



USA TouchPoints™

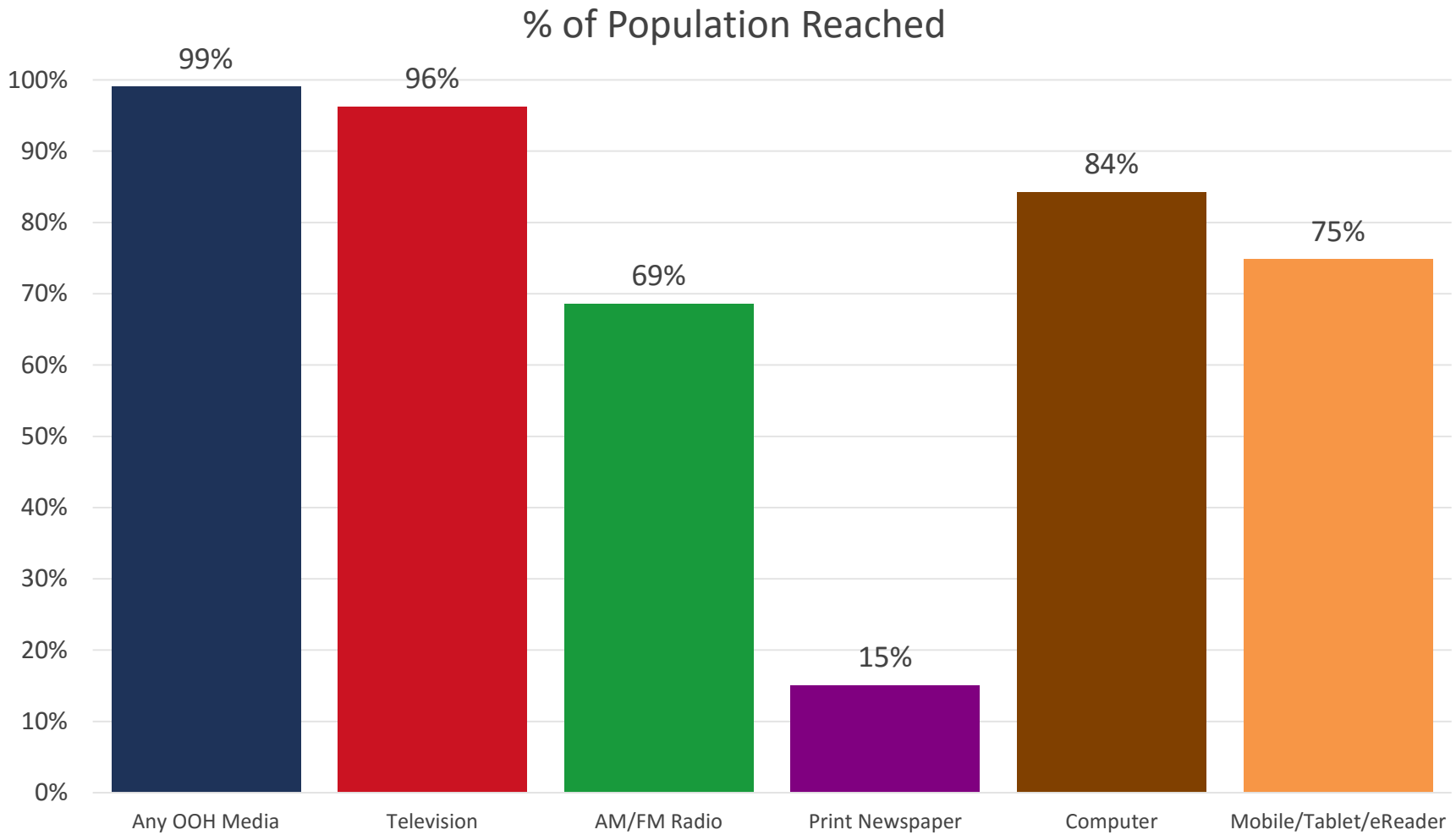
March 2015

OOH and Today's Mobile Consumer

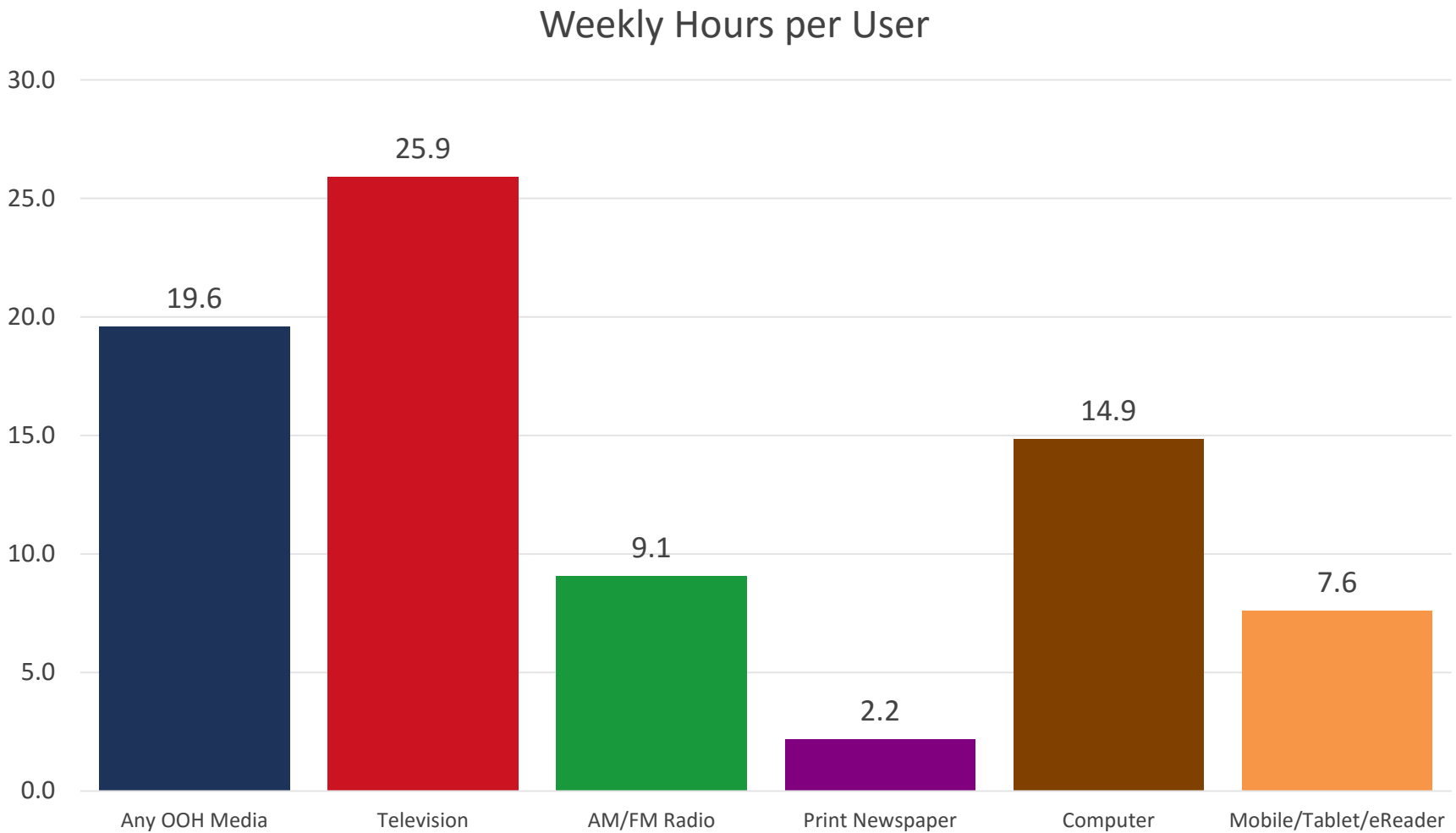


Outdoor Advertising Association of America

OOH'S WEEKLY REACH OF 99% TOPS EVERY OTHER MEDIUM

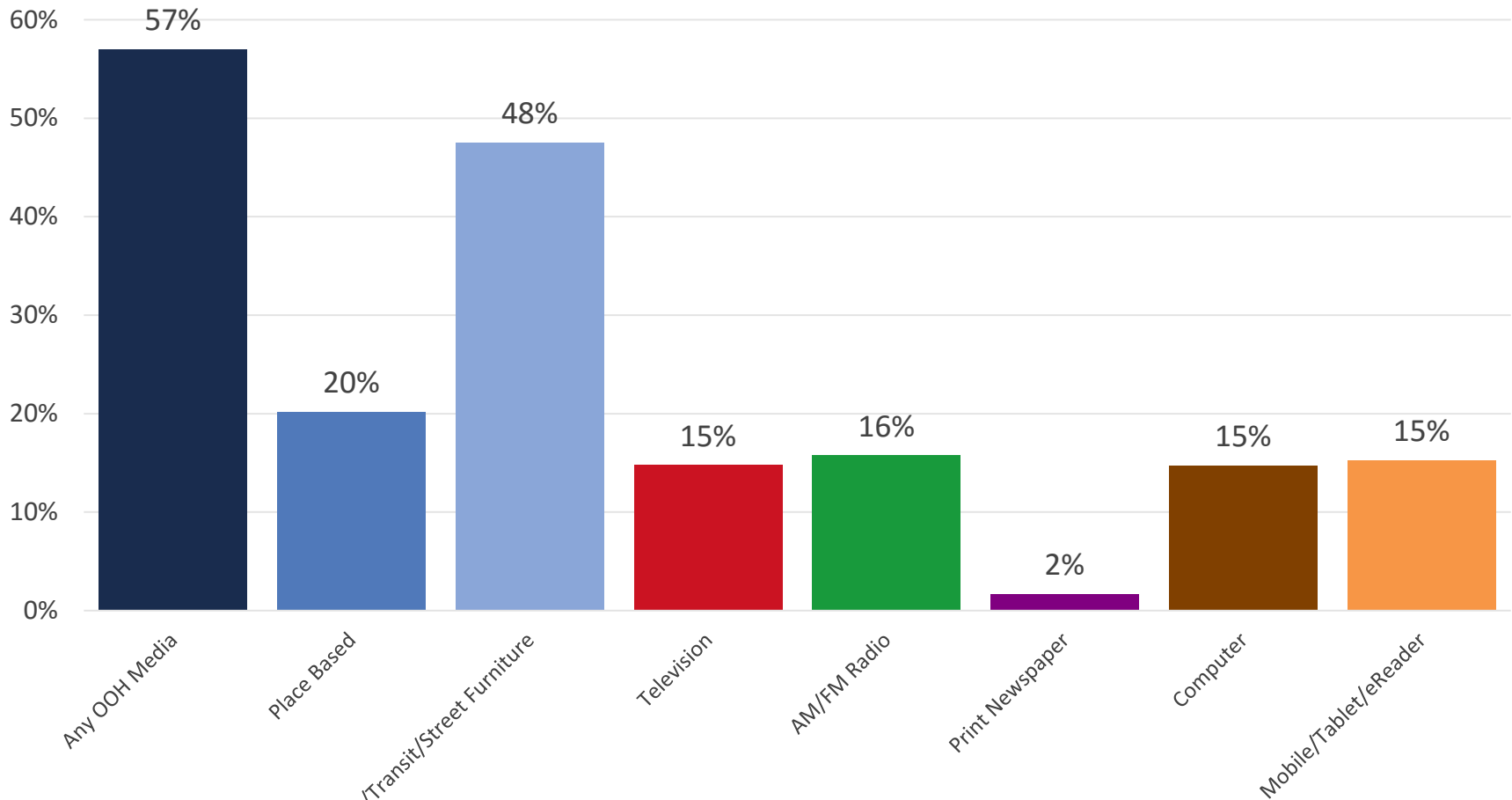


CONSUMERS SPEND 19.6 HOURS PER WEEK WITH OOH – HIGHER THAN ANY MEDIUM OTHER THAN TV



OOH REACHES CONSUMERS IN THE HOUR BEFORE 57% OF QSR VISITS

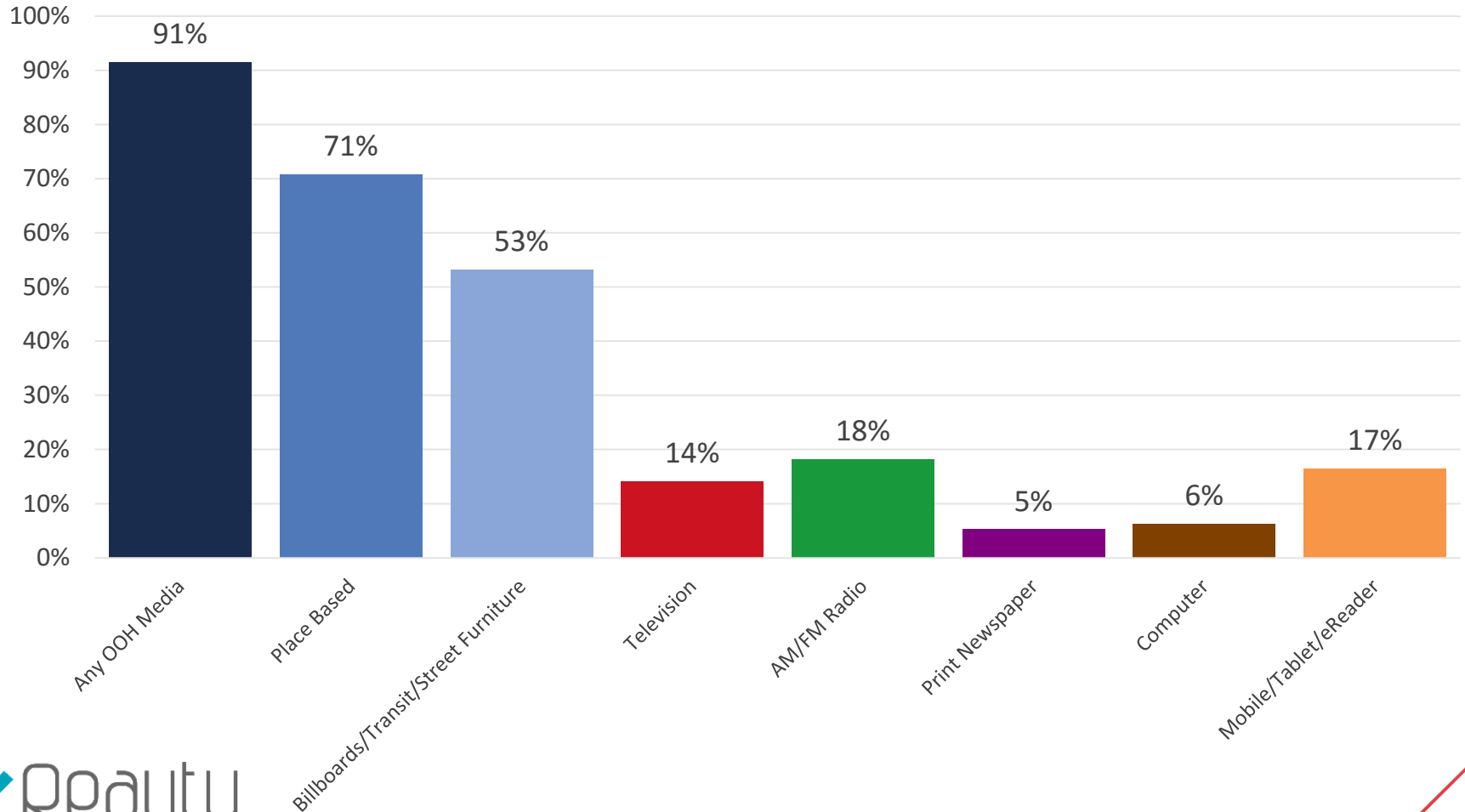
Exposure by medium hour before QSR visits



