



USA TouchPoints™

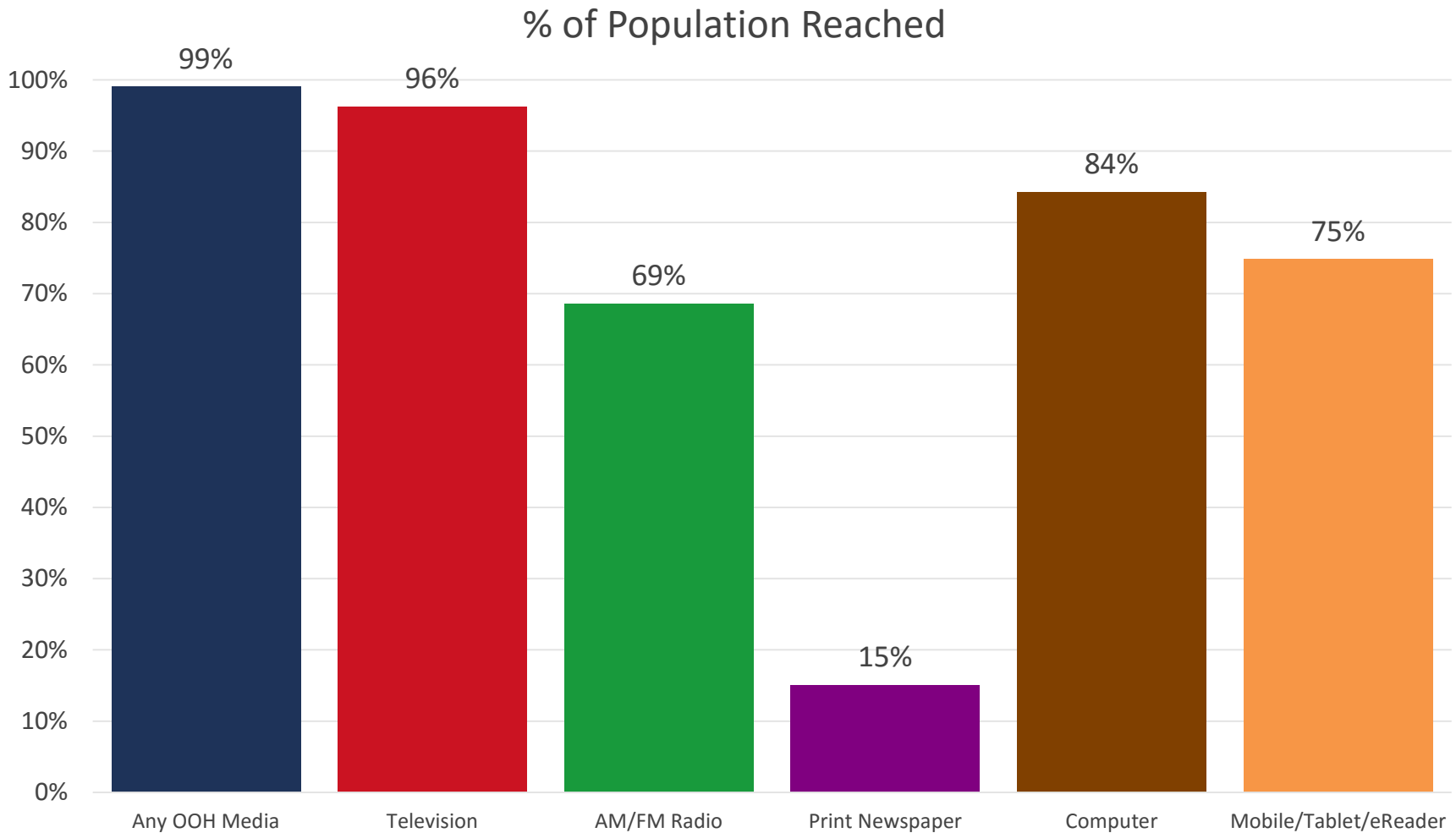
March 2015

OOH and Today's Mobile Consumer

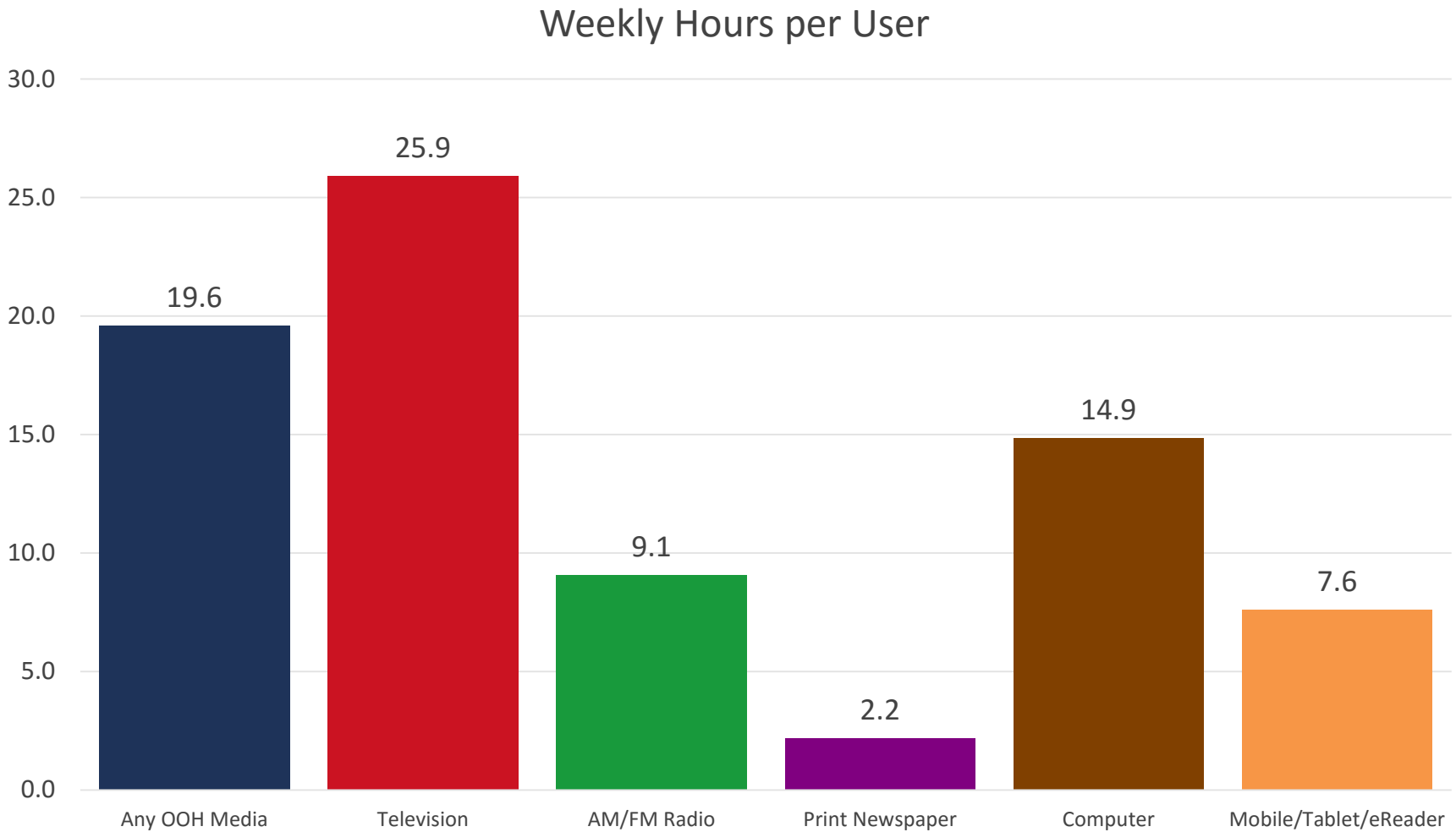


Outdoor Advertising Association of America

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

