nielsen

OUT-OF-HOME ADVERTISING STUDY

NIELSEN ON LOCATION REPORT

2019 EDITION

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INTRODUCTION

Welcome to the *Nielsen Out-of-Home Advertising Study 2019 edition*.

This report provides a detailed examination of America's travel habits and its exposure to out-of-home advertising including billboards, street furniture, transit and place-based ads. The study also examines the shopping and purchase decisions of America's on-the-go consumers.

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HIGHLIGHTS

REACH

90% of U.S. residents age 16 or older noticed some form of out-of-home advertising in the past month, 80% notice ads in the past week.

QUALITY TIME

Roadside billboards are the most noticed ads, and that stands to reason since travelers average 25+ hours on the road each week and cover over 159 miles. The heaviest travelers, Mega-Milers average 465 miles per week.

INTERACTION

66% of smartphone users took some type of action after seeing a OOH advertisement in the past year, and over 4 in 10 used online search to look up information.

AUDIENCE

Out of Home ad viewers are more likely to be both younger and have higher incomes than the general population.

ENGAGEMENT

83% of billboard viewers make a point to look at the advertising message at least some of the time; 4 in 10 look at the billboard ad each time or almost each time they noticed one.

VARIETY

People encounter OOH ads in a wide range of places. 81% of travelers have noticed a roadside bulletin, digital bulletin or poster, and 78% noticed a transit advertising in the past month.

YOUNG PEOPLE

Travelers age 16 to 24 and 18 to 34 are more likely to recall seeing various types of out-of-home media in the past month.

IN-STORE

39% noticed a directional OOH ad, 20% of OOH viewers visited immediately after seeing the ad, and 74% of those visitors made a purchase.

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DATA COLLECTION

999 COMPLETED ONLINE SURVEYS

NATIONAL SAMPLE

PEOPLE AGE 16 OR OLDER

HAVE DONE ANY OF THE FOLLOWING ACTIVITIES IN THE PAST MONTH

WALKED AROUND TOWN, CITY OR DOWNTOWN AREA

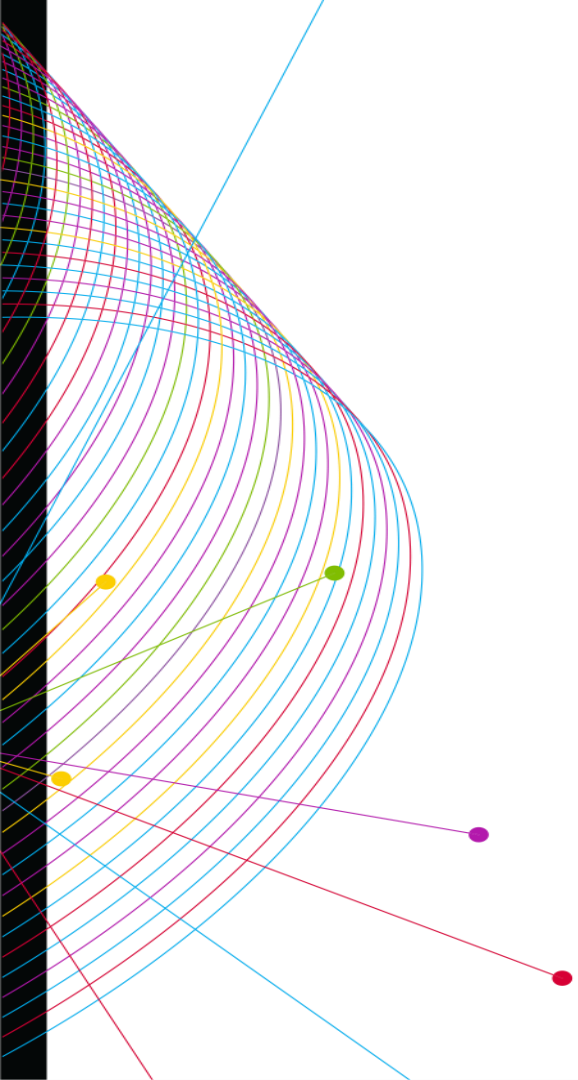
DRIVEN OR RIDDEN IN A CAR, TRUCK OR OTHER PRIVATE VEHICLE

RIDDEN AS A PASSENGER ON A PUBLIC BUS OR IN A TAXI

RIDDEN AS A PASSENGER ON A COMMUTER RAIL OR SUBWAY

Nielsen conducted 999 online surveys with a national sample of U.S. residents age 16 or older, between March 27 and April 5, 2019.

Respondents were 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.



TRAVEL PATTERNS

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AMERICA ON THE MOVE

TRANSPORTATION USED IN THE PAST MONTH

87%

DRIVEN OR RIDDEN IN A CAR, TRUCK OR OTHER PRIVATE VEHICLE

30%

RIDDEN AS A PASSENGER ON A PUBLIC BUS, TAXI OR ON-DEMAND CAR SERVICE

14%

RIDDEN AS A PASSENGER ON A COMMUTER RAIL OR SUBWAY

Nearly 9 out of 10 U.S. residents age 16 or older surveyed (87%) have traveled in a private vehicle such as car or truck in the past month.

30% of those surveyed have used public transit including buses, taxis and on-demand car services in the past month, and 14% have ridden a commuter rail or subway.

6 in 10 (60%) have walked in a town, city, or other downtown area.

BASE: ALL RESPONDENTS AGE 16 OR OLDER | n = 999
"In the last month, have you done any of the following activities?"

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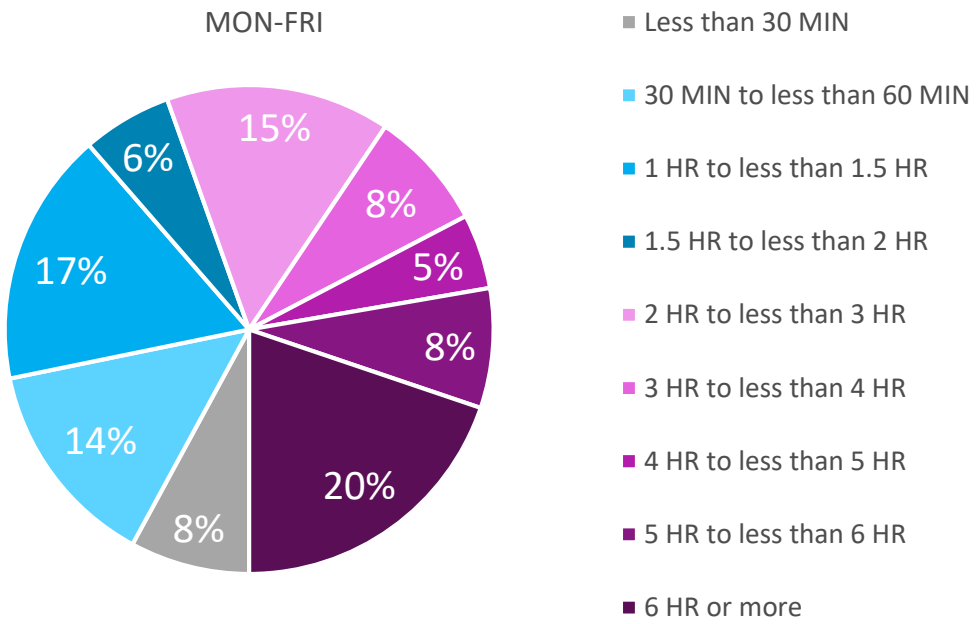
TIME SPENT TRAVELING WEEKDAYS



Over half of U.S. residents age 16 or older surveyed (56%) travel in a vehicle for 2 hours or more on an average weekday – Monday through Friday.

20% of these travelers spend 6 hours or more on the road each weekday.

BASE: PEOPLE AGE 16 OR OLDER WHO HAVE DRIVEN OR RIDDEN IN A PRIVATE VEHICLE OR RIDDEN A BUS, TAXI, COMMUTER RAIL OR SUBWAY IN THE PAST 30 DAYS | N = 974

"How much time in hours and minutes do you spend combined, either driving or riding as a passenger in any vehicle, on a typical WEEKDAY – that is, Monday through Friday?"

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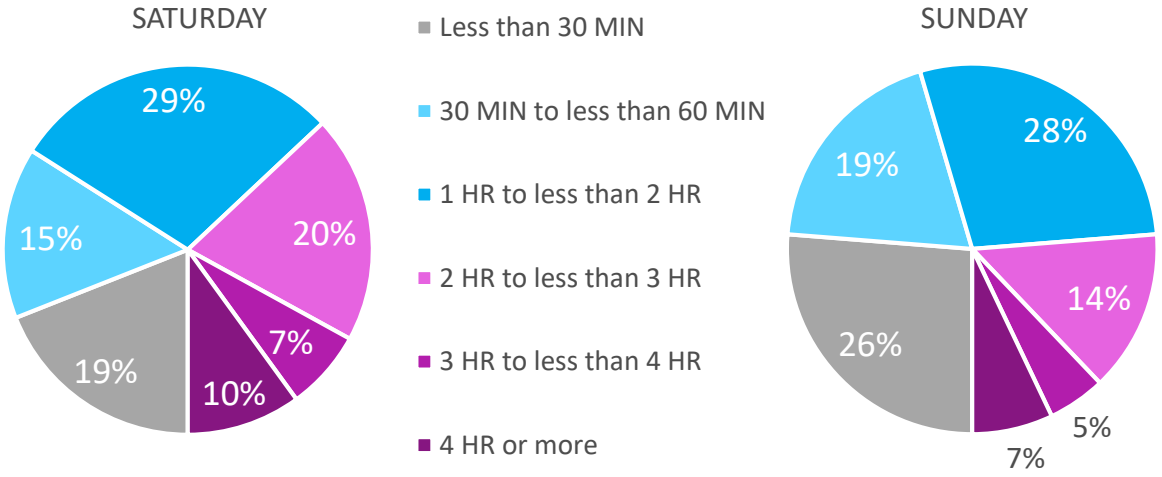
TIME SPENT TRAVELING WEEKENDS



While weekends have shorter travel times, over a third of those surveyed (37%) spend 2 hours or more on the road on an average Saturday.

