgary** (49%) compared to those who feel that there are too many signs in Calgary (30%).
- Citizens who feel that The City of Calgary is doing a **good job regulating signage** (49%) compared to those who feel that The City of Calgary is doing a poor job regulating signage (26%).
- Respondents who **are not concerned about digital signage** (47%) compared to those who are concerned about digital signage (35%).
- Residents who **support more digital signage** (49%) compared to those who oppose more digital signage (35%).

Respondents more likely to feel that a Community Temporary Sign is important to Calgarians include:

- Residents who have lived in Calgary for **5 to 10 years** (88%) compared to those who have lived in Calgary for less than 5 years (67%) or over 10 years (75%).
- Residents who live in an **inner city community** (81%) compared to those who live in an established community (70%).
- Calgarians who **have children living in the household** (86%) compared to those who do not have children living in the household (72%).

- Calgarians who feel that there are the **right amount of signs in Calgary** (84%) compared to those who feel that there are too many signs in Calgary (69%).
- Citizens who feel that The City of Calgary is doing a **good job regulating signage** (84%) compared to those who feel that The City of Calgary is doing a poor job regulating signage (65%).

Respondents more likely to feel that a Community Temporary Sign is a visual eye-sore for the community include:

- Residents in the **Southeast quadrant** (60%) compared to those living in the Northwest quadrant (47%).
- Calgarians who feel that there are **too many signs in Calgary** (60%) compared to those who feel that there are the right amount of signs in Calgary (46%).
- Citizens who feel that The City of Calgary is doing a **poor job regulating signage** (66%) compared to those who feel that The City of Calgary is doing a good job regulating signage (44%).
- Calgarians who feel that it is **important to regulate signage** (55%) compared to those who do not feel that it is important to regulate signage (39%).
- Respondents who **are concerned about digital signage** (58%) compared to those who are not concerned about digital signage (45%).
- Residents who **oppose more digital signage** (57%) compared to those who support more digital signage (45%).

Respondents more likely to feel that a Community Temporary Sign is just part of the landscape of living in a City (they need to be here) include:

- Residents who live in an **inner city community** (72%) compared to those who live in an established (59%) or new community (57%).
- Calgarians who feel that there are the **right amount of signs in Calgary** (69%) compared to those who feel that there are too many signs in Calgary (55%).
- Citizens who feel that The City of Calgary is doing a **good job regulating signage** (69%) compared to those who feel that The City of Calgary is doing a poor job regulating signage (52%).

Respondents more likely to feel that a Temporary A-Board Sign is a distraction to drivers include:

- Respondents who have an **education level of high school or less** (31%) or **some post secondary** (27%) compared to those who have completed university (14%).
- Respondents who have a **household income that is under \$60,000** (35%) compared to those who have a household income between \$60,000 to \$120,000 (18%) or that is over \$120,000 (13%).
- Calgarians who feel that there are **too many signs in Calgary** (27%) compared to those who feel that there are the right amount of signs in Calgary (17%).
- Citizens who feel that The City of Calgary is doing a **poor job regulating signage** (33%) compared to those who feel that The City of Calgary is doing a good job regulating signage (17%).
- Calgarians who feel that it is **important to regulate signage** (24%) compared to those who do not feel that it is important to regulate signage (11%).

Respondents more likely to feel that a Temporary A-Board Sign is important to a business include:

- Respondents who have a household income that is **between \$60,000 to \$120,000** (87%) or that is **over \$120,000** (92%) compared to those who have a household income under \$60,000 (78%).

Respondents more likely to feel that a Temporary A-Board Sign is important for Calgarians include:

- Calgarians who feel that there are the **right amount of signs in Calgary** (54%) compared to those who feel that there are too many signs in Calgary (36%).
- Citizens who feel that The City of Calgary is doing a **poor job regulating signage** (52%) compared to those who feel that The City of Calgary is doing a good job regulating signage (35%).
- Residents who **support more digital signage** (53%) compared to those who oppose more digital signage (39%).
- Respondents who **support a fee/levy/tax** (47%) compared to those who oppose a fee/levy/tax (34%).

Respondents more likely to feel that a Temporary A-Board Sign is a visual eye-sore for the community include:

- Calgarians who are **aged 55 and older** (40%) compared to those who are 18 to 34 (29%).
- Respondents who have an **education level of high school or less** (40%) or **some post secondary** (37%) compared to those who have completed university (28%).
- Respondents who have a **household income that is under \$60,000** (46%) compared to those who have a household income between \$60,000 to \$120,000 (28%) or that is over \$120,000 (29%).
- Calgarians who feel that there are **too many signs in Calgary** (43%) compared to those who feel that there are the right amount of signs in Calgary (24%).
- Citizens who feel that The City of Calgary is doing a **poor job regulating signage** (46%) compared to those who feel that The City of Calgary is doing a good job regulating signage (28%).
- Calgarians who feel that it is **important to regulate signage** (36%) compared to those who do not feel that it is important to regulate signage (17%).
- Respondents who **are concerned about digital signage** (39%) compared to those who are not concerned about digital signage (27%).

Respondents more likely to feel that a Temporary A-Board Sign is just part of the landscape of living in a City (they need to be here) include:

- Respondents who have a household income that is **between \$60,000 to \$120,000** (60%) or that is **over \$120,000** (65%) compared to those who have a household income under \$60,000 (47%).
- Calgarians who feel that there are the **right amount of signs in Calgary** (62%) compared to those who feel that there are too many signs in Calgary (51%).
- Citizens who feel that The City of Calgary is doing a **good job regulating signage** (61%) compared to those who feel that The City of Calgary is doing a poor job regulating signage (49%).

Respondents more likely to feel that Window Identification Signs are a distraction to drivers include:

- Calgarians who are **aged 55 and older** (26%) compared to those who are 18 to 34 (16%).
- Citizens who feel that The City of Calgary is doing a **good job regulating signage** (28%) compared to those who feel that The City of Calgary is doing a poor job regulating signage (17%).
- Calgarians who feel that it is **important to regulate signage** (23%) compared to those who do not feel that it is important to regulate signage (8%).

Respondents more likely to feel that Window Identification Signs are important to Calgarians include:

- Calgarians who are **aged 55 and older** (46%) compared to those who are 18 to 34 (34%).
- Respondents who have an **education level of high school or less** (50%) compared to those who have completed university (37%).
- Calgarians who feel that there are the **right amount of signs in Calgary** (47%) compared to those who feel that there are too many signs in Calgary (32%).
- Residents who **support more digital signage** (54%) compared to those who oppose more digital signage (31%).

Respondents more likely to feel that Window Identification Signs are a visual eye-sore for the community include:

- **Women** (46%) compared to men (35%).
- Calgarians who feel that there are **too many signs in Calgary** (50%) compared to those who feel that there are the right amount of signs in Calgary (32%).
- Citizens who feel that The City of Calgary is doing a **poor job regulating signage** (51%) compared to those who feel that The City of Calgary is doing a good job regulating signage (35%).
- Calgarians who feel that it is **important to regulate signage** (42%) compared to those who do not feel that it is important to regulate signage (25%).
- Respondents who **are concerned about digital signage** (48%) compared to those who are not concerned about digital signage (30%).
- Residents who **oppose more digital signage** (47%) compared to those who support more digital signage (30%).

Respondents more likely to feel that Window Identification Signs are a just part of the landscape of living in a City (they need to be here) include:

- Respondents who **are not concerned about digital signage** (65%) compared to those who are concerned about digital signage (54%).
- Residents who **support more digital signage** (68%) compared to those who oppose more digital signage (52%).

Respondents more likely to feel that Electronic Message Signs are a distraction to drivers include:

- Residents in the **Southeast quadrant** (61%) compared to those living in the Southwest quadrant (49%).
- Calgarians who are **aged 18 to 34** (61%) compared to those who are aged 55 and older (48%).
- Calgarians who have **3 or more vehicles in their household** (59%) compared to those with 2 vehicles (47%).
- Calgarians who feel that there are **too many signs in Calgary** (63%) compared to those who feel that there are the right amount of signs in Calgary (43%).
- Citizens who feel that The City of Calgary is doing a **poor job regulating signage** (61%) compared to those who feel that The City of Calgary is doing a good job regulating signage (47%).
- Respondents who **are concerned about digital signage** (63%) compared to those who are not concerned about digital signage (41%).
- Residents who **oppose more digital signage** (66%) compared to those who support more digital signage (35%).

Respondents more likely to feel that Electronic Message Signs are important for a business include:

- Calgarians who feel that there are the **right amount of signs in Calgary** (93%) compared to those who feel that there are too many signs in Calgary (82%).
- Calgarians who feel that it is **important to regulate signage** (89%) compared to those who do not feel that it is important to regulate signage (79%).
- Residents who **support more digital signage** (94%) compared to those who oppose more digital signage (84%).

Respondents more likely to feel that Electronic Message Signs are important for Calgarians include:

- Calgarians who are **aged 55 and older** (68%) compared to those who are 18 to 34 (57%).
- Calgarians who feel that there are the **right amount of signs in Calgary** (73%) compared to those who feel that there are too many signs in Calgary (50%).
- Citizens who feel that The City of Calgary is doing a **good job regulating signage** (70%) compared to those who feel that The City of Calgary is doing a poor job regulating signage (53%).
- Respondents who **are not concerned about digital signage** (72%) compared to those who are concerned about digital signage (54%).
- Residents who **support more digital signage** (77%) compared to those who oppose more digital signage (51%).

Respondents more likely to feel that Electronic Message Signs are a visual eye-sore for the community include:

- Residents who live in an **established community** (38%) compared to those who live in a maturing (28%) or new community (25%).
- Calgarians who feel that there are **too many signs in Calgary** (47%) compared to those who feel that there are the right amount of signs in Calgary (17%).
- Citizens who feel that The City of Calgary is doing a **poor job regulating signage** (47%) compared to those who feel that The City of Calgary is doing a good job regulating signage (22%).

- Respondents who **are concerned about digital signage** (43%) compared to those who are not concerned about digital signage (14%).
- Residents who **oppose more digital signage** (43%) compared to those who support more digital signage (12%).

Respondents more likely to feel that Electronic Message Signs are just part of the landscape of living in a City (they need to be here) include:

- Calgarians who are **aged 55 and older** (77%) compared to those who are 18 to 34 (62%).
- Calgarians who feel that there are the **right amount of signs in Calgary** (75%) compared to those who feel that there are too many signs in Calgary (62%).
- Citizens who feel that The City of Calgary is doing a **good job regulating signage** (78%) compared to those who feel that The City of Calgary is doing a poor job regulating signage (60%).
- Respondents who **are not concerned about digital signage** (81%) compared to those who are concerned about digital signage (61%).
- Residents who **support more digital signage** (81%) compared to those who oppose more digital signage (62%).