OOH REACHES CONSUMERS IN THE HOUR BEFORE 91% OF SHOPPING MALL VISITS

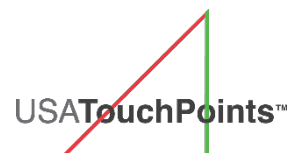
Exposure by medium hour before mall visits

(includes in-mall exposure prior to specific store shopping)



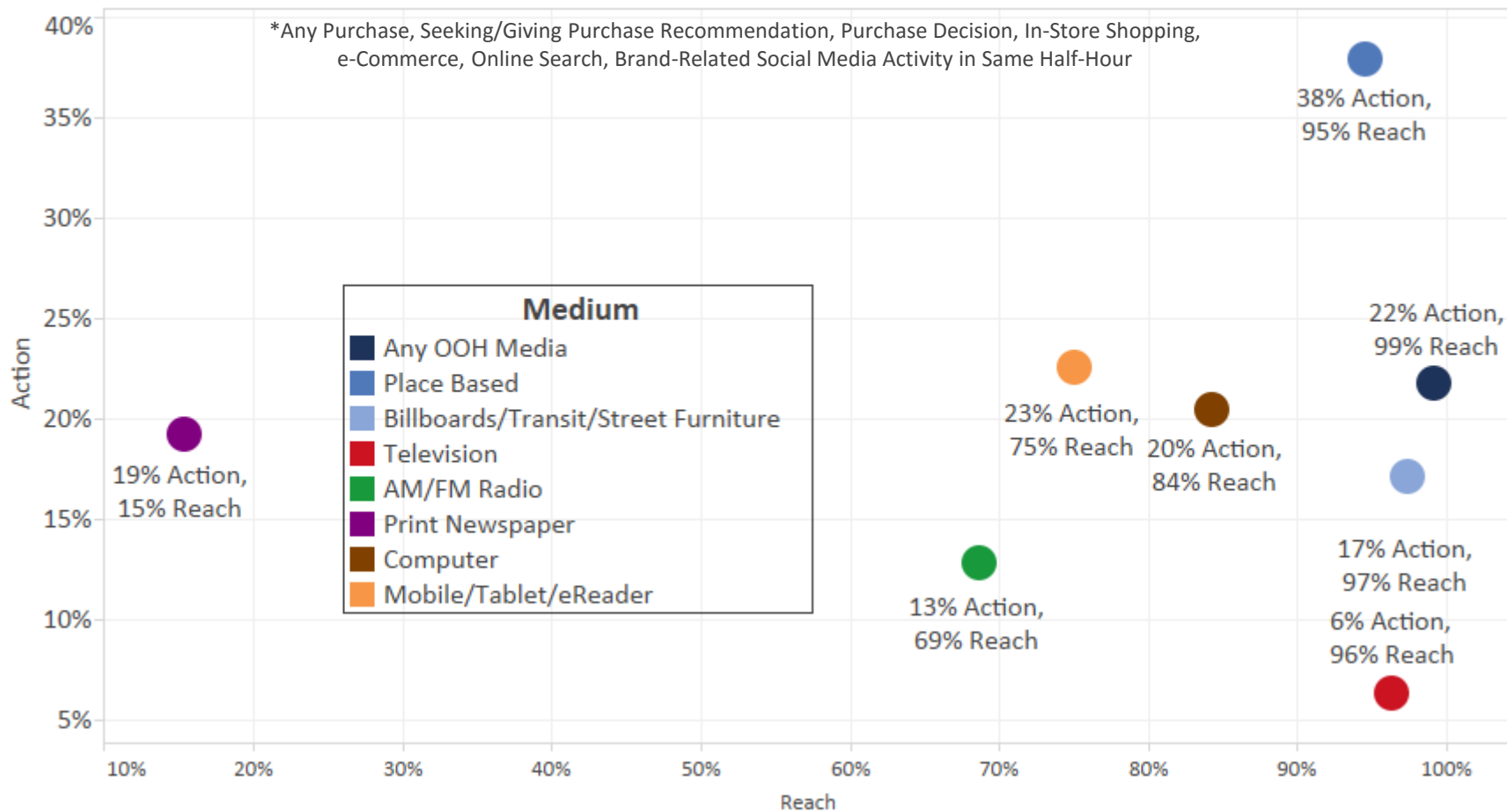
Source: USA TouchPoints, 2014.1

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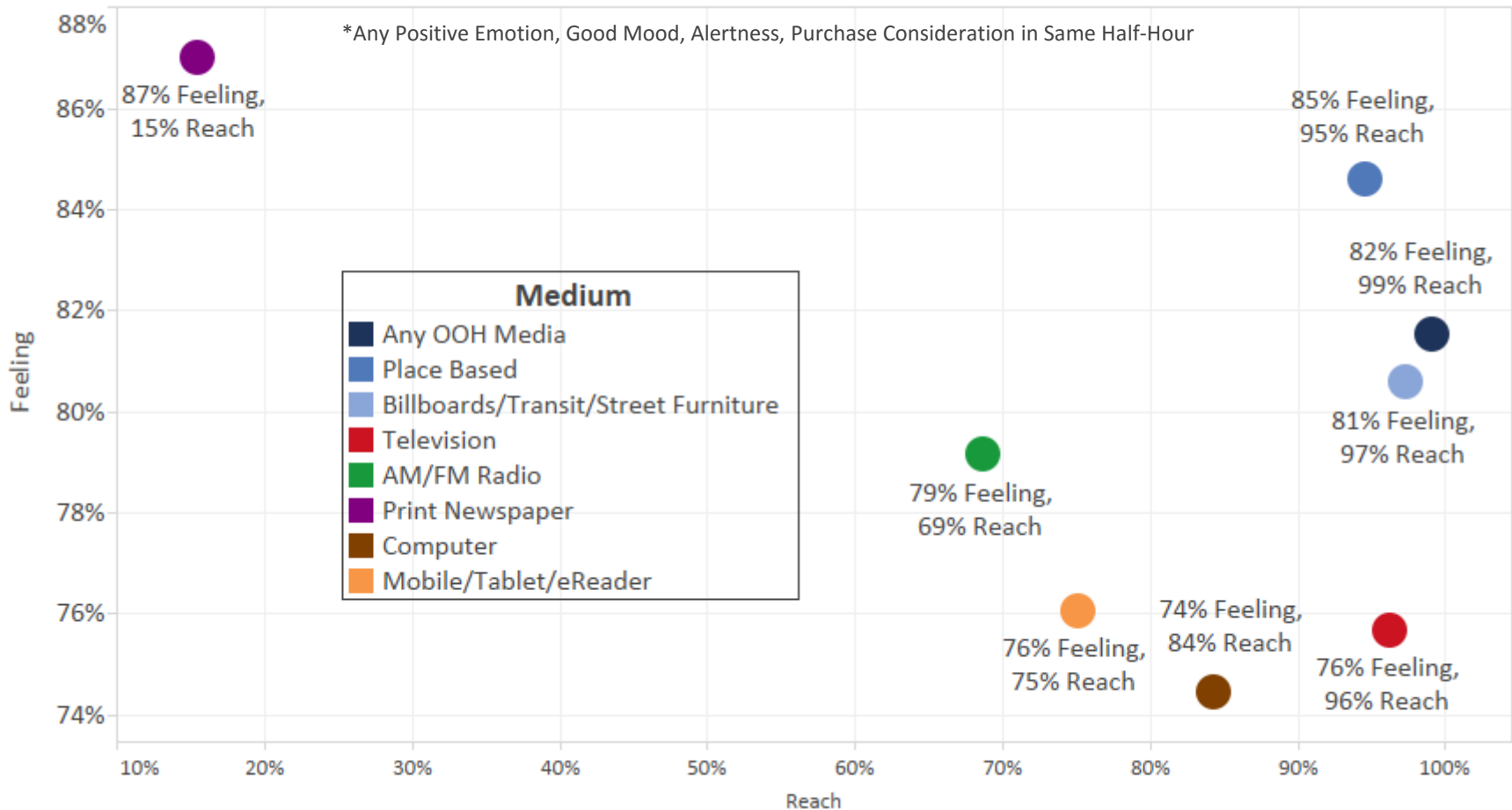
CONSUMERS REPORT “ACTION” RESPONSES IN THE SAME HALF-HOUR AS 22% OF OOH EXPOSURES

Action* and Reach by Medium

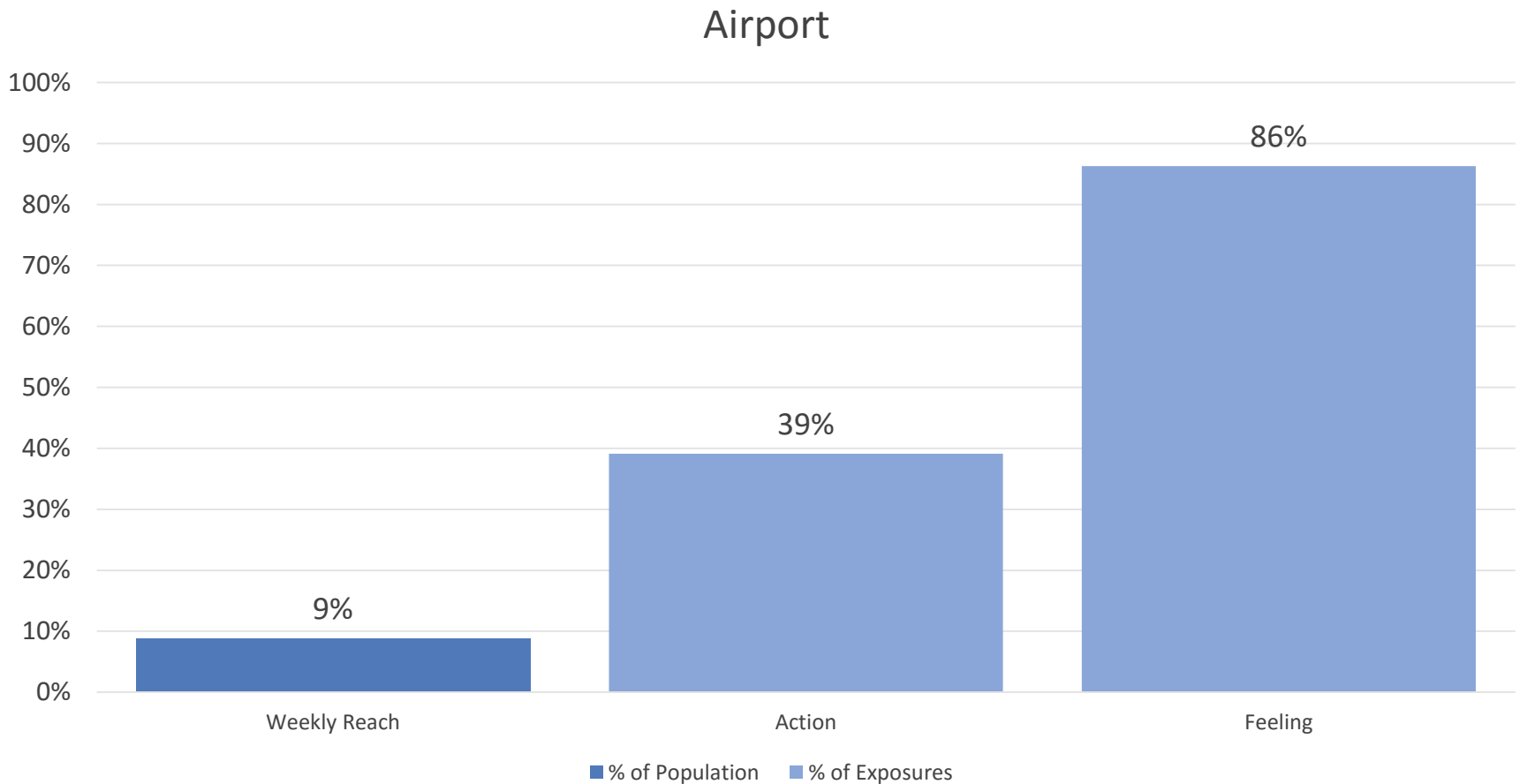


CONSUMERS REPORT “FEELING” RESPONSES IN THE SAME HALF-HOUR AS 82% OF OOH EXPOSURES

Feeling* and Reach by Medium



CONSUMERS AT AIRPORTS REPORT ACTION RESPONSES DURING 39% OF VISITS AND FEELING RESPONSES DURING 86% OF VISITS



Action: Any Purchase, Seeking/Giving Purchase Recommendation, Purchase Decision, In-Store Shopping, e-Commerce, Online Search, Brand-Related Social Media Activity in Same Half-Hour

Feeling: Any Positive Emotion, Good Mood, Alertness, Purchase Consideration in Same Half-Hour

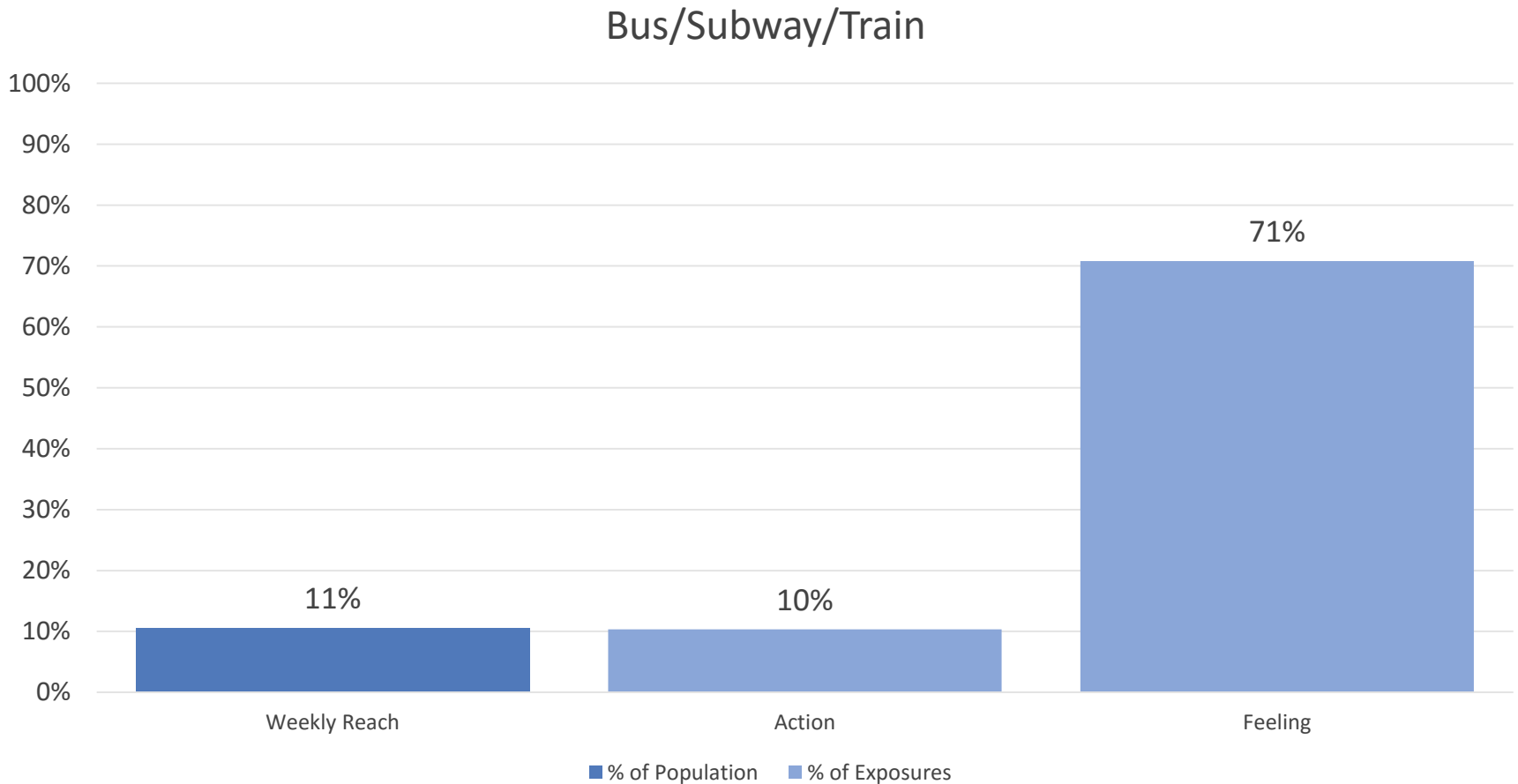


Source: USA TouchPoints, 2014.1

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BUS/SUBWAY/TRAIN RIDERS REPORT ACTION RESPONSES DURING 10% OF EXPOSURES AND FEELING RESPONSES DURING 71% OF EXPOSURES