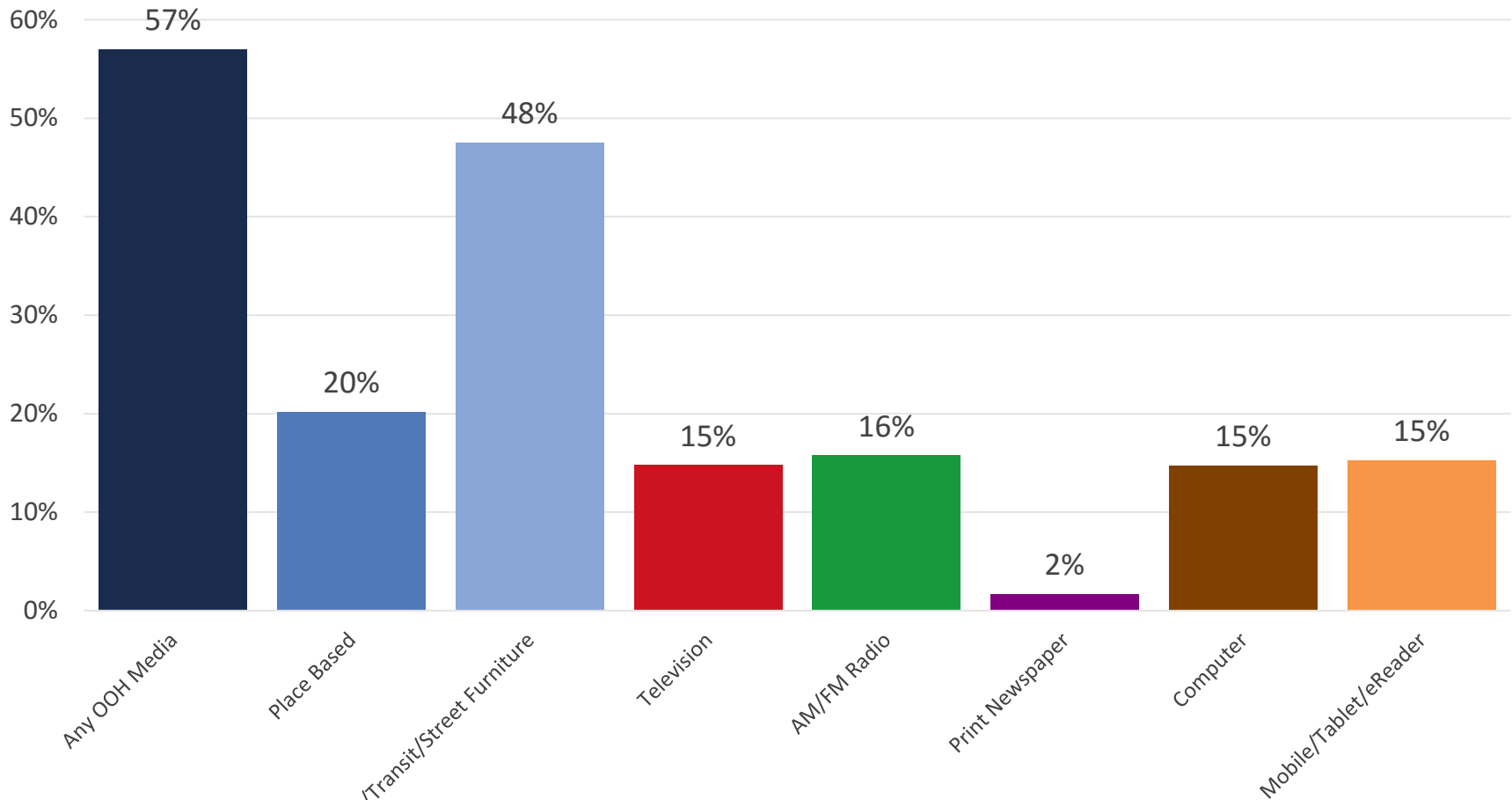


CONSUMERS SPEND 19.6 HOURS PER WEEK WITH OOH – HIGHER THAN ANY MEDIUM OTHER THAN TV



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

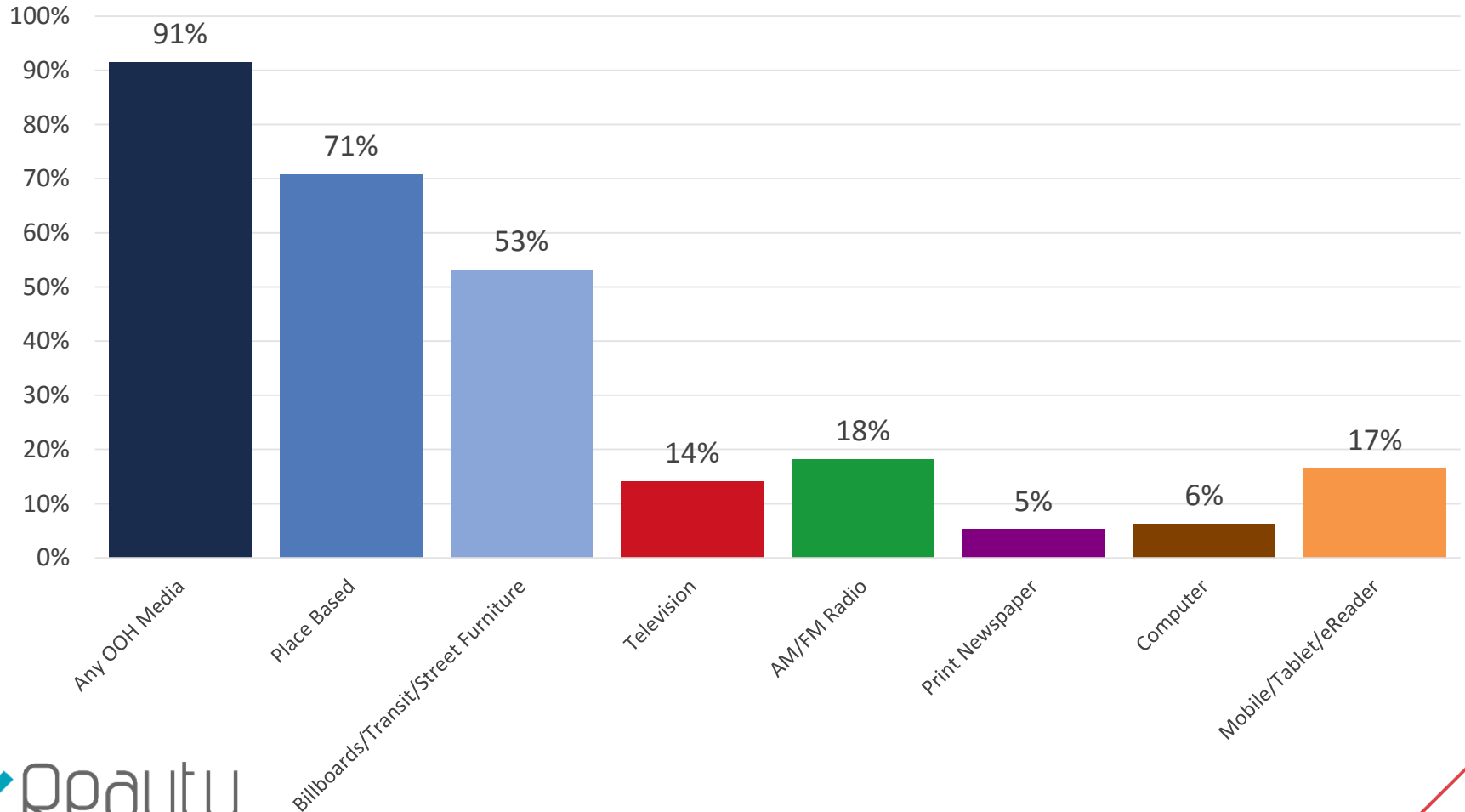
Exposure by medium hour before QSR visits