Respondents more likely to feel that Digital Third Party Signs are a distraction to drivers include:

- Calgarians who feel that there are **too many signs in Calgary** (89%) compared to those who feel that there are the right amount of signs in Calgary (72%).
- Citizens who feel that The City of Calgary is doing a **poor job regulating signage** (89%) compared to those who feel that The City of Calgary is doing a good job regulating signage (75%).
- Calgarians who feel that it is **important to regulate signage** (83%) compared to those who do not feel that it is important to regulate signage (58%).
- Respondents who **are concerned about digital signage** (91%) compared to those who are not concerned about digital signage (64%).
- Residents who **oppose more digital signage** (92%) compared to those who support more digital signage (60%).

Respondents more likely to feel that Digital Third Party Signs are important for a business include:

- Residents who have lived in Calgary for **less than 5 years** (79%) compared to those who have lived in Calgary for 5 to 10 (50%) or for more than 10 years (55%).
- Calgarians who feel that there are the **right amount of signs in Calgary** (68%) compared to those who feel that there are too many signs in Calgary (45%).
- Citizens who feel that The City of Calgary is doing a **good job regulating signage** (65%) compared to those who feel that The City of Calgary is doing a poor job regulating signage (45%).
- Respondents who **are not concerned about digital signage** (72%) compared to those who are concerned about digital signage (43%).
- Residents who **support more digital signage** (80%) compared to those who oppose more digital signage (42%).

- Respondents who **oppose a fee/levy/tax** (66%) compared to those who support a fee/levy/tax (55%).

Respondents more likely to feel that Digital Third Party Signs are important for Calgarians include:

- Calgarians who feel that there are the **right amount of signs in Calgary** (32%) compared to those who feel that there are too many signs in Calgary (13%).
- Citizens who feel that The City of Calgary is doing a **good job regulating signage** (31%) compared to those who feel that The City of Calgary is doing a poor job regulating signage (13%).
- Respondents who **are not concerned about digital signage** (38%) compared to those who are concerned about digital signage (11%).
- Residents who **support more digital signage** (46%) compared to those who oppose more digital signage (7%).

Respondents more likely to feel that Digital Third Party Signs a visual eye-sore for the community include:

- Calgarians who feel that there are **too many signs in Calgary** (79%) compared to those who feel that there are the right amount of signs in Calgary (48%).
- Citizens who feel that The City of Calgary is doing a **poor job regulating signage** (79%) compared to those who feel that The City of Calgary is doing a good job regulating signage (54%).
- Calgarians who feel that it is **important to regulate signage** (66%) compared to those who do not feel that it is important to regulate signage (50%).
- Respondents who **are concerned about digital signage** (81%) compared to those who are not concerned about digital signage (39%).
- Residents who **oppose more digital signage** (82%) compared to those who support more digital signage (35%).
- Respondents who **support a fee/levy/tax** (66%) compared to those who oppose a fee/levy/tax (53%).

Respondents more likely to feel that Digital Third Party Signs is part of the landscape of living in a City (they need to be here) include:

- Calgarians who feel that there are the **right amount of signs in Calgary** (47%) compared to those who feel that there are too many signs in Calgary (21%).
- Citizens who feel that The City of Calgary is doing a **good job regulating signage** (44%) compared to those who feel that The City of Calgary is doing a poor job regulating signage (21%).
- Calgarians who feel that it is **not important to regulate signage** (52%) compared to those who do feel that it is important to regulate signage (33%).
- Respondents who **are not concerned about digital signage** (54%) compared to those who are concerned about digital signage (19%).
- Residents who **support more digital signage** (62%) compared to those who oppose more digital signage (17%).

Respondents more likely to feel that Third Party Billboards are a distraction to drivers include:

- Calgarians who feel that there are **too many signs in Calgary** (79%) compared to those who feel that there are the right amount of signs in Calgary (60%).
- Citizens who feel that The City of Calgary is doing a **poor job regulating signage** (78%) compared to those who feel that The City of Calgary is doing a good job regulating signage (65%).
- Calgarians who feel that it is **important to regulate signage** (71%) compared to those who do not feel that it is important to regulate signage (47%).
- Respondents who **are concerned about digital signage** (76%) compared to those who are not concerned about digital signage (58%).
- Residents who **oppose more digital signage** (77%) compared to those who support more digital signage (55%).

Respondents more likely to feel that Third Party Billboards are important for a business include:

- Residents who have lived in Calgary for **less than 5 years** (86%) compared to those who have lived in Calgary for over 10 years (71%).
- Calgarians who feel that there are the **right amount of signs in Calgary** (80%) compared to those who feel that there are too many signs in Calgary (66%).
- Citizens who feel that The City of Calgary is doing a **good job regulating signage** (78%) compared to those who feel that The City of Calgary is doing a poor job regulating signage (65%).
- Respondents who **are not concerned about digital signage** (81%) compared to those who are concerned about digital signage (66%).
- Residents who **support more digital signage** (83%) compared to those who oppose more digital signage (66%).

Respondents more likely to feel that Third Party Billboards are important for Calgarians include:

- Residents in the **Southwest quadrant** (30%) compared to those living in the Northwest quadrant (19%).
- Calgarians who feel that there are the **right amount of signs in Calgary** (38%) compared to those who feel that there are too many signs in Calgary (14%).
- Citizens who feel that The City of Calgary is doing a **good job regulating signage** (32%) compared to those who feel that The City of Calgary is doing a poor job regulating signage (17%).
- Respondents who **are not concerned about digital signage** (37%) compared to those who are concerned about digital signage (17%).
- Residents who **support more digital signage** (46%) compared to those who oppose more digital signage (13%).

Respondents more likely to feel that Third Party Billboards are a visual eye-sore for the community include:

- Residents who have lived in Calgary for **over 10 years** (64%) compared to those who have lived in Calgary for less than 5 years (45%).

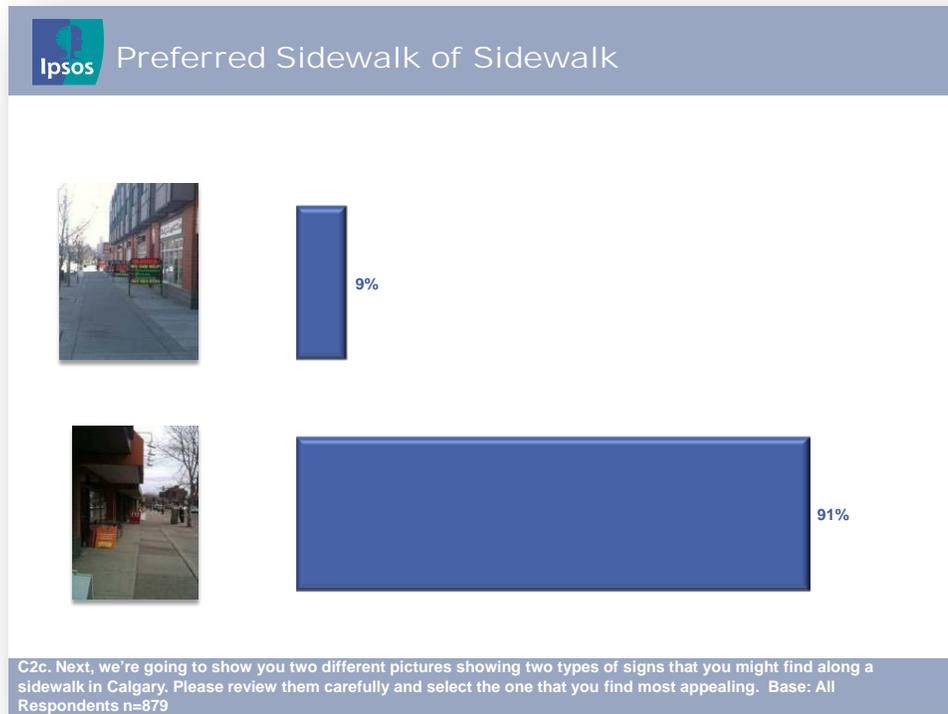
- Calgarians who have **3 or more vehicles in their household** (72%) compared to those with 2 vehicles (58%).
- Calgarians who feel that there are **too many signs in Calgary** (78%) compared to those who feel that there are the right amount of signs in Calgary (44%).
- Citizens who feel that The City of Calgary is doing a **poor job regulating signage** (81%) compared to those who feel that The City of Calgary is doing a good job regulating signage (50%).
- Calgarians who feel that it is **important to regulate signage** (64%) compared to those who do not feel that it is important to regulate signage (46%).
- Respondents who **are concerned about digital signage** (74%) compared to those who are not concerned about digital signage (46%).
- Residents who **oppose more digital signage** (75%) compared to those who support more digital signage (42%).

Respondents more likely to feel that Third Party Billboards are just part of the landscape of living in a City (they need to be here) include:

- Respondents who have **completed university** (50%) compared to those who have some post secondary (40%).
- Calgarians who feel that there are the **right amount of signs in Calgary** (58%) compared to those who feel that there are too many signs in Calgary (31%).
- Citizens who feel that The City of Calgary is doing a **good job regulating signage** (54%) compared to those who feel that The City of Calgary is doing a poor job regulating signage (32%).
- Respondents who **are not concerned about digital signage** (57%) compared to those who are concerned about digital signage (35%).
- Residents who **support more digital signage** (64%) compared to those who oppose more digital signage (32%).

Preferred Type of Sidewalk

Calgarians generally prefer A Board signage on sidewalk streetscapes versus temporary mobile signs.

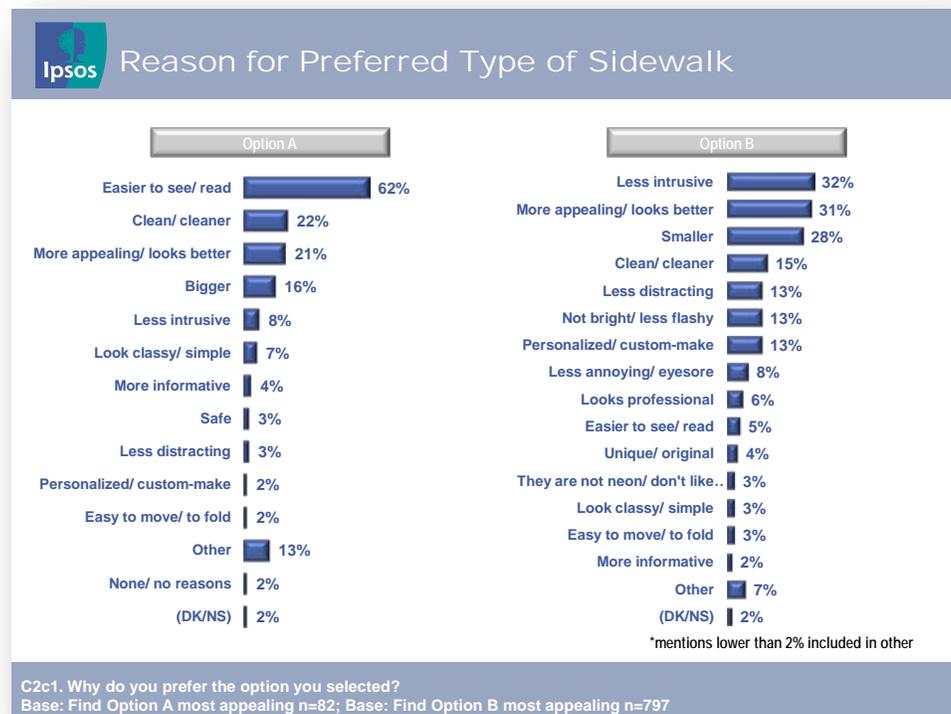


Respondents more likely to choose the second option (91%) include:

- Residents who have lived in Calgary for **between 5 and 10 years** (96%) or **over 10 years** (92%) compared to those who have lived in Calgary for less than 5 years (77%).
- Respondents who **are not concerned about digital signage** (95%) compared to those who are concerned about digital signage (85%).
- Residents who **support more digital signage** (95%) compared to those who oppose more digital signage (84%).

