



OOH COMPILATION REPORT

A Review of Recent Research Studies

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Introduction

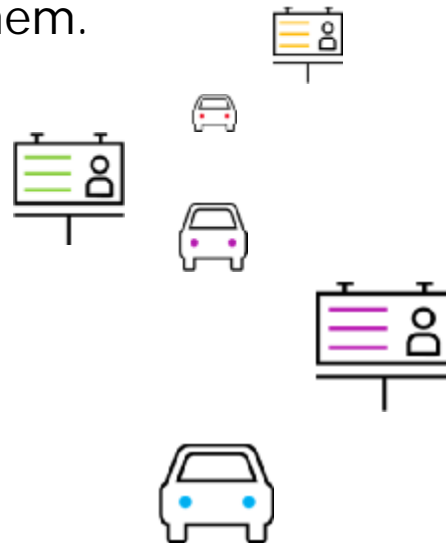
Nielsen On Location provides information services for the out of home (OOH) and place-based advertising marketplace. Four years ago, The Outdoor Advertising Association of America (OAAA) partnered with Nielsen to measure awareness and impact OOH advertising and to further explore this space. Since then, the OAAA and Nielsen have worked together to provide insight into the value of and engagement with OOH advertising.

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I. OOH Advertising Study 2016 – Objective

The goal of this survey was to examine America's travel habits and its exposure to OOH advertising including billboards, digital signage, bus shelters, taxi cabs, kiosks and more. The study also examined the shopping and purchase decisions of America's on-the-go consumers, and how OOH influences them.



OOH Advertising Study 2016 – Top 5 Findings

TOP 5 FINDINGS

- **REACH:** On average, 91% of the U.S. residents age 16 or older, who have traveled in a vehicle in the past month, noticed some form of OOH advertising.
- **ENGAGEMENT:** Billboard viewers (83%) report that they look at the advertising message on a roadside or digital billboard either all, most, or some of the time. Over 1 in 3 billboard viewers (37%) are highly engaged with the ads, looking either all or most of the time.

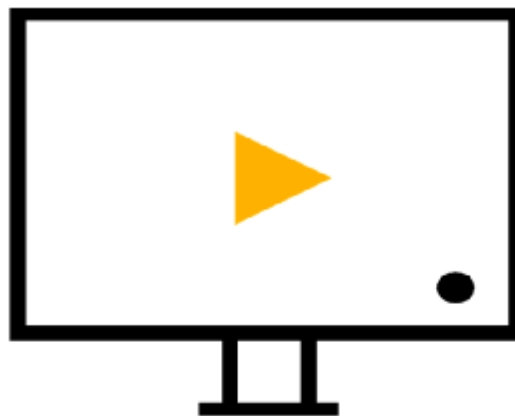
OOH Advertising Study 2016 – Top 5 Findings (cont.)

TOP 5 FINDINGS

- **ACTIVATION:** Nearly 4 in 10 OOH viewers (39%) have noticed an advertisement providing directions to a specific store, business or restaurant location. 16% of OOH viewers have visited the advertised business immediately after seeing the directional OOH ad.
- **INTERACTION:** One in four OOH viewers, with a smartphone, have interacted with an OOH advertisement through an NFC sensor or QR code in the past year.
- **YOUNG ADULTS:** Travelers, age 16-24 and 18-34, are most likely to recall seeing the widest variety of OOH media in the past month.

II. Digital Billboard Study 2015– Objective

U.S. consumers are increasingly exposed to digital screens. While most of these displays offer a solitary experience, OOH digital billboards remain a true mass medium. The goal of this survey was to help advertisers and media sellers better understand the impact of digital billboards.



Digital Billboard Study 2015– Top 5 Findings

TOP 5 FINDINGS

- **REACH:** Of travelers surveyed, 75% noticed a digital billboard in the past month. Of these respondents, 60% noticed a digital billboard in the past week.
- **ENGAGEMENT:** Over half of the travelers (55%), who noticed a digital billboard in the past month, noticed specific messages on the billboard either every time or most of the time they pass one.

Digital Billboard Study 2015– Top 5 Findings (cont.)

TOP 5 FINDINGS

- **ATTITUDE:** Of past month digital billboard viewers, 77% agreed that digital billboards often catch their attention and 71% felt digital billboards stand out more than online ads.
- **INFORMATIVE:** 65% of past month digital billboard viewers consider them a good way to learn about new businesses in the area, and 61% agree digital billboard are a good way to learn about sales and events.
- **INTERACTION:** One third (37%) of past month digital billboard viewers have noticed a digital billboard that provided specific directions to a nearby store, business or restaurant, while one in five viewers (22%) have changed plans to visit an establishment based on what was featured on a digital billboard.

III. Poster Billboard Study 2017– Objective

The goal of this study was to better understand the role that poster billboards play in the media landscape. The study examined awareness and attitudes toward posters in 10 markets and measured advertising recall for 36 brands featured on posters in those markets.



Poster Billboard Study 2017– Top 5 Findings

TOP 5 FINDINGS

- **REACH:** Over half of the adults surveyed (51%) noticed a poster advertisement in the past month and 38% of those noted a poster in the past week.
- **ENGAGEMENT:** Past month poster viewers (94%) reported looking at the advertising messages either all, most or some of the time. Half of poster viewers (50%) were highly engaged with the ads, reporting to notice messages either all or most of the time.