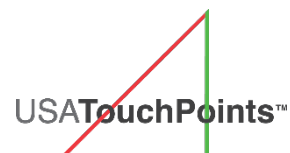
Action: Any Purchase, Seeking/Giving Purchase Recommendation, Purchase Decision, In-Store Shopping, e-Commerce, Online Search, Brand-Related Social Media Activity in Same Half-Hour

Feeling: Any Positive Emotion, Good Mood, Alertness, Purchase Consideration in Same Half-Hour



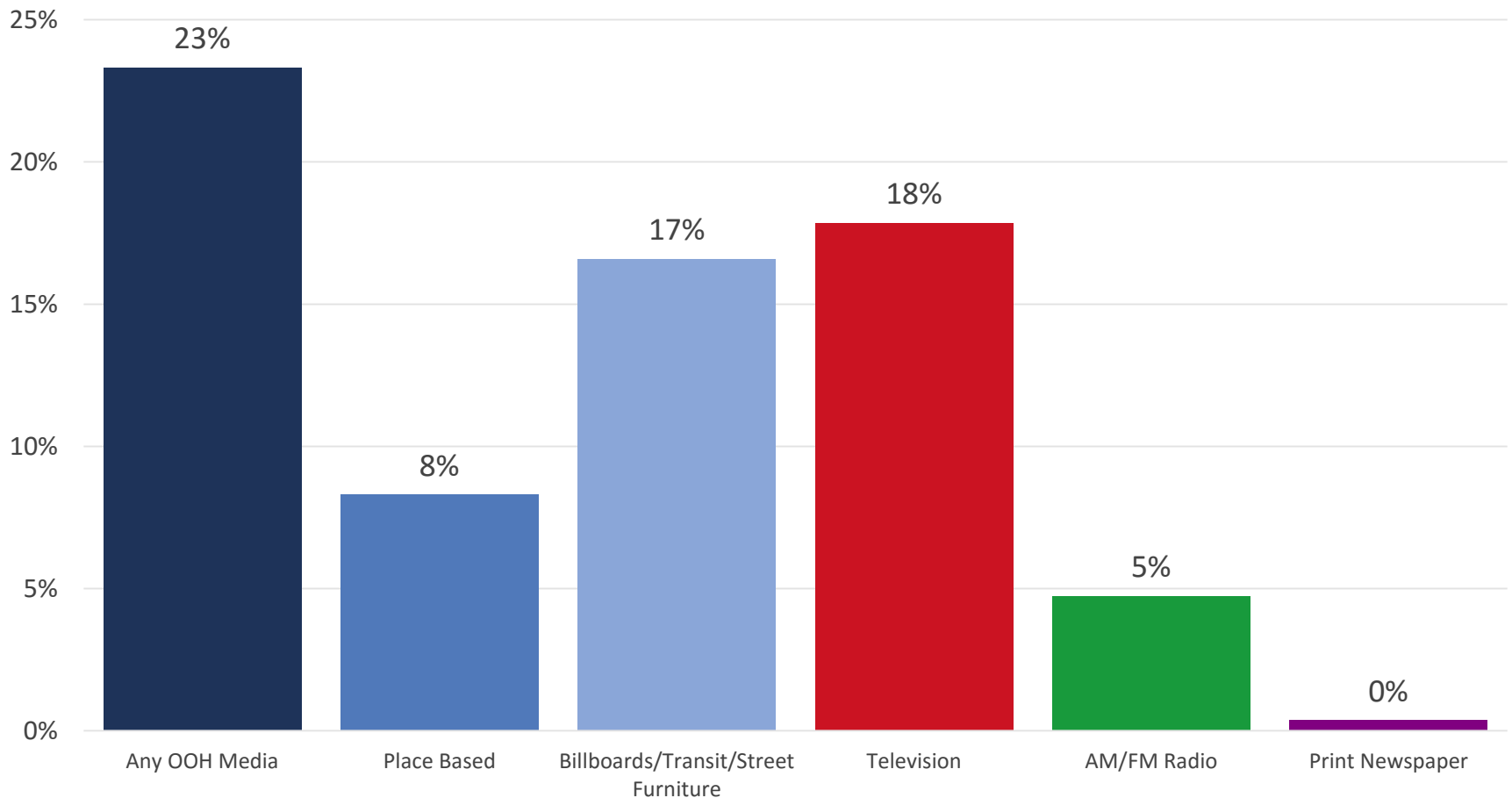
Source: USA TouchPoints, 2014.1

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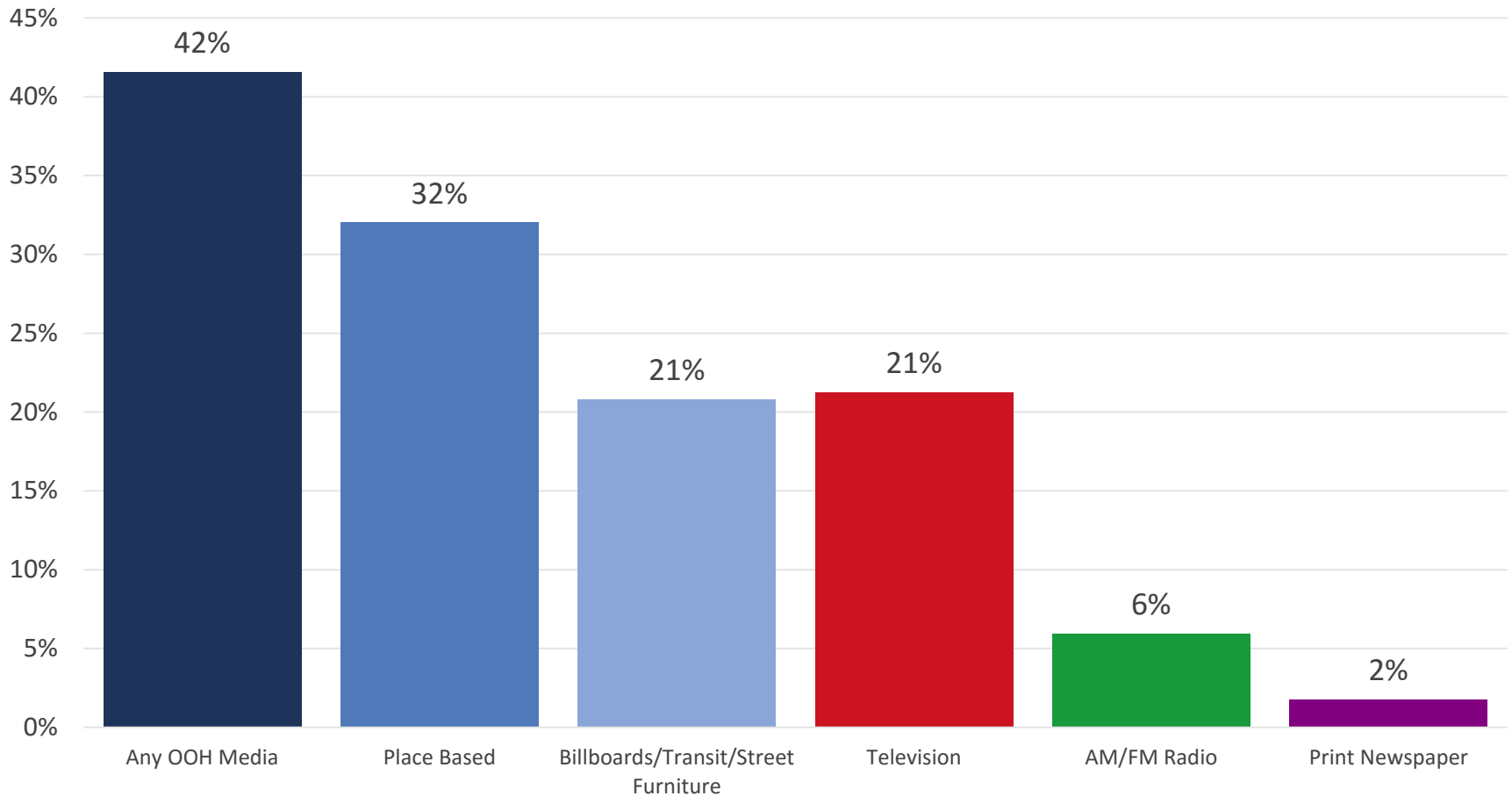
OOH REACHES CONSUMERS IN THE SAME HALF-HOUR AS 23% OF ONLINE MOBILE ACTIVITY, MORE THAN ANY OTHER TRADITIONAL MEDIUM

Exposure by medium during mobile online activity



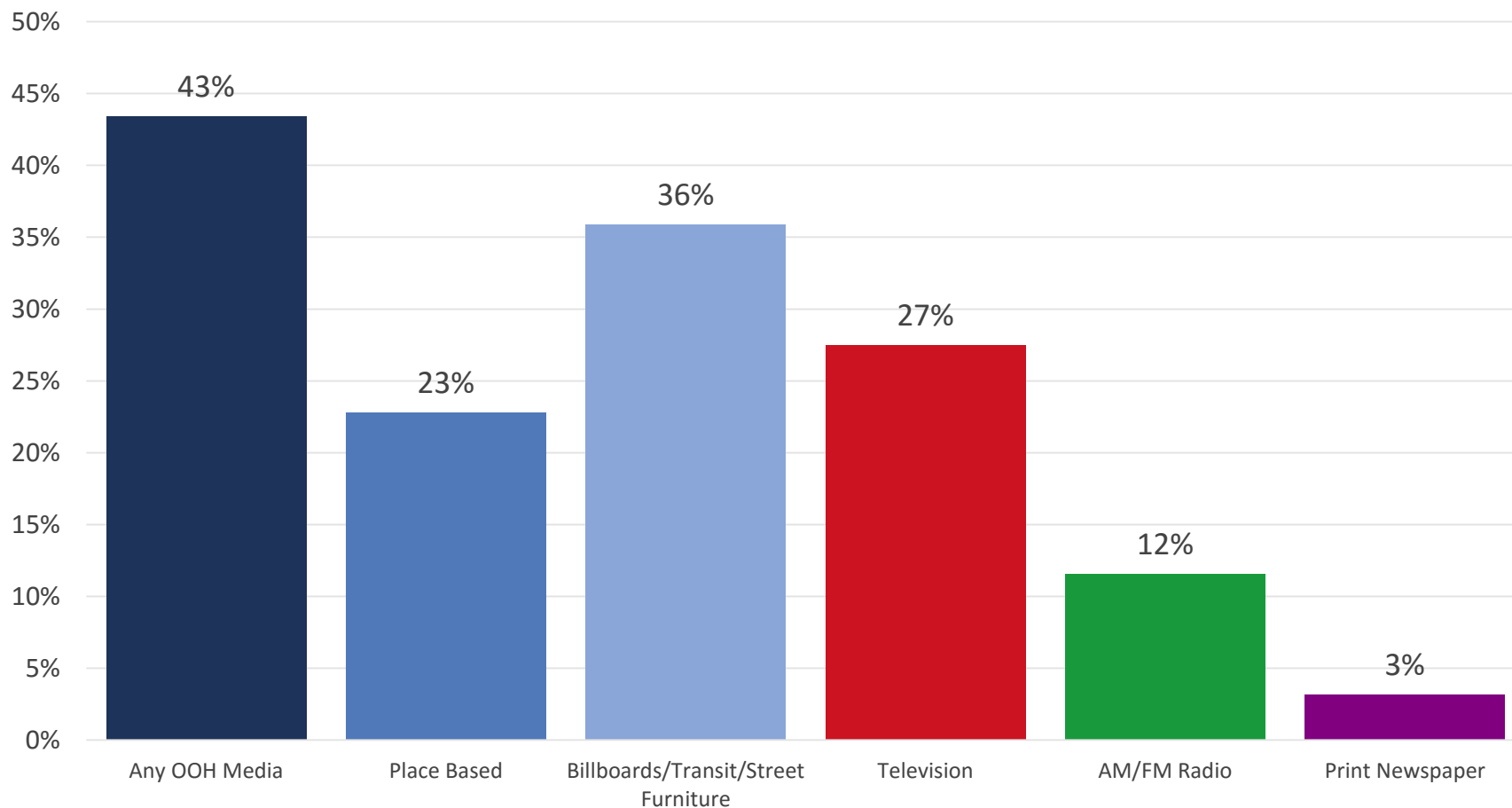
OOH REACHES CONSUMERS IN THE SAME HALF-HOUR AS 42% OF ONLINE SHOPPING ACTIVITY ON MOBILE