Sundays have the lightest traffic with a quarter (26%) of travelers spending 2 or more hours in a vehicle.

BASE: PEOPLE AGE 16 OR OLDER WHO HAVE DRIVEN OR RIDDEN IN A PRIVATE VEHICLE OR RIDDEN A BUS, TAXI, COMMUTER RAIL OR SUBWAY IN THE PAST 30 DAYS | N = 974

"How much time in hours and minutes do you spend combined, either driving or riding as a passenger in any vehicle, on a typical {SATURDAY} {SUNDAY}?"

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MEAN TIME SPENT TRAVELING PER WEEK

TIME SPENT DRIVING OR RIDING IN A VEHICLE

MON	TUES	WED	THUR	FRI	SAT	SUN
4 HRS 24 MINS	4 HRS 24 MINS	4 HRS 24 MINS	4 HRS 24 MINS	4 HRS 24 MINS	1 HR 54 MINS	1 HR 24 MINS
MON-FRI					SAT-SUN	
22 HOURS					3 HRS 18 MINS	
MON-SUN						
25 HOURS 18 MINUTES						

During an average week, U.S. travelers spend an average of 22 hours driving or riding in a vehicle.

On weekdays people travel an average of 4 hours and 24 minutes per day.

Sunday is the lightest traveling day of the week with just under an hour and a half of time spent on the road.

BASE: PEOPLE AGE 16 OR OLDER WHO HAVE DRIVEN OR RIDDEN IN A PRIVATE VEHICLE OR RIDDEN A BUS, TAXI, COMMUTER RAIL OR SUBWAY IN THE PAST 30 DAYS | N = 974

"How much time in hours and minutes do you spend combined, either driving or riding as a passenger in any vehicle, on a typical WEEKDAY {WEEKDAY, that is Monday through Friday}, {SATURDAY}, {SUNDAY}?"

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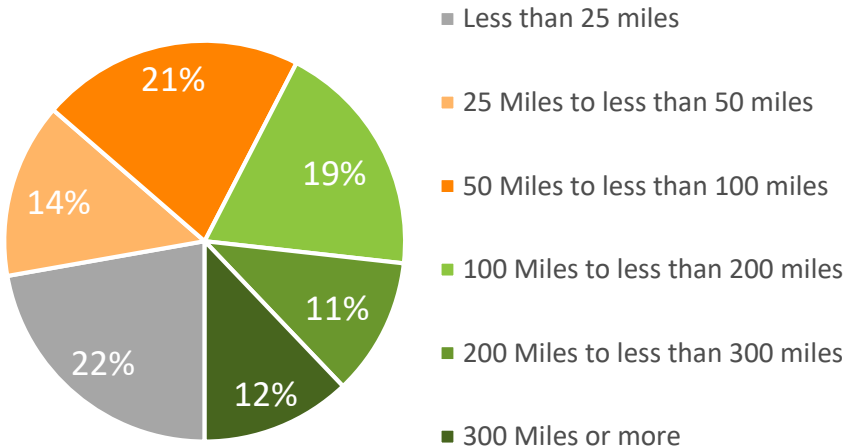
DISTANCE TRAVELED PER WEEK

MILES TRAVELED IN ANY VEHICLE



AVERAGE DISTANCE TRAVELED PER WEEK

159 MILES

Over 4 in 10 U.S. travelers (42%) travel over 100 miles per week.

The average distance traveled per week is 159 miles.

People who travel the longest distances per week tend to live in upper income households. Please see the appendix of this report for demographic breakdowns of travelers by mileage.

BASE: PEOPLE AGE 16 OR OLDER WHO HAVE DRIVEN OR RIDDEN IN A PRIVATE VEHICLE OR RIDDEN A BUS, TAXI, COMMUTER RAIL OR SUBWAY IN THE PAST 30 DAYS | N = 974

"Thinking about a typical week - approximately how many MILES do you travel combined, either as a driver or passenger in any vehicle, on a typical WEEK?"

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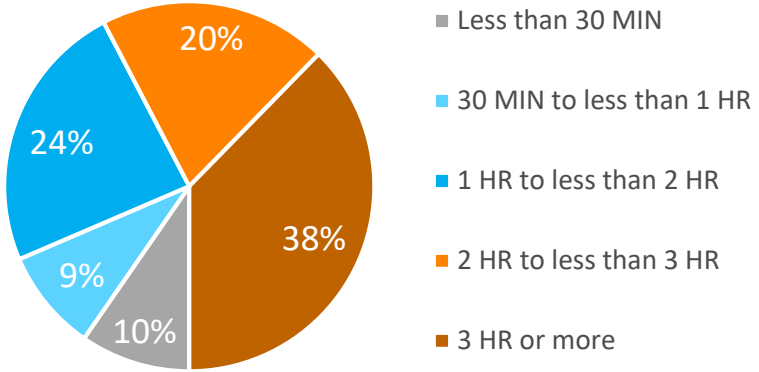
WALK ABOUT TOWN

60%

WALKED AROUND A TOWN, CITY OR DOWNTOWN AREA

TIME SPENT WALKING



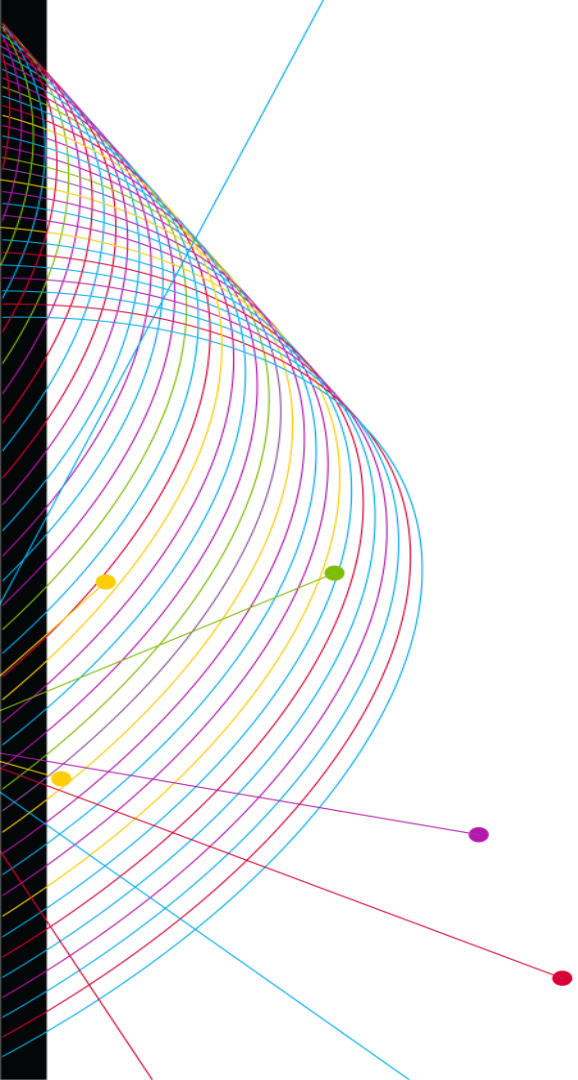
MEAN TIME SPENT WALKING PER WEEK

3 HOURS

6 out of 10 U.S. residents age 16 or older surveyed (60%) have walked around in a town, city or downtown area in the past month.

Among those who walk, 38% spend 3 hours or more on foot per week. The average amount of time spent walking is 3 hours per week.

BASE: ALL RESPONDENTS | n = 999 | "In the last month, have you done any of the following activities?
BASE: WALKED IN A TOWN, CITY OR DOWNTOWN AREA IN THE PAST MONTH | n = 596 | "How much time in hours and minutes do you spend walking in a town, city or downtown area during a typical WEEK?"



OUT OF HOME ADVERTISING

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ANY OOH MEDIA ADVERTISING

Billboard or Digital Billboard or Poster or Street Level Advertising or Public Bus or Taxi Cab or Wrapped Vehicle or Mobile Billboard or Commuter Rail or Subway or Bus Shelter or Airport or Shopping Mall or Movie Theater or Place-based Printed Signs or Place-based Video Screens

NOTICED

PAST MONTH 90%

PAST WEEK 80%

90% of U.S. residents age 16 or older surveyed have noticed any out of home advertising format in the past month and 80% have noted any OOH ads in the past week.

BASE: ALL RESPONDENTS | n = 999 | “Please indicate when, if ever, was the last time you noticed {OOH MEDIA FORMAT} advertising.”
[sample images shown – see Appendix C]

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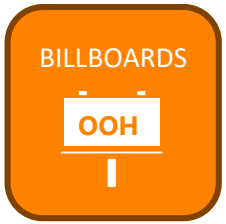
OOH ADVERTISING CATEGORIES



NOTICED PAST MONTH

81%

- Roadside Bulletin
- Digital Bulletin
- Poster

NOTICED PAST MONTH

78%

- Airport
- Mobile Billboards
- Rail or subway
- Side of a public bus
- Taxi cab
- Wrapped vehicles

NOTICED PAST MONTH

74%

- Movie theater
- Shopping mall
- Place-based printed signs
- Place-based video screens

NOTICED PAST MONTH

50%

- Any street level advertising
- Bus shelter

81% of U.S. residents age 16 or older surveyed have noticed a roadside bulletin, digital bulletin or poster in the past month.