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

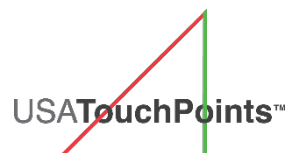
Exposure by medium hour before mall visits

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



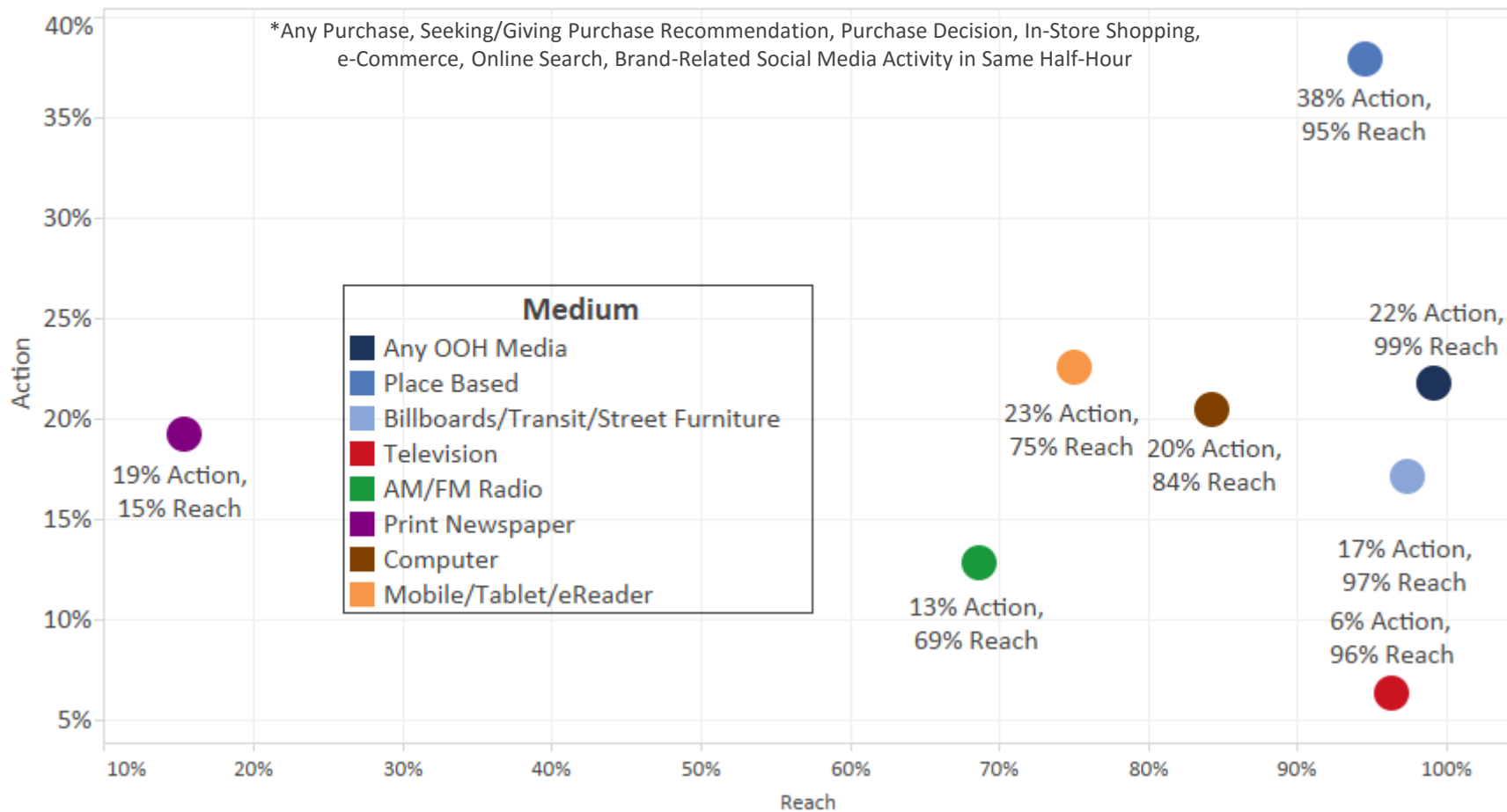
Source: USA TouchPoints, 2014.1

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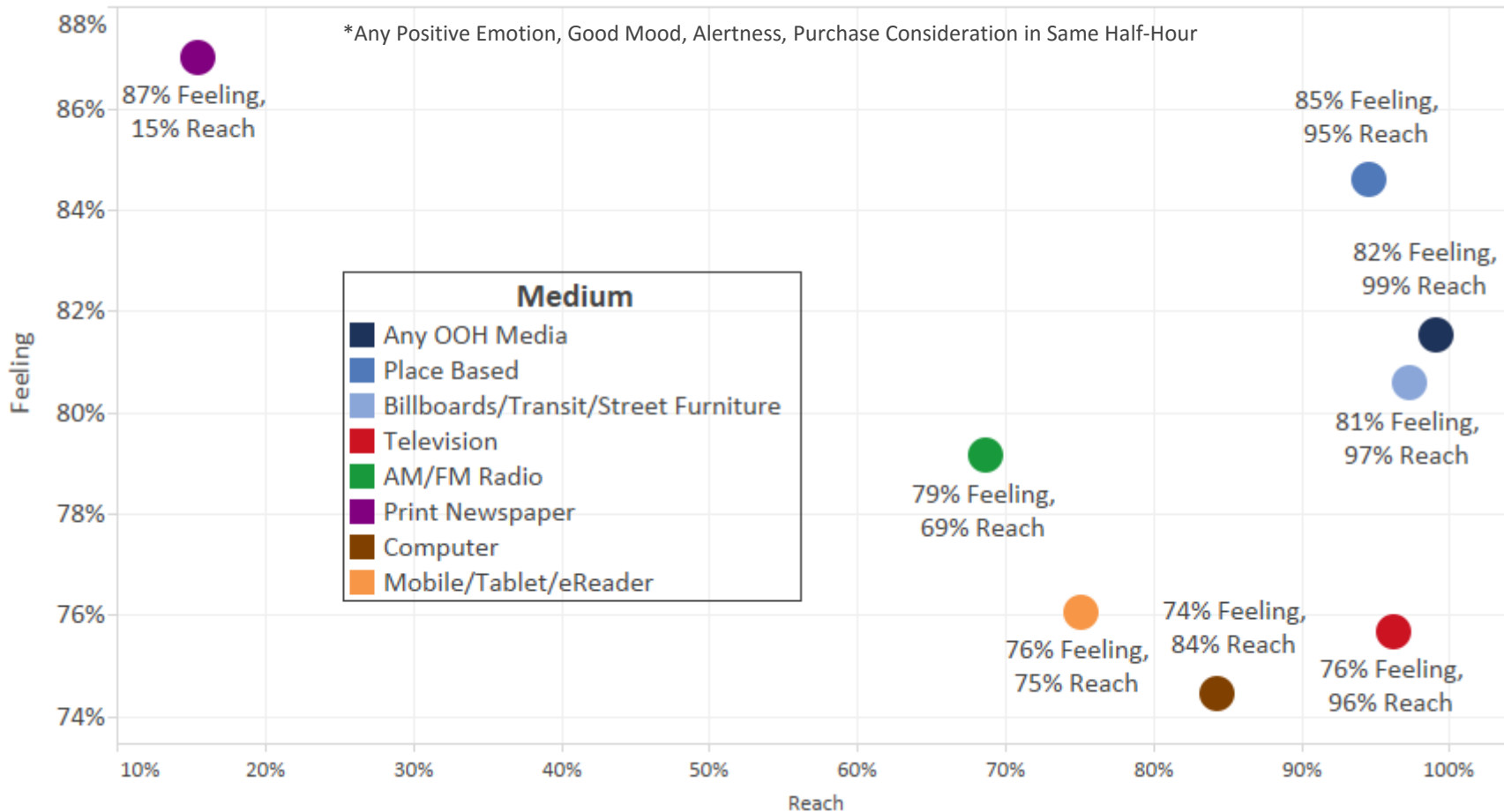
CONSUMERS REPORT “ACTION” RESPONSES IN THE SAME HALF-HOUR AS 22% OF OOH EXPOSURES