Reason for Preferred Type of Sidewalk

Less intrusive, small, more appealing, and clean/cleaner are key reasons for saying that A board signs are more appealing.



Respondents more likely to feel that Option B is 'less intrusive' include:

- Residents in the **Southwest quadrant** (37%) compared to those living in the Northwest quadrant (26%).
- Calgarians who are **aged 55 and older** (46%) or **35 to 54** (35%) compared to those who are aged 18 to 34 (19%). Additionally, between those **aged 55 and older** (46%) compared to those who are aged 35 to 54 (35%).
- Residents who have lived in Calgary for **over 10 years** (36%) compared to those who have lived in Calgary for less than 5 years (14%).
- Residents who live in a **single detached house** (35%) compared to those who live in a semi-detached house (22%).
- Respondents who have **completed university** (36%) or who have **some post secondary** (33%) compared to those who have an education level of high school or less (20%).
- Calgarians who feel that there are **too many signs in Calgary** (39%) compared to those who feel that there are the right amount of signs in Calgary (27%).

- Citizens who feel that The City of Calgary is doing a **poor job regulating signage** (39%) compared to those who feel that The City of Calgary is doing a good job regulating signage (28%).
- Calgarians who feel that it is **important to regulate signage** (33%) compared to those who do not feel that it is important to regulate signage (16%).
- Residents who **oppose more digital signage** (38%) compared to those who support more digital signage (21%).

Respondents more likely to feel that Option B is 'more appealing/ looks better' include:

- Calgarians who are **aged 18 to 34** (37%) or **35 to 54** (31%) compared to those who are aged 55 and older (23%).

Respondents more likely to feel that Option B is 'smaller' include:

- Calgarians who are **aged 55 and older** (34%) or **35 to 54** (32%) compared to those who are aged 18 to 34 (18%).
- Respondents who have an **education level of high school or less** (42%) or **some post secondary** (30%) compared to those who have completed university (20%).
- Calgarians who feel that there are **too many signs in Calgary** (34%) compared to those who feel that there are the right amount of signs in Calgary (19%).
- Citizens who feel that The City of Calgary is doing a **poor job regulating signage** (34%) compared to those who feel that The City of Calgary is doing a good job regulating signage (24%).

Respondents more likely to feel that Option B is 'clean/cleaner' include:

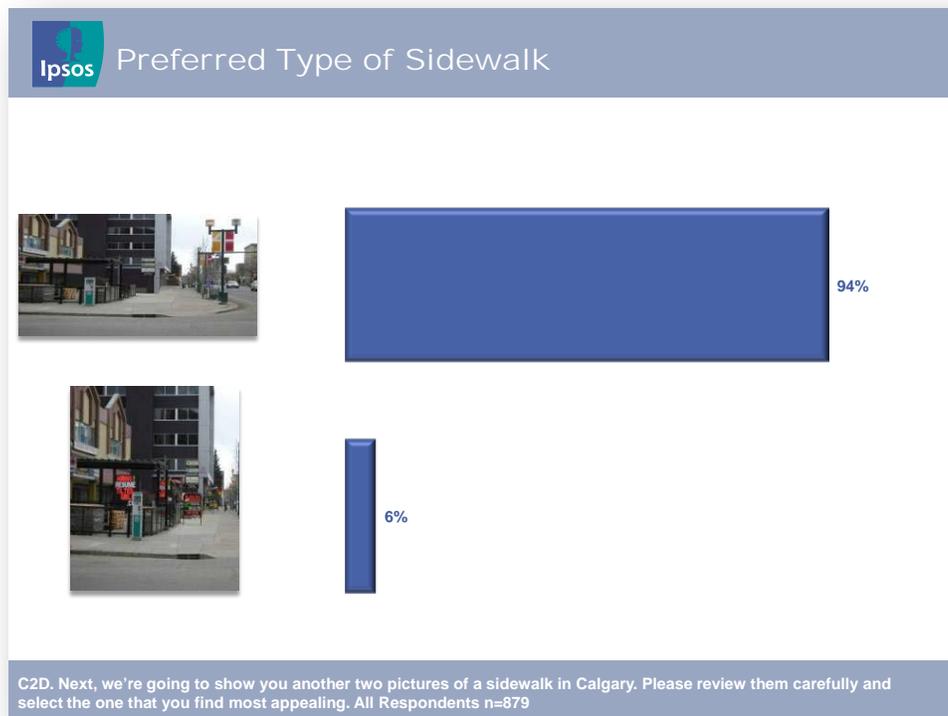
- Residents in the **Southeast quadrant** (23%) compared to those living in the Southwest quadrant (14%), Northwest quadrant (12%) or Northeast quadrant (13%).

Respondents more likely to feel that Option B is 'less distracting' include:

- Calgarians who feel that it is **important to regulate signage** (15%) compared to those who do not feel that it is important to regulate signage (0%).

Preferred Type of Sidewalk

In this option, Calgarians prefer the streetscape that does not include temporary mobile signs.

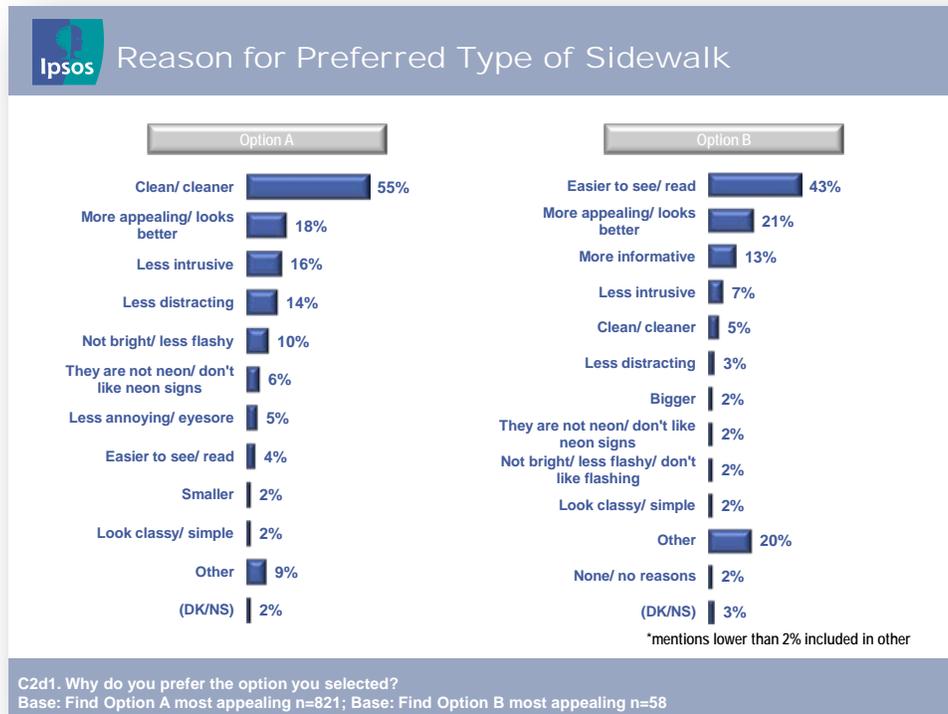


Respondents more likely to choose the first option (94%) include:

- Calgarians who feel that it is **important to regulate signage** (95%) compared to those who do not feel that it is important to regulate signage (87%).

Reason for Preferred Type of Sidewalk

Cleaner is the key reason for selecting the streetscape that does not have temporary mobile signage.



Respondents more likely to feel that Option A is 'clean/cleaner' include:

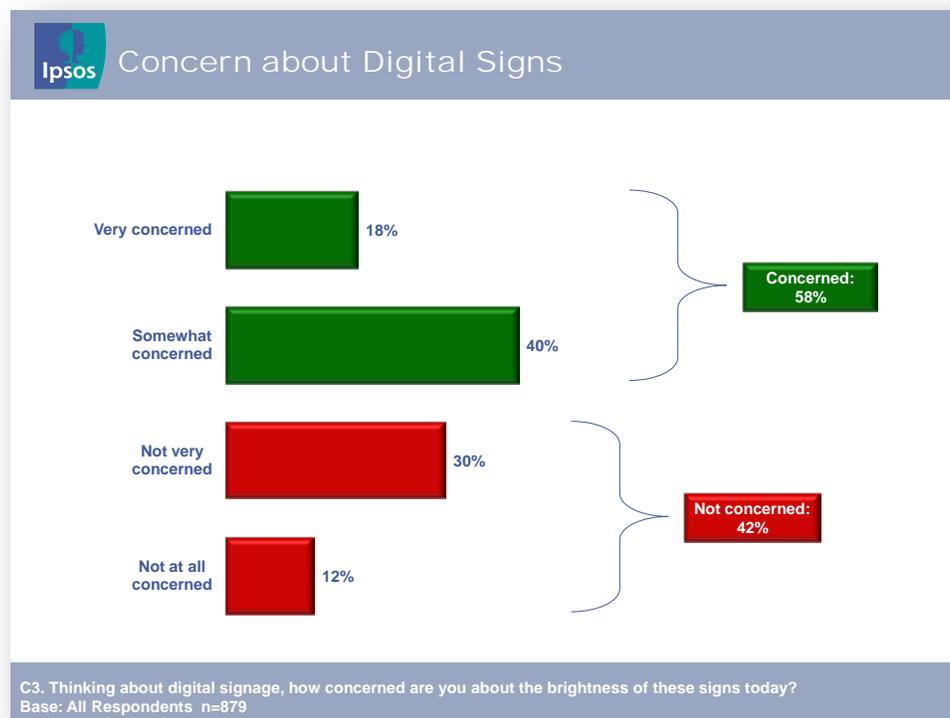
- Residents in the **Southwest quadrant** (60%) or **Southeast quadrant** (62%) compared to those living in the Northwest quadrant (45%).
- Calgarians who are **aged 55 and older** (58%) or **35 to 54** (61%) compared to those who are aged 18 to 34 (46%).
- Residents living in Calgary for **over 10 years** (58%) compared to those who have lived in Calgary for 5 to 10 years (40%).