78% of those surveyed noticed a transit advertising in the past month.

74% noticed place-based advertising in movie theaters, shopping malls and other public venues.

While street level advertising is not available in all markets throughout the U.S., 50% of U.S. residents noticed street level ads in the past month.

BASE: ALL RESPONDENTS | n = 999 | “When was the last time you noticed {OOH MEDIA FORMAT} advertising.” [sample images shown]

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BILLBOARD ADVERTISING

BULLETIN

NOTICED

PAST MONTH 76%

PAST WEEK 60%

DIGITAL BULLETIN OR POSTER

NOTICED

PAST MONTH 55%

PAST WEEK 38%

POSTER

NOTICED

PAST MONTH 47%

PAST WEEK 30%

NOTE: According to the OAAA, there are approximately 345,000 billboards in the U.S. and 8,800 of them are digital bulletins and posters.

76% of U.S. residents age 16 or older surveyed have noticed a bulletin in the past month and 60% have noted a bulletin in the past week.

55% of those surveyed noticed a digital bulletin or poster in the past month and 38% have noticed one in the past week.

47% of U.S. residents age 16 or older surveyed noticed a poster advertisement in the past month and 30% noted a poster in the past week.

BASE: ALL RESPONDENTS | n = 999 | “When was the last time you noticed {ROADSIDE BILLBOARD} {DIGITAL BILLBOARD} advertising.” [sample images shown]

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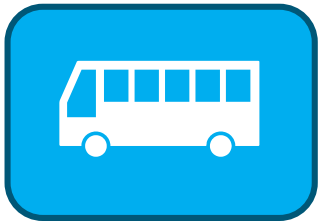
TRANSPORTATION ADVERTISING

PUBLIC BUS



NOTICED

PAST MONTH 55%

PAST WEEK 39%

TAXI CAB

NOTICED

PAST MONTH 31%

PAST WEEK 17%

COMMUTER RAIL OR SUBWAY

NOTICED

PAST MONTH 15%

PAST WEEK 8%

55% of U.S. residents age 16 or older surveyed noticed ads on the side of public buses in the past month and 39% have noted bus ads in the past week.

31% of those surveyed noticed ads on taxis in the past month and 17% noticed in the past week.

15% of those surveyed noticed advertising on commuter rail or subway trains or in transit stations in the past month and 8% have noticed them in the past week.

BASE: ALL RESPONDENTS | n = 999 | “When was the last time you noticed {PUBLIC BUS} {TAXI CAB} {COMMUTER RAIL OR SUBWAY CAR, PLATFORM, OR STATION} advertising.” [sample images shown – see Appendix C]

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ADVERTISING ON THE MOVE

WRAPPED VEHICLE

NOTICED

PAST MONTH 64%

PAST WEEK 44%

MOBILE BILLBOARD

NOTICED

PAST MONTH 27%

PAST WEEK 14%

64% of U.S. residents age 16 or older surveyed noticed a wrapped vehicle advertisement in the past month and 44% have noticed one in the past week.

27% of those surveyed noticed a mobile billboard in the past month and 14% have noticed one in the past week.

BASE: ALL RESPONDENTS | n = 999 | “When was the last time you noticed {WRAPPED VEHICLE}{MOBILE BILLBOARD} advertising.” [sample images shown – see Appendix C]

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STREET LEVEL ADVERTISING

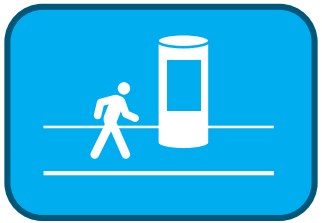
BUS SHELTER

NOTICED

PAST MONTH 39%

PAST WEEK 25%

STREET KIOSKS



NOTICED

PAST MONTH 37%

PAST WEEK 22%

39% of U.S. residents age 16 or older surveyed noticed a bus shelter advertisement in the past month and 25% have noticed one in the past week.

37% of those surveyed noticed a street level kiosks in the past month and 22% have noticed one in the past week.

BASE: ALL RESPONDENTS | n = 999 | “When was the last time you noticed {POSTER} {BUS SHELTER} {STREET LEVEL} advertising.” [sample images shown – see Appendix C]

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PLACE-BASED ADVERTISING

SHOPPING MALL

NOTICED

PAST MONTH 41%

PAST WEEK 19%

MOVIE THEATER

NOTICED

PAST MONTH 31%

PAST WEEK 15%

AIRPORT

NOTICED

PAST MONTH 16%

PAST WEEK 7%

41% of U.S. residents age 16 or older surveyed noticed advertising in shopping malls in the past month and 19% noted mall ads in the past week.

31% of those surveyed recalled seeing an ad in a movie theater in the past month and 15% saw an ad in a movie theater in the past week.

16% of those surveyed noticed advertising in an airport in the past month and 7% have noticed it in the past week.

BASE: ALL RESPONDENTS | n = 999 | "When was the last time you noticed {SHOPPING MALL} {AIRPORT} {MOVIE THEATER} advertising." [sample images shown – see Appendix C]

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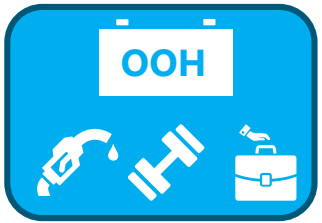
MORE PLACE-BASED ADVERTISING

PRINTED SIGNS
IN VARIOUS VENUES

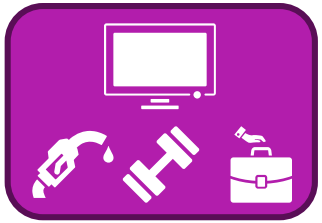


NOTICED

PAST MONTH 57%

PAST WEEK 33%

VIDEO SCREENS
IN VARIOUS VENUES



NOTICED

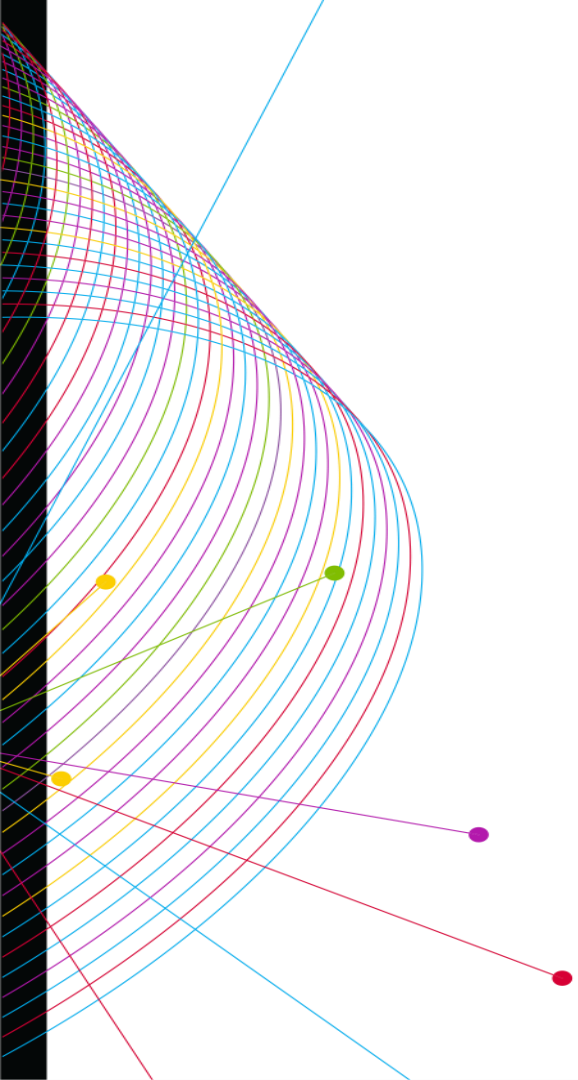
PAST MONTH 45%

PAST WEEK 26%

57% of U.S. residents age 16 or older surveyed noticed printed advertising in venues such as retail stores, health clubs and gas stations in the past month and 33% noted these ads in the past week.

45% of those surveyed recalled seeing video screens with advertising in venues in the past month and 26% have noticed one in the past week.