Action* and Reach by Medium

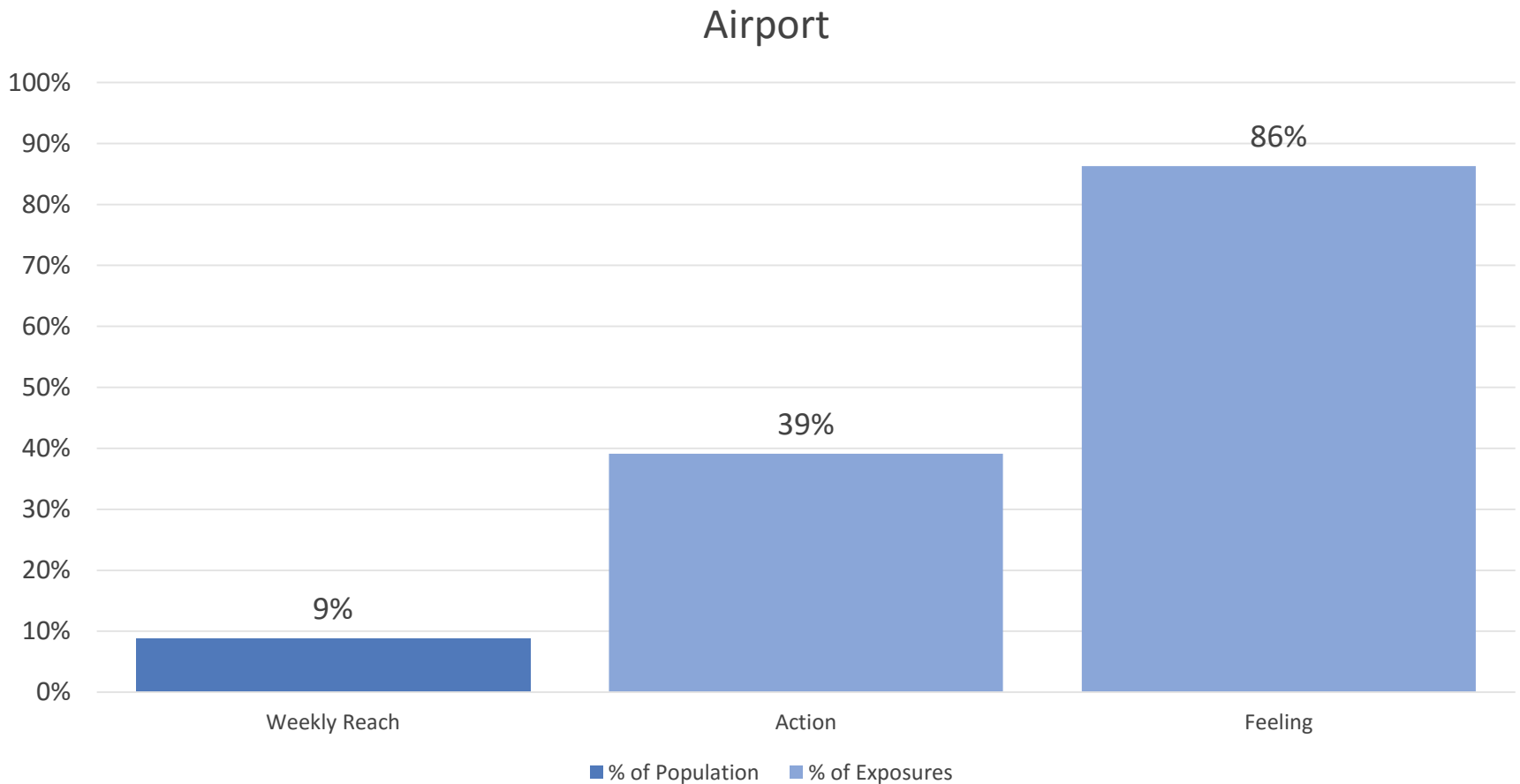


CONSUMERS REPORT “FEELING” RESPONSES IN THE SAME HALF-HOUR AS 82% OF OOH EXPOSURES

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

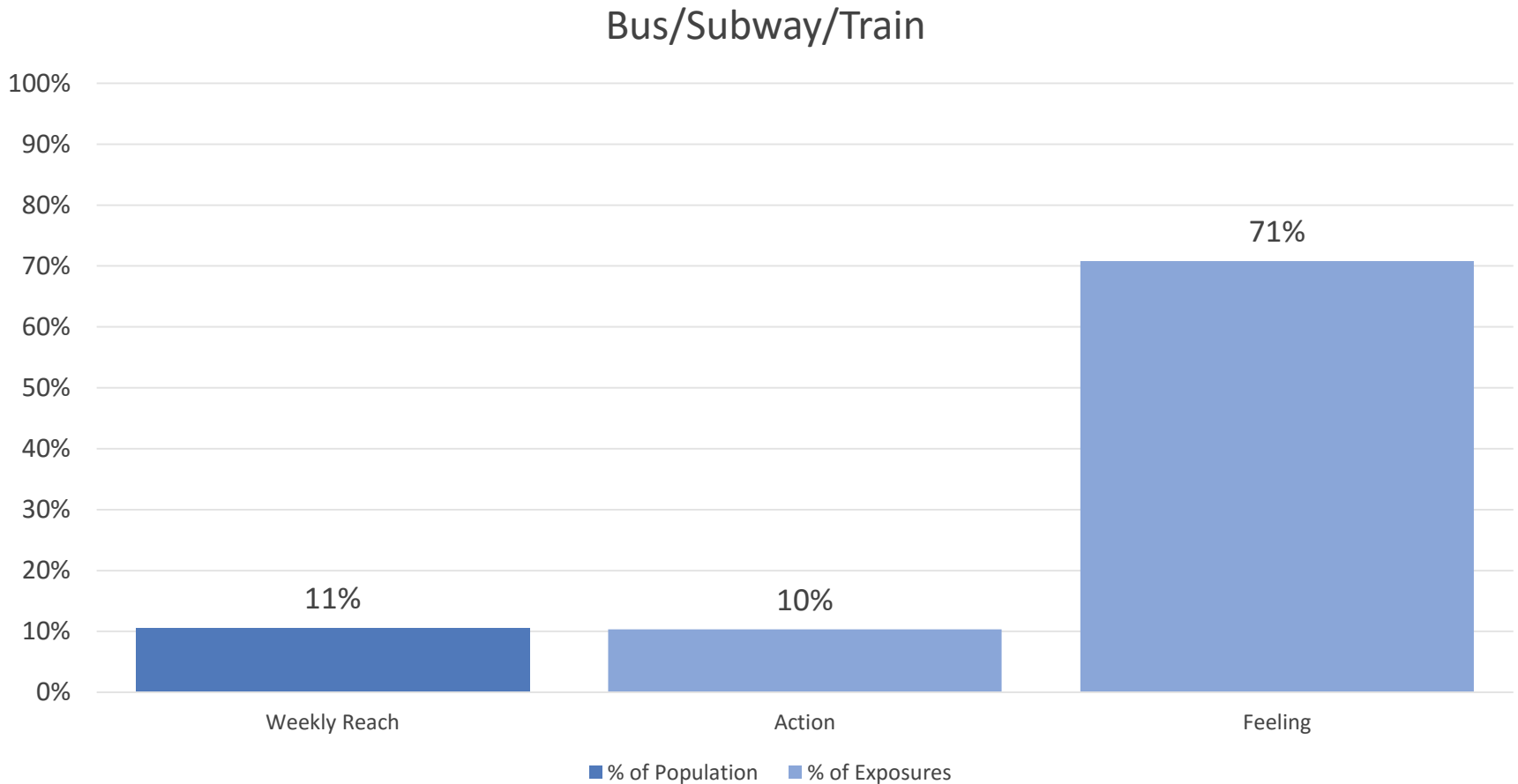


Source: USA TouchPoints, 2014.1

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



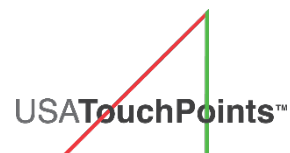
Action: Any Purchase, Seeking/Giving Purchase Recommendation, Purchase Decision, In-Store Shopping, e-Commerce, Online Search, Brand-Related Social Media Activity in Same Half-Hour