Respondents more likely to feel that Option A is 'less intrusive include:

- Residents who live in an **established** (19%) or **maturing community** (19%) compared to those who live in an inner city community (9%).

Concern about Digital Signage

A majority of Calgarians express concern about digital signage; one-in-five are very concerned.



Respondents more likely to be very concerned about the brightness of digital signs include:

- Residents in the **Southeast quadrant** (23%) or the **Northwest quadrant** (20%) compared to those living in the Northeast quadrant (10%).
- Calgarians who feel that there are **too many signs in Calgary** (28%) compared to those who feel that there are the right amount of signs in Calgary (8%).
- Citizens who feel that The City of Calgary is doing a **poor job regulating signage** (28%) compared to those who feel that The City of Calgary is doing a good job regulating signage (12%).
- Residents who **oppose more digital signage** (28%) compared to those who support more digital signage (2%).

Respondents more likely to be somewhat concerned about the brightness of digital signs include:

- Residents who **oppose more digital signage** (49%) compared to those who support more digital signage (26%).

Respondents more likely to be not very concerned about the brightness of digital signs include:

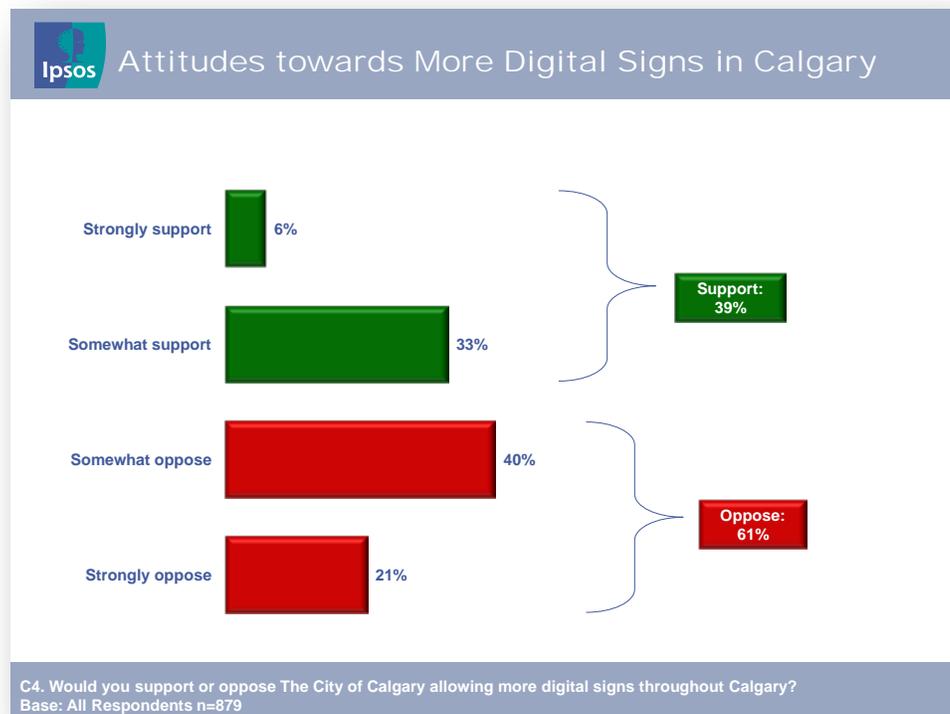
- Calgarians who feel that there is the **right amount of signs in Calgary** (39%) compared to those who feel that there are too many signs in Calgary (21%).
- Citizens who feel that The City of Calgary is doing a **good job regulating signage** (35%) compared to those who feel that The City of Calgary is doing a poor job regulating signage (20%).
- Residents who **support more digital signage** (48%) compared to those who oppose more digital signage (19%).

Respondents more likely to be not at all concerned about the brightness of digital signs include:

- Calgarians who feel that there is the **right amount of signs in Calgary** (17%) compared to those who feel that there are too many signs in Calgary (7%).
- Citizens who feel that The City of Calgary is doing a **good job regulating signage** (16%) compared to those who feel that The City of Calgary is doing a poor job regulating signage (6%).
- Calgarians who feel that it is **not important to regulate signage** (30%) compared to those who do feel that it is important to regulate signage (10%).
- Residents who **support more digital signage** (23%) compared to those who oppose more digital signage (5%).
- Respondents who **oppose a fee/levy/tax** (21%) compared to those who support a fee/levy/tax (10%).

Attitudes towards More Digital Signs in Calgary

There is strong opposition to increasing the number of digital signs in Calgary; one-in-five are strongly opposed.



Respondents more likely to somewhat support The City of Calgary allowing more digital signs throughout Calgary include:

- Residents who have lived in Calgary for **less than 5 years** (49%) compared to those who have lived in Calgary for 5 to 10 (22%) or for more than 10 years (33%).
- Calgarians who feel that there is the **right amount of signs in Calgary** (48%) compared to those who feel that there are too many signs in Calgary (18%).
- Citizens who feel that The City of Calgary is doing a **good job regulating signage** (41%) compared to those who feel that The City of Calgary is doing a poor job regulating signage (19%).
- Respondents who **are not concerned about digital signage** (55%) compared to those who are concerned about digital signage (17%).
- Respondents who **oppose a fee/levy/tax** (42%) compared to those who support a fee/levy/tax (31%).

Respondents more likely to somewhat oppose The City of Calgary allowing more digital signs throughout Calgary include:

- Residents in the **Northeast quadrant** (47%) compared to those living in the Southeast quadrant (35%).
- Residents who live in a **single detached house** (44%) compared to those who live in an apartment/condo with 6 or more units (30%).
- Respondents who **are concerned about digital signage** (47%) compared to those who are not concerned about digital signage (30%).

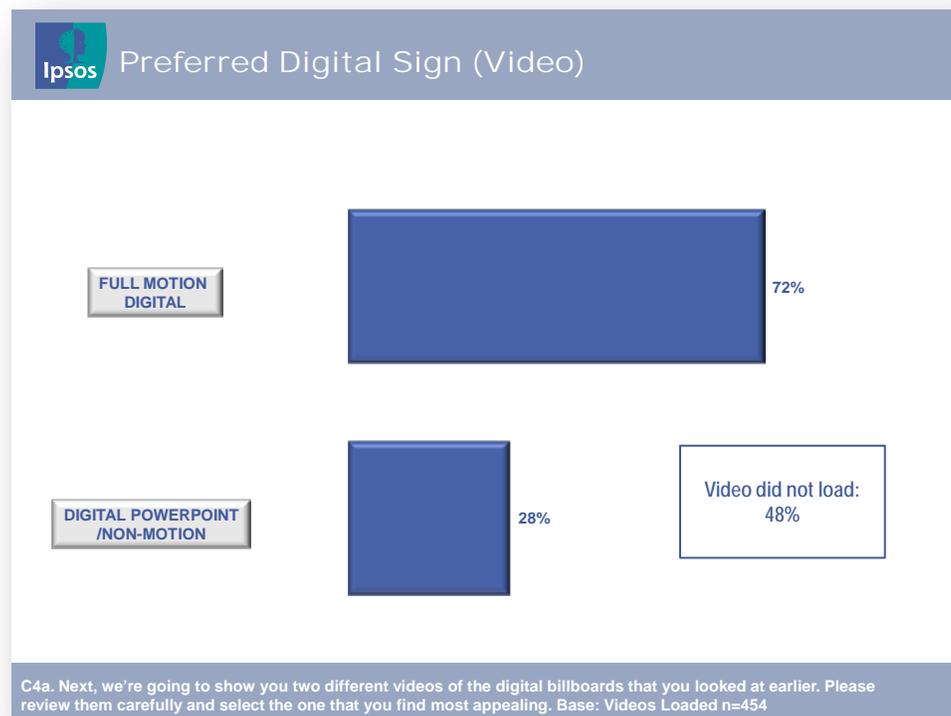
Respondents more likely to strongly oppose The City of Calgary allowing more digital signs throughout Calgary include:

- Residents in the **Southeast quadrant** (27%) or the **Northwest quadrant** (23%) compared to those living in the Northeast quadrant (14%).
- Calgarians who are **aged 55 and older** (26%) compared to those who are 18 to 34 (16%).
- Residents who have lived in Calgary for **over 10 years** (23%) compared to those who have lived in Calgary for less than 5 years (10%).
- Calgarians who feel that there are **too many signs in Calgary** (35%) compared to those who feel that there are the right amount of signs in Calgary (8%).
- Citizens who feel that The City of Calgary is doing a **poor job regulating signage** (36%) compared to those who feel that The City of Calgary is doing a good job regulating signage (13%).
- Respondents who **are concerned about digital signage** (34%) compared to those who are not concerned about digital signage (5%).

Preferred Digital Sign (Video)

Calgarians generally prefer full motion digital signs versus digital PowerPoint/non-motion signs.

Reader's Note: A total of 454 of the 801 total respondents were able to view two videos included in the survey for evaluation. A sample of this size yields a reliable margin of error of +/- 4.6%, nineteen times out of 20.



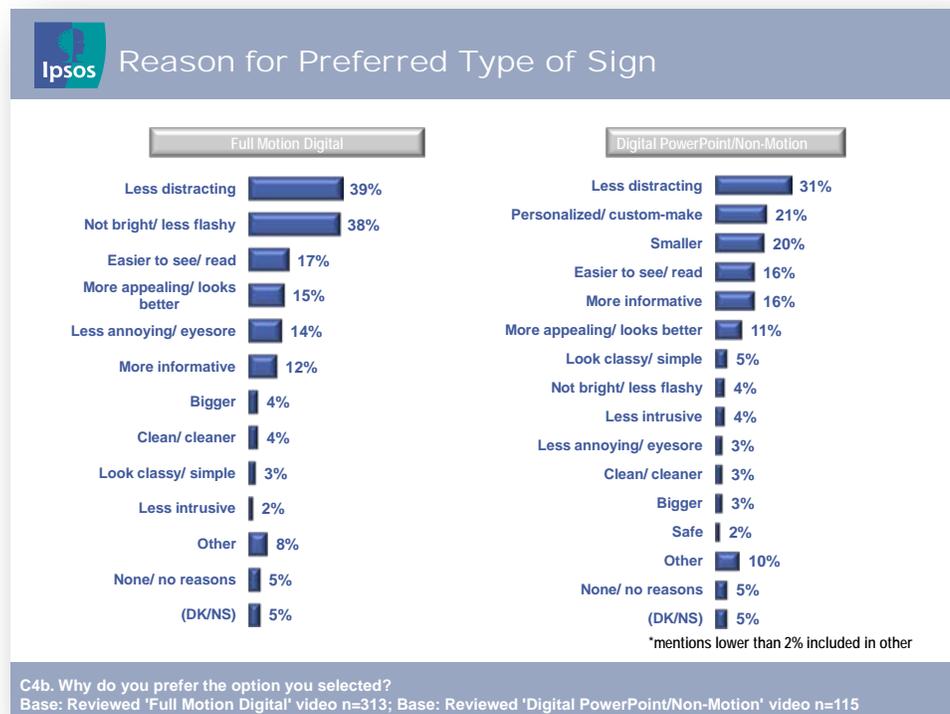
Respondents more likely to prefer the Full Motion Digital Sign Video (72%) include:

- Calgarians who are **aged 35 to 54** (41%) compared to those who are aged 55 and older (30%).
- Residents who live in an **inner city community** (43%) compared to those who live in an established community (32%).
- Respondents who have **completed university** (43%) compared to those who have an education level of high school or less (33%).
- Calgarians who feel that it is **not important to regulate signage** (53%) compared to those who do feel that it is important to regulate signage (35%).