BASE: ALL RESPONDENTS | n = 999 | "When was the last time you noticed {PRINTED SIGNS IN PLACES such as retail stores, bars/restaurants, gas stations, sports arenas, health clubs or office buildings} {VIDEO SCREENS AT PLACES of business such as health clubs, office buildings and elevators, gas stations, bars/restaurants or other retail locations} advertising." [sample images shown[sample images shown – see Appendix C]



ENGAGEMENT WITH OUT OF HOME

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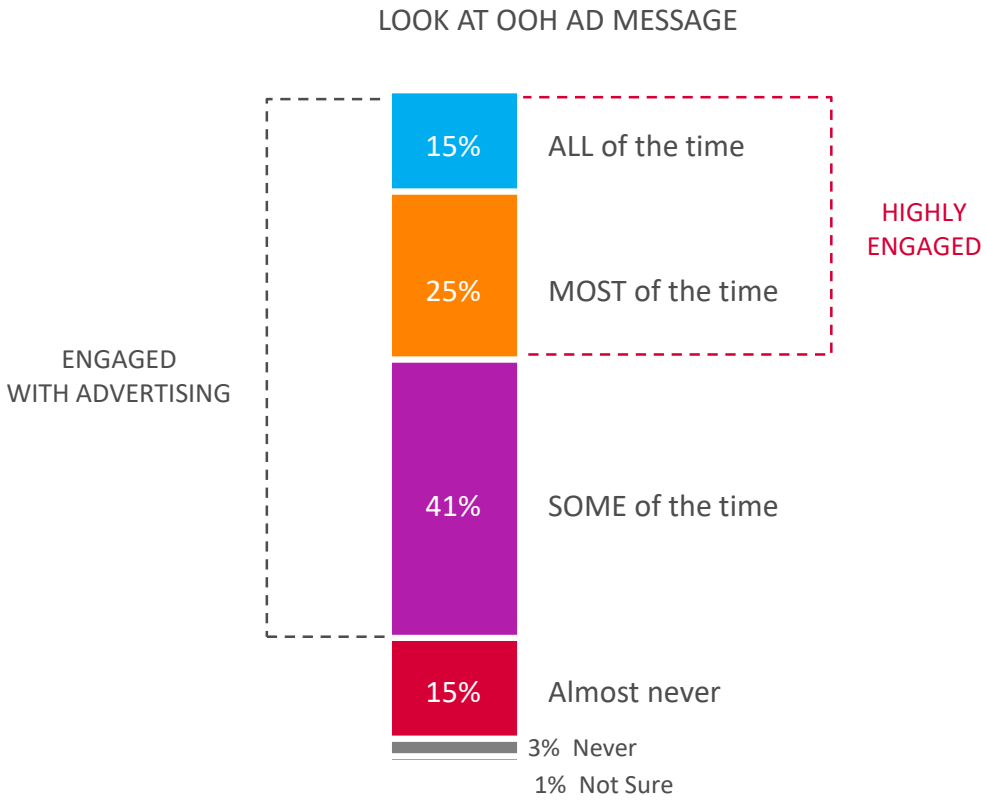
ENGAGEMENT WITH OOH MEDIA



On average, 81% of people who noticed a specific type of OOH advertising in the past month engaged with the messaging.

40% of OOH media viewers are highly engaged with the ads and look at the messages either all or most of the time.

BASE: NOTICE ANY OOH FORMAT IN PAST 30 DAYS | n = 896 | "How often do you look at advertising messages in each of the following categories?"

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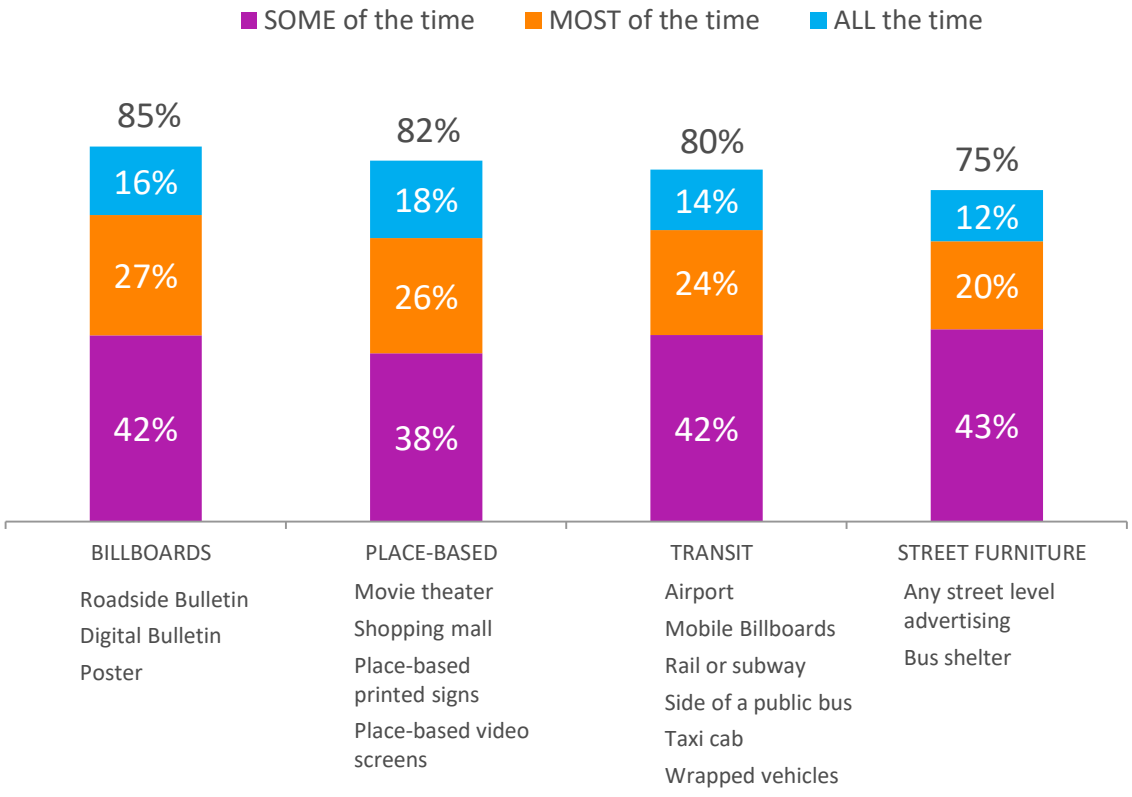
ENGAGEMENT BY OOH CATEGORY



Billboard advertising was the most engaging category with 85% of bulletin or poster viewers looking at the advertising messages either all, most or some of the time.

Place-based advertising had the most highly engaged viewers with 44% looking at the ad messages either all or most of the time.

BASE: NOTICE {OOH MEDIA FORMATS} IN PAST 30 DAYS | "How often do you look at advertising messages in each of the following categories?"

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ACTIONS TAKEN AFTER SEEING OOH ADS

LIVE ACTION	
Watched a movie in the theater	28%
Visited a restaurant advertised	25%
Visited a store or other business advertised	19%
Attended a sporting event, festival, concert, performance or other public event advertised	14%
Called a phone number	8%
TUNE-IN	
Watched a television program	26%
Tuned to a radio station	14%

Over a quarter of OOH viewers (28%) have watched a movie in a theater, and another 25% have visited a restaurant after seeing an OOH advertisement.

19% of OOH viewers have visited a store or other business after seeing an OOH advertisement; 14% have attended a public event and 8% called a phone number after seeing an OOH ad.

OOH media has also prompted 26% of OOH viewers to watch a TV program and 14% have tuned to a radio station.

BASE: NOTICED ANY OUT OF HOME ADVERTISING IN THE PAST 30 DAYS| n = 866

"In the past year, have you done any of the following activities after seeing a billboard or other out of home advertisement?"

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MORE ACTIONS TAKEN AFTER SEEING ADS

WORD OF MOUTH	
Talked about the ad or product with others	23%
Visited an advertiser's social media page (e.g. Facebook)	15%
Recommended the advertised product or brand to others	8%
Posted about the ad or product on a blog or social media network	5%
ONLINE ACTIVITY	
Used an online search engine (such as Google) to look up information about the advertiser	33%
Visited an advertiser's website	23%

Nearly 1 in 4 OOH viewers (23%) have talked about an ad or product with others after seeing on OOH message in the past year.

15% of OOH viewers have visited an advertiser's social media page, 8% have recommended the brand and 5% have posted about the ad or product seen in an OOH ad in the past year.

One third of OOH viewers (33%) have searched for the advertised brand online and nearly a quarter (23%) have visited an advertised website in the past year.

BASE: NOTICED ANY OUT OF HOME ADVERTISING IN THE PAST 30 DAYS| n = 866

"In the past year, have you done any of the following activities after seeing a billboard or other out of home advertisement?"

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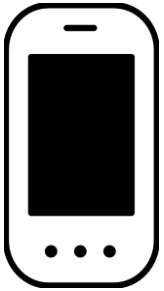
ACTIONS TAKEN ON A SMARTPHONE

MOBILE INTERACTION	
Used online search (such as Google) to look up information about the advertiser	42%
Accessed a coupon or discount code	33%
Visited an advertiser's website	32%
Downloaded or used an app shown in the ad	21%
Snapped a photo of an ad	18%
Interacted with an ad to send a message, upload a photo or vote	13%
Interacted with an out-of-home advertisement by either swiping an NFC sensor, scanning a QR code or sending a SMS text.	20%
ANY OF THE ABOVE ACTIONS	66%



Two-thirds of OOH viewers (66%) used their smartphone in response to seeing an OOH ad.

Over 4 in 10 OOH viewers (42%) who own a smartphone have searched for an OOH advertiser on their mobile device.

One third (33%) of smartphone users have accessed a coupon or discount, 32% have visited the advertiser's website and 21% have downloaded an app after seeing an OOH ad.

20% of smartphone users have used NFC, QR or SMS text technology to interact with an ad, 18% have snapped a photo of an ad, 13% uploaded a photo or voted after seeing an OOH ad.

BASE: OOH MEDIA VIEWERS WHO OWN A SMARTPHONE WITH INTERNET ACCESS | n = 786 | "In the past year, have you done any of the following activities on your smartphone or mobile device after seeing a billboard or other out-of-home advertisement?"