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



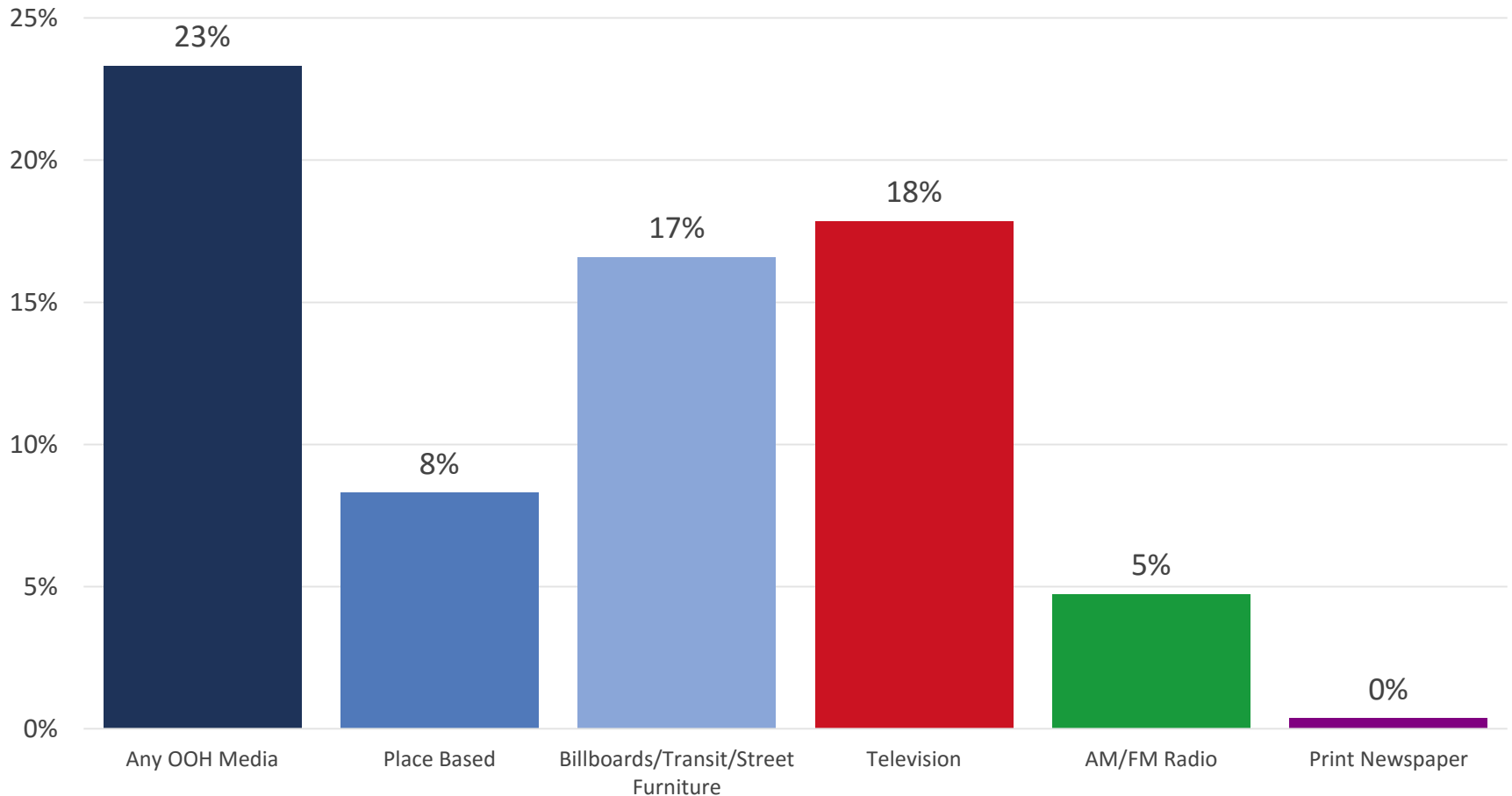
Source: USA TouchPoints, 2014.1

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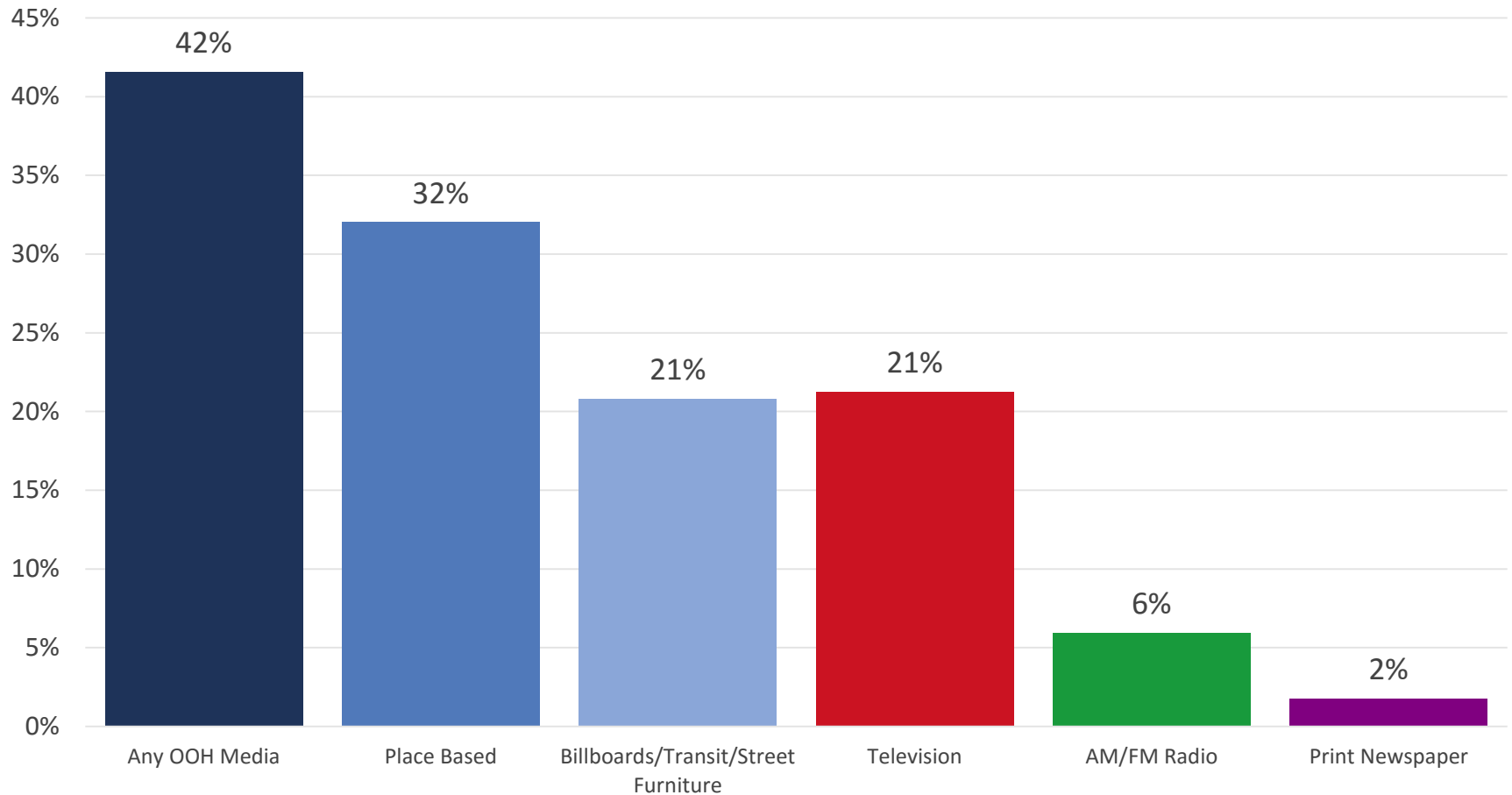
OOH REACHES CONSUMERS IN THE SAME HALF-HOUR AS 23% OF ONLINE MOBILE ACTIVITY, MORE THAN ANY OTHER TRADITIONAL MEDIUM