2011 Signs Regulations Research

Reason for Preferred Type of Sign

Those who selected the full motion digital signs did so because they are seen to be less distracting, less flashy, and easier to read.



Respondents more likely to feel that the Full Motion Digital sign is 'less distracting' include:

- Residents in the **Southwest quadrant** (51%) compared to those living in the Northwest quadrant (29%).
- Residents who live in an **apartment/condo with 6 or more units** (64%) compared to those who live in a single-detached house (30%).
- Calgarians who have **1 vehicle in the household** (53%) compared to those who have 2 (29%) or 3 vehicles in the household (29%).
- Respondents who have a **household income that is under \$60,000** (51%) compared to those who have a household income that is over \$120,000 (23%).
- Respondents who **are concerned about digital signage** (45%) compared to those who are not concerned about digital signage (31%).
- Residents who **oppose more digital signage** (47%) compared to those who support more digital signage (30%).

Respondents more likely to feel that the Full Motion Digital sign is 'not bright/less flashy' include:

- Calgarians who are **aged 18 to 34** (47%) or **35 to 54** (37%) compared to those who are aged 55 and older (22%).
- Residents who live in a **semi-detached house** (52%) compared to those who live in a single-detached house (31%).
- Calgarians who **have children living in the household** (48%) compared to those who do not have children living in the household (30%).

Respondents more likely to feel that the Full Motion Digital sign is 'easier to see/read' include:

- Residents who live in an **established community** (24%) compared to those who live in a maturing community (10%).
- Respondents who have a **household income that is under \$60,000** (27%) compared to those who have a household income that is between \$60,000 and \$120,000 (13%) or over \$120,000 (12%).
- Respondents who **oppose a fee/levy/tax** (29%) compared to those who support a fee/levy/tax (15%).

Respondents more likely to feel that the Full Motion Digital sign is 'less annoying/eyesore' include:

- Residents in the **Northwest quadrant** (23%) compared to those living in the Southwest quadrant (10%).
- Citizens who are living alone (25%) compared to those who are living with one or more people (11%).
- Residents who live in a household with **1** (17%) or **3 or more vehicles** (18%) compared to those who have 2 vehicles in the household (6%).

Respondents more likely to feel that the Full Motion Digital sign is 'more informative' include:

- Residents in the **Southwest quadrant** (21%) compared to those living in the Northwest quadrant (5%).
- Respondents who **are not concerned about digital signage** (18%) compared to those who are concerned about digital signage (7%).
- Residents who **support more digital signage** (17%) compared to those who oppose more digital signage (7%).

Preferred Sign Locations

Community temporary signs are top for those acceptable in neighbourhoods. Digital third party signs are seen to be preferred near major roads and commercial businesses.



Respondents more likely to place the Freestanding Identification Sign or Ground Sign 'in my own neighbourhood' include:

- Calgarians who are **aged 18 to 34** (37%) compared to those who are aged 55 and older (27%).
- Calgarians who have **3 or more vehicles in their household** (42%) compared to those with 1 vehicle (30%).
- Respondents who are **not concerned about digital signage** (40%) compared to those who are concerned about digital signage (28%).
- Residents who **support more digital signage** (39%) compared to those who oppose more digital signage (29%).

Respondents more likely to place the Freestanding Identification Sign or Ground Sign 'on a major roadway close to residential houses' include:

- Residents in the **Northwest quadrant** (31%) compared to those living in the Southeast quadrant (21%).
- Calgarians who are **aged 18 to 34** (37%) compared to those who are aged 35 to 54 (23%) or 55 and older (16%).
- Residents who have lived in Calgary for **less than 5 years** (39%) compared to those who have lived in Calgary for over 10 years (24%).
- Residents who live in a **new community** (36%) compared to those who live in an established (24%) or maturing (23%) community.
- Calgarians who have **3 or more vehicles in their household** (42%) compared to those with 1 vehicle (30%).
- Citizens who feel that The City of Calgary is doing a **good job regulating signage** (31%) compared to those who feel that The City of Calgary is doing a poor job regulating signage (21%).

Respondents more likely to place the Freestanding Identification Sign or Ground Sign 'on a major roadway close to high-rise condominiums/ apartments' include:

- Calgarians who are **aged 18 to 34** (31%) or **35 to 54** (24%) compared to those who are aged 55 and older (12%).
- Respondents who have a household income that is **between \$60,000 to \$120,000** (26%) or that is **over \$120,000** (28%) compared to those who have a household income under \$60,000 (17%).
- Citizens who feel that The City of Calgary is doing a **good job regulating signage** (30%) compared to those who feel that The City of Calgary is doing a poor job regulating signage (16%).

Respondents more likely to place the Freestanding Identification Sign or Ground Sign 'on a major road near commercial businesses' include:

- Calgarians who feel that it is **important to regulate signage** (70%) compared to those who do not feel that it is important to regulate signage (50%).

Respondents more likely to place the Freestanding Identification Sign or Ground Sign 'not in the city of Calgary' include:

- Residents in the **Northeast quadrant** (8%) compared to those living in the Southwest quadrant (2%), Southeast quadrant (1%) or the Northwest quadrant (0%).
- Residents who live in an **inner city community** (7%) compared to those who live in a maturing (1%) or new community (1%).

Respondents more likely to place the Temporary Mobile Sign 'in my own neighbourhood' include:

- Calgarians who feel that it is **not important to regulate signage** (34%) compared to those who do feel that it is important to regulate signage (18%).
- Respondents who **are not concerned about digital signage** (29%) compared to those who are concerned about digital signage (13%).
- Residents who **support more digital signage** (28%) compared to those who oppose more digital signage (14%).

Respondents more likely to place the Temporary Mobile Sign ‘on a major roadway close to residential houses’ include:

- Residents in the **Northeast quadrant** (29%) compared to those living in the Southeast quadrant (17%).
- Respondents who have an **education level of high school or less** (32%) compared to those with some post secondary (19%) or who have completed university (19%).
- Citizens who feel that The City of Calgary is doing a **good job regulating signage** (25%) compared to those who feel that The City of Calgary is doing a poor job regulating signage (15%).
- Respondents who **are not concerned about digital signage** (28%) compared to those who are concerned about digital signage (16%).
- Residents who **support more digital signage** (29%) compared to those who oppose more digital signage (16%).

Respondents more likely to place the Temporary Mobile Sign ‘on a major roadway close to high-rise condominiums/ apartments’ include:

- Residents who live in a **semi-detached house** (25%) compared to those who live in an apartment/condo with 6 or more units (13%).
- Respondents who have an **education level of high school or less** (25%) compared to those with some post secondary (15%) or who have completed university (13%).
- Citizens who feel that The City of Calgary is doing a **good job regulating signage** (21%) compared to those who feel that The City of Calgary is doing a poor job regulating signage (10%).

Respondents more likely to place the Temporary Mobile Sign ‘on a major road near commercial businesses’ include:

- Calgarians who feel that there are the **right amount of signs in Calgary** (38%) compared to those who feel that there are too many signs in Calgary (26%).
- Citizens who feel that The City of Calgary is doing a **good job regulating signage** (36%) compared to those who feel that The City of Calgary is doing a poor job regulating signage (25%).

Respondents more likely to place the Temporary Mobile Sign in ‘downtown Calgary - close to office buildings and/or high rise apartments/ condominiums’ include:

- Residents in the **Northeast quadrant** (15%) compared to those living in the Southeast quadrant (5%).
- Residents who live in a **new** (13%) or **maturing community** (14%) compared to those who live in an inner city community (4%).
- Calgarians who have **3 or more vehicles in their household** (18%) compared to those with 1 vehicle (8%).

Respondents more likely to place the Temporary Mobile Sign ‘not in the city of Calgary’ include:

- Residents who live in an **apartment/condo with 6 or more units** (44%) compared to those who live in a semi-detached (27%) or single-detached house (31%).
- Respondents who have **completed university** (37%) or who have **some post secondary** (32%) compared to those who have an education level of high school or less (21%).
- Citizens who feel that The City of Calgary is doing a **poor job regulating signage** (48%) compared to those who feel that The City of Calgary is doing a good job regulating signage (23%).
- Respondents who **are concerned about digital signage** (38%) compared to those who are not concerned about digital signage (24%).
- Residents who **oppose more digital signage** (38%) compared to those who support more digital signage (24%).

Respondents more likely to place the Community Temporary Sign ‘in my own neighbourhood’ include:

- Residents in the **Northeast quadrant** (76%) compared to those living in the Southwest quadrant (64%).
- Calgarians who are **aged 35 to 54** (73%) compared to those who are aged 55 and older (63%).
- Residents who live in a **single detached house** (72%) compared to those who live in an apartment/condo with 6 or more units (59%).
- Citizens who **live with one or more persons** (72%) compared to those who are living alone (61%).
- Respondents who have a **household income that is between \$60,000 and \$120,000** (75%) compared to those who have a household income that is under \$60,000 (62%).

Respondents more likely to place the Community Temporary Sign ‘on a major roadway close to residential houses’ include:

- Residents in the **Southwest quadrant** (45%) compared to those living in the Southeast quadrant (33%).
- Calgarians who are **aged 18 to 34** (45%) compared to those who are aged 35 to 54 (34%).
- Residents who have lived in Calgary for **5 to 10 years** (48%) compared to those who have lived in Calgary for over 10 years (36%).
- Residents who live in an **inner city community** (46%) compared to those who live in an established community (33%).
- Citizens who **live alone** (47%) compared to those who live with one or more persons (35%).

- Respondents who have **completed university** (44%) compared to those who have some post secondary (33%).
- Calgarians who feel that there are the **right amount of signs in Calgary** (43%) compared to those who feel that there are too many signs in Calgary (32%).
- Citizens who feel that The City of Calgary is doing a **good job regulating signage** (42%) compared to those who feel that The City of Calgary is doing a poor job regulating signage (31%).