Exposure by medium during mobile shopping activity



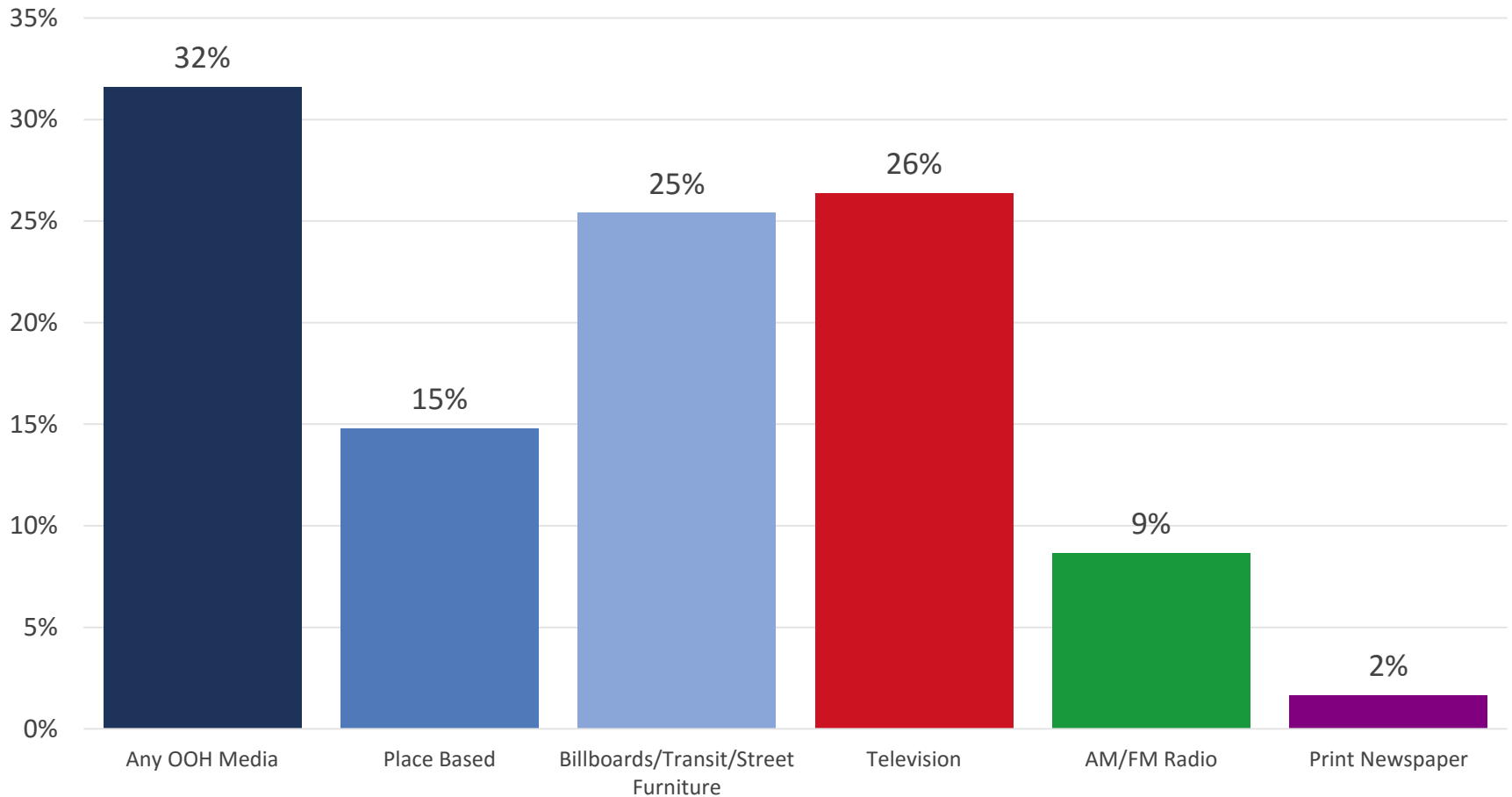
OOH REACHES CONSUMERS IN THE HOUR BEFORE 43% OF MOBILE SHOPPING ACTIVITY

Exposure by medium hour before mobile shopping activity



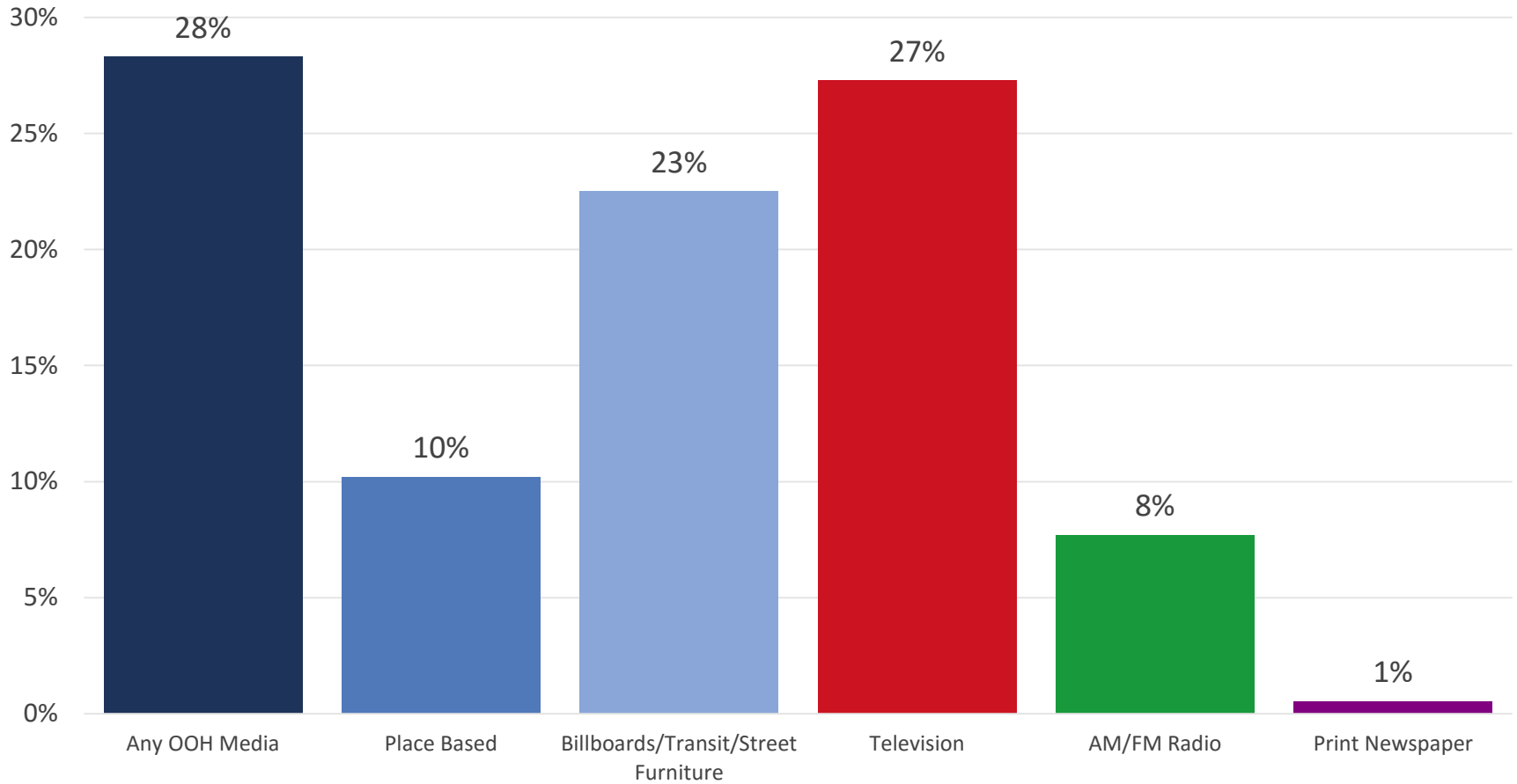
OOH REACHES CONSUMERS IN THE HOUR BEFORE 32% OF ALL MOBILE SEARCH ACTIVITY

Exposure by medium hour before mobile search activity



OOH REACHES CONSUMERS IN THE HOUR BEFORE 28% OF MOBILE SOCIAL ACTIVITY

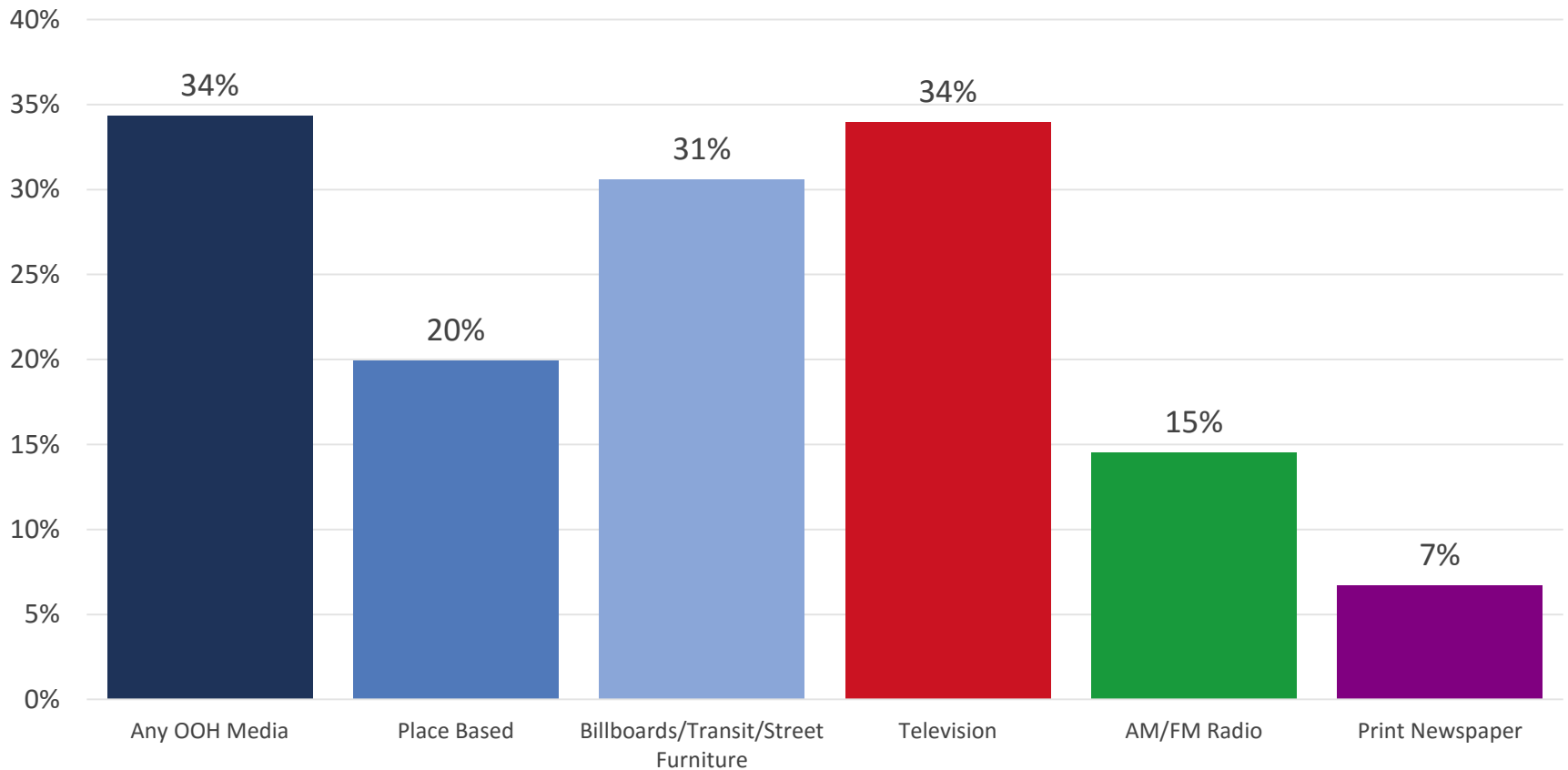
Exposure by medium hour before mobile social media activity



OOH REACHES CONSUMERS IN THE HOUR BEFORE 34% OF BRAND-RELATED SOCIAL MEDIA ACTIVITY

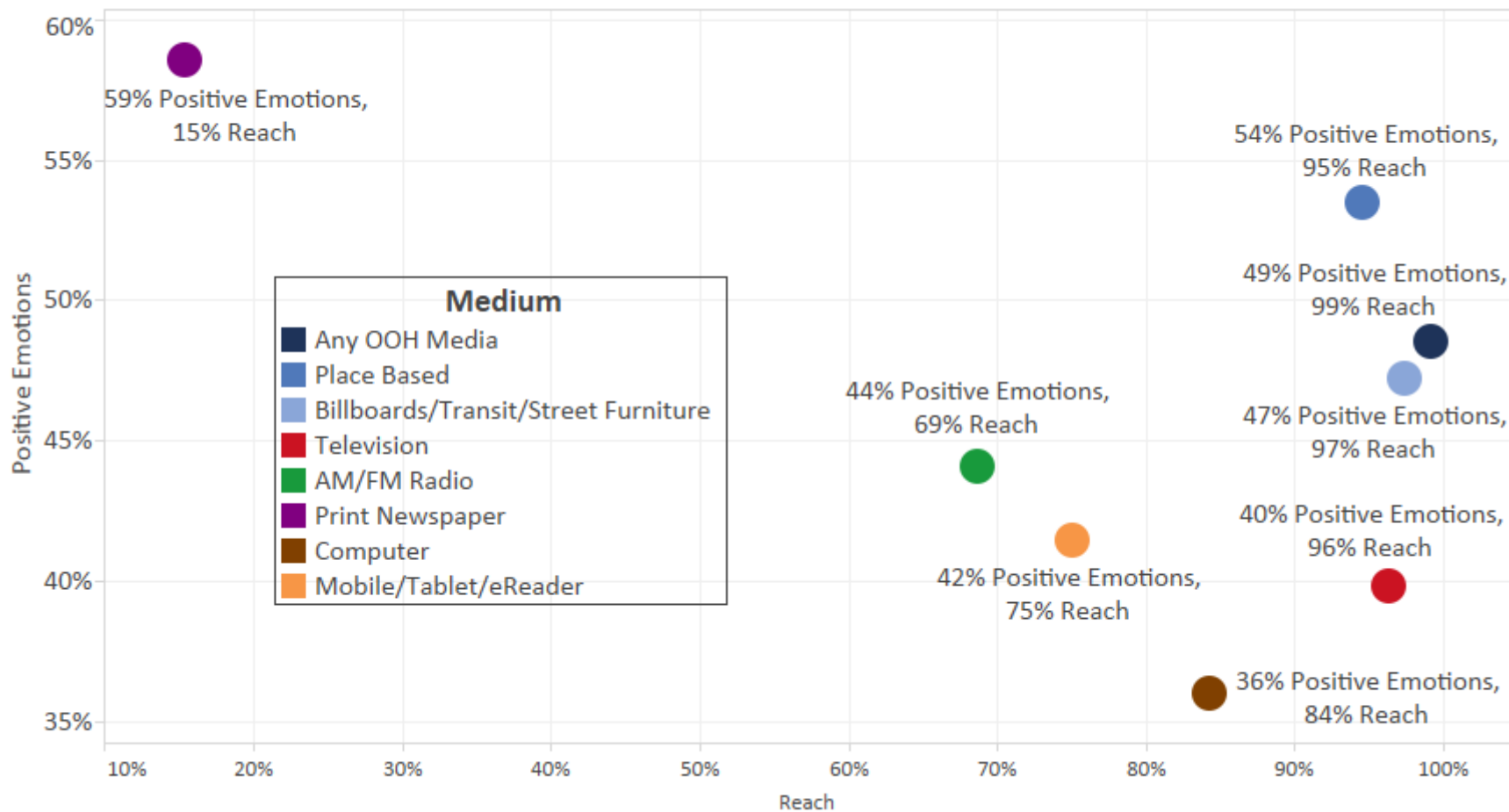
Exposure by medium hour before brand-related* social media activity

*Location-based services (checking in) or interacting with brands, products, services, celebrities, personalities, fan pages, non-profits, charities, or cause-driven organizations