Poster Billboard Study 2017– Top 5 Findings (cont.)

TOP 5 FINDINGS

- **ACTIVATION:** Nearly two-thirds of past month poster viewers (65%) noticed a sign directing them to a nearby store, business or restaurant. 55% of those who noticed a directional poster have changed their plans to visit the business seen advertised.
- **AD RECALL:** The average ad recall per poster campaign tested was 47%; meaning 47% of poster viewers in the campaign's local market, recalled seeing that specific ad. Over half of poster viewers agree poster ads stand out more than ads seen in newspapers, online, on mobile devices or over the radio.
- **YOUNG ADULTS:** Younger adults were more likely to notice posters. Poster viewership was highest among people age 25-34 with 71% noticing a poster in the past month.

IV. Art Everywhere 2014– Objective

Five leading US museums collaborated with OAAA to share images of works of art with the public with the goal of heightening the public's appreciation of American art and promoting visits to art museums nationwide. The purpose of the survey was to track awareness of the *Art Everywhere US* project from week to week, monitor how information about the campaign was being disseminated and finally track viewership and reaction to the displays.



Art Everywhere 2014– Top 3 Findings

TOP 3 FINDINGS

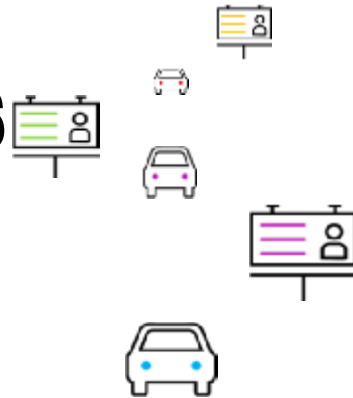
- **REACH:** On average, 7.6% of the total U.S. population, age 18 or older, reported awareness of the campaign each week – equaling a reach of approximately 17.5 million people. Familiarity with the art show peaked at 10.8% of the U.S. adult population after some heavy promotion in late June.
- **AWARENESS THROUGH MEDIA:** Movie theaters were the top OOH media to raise awareness of the campaign with 17% of those who knew about the project – or 3 million U.S. adults – learning about *Art Everywhere US* during the cinema pre-show.
- **INTERACTION:** The project succeeded in changing minds as 7 in 10 people who personally saw a piece of artwork from the project felt they were much more appreciative of American art. The project also inspired action as 74% of those who personally saw a piece of artwork from the project felt they were much more interested in visiting an art museum.



V. Research Methodologies

OOH Advertising Study 2016

Methodology



How?

Deployment of an Online Survey designed to explore travel patterns, engagement with billboards, and consumer actions of billboard viewers.

Dates?

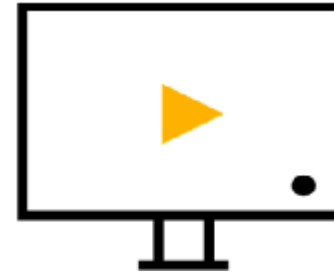
The survey was fielded from March 2-March 9, 2016.

Sample?

The sample frame consisted of U.S. residents, age 16 or older, screened for having traveled on foot, in a car, truck or other private vehicle, ridden as a passenger on a public bus, taxi, commuter rail or subway, in the past month. A total of 1,006 surveys were completed.

Digital Billboard Study 2015

Methodology



How?

Deployment of an Online Survey designed to test ad recall for 30 OOH advertising campaigns running on select digital billboards in 5 major markets.

Dates?

The survey was fielded from May 18-29, 2015.

Sample?

The sample frame consisted of U.S. residents, age 18 or older, who lived in and around five major cities (Atlanta, Cincinnati, Minneapolis, Phoenix, and Tampa). Respondents were screened for having traveled on specified roads containing digital billboards within the past 30 days. A total of 1,256 surveys were completed.

Poster Billboard Study 2017

Methodology



How?

Deployment of an Online survey designed to measure viewer attitudes, viewer awareness, and recall for 36 brands across 10 markets .

Dates?

The survey was fielded from August 16- November 15, 2016.

Sample?

The sample frame consisted of a local sample, age 18 or older, from select U.S. cities (Baltimore, Chico, Louisville, Montgomery, Norfolk, Philadelphia, Salt Lake City, San Diego, Seattle, and Topeka). Data was weighted to market populations by sex and age. A total of 4,020 surveys were completed.

Art Everywhere 2014

Methodology



How?

Deployment of Online Survey designed to measure awareness during the *Art Everywhere US* campaign.

Dates?

The survey was fielded from June 4 – August 29, 2014.

Sample?

The sample frame consisted of a vendor-supplied list of online panelist email addresses, age 18 or older with Internet access, proportionate to the population in the Continental U.S., Alaska, and Hawaii. A total of 7,110 surveys were completed.

The image features the Nielsen logo centered on a vibrant blue background with a dynamic, wavy, 3D effect. The logo consists of the word "nielsen" in a white, lowercase serif font. Below the text is a horizontal line of eight white dots, with the first dot positioned under the 'i' and the remaining seven dots spaced evenly across the rest of the word.

nielsen
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