Respondents more likely to place the Community Temporary Sign ‘not in the city of Calgary’ include:

- Residents who live in an **apartment/condo with 6 or more units** (16%) compared to those who live in a single-detached house (6%).
- Citizens who feel that The City of Calgary is doing a **poor job regulating signage** (16%) compared to those who feel that The City of Calgary is doing a good job regulating signage (5%).

Respondents more likely to place the Temporary A-Board Sign ‘in my own neighbourhood’ include:

- Residents who live in an **inner city community** (47%) compared to those who live in an established (35%), maturing (32%) or new community (29%).
- Citizens who **live alone** (44%) compared to those who live with one or more persons (33%).

Respondents more likely to place the Temporary A-Board Sign ‘on a major roadway close to residential houses’ include:

- Residents in the **Northwest quadrant** (20%) compared to those living in the Southeast quadrant (11%) or Southwest quadrant (9%).
- Respondents who have an **education level of high school or less** (23%) compared to those with some post secondary (13%) or who have completed university (12%).

Respondents more likely to place the Temporary A-Board Sign ‘on a major roadway close to high-rise condominiums/ apartments’ include:

- Residents in the **Northwest quadrant** (19%) compared to those living in the Southeast quadrant (10%) or the Northeast quadrant (9%).

Respondents more likely to place the Temporary A-Board Sign ‘on a major road near commercial businesses’ include:

- Calgarians who are **aged 18 to 34** (22%) or **35 to 54** (19%) compared to those who are aged 55 and older (12%).
- Respondents who have an **education level of high school or less** (28%) compared to those with some post secondary (19%) or who have completed university (15%).
- Calgarians who feel that it is **not important to regulate signage** (32%) compared to those who do feel that it is important to regulate signage (17%).

Respondents more likely to place the Temporary A-Board Sign in 'downtown Calgary - close to office buildings and/or high rise apartments/ condominiums' include:

- Calgarians who are **aged 18 to 34** (50%) or **35 to 54** (44%) compared to those who are aged 55 and older (35%).
- Calgarians who feel that there are the **right amount of signs in Calgary** (52%) compared to those who feel that there are too many signs in Calgary (40%).
- Citizens who feel that The City of Calgary is doing a **good job regulating signage** (49%) compared to those who feel that The City of Calgary is doing a poor job regulating signage (35%).

Respondents more likely to place the Temporary A-Board Sign in 'downtown Calgary - on Stephen Ave or along 17th Avenue SW' include:

- Calgarians who are **aged 18 to 34** (65%) or **35 to 54** (59%) compared to those who are aged 55 and older (47%).
- Respondents who have **completed university** (64%) or who have **some post secondary** (58%) compared to those who have an education level of high school or less (46%).
- Respondents who have a household income that is **between \$60,000 to \$120,000** (60%) or that is **over \$120,000** (67%) compared to those who have a household income under \$60,000 (50%).

Respondents more likely to place the Electronic Message Sign 'on a major roadway close to residential houses' include:

- Respondents who **are not concerned about digital signage** (18%) compared to those who are concerned about digital signage (8%).

Respondents more likely to place the Electronic Message Sign 'on a major roadway close to high-rise condominiums/ apartments' include:

- Calgarians who are **aged 18 to 34** (29%) or **35 to 54** (24%) compared to those who are aged 55 and older (16%).
- Citizens who feel that The City of Calgary is doing a **good job regulating signage** (29%) compared to those who feel that The City of Calgary is doing a poor job regulating signage (16%).
- Respondents who **are not concerned about digital signage** (31%) compared to those who are concerned about digital signage (18%).
- Residents who **support more digital signage** (31%) compared to those who oppose more digital signage (19%).

Respondents more likely to place the Electronic Message Sign 'on a major road near commercial businesses' include:

- Residents who have lived in Calgary for **5 to 10 years** (70%) compared to those who have lived in Calgary for less than 5 years (49%).

Respondents more likely to place the Electronic Message Sign in ‘downtown Calgary - close to office buildings and/or high rise apartments/ condominiums’ include:

- Calgarians who are **aged 18 to 34** (24%) or **35 to 54** (18%) compared to those who are aged 55 and older (11%).
- Residents who live in a **new** (26%) or **established community** (21%) compared to those who live in an inner city community (10%). Additionally, between those who live in a **new community** (26%) and those who live in a maturing community (11%).
- Residents who live in a **single detached house** (21%) compared to those who live in an apartment/condo with 6 or more units (11%).
- Respondents who have a **household income that is between \$60,000 and \$120,000** (22%) compared to those who have a household income that is greater than \$120,000 (11%).

Respondents more likely to place the Electronic Message Sign in ‘downtown Calgary - on Stephen Ave or along 17th Avenue SW’ include:

- Residents who live in a **semi detached house** (15%) compared to those who live in an apartment/condo with 6 or more units (4%).

Respondents more likely to place the Electronic Message Sign ‘not in the city of Calgary’ include:

- Citizens who feel that The City of Calgary is doing a **poor job regulating signage** (16%) compared to those who feel that The City of Calgary is doing a good job regulating signage (5%).
- Respondents who **are not concerned about digital signage** (15%) compared to those who are concerned about digital signage (2%).
- Residents who **support more digital signage** (15%) compared to those who oppose more digital signage (1%).

Respondents more likely to place the Digital Third Party Sign ‘on a major roadway close to residential houses’ include:

- Residents in the **Northeast quadrant** (15%) or **Northwest quadrant** (14%) compared to those living in the Southeast quadrant (5%).

Respondents more likely to place the Digital Third Party Sign ‘on a major roadway close to high-rise condominiums/ apartments’ include:

- Residents in the **Northeast quadrant** (26%) compared to those living in the Southwest quadrant (12%), Southeast quadrant (13%) or the Northwest quadrant (15%).
- Respondents who have an **education level of high school or less** (23%) compared to those who have completed university (13%).

- Residents who **support more digital signage** (22%) compared to those who oppose more digital signage (12%).

Respondents more likely to place the Digital Third Party Sign ‘on a major road near commercial businesses’ include:

- Calgarians who feel that there are the **right amount of signs in Calgary** (55%) compared to those who feel that there are too many signs in Calgary (42%).
- Citizens who feel that The City of Calgary is doing a **good job regulating signage** (54%) compared to those who feel that The City of Calgary is doing a poor job regulating signage (44%).
- Respondents who **are not concerned about digital signage** (64%) compared to those who are concerned about digital signage (39%).
- Residents who **support more digital signage** (66%) compared to those who oppose more digital signage (39%).

Respondents more likely to place the Digital Third Party Sign in ‘downtown Calgary - on Stephen Ave or along 17th Avenue SW’ include:

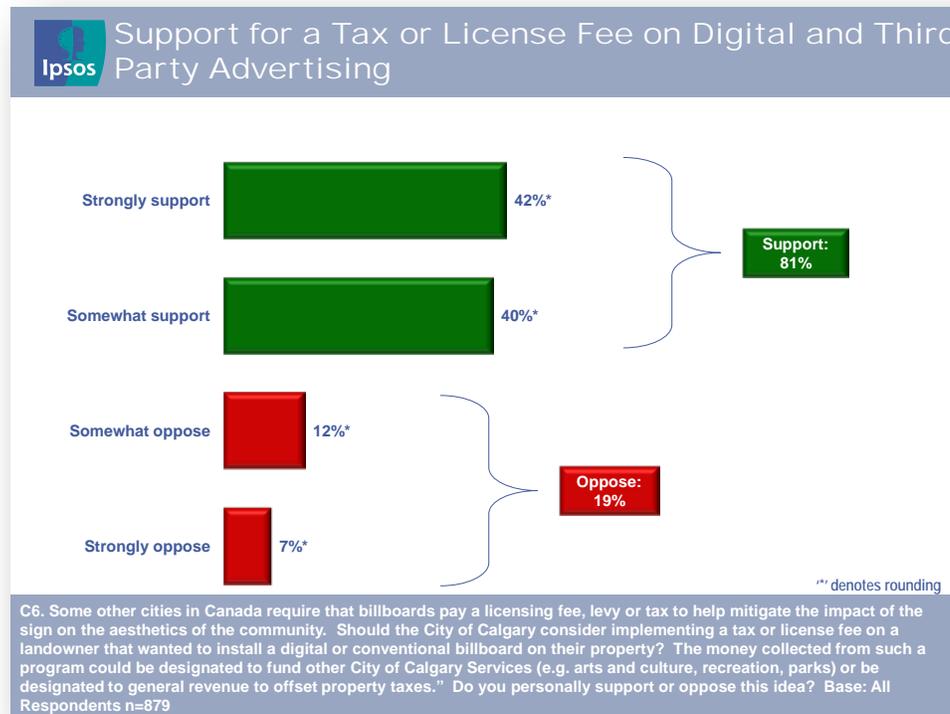
- Residents who live in a **semi detached house** (14%) compared to those who live in an apartment/condo with 6 or more units (5%).

Respondents more likely to place the Digital Third Party Sign ‘not in the city of Calgary’ include:

- Residents in the **Northwest quadrant** (32%) compared to those living in the Northeast quadrant (21%).
- Calgarians who feel that there are **too many signs in Calgary** (38%) compared to those who feel that there are the right amount of signs in Calgary (20%).
- Citizens who feel that The City of Calgary is doing a **poor job regulating signage** (37%) compared to those who feel that The City of Calgary is doing a good job regulating signage (22%).
- Respondents who **are concerned about digital signage** (40%) compared to those who are not concerned about digital signage (12%).
- Residents who **oppose more digital signage** (42%) compared to those who support more digital signage (8%).

Support for a Tax or License Fee on Digital and Third Party Advertising

There is strong support for a tax or license fee on digital and third party advertising in Calgary.



Respondents more likely to strongly support implementing a tax or license fee on digital signs include:

- Respondents who have **completed university** (47%) compared to those who have some post secondary (34%).
- Calgarians who feel that there are **too many signs in Calgary** (51%) compared to those who feel that there are the right amount of signs in Calgary (35%).
- Citizens who feel that The City of Calgary is doing a **poor job regulating signage** (51%) compared to those who feel that The City of Calgary is doing a good job regulating signage (37%).
- Respondents who **are concerned about digital signage** (49%) compared to those who are not concerned about digital signage (32%).
- Residents who **oppose more digital signage** (48%) compared to those who support more digital signage (33%).

Respondents more likely to somewhat support implementing a tax or license fee on digital and third party advertising include:

- Calgarians who feel that there are the **right amount of signs in Calgary** (46%) compared to those who feel that there are too many signs in Calgary (33%).
- Citizens who feel that The City of Calgary is doing a **good job regulating signage** (44%) compared to those who feel that The City of Calgary is doing a poor job regulating signage (30%).