CONSUMERS REPORT POSITIVE EMOTIONS IN THE SAME HALF-HOUR AS 49% OF OOH EXPOSURES

Positive Emotions and Reach by Medium

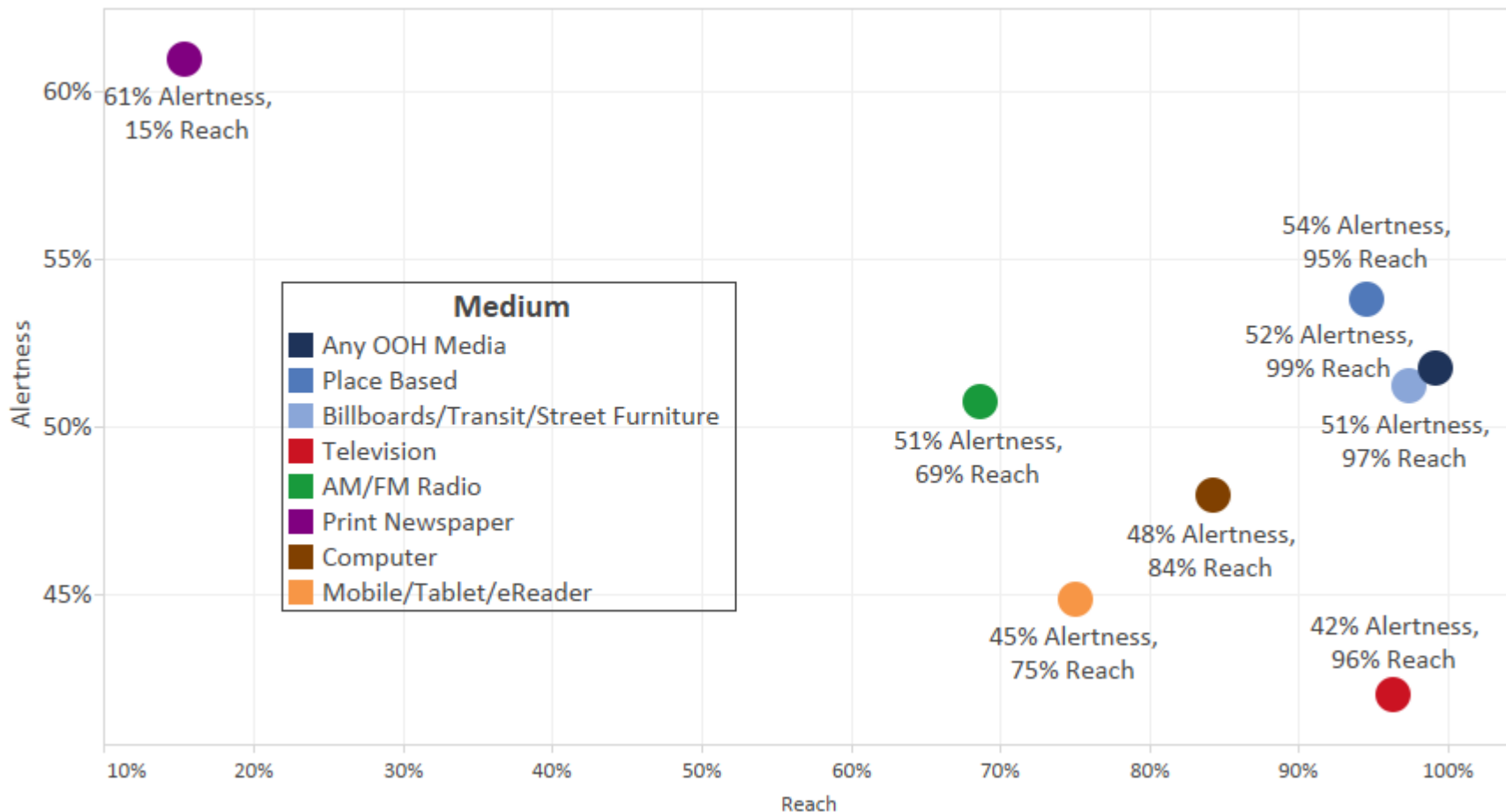


Source: USA TouchPoints, 2014.1

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CONSUMERS REPORT ALERTNESS IN THE SAME HALF-HOUR AS 52% OF OOH EXPOSURES

Alertness and Reach by Medium

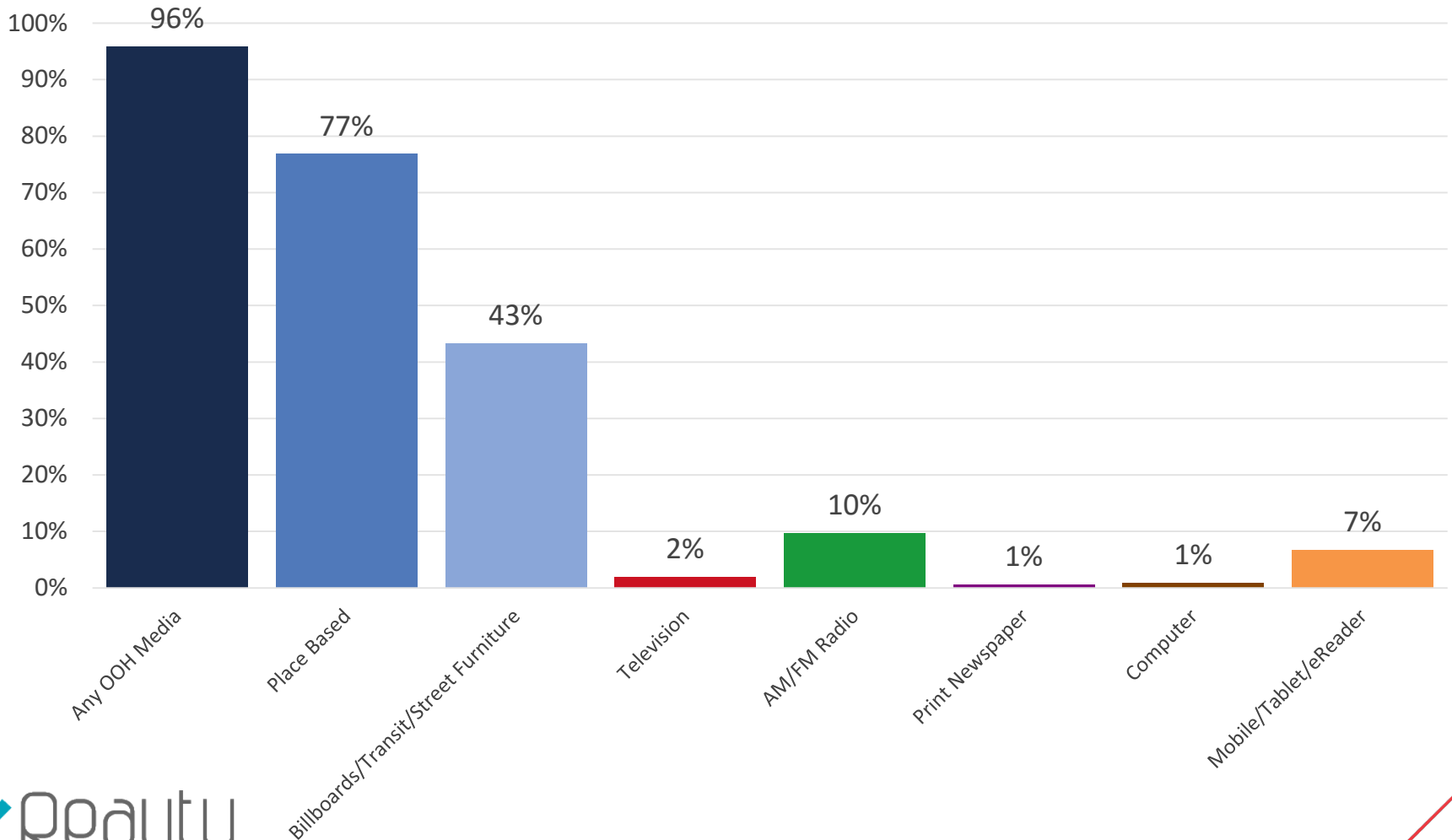


Source: USA TouchPoints, 2014.1

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OOH REACHES CONSUMERS IN THE SAME HALF-HOUR AS 96% OF IN-STORE SHOPPING ACTIVITY

Exposure by medium during in-store shopping activity



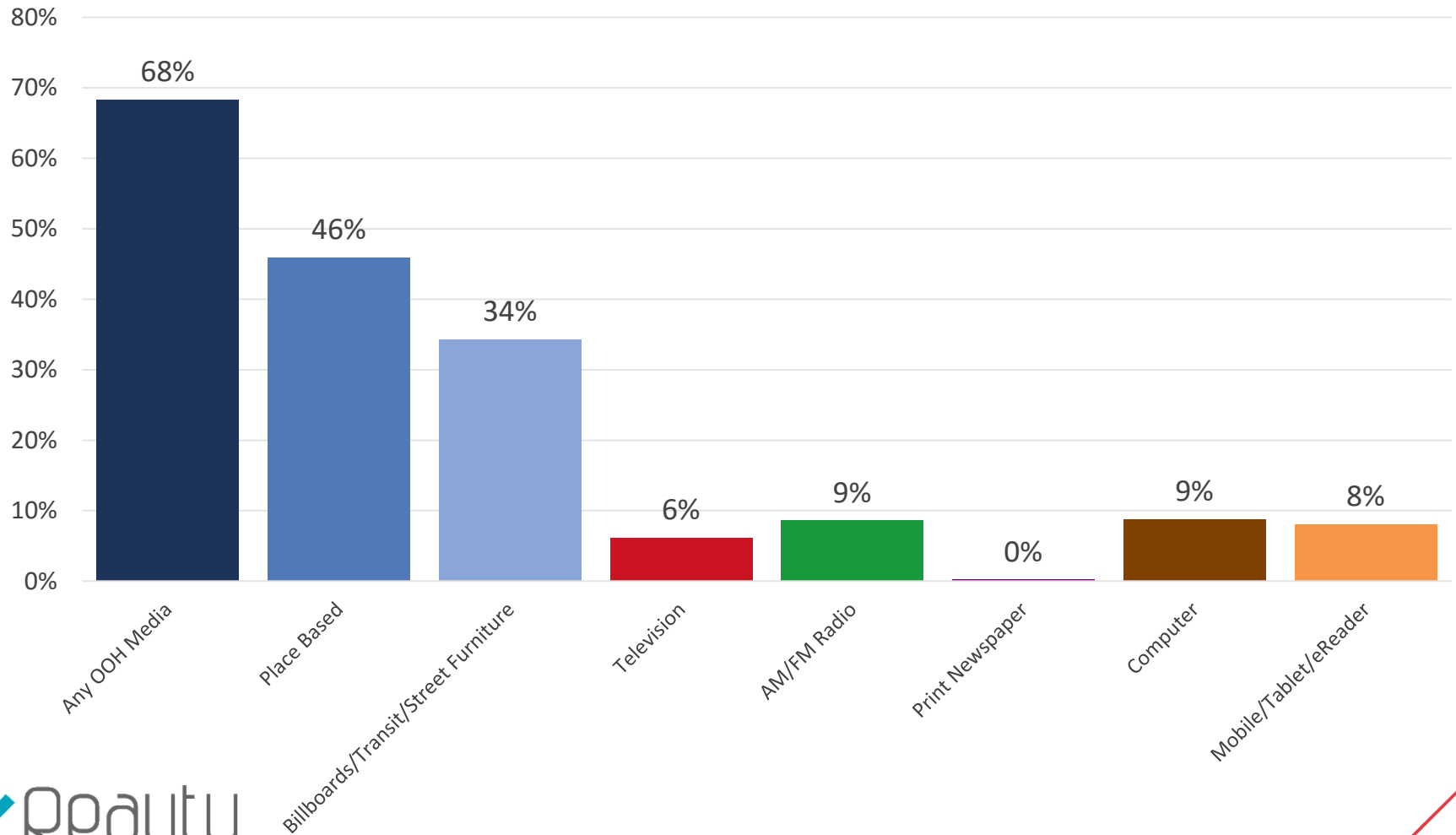
Source: USA TouchPoints, 2014.1

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OOH REACHES CONSUMERS IN THE SAME HALF-HOUR AS 68% OF PURCHASE ACTIVITY

Exposure by medium during purchase activity



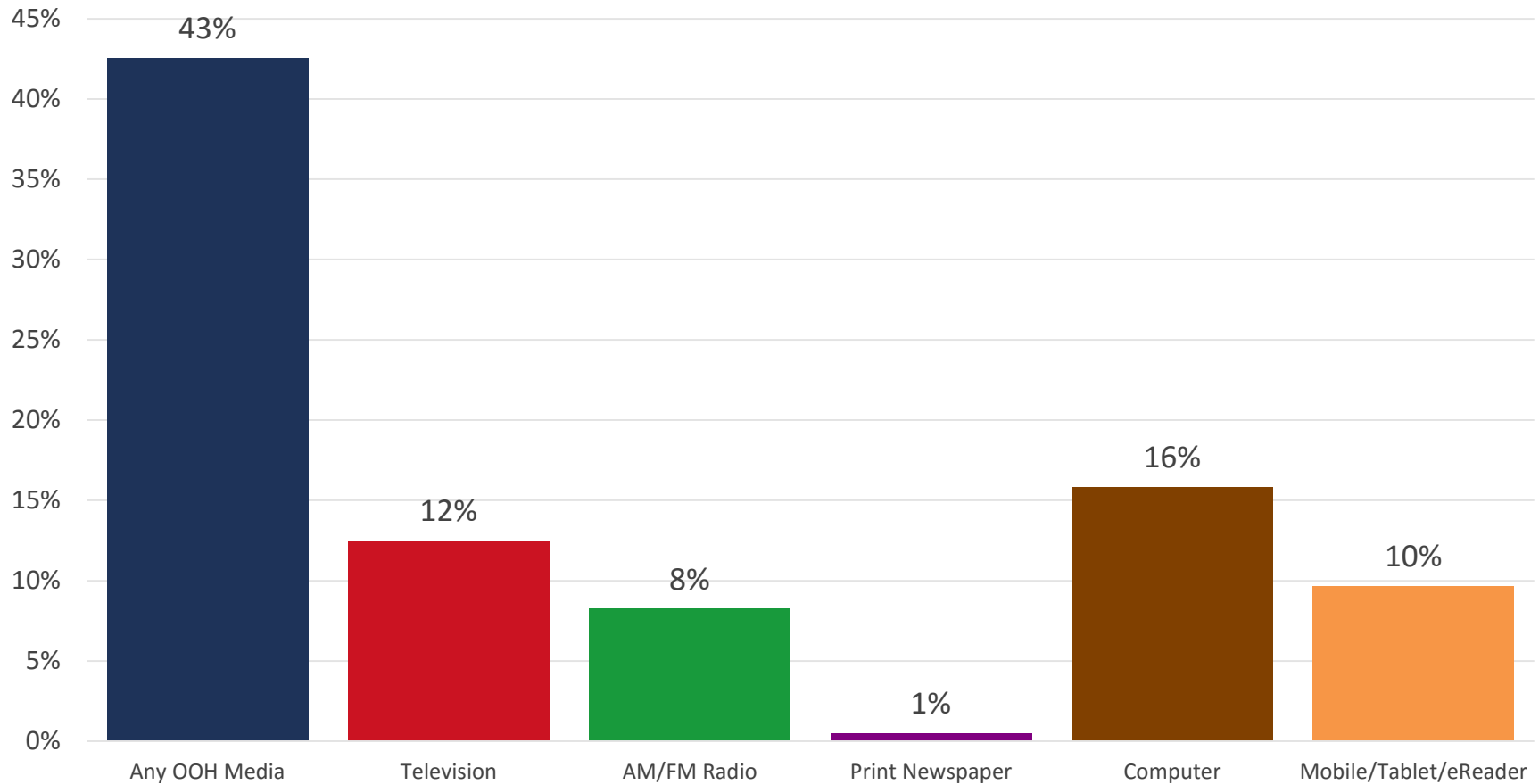
Source: USA TouchPoints, 2014.1

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OOH REACHES CONSUMERS IN THE SAME HALF-HOUR AS 43% OF PATH TO PURCHASE ACTIVITIES