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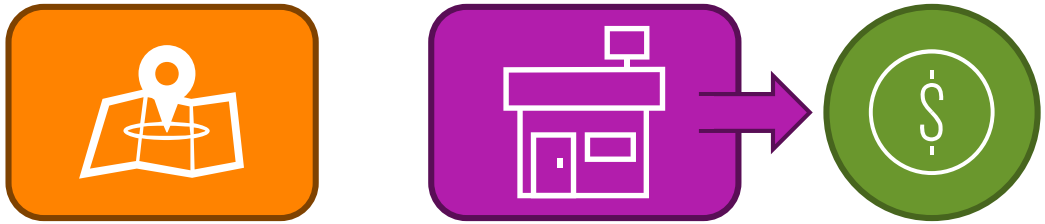
DRIVING IN-STORE TRAFFIC



39%

HAVE NOTICED DIRECTIONAL OOH ADS

20%

IMMEDIATELY VISITED A BUSINESS SEEN ADVERTISED

74%

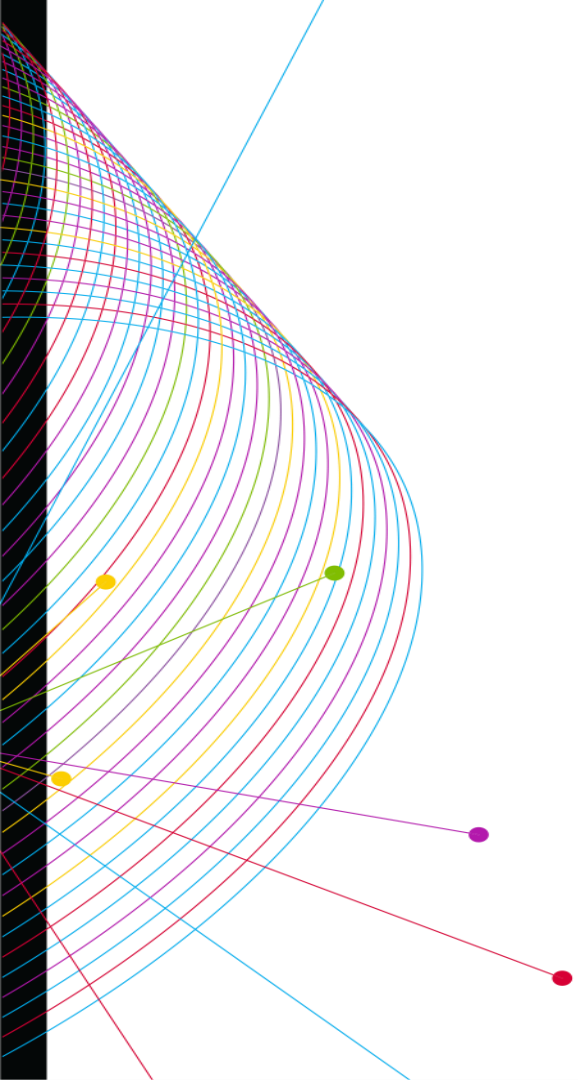
MADE A PURCHASE

BASE: NOTICED ANY OUT OF HOME ADVERTISING IN THE PAST 30 DAYS| n = 866
"Have you ever noticed an out-of-home advertisement that gave you directions to a specific store, business or restaurant location?"
"Have you ever immediately (within 30 minutes) visited a store, business or restaurant specifically because you saw their out-of-home ad?"

BASE: RESPONDENTS WHO VISITED A STORE AFTER WATCHING OUT-OF-HOME AD | n = 187
"You indicated that you have immediately visited a store, business or restaurant specifically because you saw an out-of-home ad. The last time that you did this, did you make a purchase at that store, business or restaurant?"

Nearly 4 in 10 OOH viewers (39%) have noticed an advertisement providing directions to a specific store, business or restaurant location.

20% of OOH viewers have visited a business immediately after seeing a directional OOH ad; 74% of those visitors made a purchase.



CONSUMER PATTERNS

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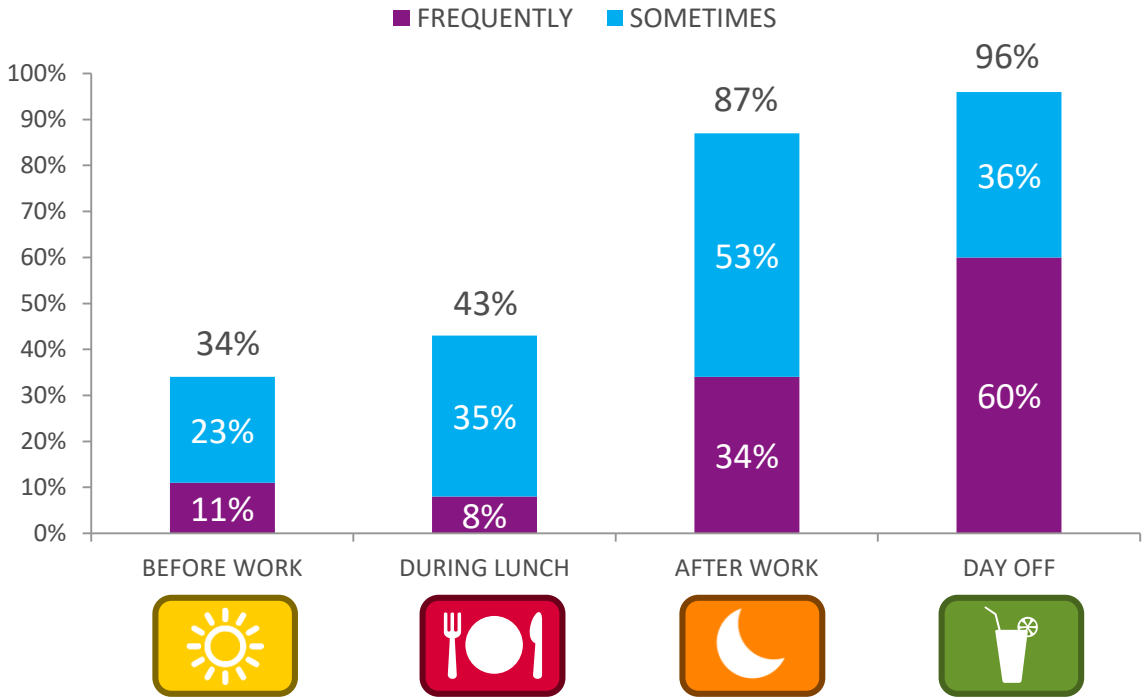
IN-PERSON SHOPPING



The majority of people who travel to their job, do their shopping either after work or on their day off.

34% of those who travel to work frequently shop after work and 53% sometimes visit stores or business when the work day is done.

BASE: RESPONDENTS WHO WORK OUTSIDE OF THEIR HOME AT LEAST SOME DAYS| n = 504

"How often do you SHOP IN STORES OR OTHER BUSINESSES during various TIMES OF DAY in the course of a typical week?"

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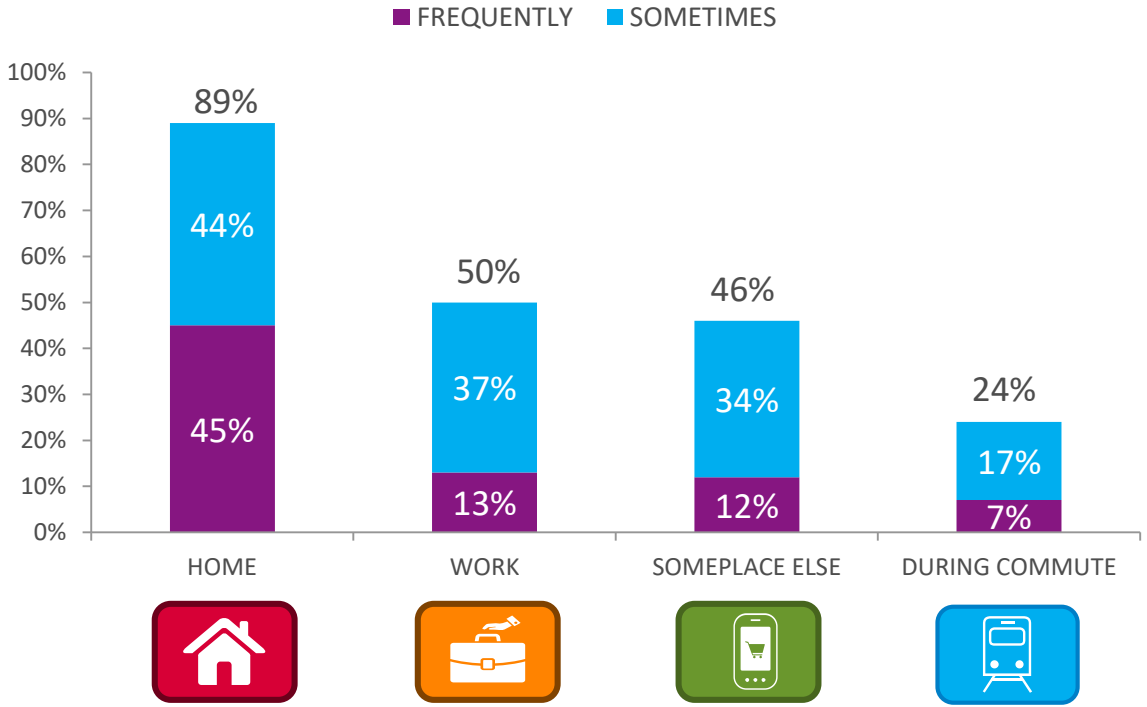
ONLINE SHOPPING



Most people who commute to work, do their online shopping at home.

13% of those who travel to their job frequently shop online while at work and 37% sometimes shop at their place of business.

BASE: RESPONDENTS WHO WORK OUTSIDE OF THEIR HOME AT LEAST SOME DAYS| n = 504

"How often do you SHOP ONLINE during various TIMES OF DAY in the course of a typical week?"