Respondents more likely to somewhat oppose implementing a tax or license fee on digital and third party advertising include:

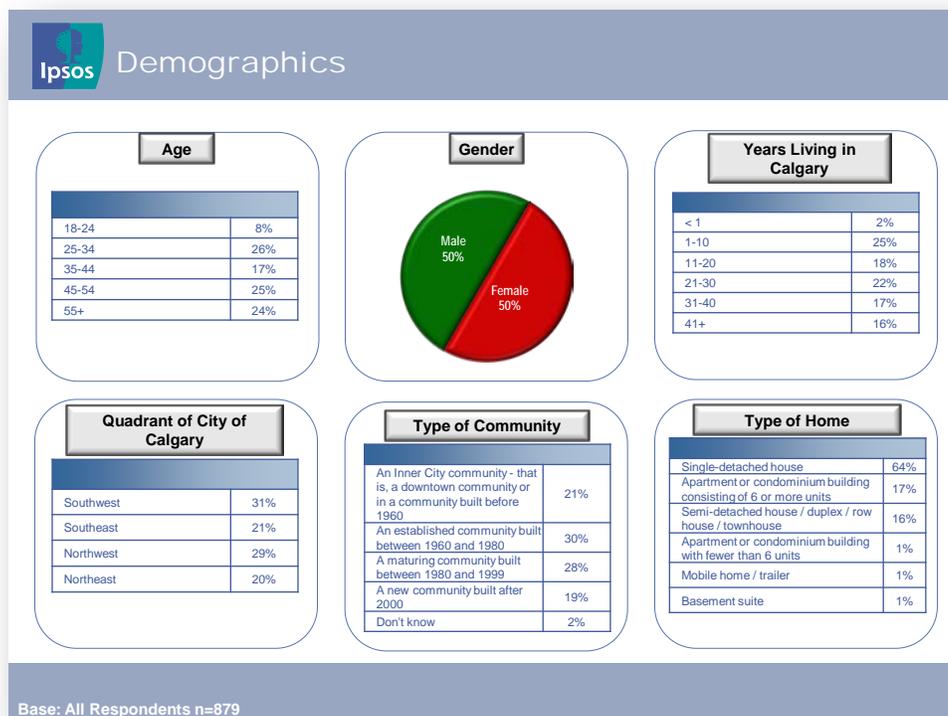
- Calgarians who have **3 or more vehicles in their household** (22%) compared to those with 1 vehicle (12%) or 2 vehicles (9%).

Respondents more likely to strongly oppose implementing a tax or license fee on digital and third party advertising include:

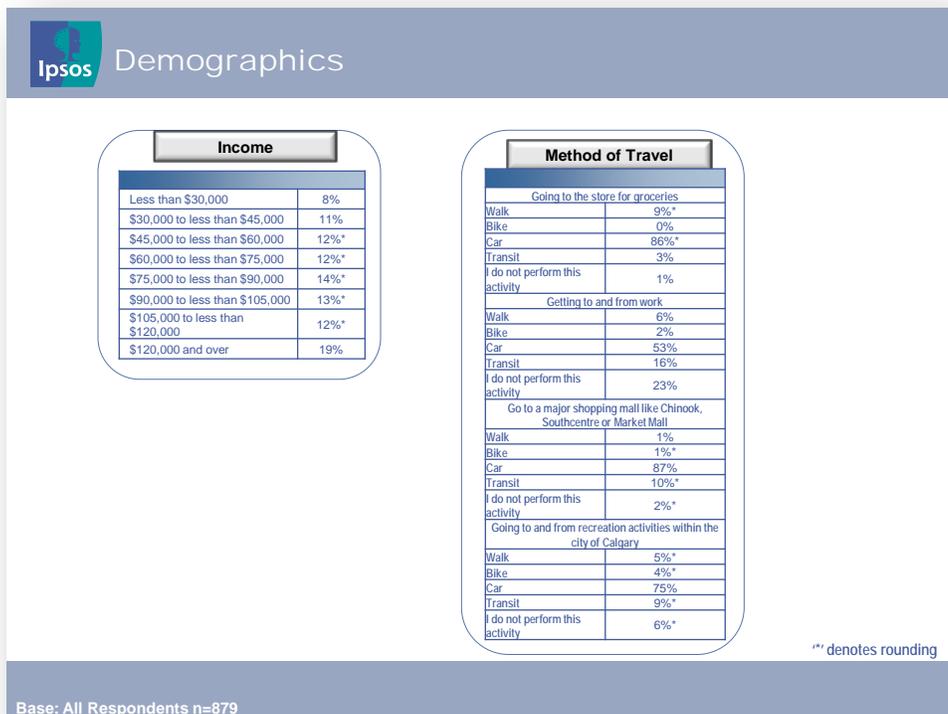
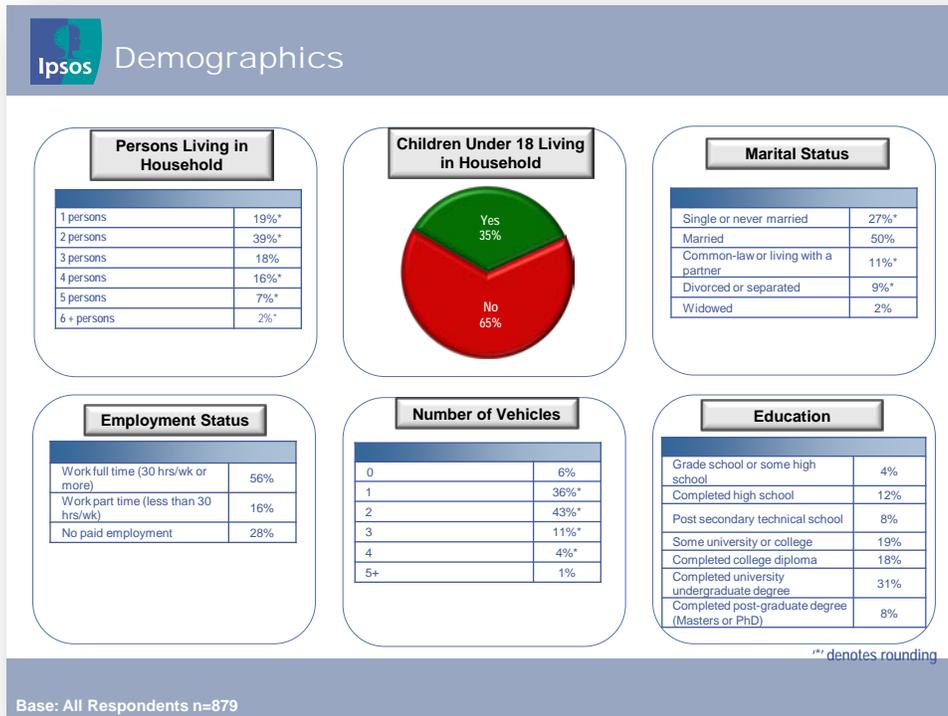
- Residents in the **Southeast quadrant** (13%) compared to those living in the Southwest quadrant (5%) or the Northeast quadrant (4%).
- Calgarians who are **aged 55 and older** (9%) or **35 to 54** (9%) compared to those who are aged 18 to 34 (2%).
- Residents who live in an **established community** (10%) compared to those who live in a new community (3%).

Appendix

Demographics



2011 Signs Regulations Research



Questionnaire

The City of Calgary Signs Research – Quantitative Wave

June 3rd, 2011

DRAFT Questionnaire

EMAIL INVITATION:

[INSERT STANDARD IPSOS I-SAY EMAIL INVITATION]

INTRODUCTION AT SITE:

[INSERT STANDARD IPSOS I-SAY INTRODUCTION]

AGE Numeric Field

What is your age?

GENDER Single Punch

What is your gender?

A1 Male

A2 Female

EN01CTY Single Punch

In what country do you live?

A1 USA

A2 Canada

A3 Australia

A4 United Kingdom

A5 Other

[PN: THANK AND TERMINATE IF NOT A2]

IND10US

Multi-Punch PREQUAL

In which industries or professions do you, or any member of your immediate household, work? Please select all that apply.

- A1 Advertising/Public Relations
- A2 Automotive
- A3 Beauty/Cosmetics
- A4 Education
- A5 Electronics/Computer/Software
- A6 Fashion/Clothing
- A7 Financial Services/Insurance
- A8 Food/Beverages
- A9 Government/Politics
- A10 Grocery/Convenience/Department Stores
- A11 Healthcare/Pharmaceuticals
- A12 Internet/E-Commerce
- A13 Management Consulting
- A14 Marketing/Market Research
- A15 Movie Studio
- A16 Movie Theater or Theater Chain
- A17 Music
- A18 Personal Care/Toiletries
- A19 Pets (Grooming, Veterinary, Retail, Training)
- A20 Publishing (Newspaper, Magazines, Books)
- A21 Radio
- A22 Real Estate/Construction
- A23 Restaurants
- A24 Sales/Sales Promotion
- A25 Sports

- A26 Telecommunications (phone, cell phone, cable)
- A27 Television (Studio/Network/Cable/Satellite)
- A28 Toys
- A29 Transportation/Shipping
- A30 Travel/Tourism
- A31 Video Games
- A32 Other Entertainment
- A33 None of the above

[PN THANK AND TERMINATE IF A1, A14, A20, A21, A27]

S1. And, do you or does anyone in your household work for the following?

Please select all that apply.

The City of Calgary

The signage industry, including companies who manufacturer/rent signs in Calgary

None of the above

[THANK AND TERMINATE IF ANY OPTION OTHER THAN “NONE OF THE ABOVE” SELECTED AT S1]

S2. How many years have you lived in the City of Calgary?

[RANGE less than one year to 100]

I do not live in Calgary **[THANK & TERMINATE]**

S3. Which quadrant of the city do you live in?

- Southwest
- Southeast
- Northwest
- Northeast
- Don't know

[THANK & TERMINATE IF DON'T KNOW AT S3]

CRQ4QUAL [SinglePunchCliff]

Congratulations, you've qualified! A survey is waiting for you.

It may take up to 15 seconds for the survey to load so please do not refresh your browser while you are waiting.

Thank You for your participation.

GO TO SURVEY (ONLY CHOICE)

SECTION A: ISSUES FACING CALGARY

A1. In your view, as a resident of the City of Calgary, what is the most important issue facing your community - that is, the one issue you feel should receive the greatest attention from your local leaders?

[RECORD VERBATIM]

A2. What are some of the key distractions that you think exist in Calgary when it comes to traveling by car?

[RECORD VERBATIM]

SECTION B: SIGNAGE IN CALGARY

B1. Next, I'd like you to think about all of the different types of signs that we can find throughout Calgary. Please list as many different signs as possible.

[RECORD INDIVIDUAL RESPONSES IN SEPARATE TEXT BOXES – ALLOW FOR 15 MENTIONS].