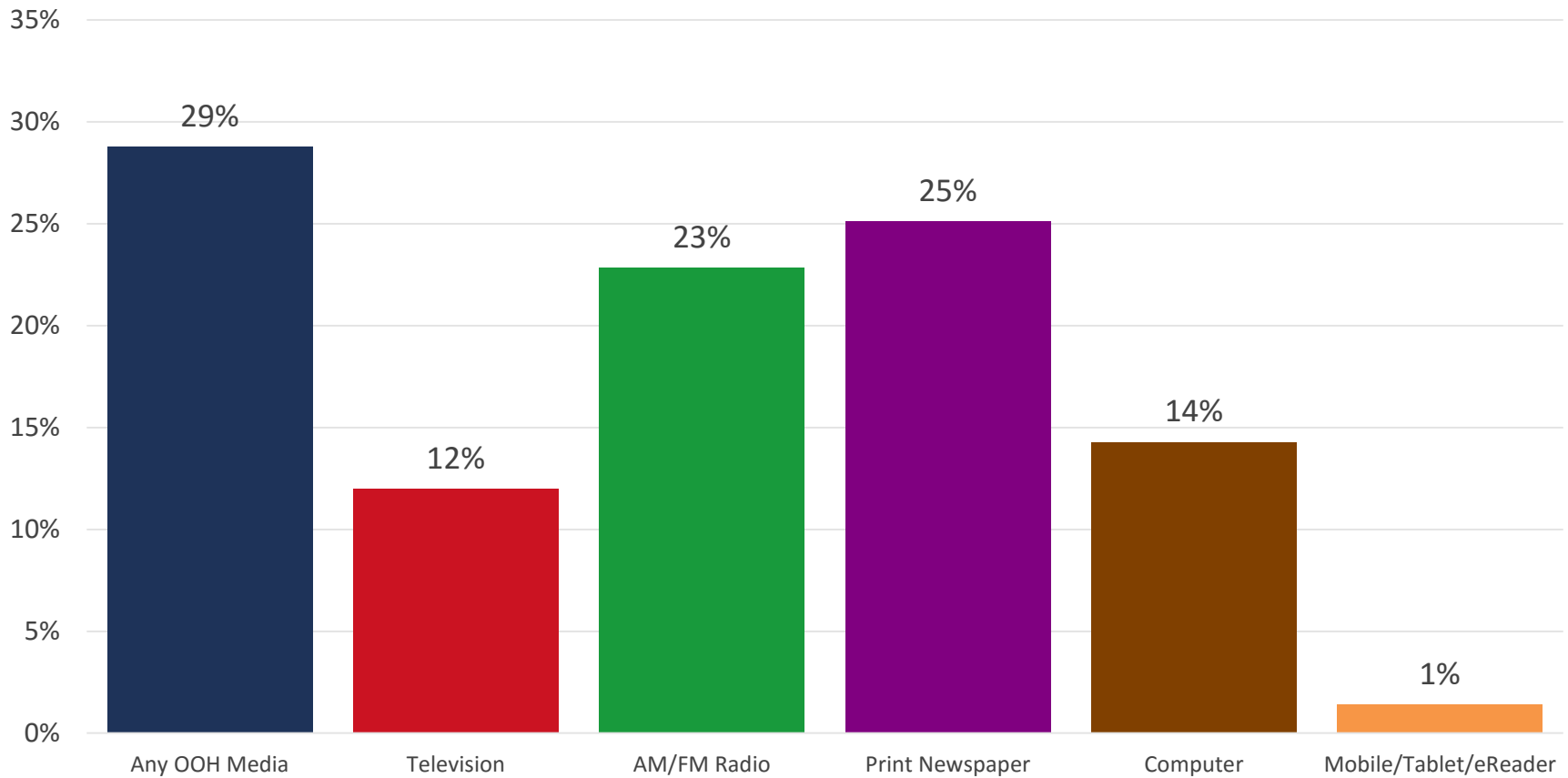
Exposure by medium during any path to purchase* activity

*giving/seeking purchase recommendation, purchase consideration, purchase decision, or purchase made



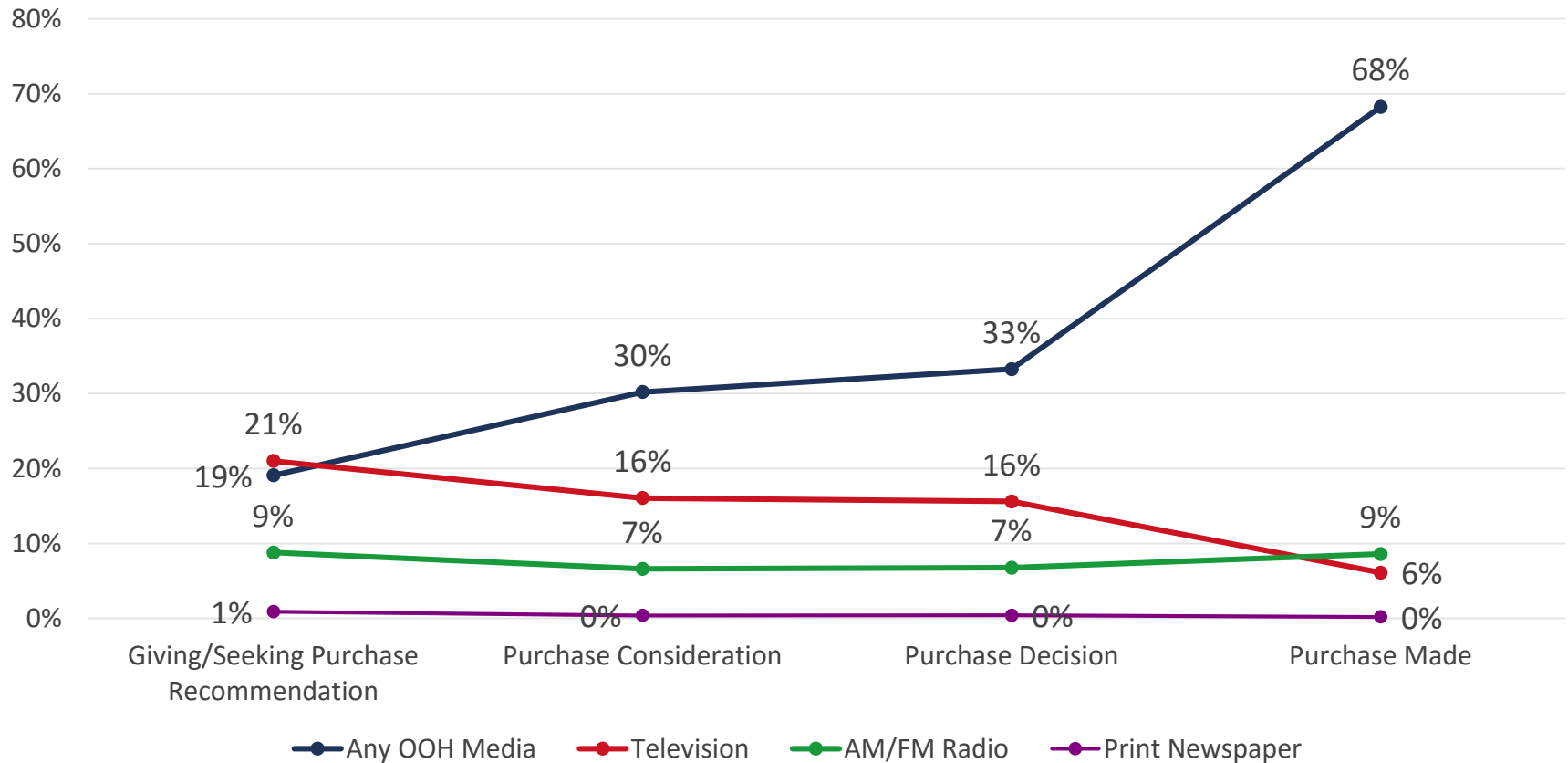
OOH REACHES CONSUMERS IN THE HOUR BEFORE 29% OF PURCHASE RECOMMENDATIONS

Exposure by medium hour before giving/seeking purchase recommendation



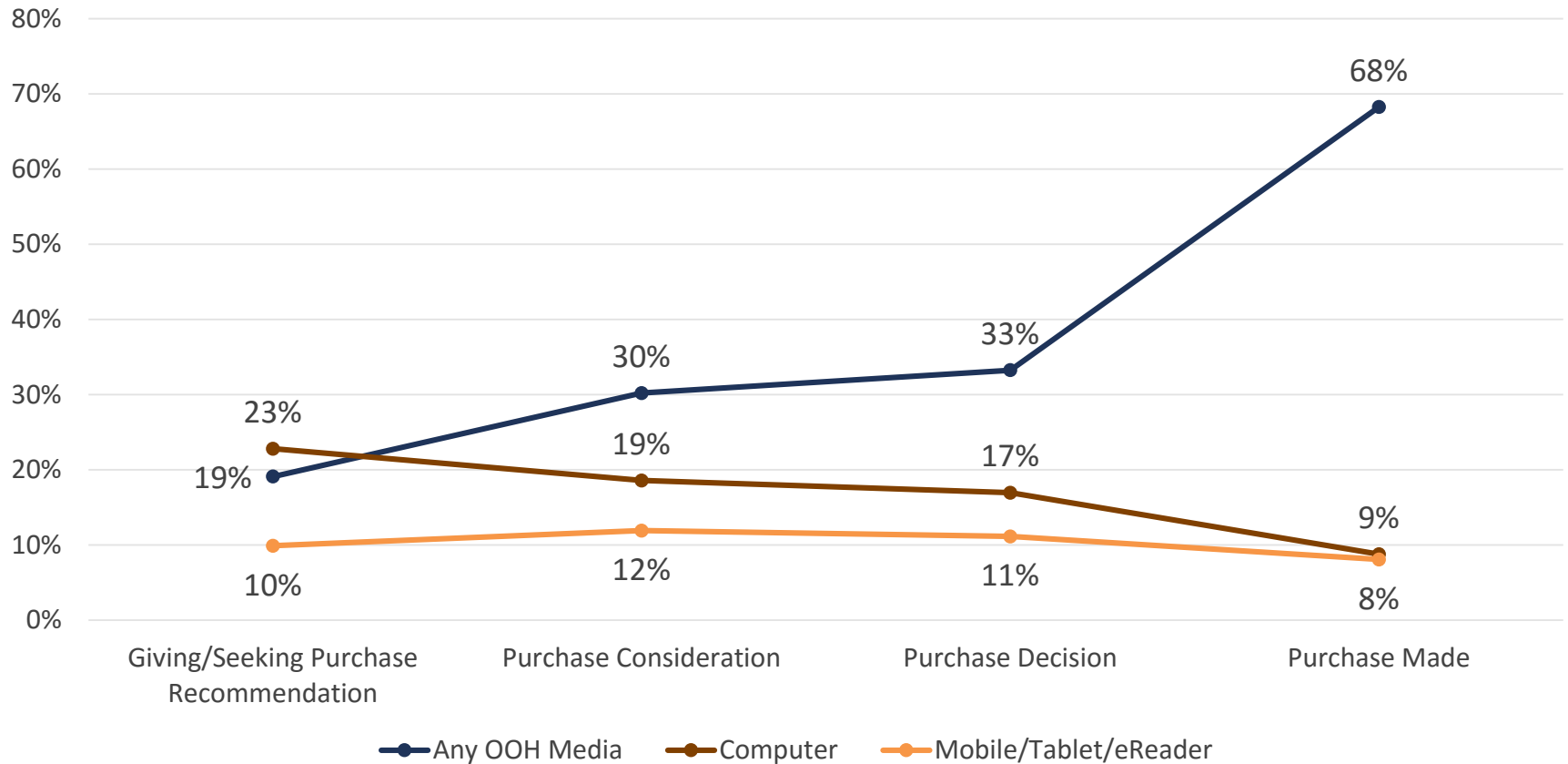
OOH OUTPERFORMS TRADITIONAL MEDIA IN REACHING CONSUMERS IN THE SAME HALF-HOUR THEY CONSIDER PURCHASES, DECIDE ON PURCHASES, AND MAKE PURCHASES

Exposure by medium during path to purchase activities:
OOH & traditional media comparison



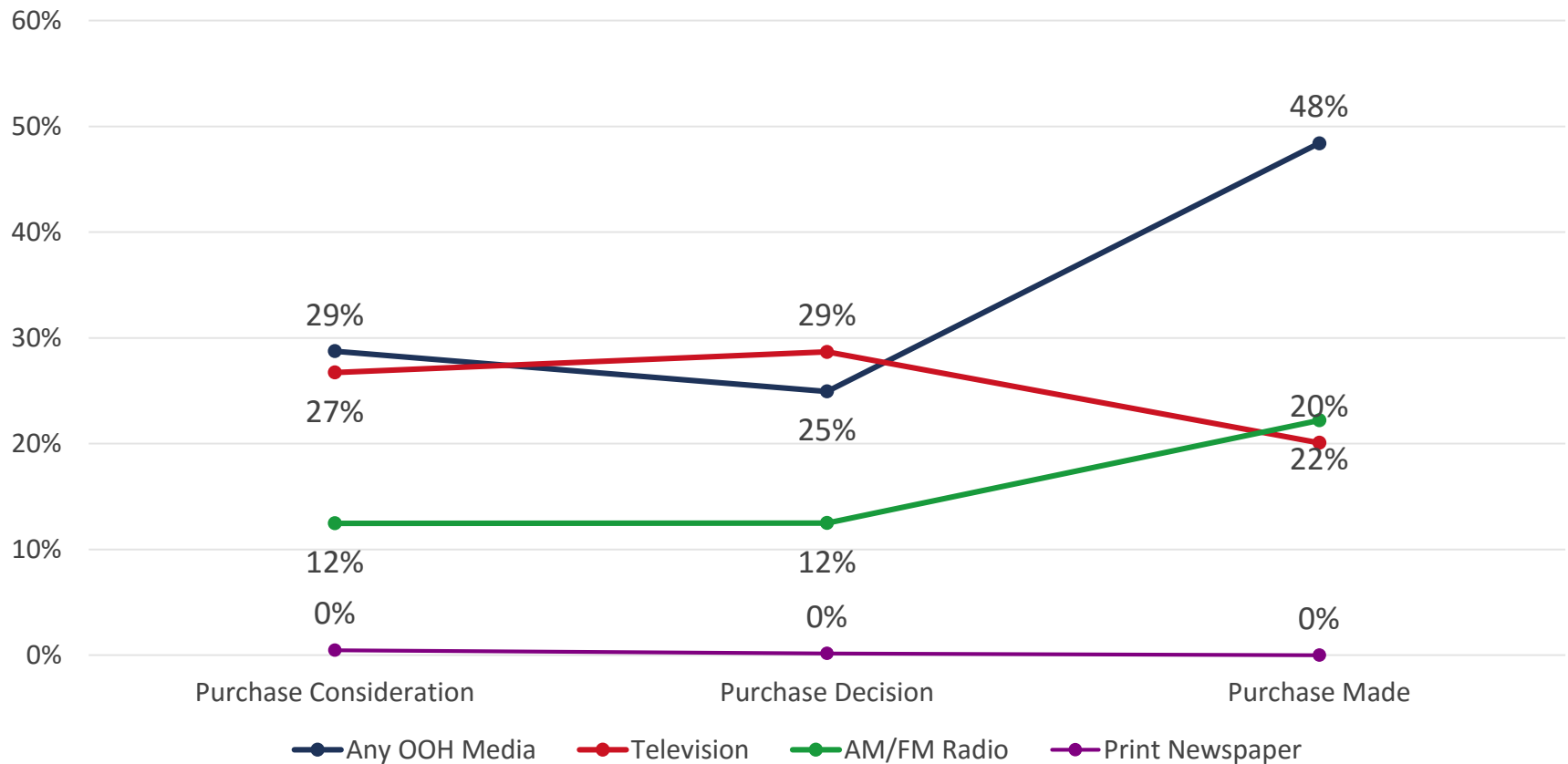
OOH OUTPERFORMS ONLINE MEDIA IN REACHING CONSUMERS IN THE SAME HALF-HOUR THEY CONSIDER PURCHASES, DECIDE ON PURCHASES, AND MAKE PURCHASES

Exposure by medium during path to purchase activities:
OOH & online media comparison