Exposure by medium during mobile online activity



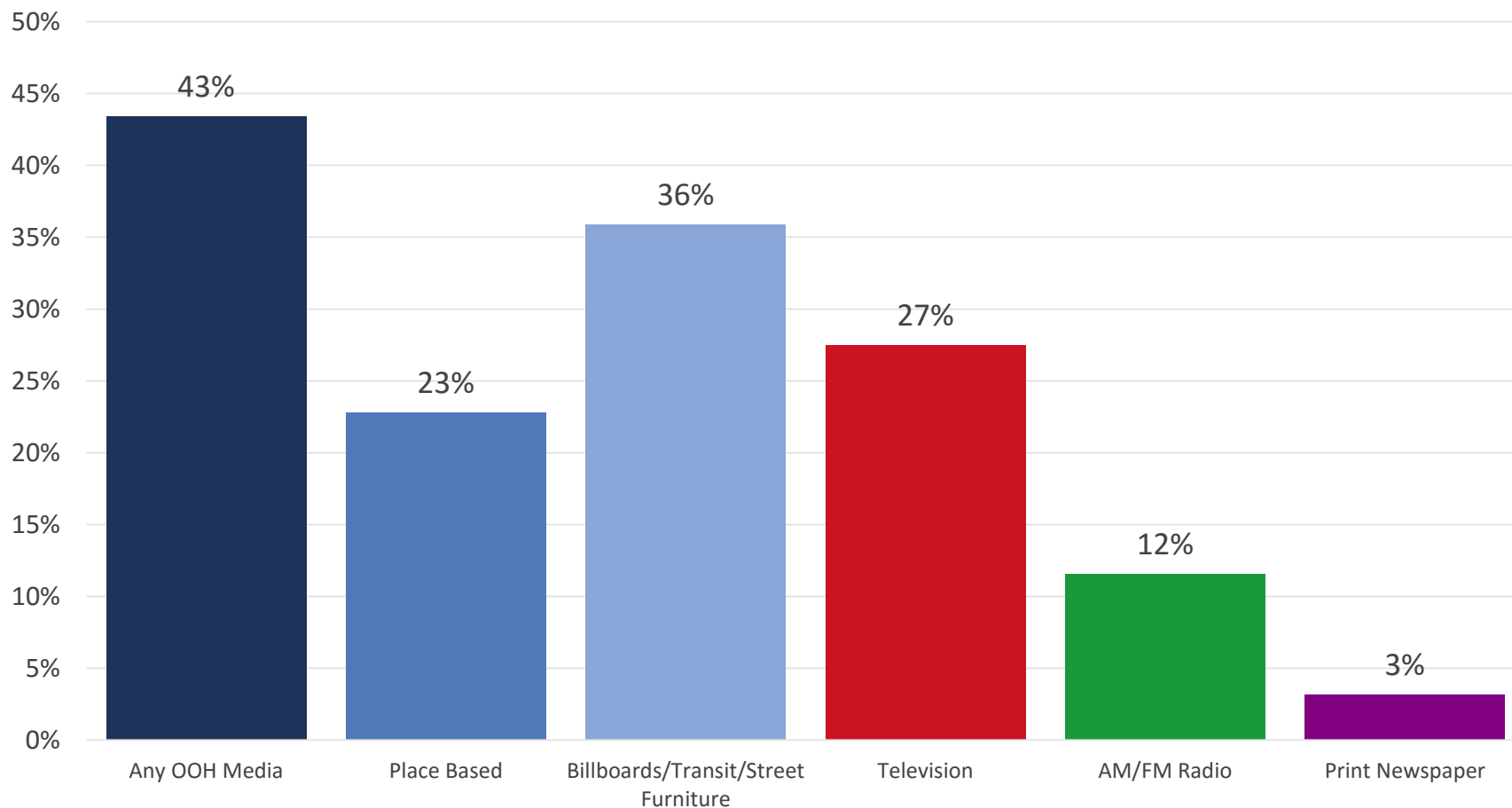
OOH REACHES CONSUMERS IN THE SAME HALF-HOUR AS 42% OF ONLINE SHOPPING ACTIVITY ON MOBILE