B2. Still thinking about all the different types of signs that exist in our city, which single sign or type of sign is the most distracting to drivers? *Please describe the sign or where the sign might be.*

[RECORD VERBATIM]

B3. Thinking about all of the signs that exist in our city, would you say that in general, there are...?

- Too many
- The right amount
- Not enough
- Don't know

B4. What, if anything, have you read, seen, or heard, about signage regulations in Calgary?

[RECORD VERBATIM]

- Nothing

B5. What organization do you believe is responsible for regulating **business or advertising** signage in Calgary?

[RANDOMIZE LIST]

- The City of Calgary
 Alberta Government
 Chamber of Commerce
 There isn't an organization that regulates signage in Calgary today
 Other (specify)

B6. As you may or may not know, The City of Calgary is responsible for regulating business and advertising signage throughout the city. Based on what you may have read, seen, or heard or your own impressions, how would you rate the job The City of Calgary is doing today in regulating business and advertising signage throughout the city?

- Very good
 Good
 Poor
 Very Poor
 Don't know **[SKIP TO B8]**

B7. Why did you rate the job The City of Calgary is doing today in regulating business and advertising signage throughout the city as [INSERT RESPONSE FROM B6]?

[RECORD VERBATIM]

B8. In your view, how important is it that The City of Calgary regulates business and advertising signage throughout the city?

- Very important
 Somewhat important
 Not very important
 Not at all important
 Don't know

SECTION C: EVALUTATING SPECIFIC SIGNAGE TYPES IN CALGARY

C1. Next, we are going to show you a series of different signs that exist in Calgary. For each, you will be asked a series of questions after viewing the picture.

- Signs to be shown one at a time with the description next to them. Questions C2a and C2b should be asked for each image. **[RANDOMIZE ORDER OF IMAGES]**

A		<p>This is a fascia sign or wall sign.</p> <p>It is a sign that is affixed directly to the wall of the building where the business is located. It is usually directly above the business for a multi-tenant building.</p>
B		<p>This is a freestanding identification sign or ground sign.</p> <p>This sign is freestanding and not attached to a building. The sign is meant to identify a tenant or tenants that are located on the site. The position of the sign is close to the roadway in order for the businesses to have some sign visibility for the traveling public.</p>
C		<p>This is a temporary mobile sign.</p> <p>This sign is a structure that is easily movable and meant to occupy a site on a temporary basis to advertise business activities or sales events.</p> <p><i>These are <u>not</u> the same as Community signs that you see in your neighbourhood. These are specific to a business.</i></p>

		<p>This is a community temporary sign.</p> <p>This sign is a structure that is easily movable and meant to occupy a space on a temporary basis. <u>These are NOT meant for businesses, but are to advertise community events and information.</u></p>
D		<p>This is a temporary A-board sign.</p> <p>These signs are easily movable signs that are typically used to identify a business and/or advertise sales/events. They are generally located in areas with higher pedestrian activity as they tend to be smaller than mobile signs.</p>
E		<p>These are window identification signs.</p> <p>The purpose of window signs is that they allow for short term messages for events or sales. They are also used to expand the amount of total signage available for business.</p>
F		<p>These are examples of electronic message signs.</p> <p>This sign communicates information using electronic technology such as LED lights or TV screens.</p> <p>These signs advertise products or services which typically occur on the same property where the sign is located.</p>

		
<p>G</p>		<p>These are examples of digital third party signs.</p> <p>These signs present information, advertising and information on a digital screen that changes, or moves.</p> <p>It does not always advertise specifically for the business where the sign is located, but for any business that wishes to purchase advertising using this type of sign. Some people might describe them as a large television style screen showing advertising for different companies.</p>
<p>H</p>		<p>This is a third party billboard.</p> <p>This sign may be stationary or some versions rotate and show up to three different advertisements every few seconds. They are typically along roadways and communicate advertising for a business or product not located on the same property as the sign.</p>



QUESTIONS WILL LOOP FOR EACH SIGNAGE TYPE TESTED

C2a. In Calgary today, do you believe that there are...?

- Too many of these signs
- The right amount of these signs
- Not enough of these signs

C2b. In your own view, is this type of sign ...?

[GRID]

[ROW]

- A distraction to drivers
- Important for a business
- Important for Calgarians
- A visual eye-sore for the community
- Just part of the landscape of living in a City (they need to be here)

[COLUMN]

- Yes
- No

[ENSURE C2c and C2c1 ARE ON THE SAME SCREEN]

C2c. Next, we're going to show you two different pictures showing two types of signs that you might find along a sidewalk in Calgary. Please review them carefully and select the one that you find most appealing.

[ROTATE OPTIONS]



C2c1. Why do you prefer the option you selected?

[RECORD RESPONSE]

[ENSURE C2D and C2d1 ARE ON THE SAME SCREEN]

C2D. Next, we're going to show you another two pictures of a sidewalk in Calgary. Please review them carefully and select the one that you find most appealing.

[ROTATE OPTIONS]



C2d1. Why do you prefer the option you selected?

[RECORD RESPONSE]

For the next few questions, I'd like you to think specifically about digital signage in Calgary.

What is digital signage?

These signs present information, advertising and information on a digital screen that changes, or moves.

It does not always advertise specifically for the business where the sign is located, but for any business that wishes to purchase advertising using this type of sign.

Some people might describe them as a large television style screen showing advertising for different companies.

C3. Thinking about digital signage, how concerned are you about the brightness of these signs today?

- Very concerned
- Somewhat concerned
- Not very concerned
- Not at all concerned

C4. Would you support or oppose The City of Calgary allowing more digital signs throughout Calgary?

Strongly support
Somewhat support
Somewhat oppose
Strongly oppose

[ENSURE C4a and C4b ARE ON THE SAME SCREEN]

C4a. Next, we’re going to show you two different videos of the digital billboards that you looked at earlier. Please review them carefully and select the one that you find most appealing.

“These videos may take a minute to load. Please wait and then press play.”

[ROTATE OPTIONS]

VIDEO A to be inserted	VIDEO A to be inserted
FULL MOTION DIGITAL	DIGITAL POWERPOINT/NON-MOTION
Option A	Option B

C4b. Why do you prefer the option you selected?

[RECORD RESPONSE]

C5. As we’ve seen so far in this survey, there are a variety of signs that exist in Calgary today. These different signs are shown in the first column of the grid below. For each type of sign, we’d like you to click and drag the sign to the area or areas where you support The City allowing this type of sign. You also have the option of selecting “*not in the city of Calgary*” if you think The City should not allow this type of sign in any of the areas described.

Please drag each type of sign into at least one column. To change your choice click the red X that appears above the picture.

Sign Types [RANDOMIZE ORDER]	In my own neighbourhood	On a major roadway close to residential houses	On a major roadway close to high-rise condominiums/apartments	Downtown Calgary – close to office buildings and/or high rise apartments/condominiums	Downtown Calgary – on Stephen Ave or along 17th Avenue SW	Not in the city of Calgary	On a major road near commercial businesses’
FREESTANDING IDENTIFICATION SIGN/ GROUND SIGN							

							
<p>TEMPORARY MOBILE SIGN</p> 							
<p>COMMUNITY TEMPORARY SIGN</p> 							
<p>TEMPORARY A-BOARD SIGN</p> 							
<p>ELECTRONIC MESSAGE SIGN</p> 							
<p>DIGITAL THIRD PARTY SIGN</p>							

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C6. Some other cities in Canada require that billboards pay a licensing fee, levy or tax to help mitigate the impact of the sign on the aesthetics of the community. Should the City of Calgary consider implementing a tax of licence fee on a landowner that wanted to install a digital or conventional billboard on their property? The money collected from such a program could be designated to fund other City of Calgary Services (e.g. arts and culture, recreation, parks) or be designated to general revenue to offset property taxes.”

Do you personally support or oppose this idea?

- Strongly support
- Somewhat support
- Somewhat oppose
- Strongly oppose

SECTION D: DEMOGRAPHICS

D1. How would you describe your community?

- An Inner City community – that is, a downtown community or in a community built before 1960
- An established community built between 1960 and 1980
- A maturing community built between 1980 and 1999
- A new community built after 2000
- Don't know

D2. What type of home do you live in today?

- Single-detached house
- Semi-detached house / duplex / row house / townhouse
- Collective dwelling (such as staff housing, military housing or nursing home)
- Mobile home / trailer
- Apartment or condominium building with fewer than 6 units
- Apartment or condominium building consisting of 6 or more units
- Basement suite
- Other (please specify)

D3. In total, how many people live in your household?

[RANGE 1 – 20]

[ASK IF MORE THAN 1]

D4. Do you currently have any children living in your household under the age of 18 years?

- Yes
- No

D5. Which of the following best describes your current marital status?

- Single or never married
- Married
- Common-law or living with a partner
- Divorced or separated
- Widowed
- Don't know

D6. What is your current working status?

- Work full time (30 hrs/wk or more)
- Work part time (less than 30 hrs/wk)
- No paid employment

D7. How many different vehicles does your household currently lease or own?

[RANGE 0 – 10]

D8. What is the highest level of schooling that you have obtained?

- Grade school or some high school
- Completed high school
- Post secondary technical school
- Some university or college
- Completed college diploma
- Completed university undergraduate degree
- Completed post-graduate degree (Masters or PhD)

D9. Which of the following categories best describes the total annual income, before taxes, of all the members of your household?

- Less than \$30,000
- \$30,000 to less than \$45,000
- \$45,000 to less than \$60,000
- \$60,000 to less than \$75,000
- \$75,000 to less than \$90,000
- \$90,000 to less than \$105,000
- \$105,000 to less than \$120,000
- \$120,000 and over

D10. For each of the following types of activities that you might do on a regular basis, please indicate the method of travel you use most often.

<u>Activity</u>	<u>Primary Method of Transportation</u>	<u>I do not perform this activity</u>
Going to the store for groceries	<input type="checkbox"/> Walk <input type="checkbox"/> Bike <input type="checkbox"/> Car <input type="checkbox"/> Transit	<input type="checkbox"/>

Getting to and from work	<input type="checkbox"/> Walk <input type="checkbox"/> Bike <input type="checkbox"/> Car <input type="checkbox"/> Transit	<input type="checkbox"/>
Go to a major shopping mall like Chinook, Southcentre or Market Mall	<input type="checkbox"/> Walk <input type="checkbox"/> Bike <input type="checkbox"/> Car <input type="checkbox"/> Transit	<input type="checkbox"/>
Going to and from recreation activities within the city of Calgary	<input type="checkbox"/> Walk <input type="checkbox"/> Bike <input type="checkbox"/> Car <input type="checkbox"/> Transit	<input type="checkbox"/>

D11. Please provide us with your six digit postal code. This is strictly for classification purposes.

Prefer not to answer

D12. On behalf of Ipsos Reid and The City of Calgary, thank you for taking the time today to provide your responses.