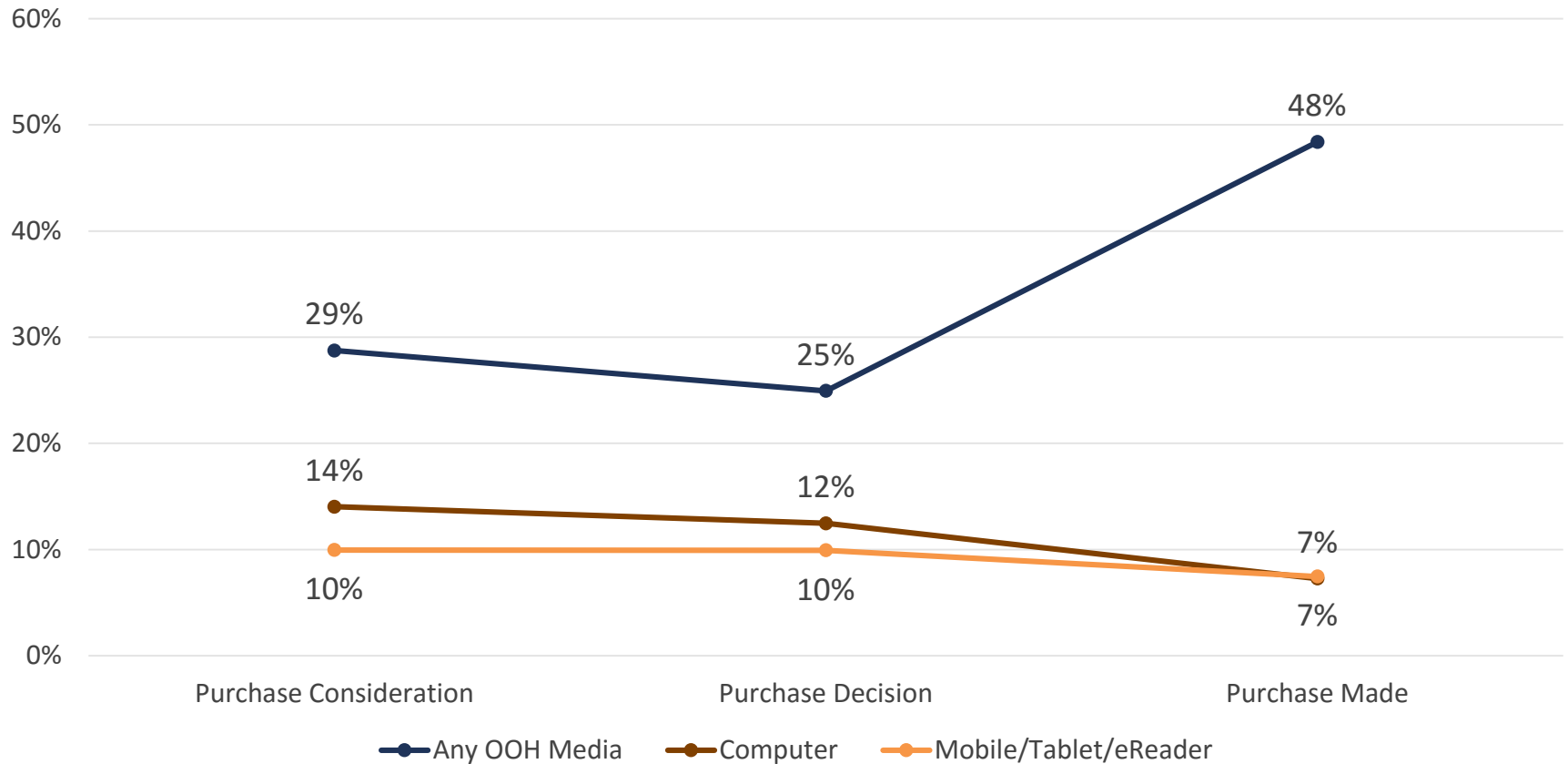
OOH OUTPERFORMS TRADITIONAL MEDIA IN REACHING CONSUMERS IN THE SAME HALF-HOUR THEY CONSIDER PURCHASES AND MAKE PURCHASES IN THE AUTOMOTIVE CATEGORY

Exposure by medium during Automotive path to purchase activities:
OOH & traditional media comparison



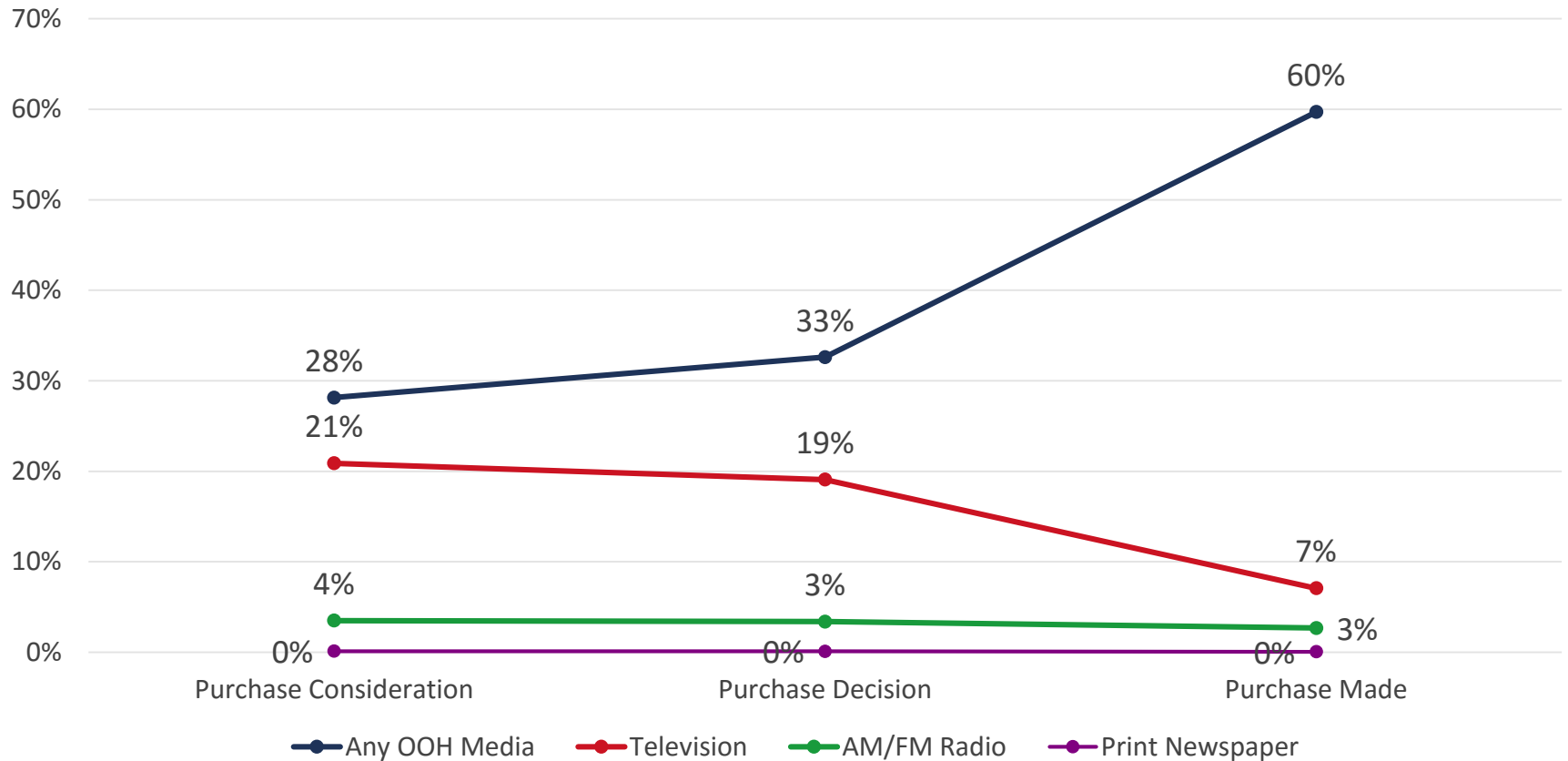
OOH OUTPERFORMS ONLINE MEDIA IN REACHING CONSUMERS IN THE SAME HALF-HOUR THEY CONSIDER PURCHASES, DECIDE ON PURCHASES, AND MAKE PURCHASES IN THE AUTOMOTIVE CATEGORY

Exposure by medium during Automotive path to purchase activities:
OOH & online media comparison



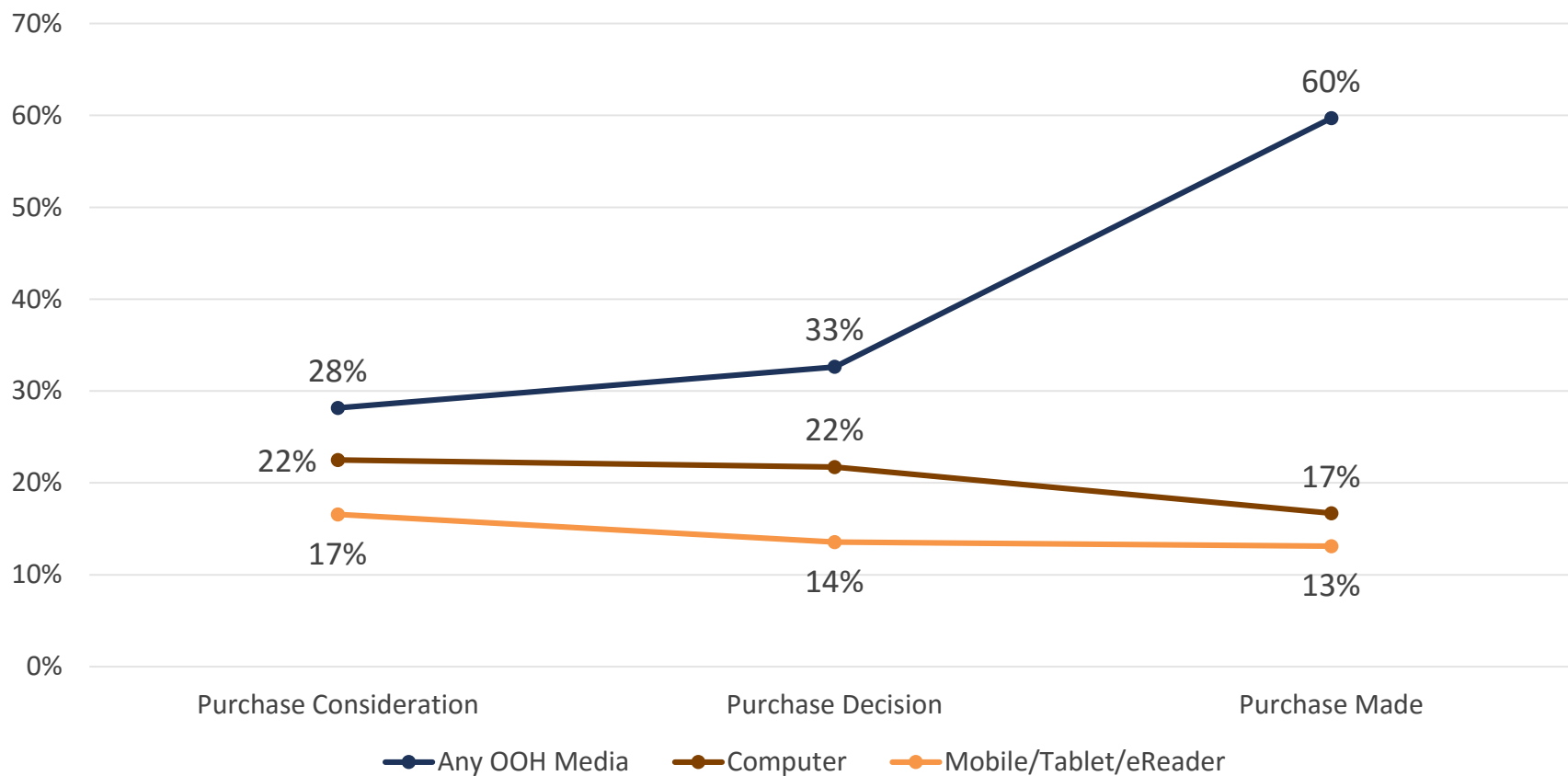
OOH OUTPERFORMS TRADITIONAL MEDIA IN REACHING CONSUMERS IN THE SAME HALF-HOUR THEY CONSIDER PURCHASES, DECIDE ON PURCHASES, AND MAKE PURCHASES IN THE FASHION & APPAREL CATEGORY

Exposure by medium during Fashion & Apparel path to purchase activities: OOH & traditional media comparison



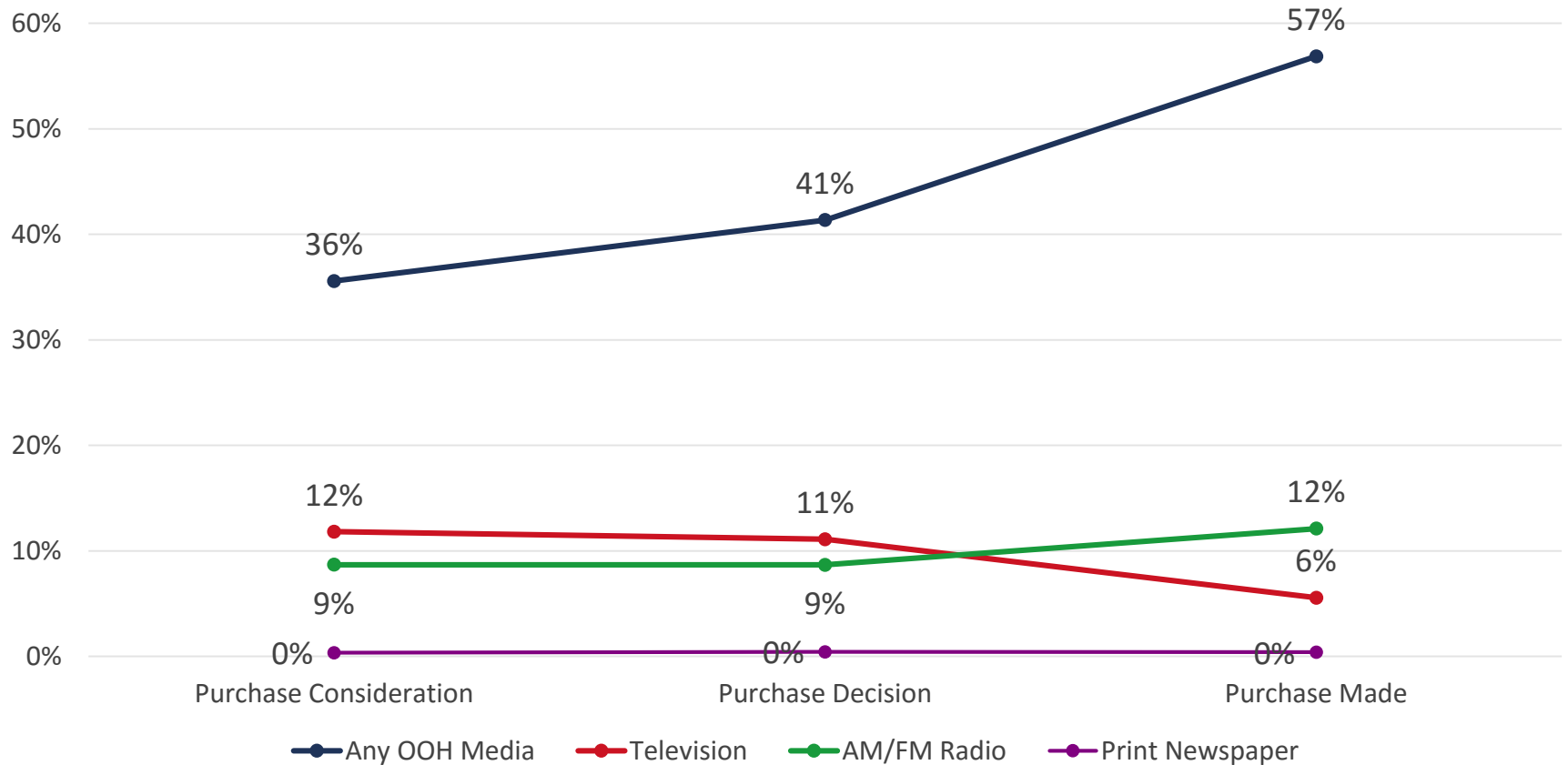
OOH OUTPERFORMS ONLINE MEDIA IN REACHING CONSUMERS IN THE SAME HALF-HOUR THEY CONSIDER PURCHASES, DECIDE ON PURCHASES, AND MAKE PURCHASES IN THE FASHION & APPAREL CATEGORY