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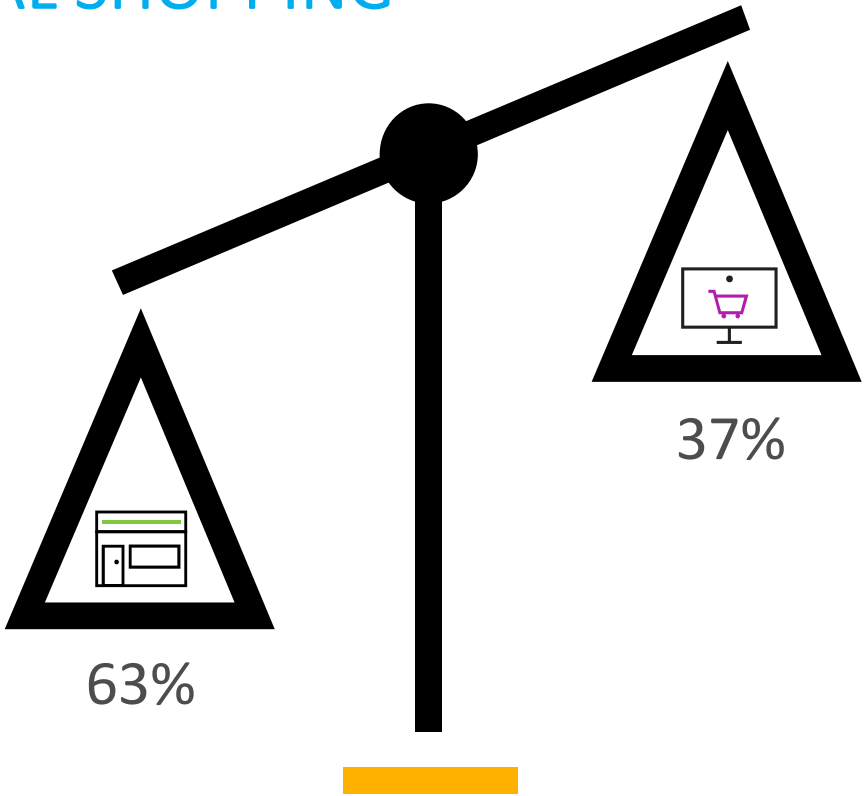
TOTAL SHOPPING



U.S. residents who travel to work most days estimate nearly two-thirds of their total shopping (63%) is done in-store, while over one-third (37%) is done online.

BASE: RESPONDENTS WHO WORK OUTSIDE OF THEIR HOME AT LEAST SOME DAYS| n = 504

"How much of your total shopping is done in-store versus online?" Note: Estimate may exclude grocery and convenience shopping

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TOP OF MIND DURING COMMUTE

TOP THINGS PEOPLE THINK ABOUT DURING THEIR DAILY COMMUTE

Family	74%
Work	71%
Finances	50%
Friends	43%
What I'm going to eat later that day	36%
Plans for this evening	33%
Plans for the weekend	33%
Food shopping I need to do	31%
Current events/news	27%
Shopping for things other than food	19%
Your car or other auto needs	18%
Politics	15%
My health and/or medical conditions	14%
What to watch on TV or stream online	12%
Vacation plans	11%

Commuters have a lot on their mind.

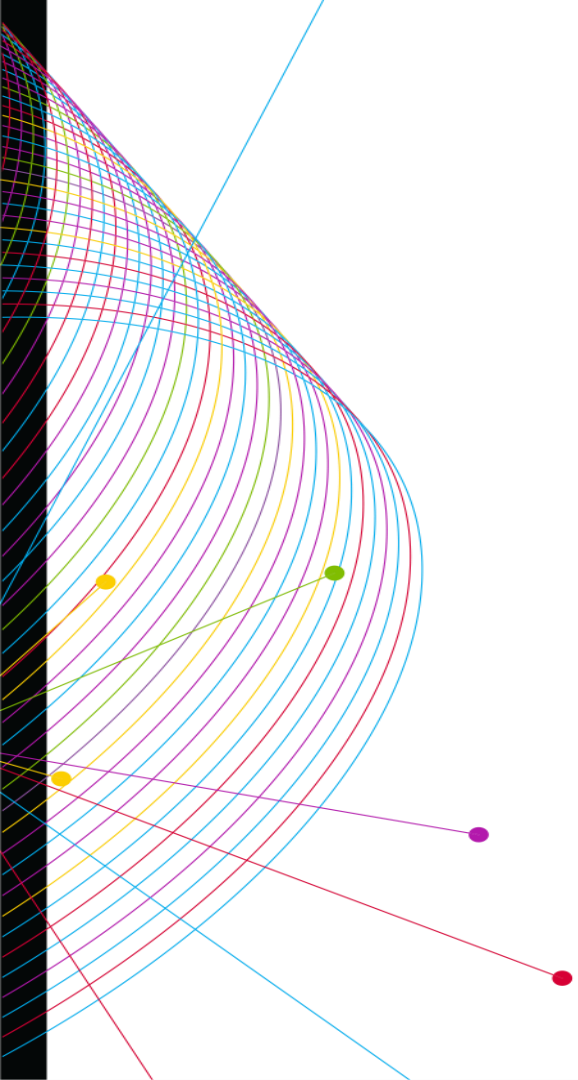
Family and work are the most popular topics, with 74% and 71% of those who travel to their job thinking about these, respectively.

Half think of their finances while on the road and 44% think of their friends most often.

Eating, plans for the evening and plans for the weekend round out the topics on people's minds.

BASE: RESPONDENTS WHO WORK OUTSIDE OF THEIR HOME AT LEAST SOME DAYS| n = 504

"Which FIVE of the following topics do you think about MOST OFTEN while driving to or from work?"



APPENDIX A

TRAFFIC PROFILE + OOH VIEWERSHIP

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APPENDIX A –KEY

U.S. TOTAL	U.S. residents age 16 or older who have ridden driven or ridden in a car, ridden as a passenger on a public bus or in a taxi, commuter rail or subway, or walked around town, city or downtown area in the past month. (100% of total respondents)
	TRAVEL METHOD
PRIVATE	Respondents who have driven or ridden in a car, truck or other private vehicle in the past month. (87% of total respondents)
PUBLIC	Respondents who have ridden as a passenger on a public bus or in a taxi, commuter rail or subway in the past month. (32% of total respondents)
WALKER	Respondents who have walked around town, city or downtown area. (60% of respondents)
	TRAVEL MILEAGE
LIGHT	Respondents who travel less than 50 miles per week. (37% of total respondents)
MEDIUM	Respondents who travel between 50 and 150 miles per week. (38% of total respondents)
HEAVY	Respondents who travel over 150 miles per week. (25% of total respondents)
	OOH VIEWER
BILLBOARD	Respondents who noticed a roadside billboard or digital billboard in the past month. (76% of total respondents)
OOH MEDIA	Respondents who noticed any format of out-of-home advertising in the past month – including roadside billboard, digital billboard, poster, street level advertising, public bus, taxi, wrapped vehicle, mobile billboard, commuter rail or subway, bus shelter, airport, shopping mall, movie theater, place-based printed sign or place-based video screen in the past month. (90% of total respondents)

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APPENDIX A –DEMO

	U.S.	TRAVEL METHOD (Q3)			TRAVEL MILEAGE (Q8)			OOH VIEWER	
	TOTAL	PRIVATE	PUBLIC	WALKER	LIGHT	MEDIUM	HEAVY	BILLBOARD	ANY OOH
SEX									
Male	49%	45%	64%	53%	49%	43%	58%	50%	49%
Female	51%	55%	36%	47%	51%	57%	42%	50%	51%
AGE									
16-17	1%	1%	2%	1%	1%	1%	1%	1%	1%
18-24	11%	8%	22%	14%	18%	7%	12%	12%	12%
25-34	18%	16%	33%	20%	20%	16%	20%	20%	19%
35-44	13%	15%	12%	13%	11%	14%	14%	14%	14%
45-54	20%	21%	13%	21%	14%	21%	21%	21%	21%
55-64	16%	17%	9%	13%	14%	16%	14%	14%	14%
65+	21%	22%	9%	18%	21%	27%	19%	19%	20%
HOUSEHOLD INCOME (~99% of sample who provided income information)									
Less than $25,000	25%	17%	21%	17%	30%	13%	13%	18%	20%
$25,000 to less than $75,000	42%	42%	39%	41%	43%	44%	41%	40%	40%
$75,000 to $99,999	14%	15%	14%	15%	10%	14%	19%	15%	14%
$100,000 to $149,999	14%	15%	14%	15%	9%	17%	17%	15%	15%
$150,000 or more	9%	10%	10%	11%	7%	11%	10%	9%	9%

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APPENDIX A –DEMO

	U.S.	TRAVEL METHOD (Q3)			TRAVEL MILEAGE (Q8)			OOH VIEWER	
	TOTAL	PRIVATE	PUBLIC	WALKER	LIGHT	MEDIUM	HEAVY	BILLBOARD	ANY OOH
EMPLOYMENT STATUS									
Employed full-time	40%	40%	49%	44%	28%	38%	59%	42%	41%
Employed part-time	12%	11%	12%	13%	15%	10%	11%	12%	12%
Self-employed	7%	7%	7%	7%	6%	7%	8%	8%	7%
A stay-at-home spouse or partner	5%	6%	2%	4%	5%	6%	3%	5%	5%
Not employed- looking for work	5%	4%	7%	5%	7%	3%	3%	4%	4%
Not employed- not looking	5%	2%	2%	1%	2%	2%	2%	1%	1%
Retired	20%	21%	9%	17%	22%	25%	10%	17%	19%
LEVEL OF EDUCATION COMPLETED									
High School or Less	20%	17%	21%	17%	27%	15%	18%	19%	20%
Some college, but no degree	21%	22%	23%	20%	25%	20%	17%	20%	21%
Associate or Technical Degree	13%	13%	11%	13%	14%	14%	13%	12%	13%
College Degree (BA, BS)	24%	25%	25%	26%	20%	24%	28%	24%	24%
Some Grad School or Grad Degree	20%	21%	20%	22%	13%	24%	22%	21%	21%