Exposure by medium during mobile shopping activity



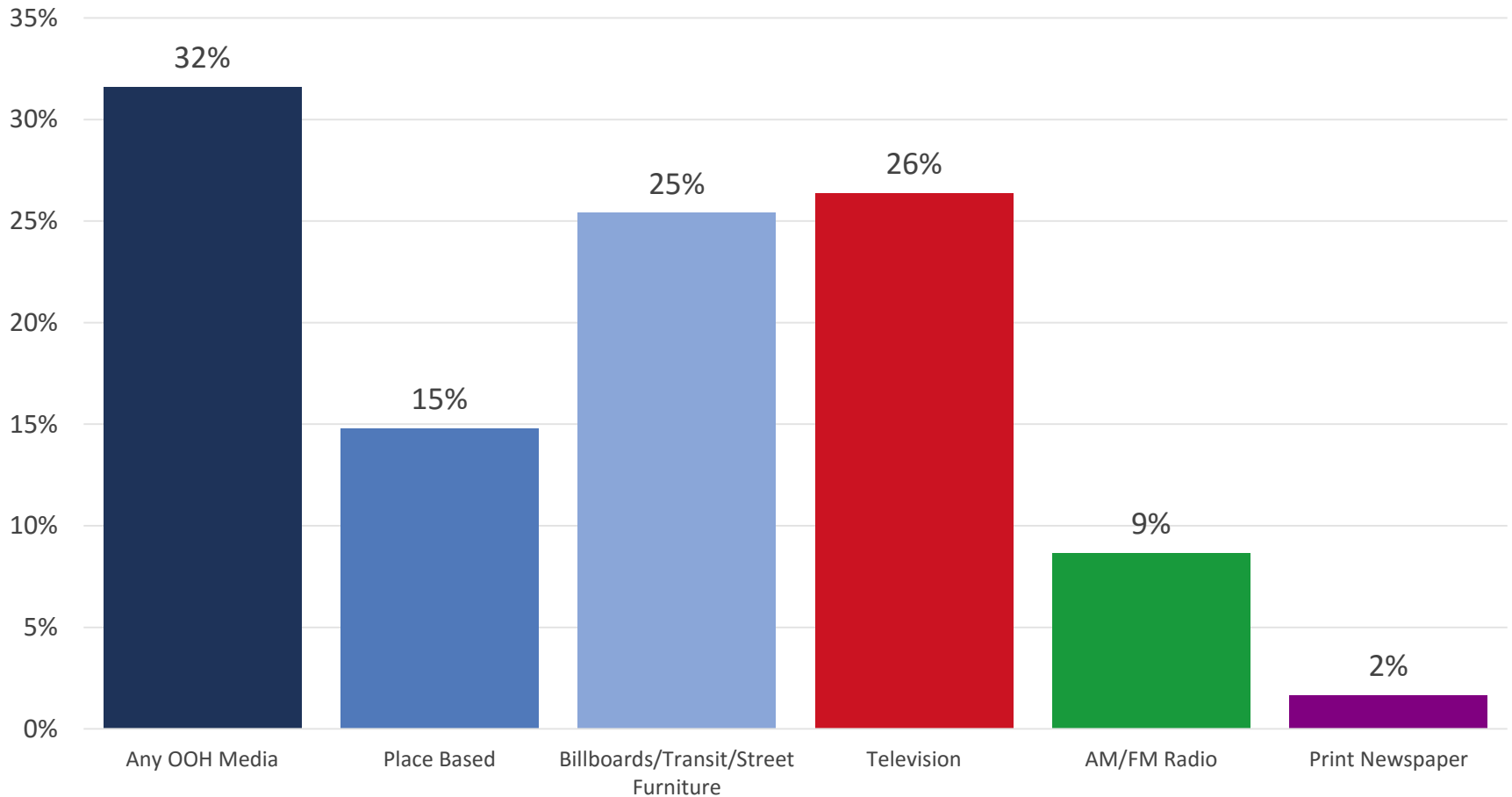
OOH REACHES CONSUMERS IN THE HOUR BEFORE 43% OF MOBILE SHOPPING ACTIVITY

Exposure by medium hour before mobile shopping activity



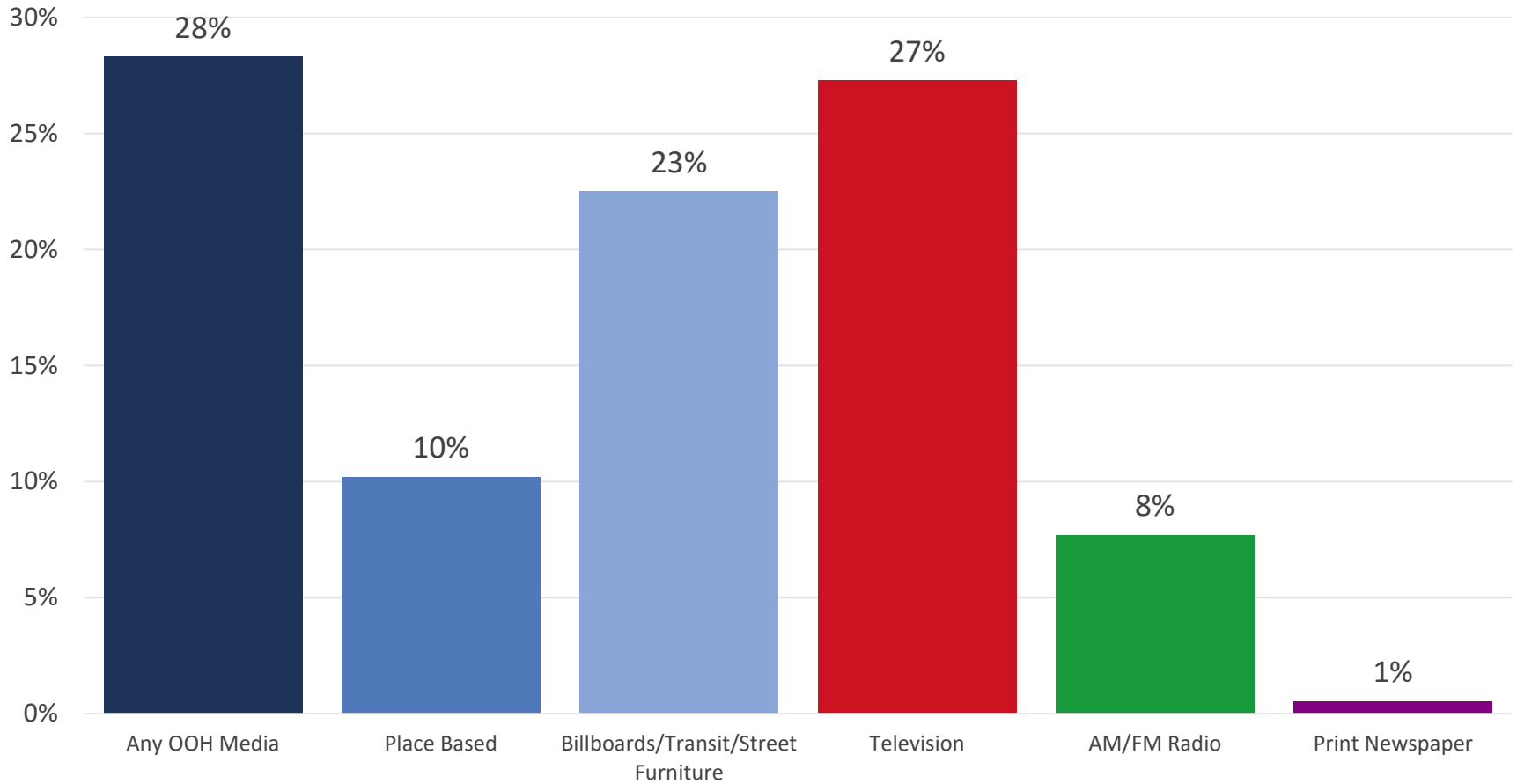
OOH REACHES CONSUMERS IN THE HOUR BEFORE 32% OF ALL MOBILE SEARCH ACTIVITY