Exposure by medium during Fashion & Apparel path to purchase activities: OOH & online media comparison



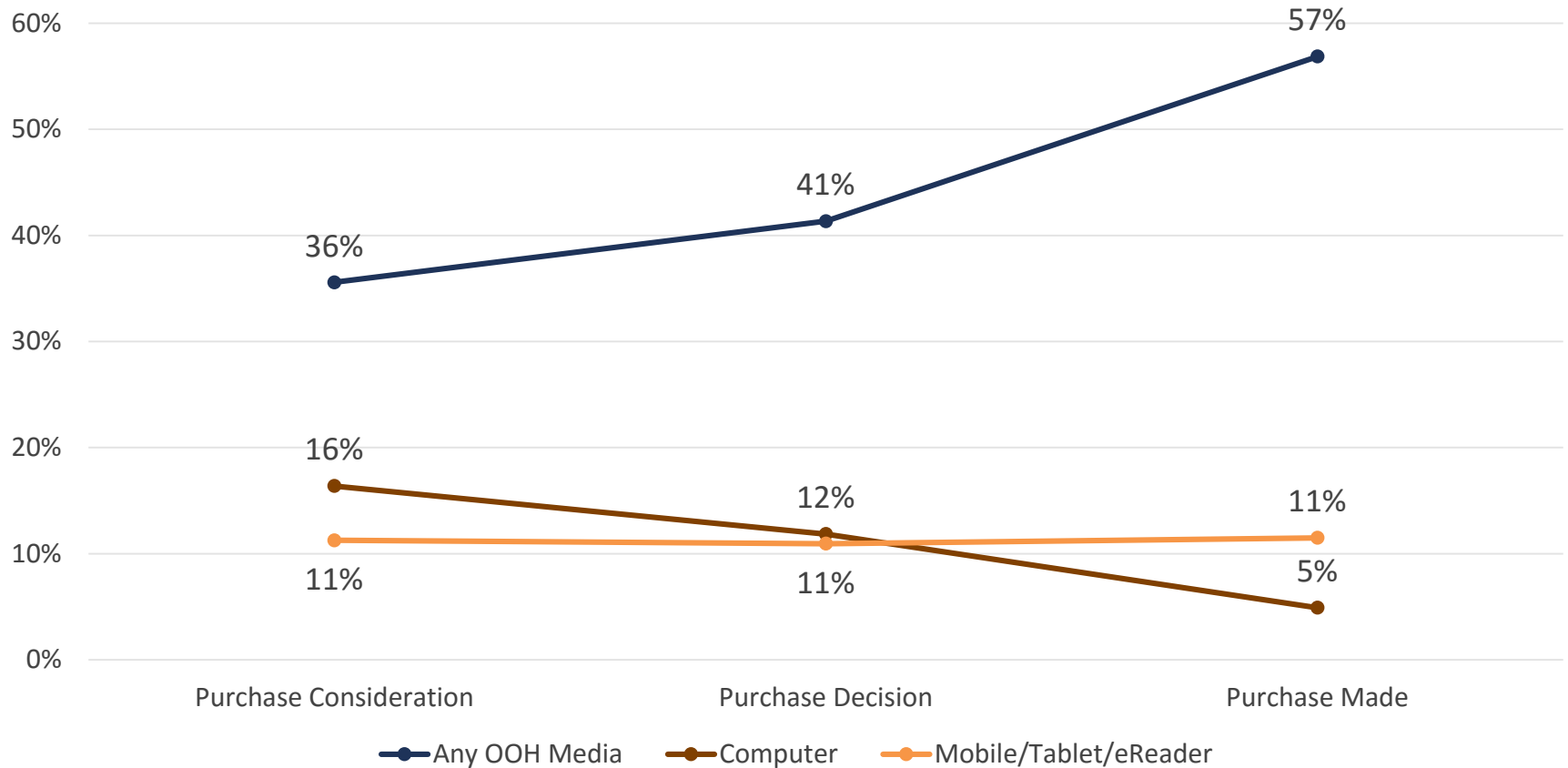
OOH OUTPERFORMS TRADITIONAL MEDIA IN REACHING CONSUMERS IN THE SAME HALF-HOUR THEY CONSIDER PURCHASES, DECIDE ON PURCHASES, AND MAKE PURCHASES IN THE FAST FOOD CATEGORY

Exposure by medium during Fast Food path to purchase activities:
OOH & traditional media comparison



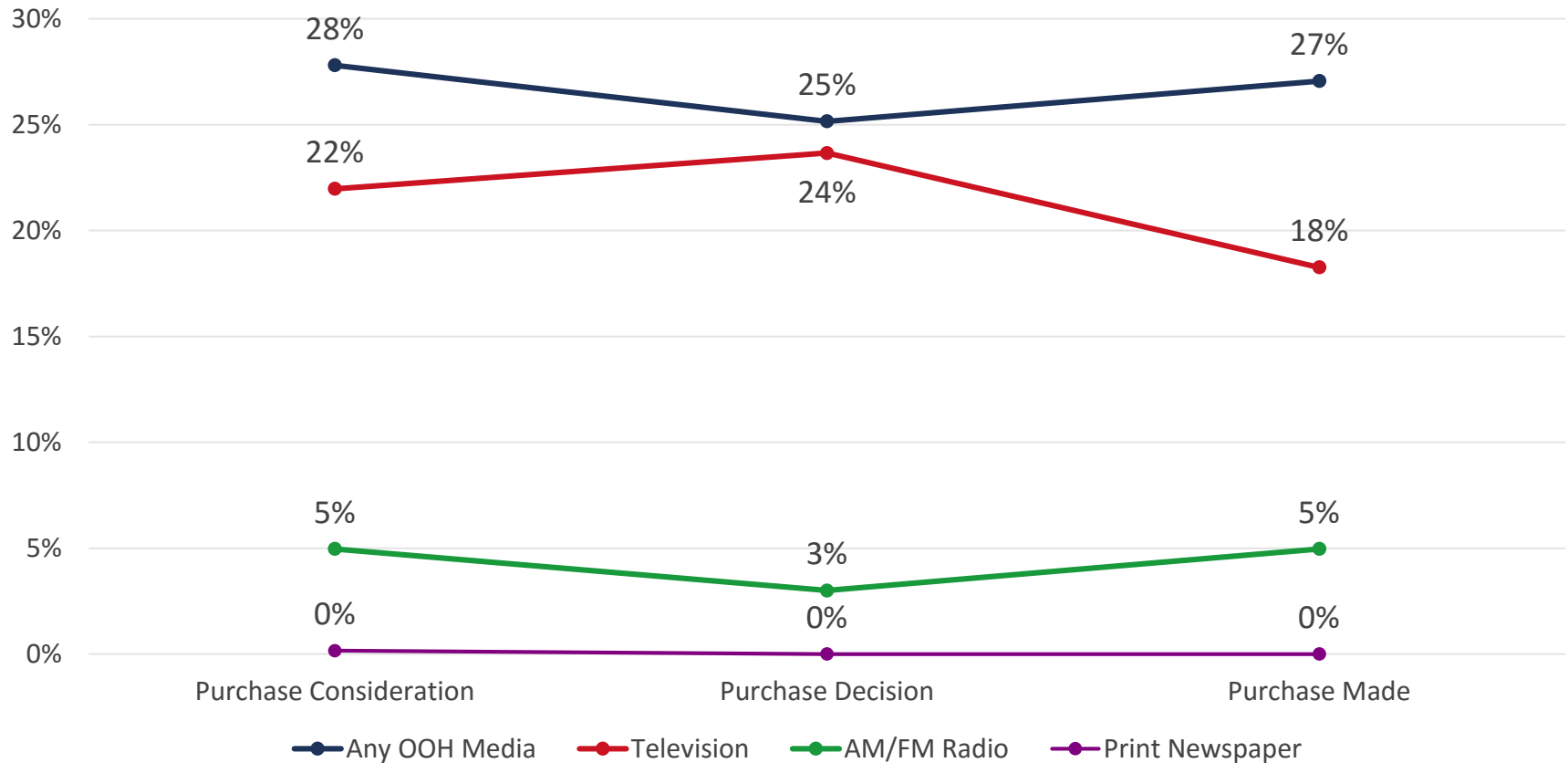
OOH OUTPERFORMS ONLINE MEDIA IN REACHING CONSUMERS IN THE SAME HALF-HOUR THEY CONSIDER PURCHASES, DECIDE ON PURCHASES, AND MAKE PURCHASES IN THE FAST FOOD CATEGORY

Exposure by medium during Fast Food path to purchase activities:
OOH & online media comparison



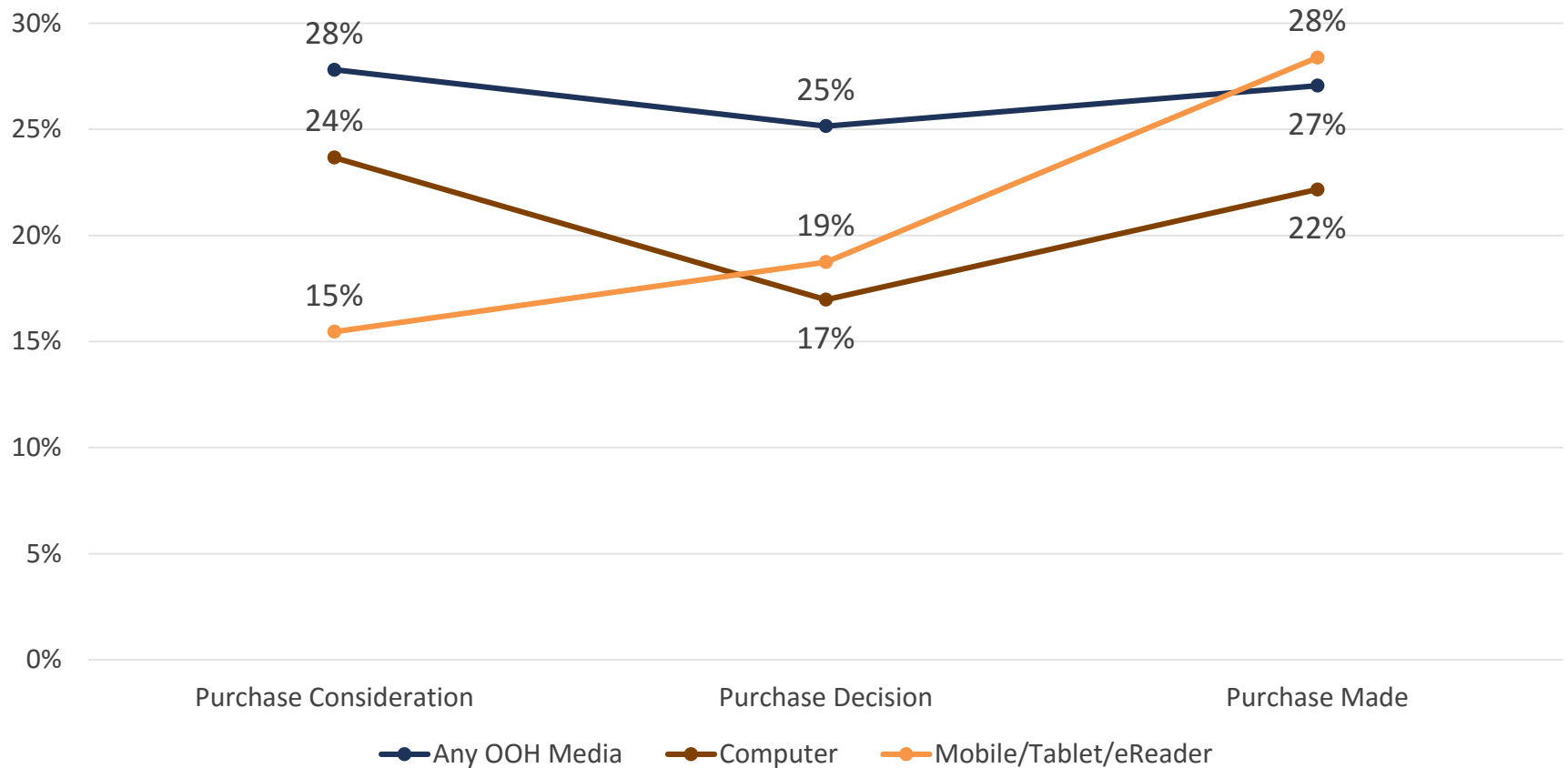
OOH OUTPERFORMS TRADITIONAL MEDIA IN REACHING CONSUMERS IN THE SAME HALF-HOUR THEY CONSIDER PURCHASES, DECIDE ON PURCHASES, AND MAKE PURCHASES IN THE MOBILE/CELLULAR SERVICE CATEGORY

Exposure by medium during Mobile/Cellular Service path to purchase activities: OOH & traditional media comparison



OOH OUTPERFORMS ONLINE MEDIA IN REACHING CONSUMERS IN THE SAME HALF-HOUR THEY CONSIDER PURCHASES AND DECIDE ON PURCHASES IN THE MOBILE/CELLULAR SERVICE CATEGORY

Exposure by medium during Mobile/Cellular Service path to purchase activities: OOH & online media comparison



Methodology & Terminology

- Data is drawn from USA TouchPoints release 2014.1, which includes the following data:
 - Sample of 1837 panelists participating for seven days
 - Location, mode of transport, activity media behavior, purchase behavior, and emotional context were collected via smartphone eDiary at each half-hour throughout the day
 - Results are projected to the US A18-64 population, excluding unacculturated Hispanics, via data fusion with the Fall 2013 release of MRI's Survey of the American Consumer.
- “exposures”, “activity”, “visits”, “occasions” mean total half-hour periods in which the location/medium/activity/emotion was reported during the survey week
- “during” and “same half-hour” mean that the locations/media/activities/emotions were both reported at any point within the same half-hour period
- “before” and “previous hour” mean that one location/medium/activity/emotion was reported in either of the two half-hour periods before the half-hour period in which the other was reported
- Exposures for computer, mobile, and tablet/eReader are limited to online activities: email/web on computer, and email/web/apps on mobile/tablet/eReader
- OOH media is defined using eDiary locations, activities, and mode of transport according to the definitions on the following page

OOH Media Definitions

Any OOH Media

Activity	Entertainment (movie, concert or sporting event)
Activity	Traveling or commuting
Location	Airport
Location	Car or other traveling
Location	Convenience store
Location	Grocery store
Location	Gym or health club
Location	Mall
Location	Medical Facility
Location	Office Elevator
Location	Other store
Location	Outdoors away from home
Location	Restaurant or bar

Place Based

Activity	Entertainment (movie, concert or sporting event)
Location	Convenience store
Location	Grocery store
Location	Gym or health club
Location	Mall
Location	Medical Facility
Location	Office Elevator
Location	Other store
Location	Restaurant or bar

Billboards/Transit/Street Furniture

Location	Airport
Location	Outdoors away from home
Mode of Transport	Bicycle
Mode of Transport	Bus, subway, or train
Mode of Transport	Car or SUV
Mode of Transport	Motorcycle
Mode of Transport	Taxi
Mode of Transport	Truck
Mode of Transport	Walking