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APPENDIX A –TRAVEL

	U.S.	TRAVEL METHOD (Q3)			TRAVEL MILEAGE (Q8)			OOH VIEWER	
	TOTAL	PRIVATE	PUBLIC	WALKER	LIGHT	MEDIUM	HEAVY	BILLBOARD	OOH MEDIA
MEAN TIME SPENT IN ANY VEHICLE (HOURS)									
Weekday	4.4	4.1	5.8	4.8	3	4.3	6.5	4.6	4.5
Saturday	1.9	1.7	2.6	1.9	1.9	1.7	2.1	1.9	1.9
Sunday	1.4	1.2	2.1	1.4	1.3	1.2	1.9	1.5	1.5
Total Week	25.3	2.9	33.7	27.3	18.2	24.4	36.5	26.4	25.9
MEAN TIME SPENT WALKING (HOURS)									
Total Week	2.9	2.8	3.8	2.9	3.2	2.8	2.8	2.9	2.9
MEAN MILES TRAVELED IN ANY VEHICLE									
Total Week	159	146	184	160	19	87	465	163	156

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APPENDIX A –OOH VIEWERSHIP

	U.S.	TRAVEL METHOD (Q3)			TRAVEL MILEAGE (Q8)			OOH VIEWER	
	TOTAL	PRIVATE	PUBLIC	WALKER	LIGHT	MEDIUM	HEAVY	BILLBOARD	OOH MEDIA
OUT-OF-HOME MEDIA NOTICED IN THE PAST 30 DAYS									
Roadside billboard	76%	77%	81%	81%	71%	77%	83%	100%	88%
Wrapped vehicles	64%	66%	65%	68%	57%	67%	68%	75%	72%
Place-based printed signs	57%	59%	63%	63%	50%	61%	62%	67%	65%
Digital billboard	55%	56%	60%	61%	45%	60%	64%	69%	64%
Side of a public bus	55%	55%	72%	64%	52%	58%	56%	65%	64%
Poster	47%	46%	61%	55%	43%	48%	52%	58%	55%
Place-based video screens	45%	46%	55%	54%	34%	52%	51%	52%	51%
Shopping mall	41%	40%	57%	50%	35%	44%	46%	48%	47%
Bus shelter	39%	37%	60%	47%	39%	39%	38%	46%	45%
Any street level advertising	37%	37%	53%	45%	34%	38%	40%	44%	43%
Movie theater	31%	30%	46%	37%	26%	32%	38%	36%	36%
Taxi	31%	30%	48%	37%	28%	31%	35%	36%	35%
Mobile billboards	27%	25%	41%	31%	25%	23%	37%	33%	31%
Airport	16%	15%	32%	19%	12%	18%	19%	19%	18%
Commuter rail or subway car	15%	13%	35%	18%	18%	13%	14%	17%	17%

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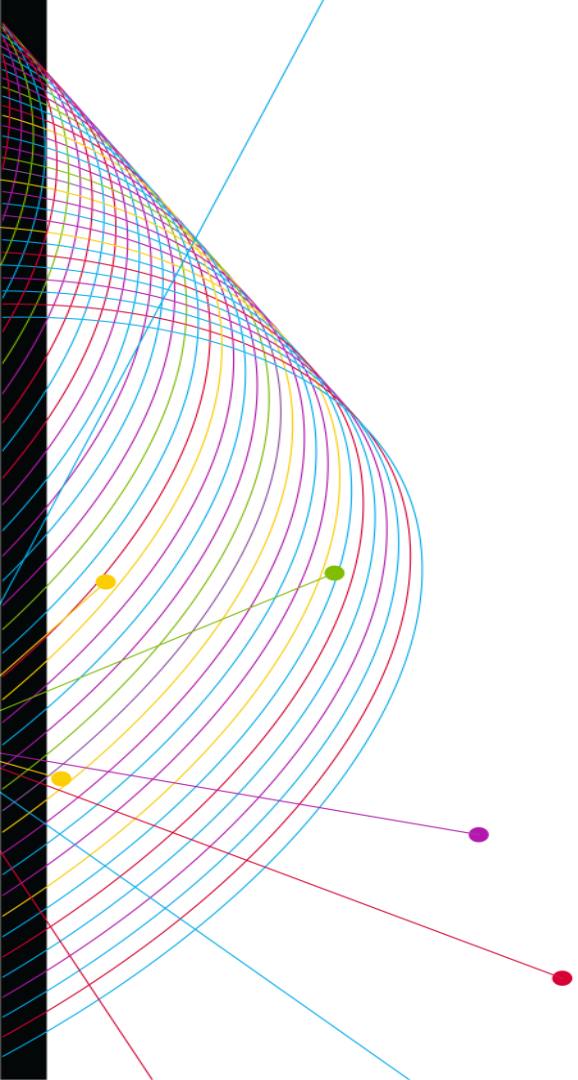
APPENDIX A –OOH VIEWERSHIP INDEXED

	U.S.	TRAVEL METHOD (Q3)			TRAVEL MILEAGE (Q8)			OOH VIEWER	
	TOTAL	PRIVATE	PUBLIC	WALKER	LIGHT	MEDIUM	HEAVY	BILLBOARD	OOH MEDIA
OUT-OF-HOME MEDIA NOTICED IN THE PAST 30 DAYS									
Roadside billboard	100	101	107	107	93	101	109	132	116
Wrapped vehicles	100	103	102	106	89	105	106	117	113
Place-based printed signs	100	104	111	111	88	107	109	118	114
Digital billboard	100	102	109	111	82	109	116	125	116
Side of a public bus	100	100	131	116	95	105	102	118	116
Poster	100	98	130	117	91	102	111	123	117
Place-based video screens	100	102	122	120	76	116	113	116	113
Shopping mall	100	98	139	122	85	107	112	117	115
Bus shelter	100	95	154	121	100	100	97	118	115
Any street level advertising	100	100	143	122	92	103	108	119	116
Movie theater	100	97	148	119	84	103	123	116	116
Taxi	100	97	155	119	90	100	113	116	113
Mobile billboards	100	93	152	115	93	85	137	122	115
Airport	100	94	200	119	75	113	119	119	113
Commuter rail or subway car	100	87	233	120	120	87	93	113	113



APPENDIX B

DEMOGRAPHIC TARGETS

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APPENDIX B – TRAVEL

	U.S.	RACE/ETHNICITY				AGE DEMO					INCOME
	TOTAL	WHITE	BLACK	HISPANIC	ASIAN	16-24	18-34	18-49	25-54	55+	$100K+
MEAN TIME SPENT IN ANY VEHICLE (HOURS)											
Weekday	4.4	3.9	5.9	6.7	5.1	4.9	5.9	5	5.1	3.1	4.1
Saturday	1.9	1.5	3.4	2.7	2.2	2.5	3	2.3	2.2	1.2	1.5
Sunday	1.4	1.1	2.8	2.3	2	2	2.4	1.9	1.7	0.9	1.2
Total Week	25.3	22.1	35.7	38.5	29.7	29	34.9	29.2	18:20	14:05	17:58
MEAN TIME SPENT WALKING (HOURS)											
Total Week	2.9	2.6	3.6	3.8	3.3	3.6	3.8	3.2	2.8	2.8	2.6
MEAN MILES TRAVELED IN ANY VEHICLE											
Total Week	157	130	270	141	274	189	223	187	184	107	170

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APPENDIX B – OOH VIEWERSHIP

	U.S.	RACE/ETHNICITY				AGE DEMO					INCOME
	TOTAL	WHITE	BLACK	HISPANIC	ASIAN	16-24	18-34	18-49	25-54	55+	$100K+
OUT-OF-HOME MEDIA NOTICED IN THE PAST 30 DAYS											
Roadside billboard	76%	75%	79%	79%	80%	81%	82%	80%	80%	70%	83%
Wrapped vehicle	64%	65%	58%	67%	68%	65%	62%	62%	62%	66%	71%
Place-based printed signs	57%	56%	57%	63%	53%	65%	61%	57%	55%	57%	63%
Digital billboard	55%	54%	54%	59%	68%	60%	59%	59%	59%	49%	63%
Side of a public bus	55%	51%	68%	66%	75%	66%	66%	62%	57%	49%	61%
Poster	47%	43%	58%	55%	67%	65%	64%	54%	47%	41%	55%
Place-based video screens	45%	43%	49%	58%	58%	58%	54%	49%	46%	39%	54%
Shopping mall	41%	36%	56%	57%	57%	62%	57%	49%	43%	32%	50%
Bus shelter	39%	33%	52%	53%	67%	65%	57%	46%	38%	30%	45%
Any street level advertising	37%	35%	42%	44%	57%	46%	47%	39%	36%	35%	47%
Movie theater	31%	26%	50%	50%	46%	51%	49%	41%	36%	19%	32%
Taxi	31%	26%	46%	46%	58%	48%	45%	36%	30%	27%	35%
Mobile billboards	27%	21%	46%	47%	58%	57%	48%	37%	28%	15%	27%
Airport	16%	13%	24%	27%	28%	25%	27%	20%	17%	12%	22%
Commuter rail or subway	15%	11%	27%	29%	35%	32%	31%	21%	17%	7%	17%

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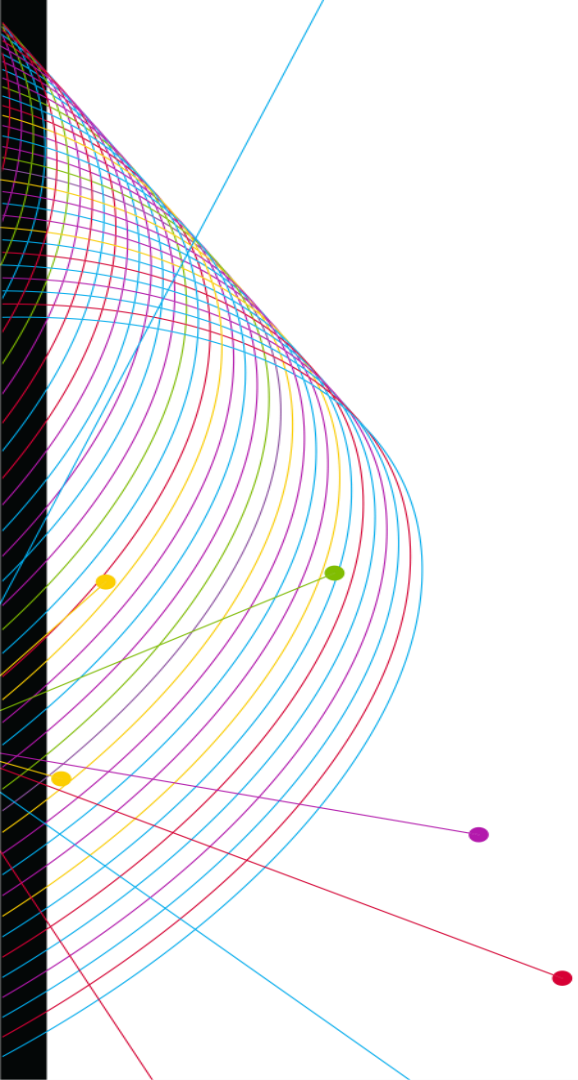
APPENDIX B – OOH VIEWERSHIP INDEXED

	U.S.	RACE/ETHNICITY				AGE DEMO					INCOME
	TOTAL	WHITE	BLACK	HISPANIC	ASIAN	16-24	18-34	18-49	25-54	55+	$100K+
OUT-OF-HOME MEDIA NOTICED IN THE PAST 30 DAYS											
Roadside billboard	100	99	104	104	105	107	108	105	105	92	109
Wrapped vehicle	100	102	91	105	106	102	97	97	97	103	111
Place-based printed signs	100	98	100	111	93	114	107	100	96	100	111
Digital billboard	100	98	98	107	124	109	107	107	107	89	115
Side of a public bus	100	93	124	120	136	120	120	113	104	89	111
Poster	100	91	123	117	143	138	136	115	100	87	117
Place-based video screens	100	96	109	129	129	129	120	109	102	87	120
Shopping mall	100	88	137	139	139	151	139	120	105	78	122
Bus shelter	100	85	133	136	172	167	146	118	97	77	115
Any street level advertising	100	95	114	119	154	124	127	105	97	95	127
Movie theater	100	84	161	161	148	165	158	132	116	61	103
Taxi	100	84	148	148	187	155	145	116	97	87	113
Mobile billboards	100	78	170	174	215	211	178	137	104	56	100
Airport	100	81	150	169	175	156	169	125	106	75	138
Commuter rail or subway	100	73	180	193	233	213	207	140	113	47	113



APPENDIX C

SURVEY VISUAL AIDS

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BILLBOARD

Roadside Billboard - large printed signs displayed near highways.

DIGITAL BILLBOARD

Digital billboard- electronic signs showing images that change every six or eight seconds. Poster- smaller printed signs that appear on city streets.

POSTER

Poster- smaller printed signs that appear on city streets.

Photos provided courtesy of the OAAA

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PUBLIC BUS

Side of a public bus

BUS SHELTER

Bus shelter

STREET LEVEL

Any street level advertising such as sidewalk kiosks or displays

Photos provided courtesy of the OAAA

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TAXI

Taxi cab

COMMUTER RAIL OR SUBWAY

Commuter rail or subway car, platform or station

Photos provided courtesy of the OAAA

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WRAPPED VEHICLE

Wrapped vehicles or other signs on vehicles

MOBILE BILLBOARD

Mobile Billboards

Photos provided courtesy of the OAAA

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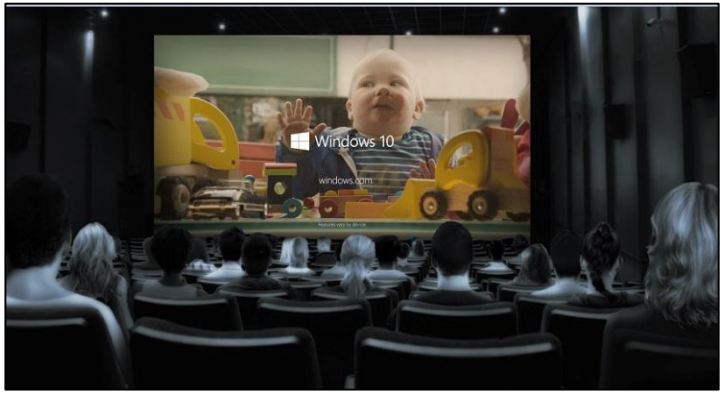
SHOPPING MALL

Shopping mall

MOVIE THEATER



Movie theater

AIRPORT

Airport

Photos provided courtesy of the OAAA

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PRINTED SIGNS
IN VARIOUS VENUES

Printed signs in places such as retail stores, bars/restaurants, gas stations, sports arenas, health clubs or office buildings

VIDEO SCREENS
IN VARIOUS VENUES

Video screens at places of business such as health clubs, office buildings and elevators, gas stations, bars/restaurants or other retail locations

Photos provided courtesy of the OAAA

For more information about the study findings or its Limitations and Permissible Uses, please contact:

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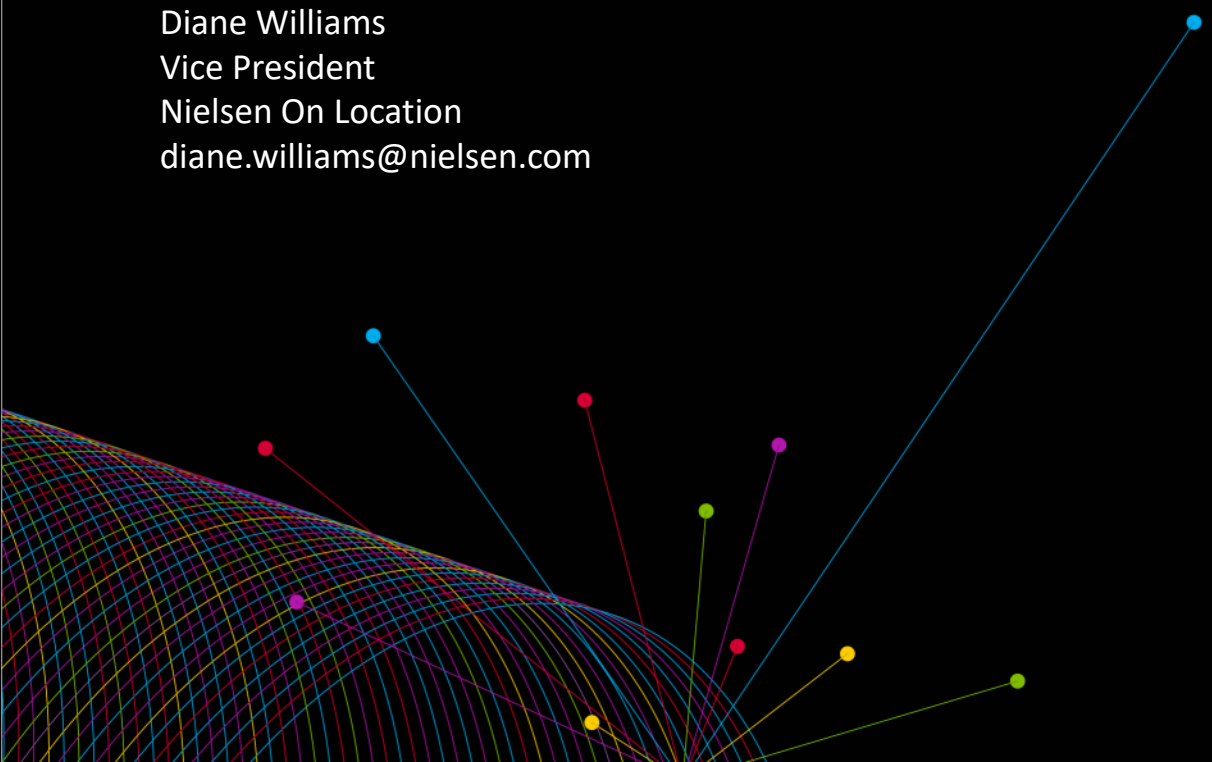
Vice President
Nielsen On Location
diane.williams@nielsen.com

nielsen

AN UNCOMMON SENSE OF THE CONSUMER™