Exposure by medium hour before mobile search activity



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

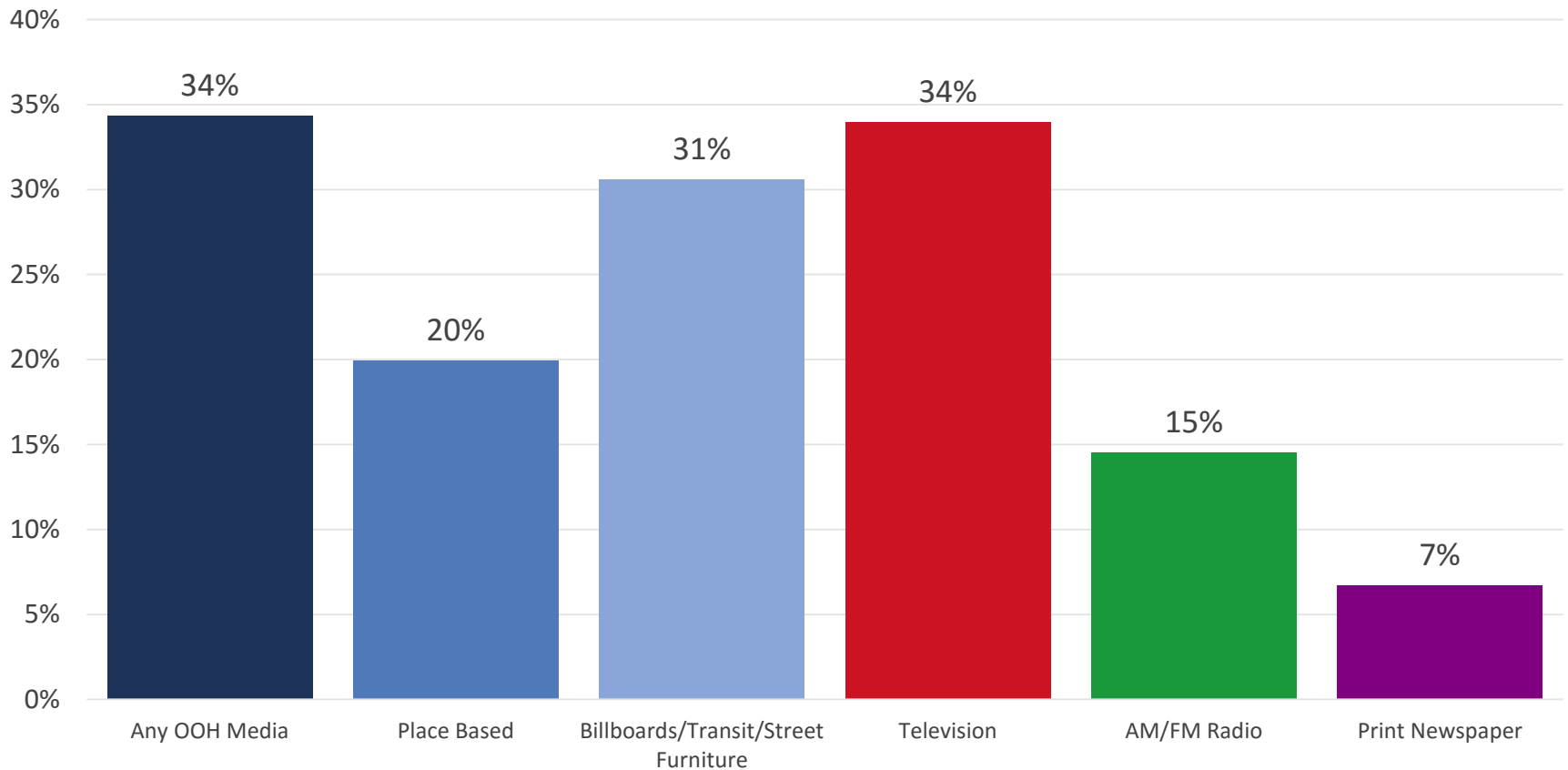
Exposure by medium hour before mobile social media activity



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

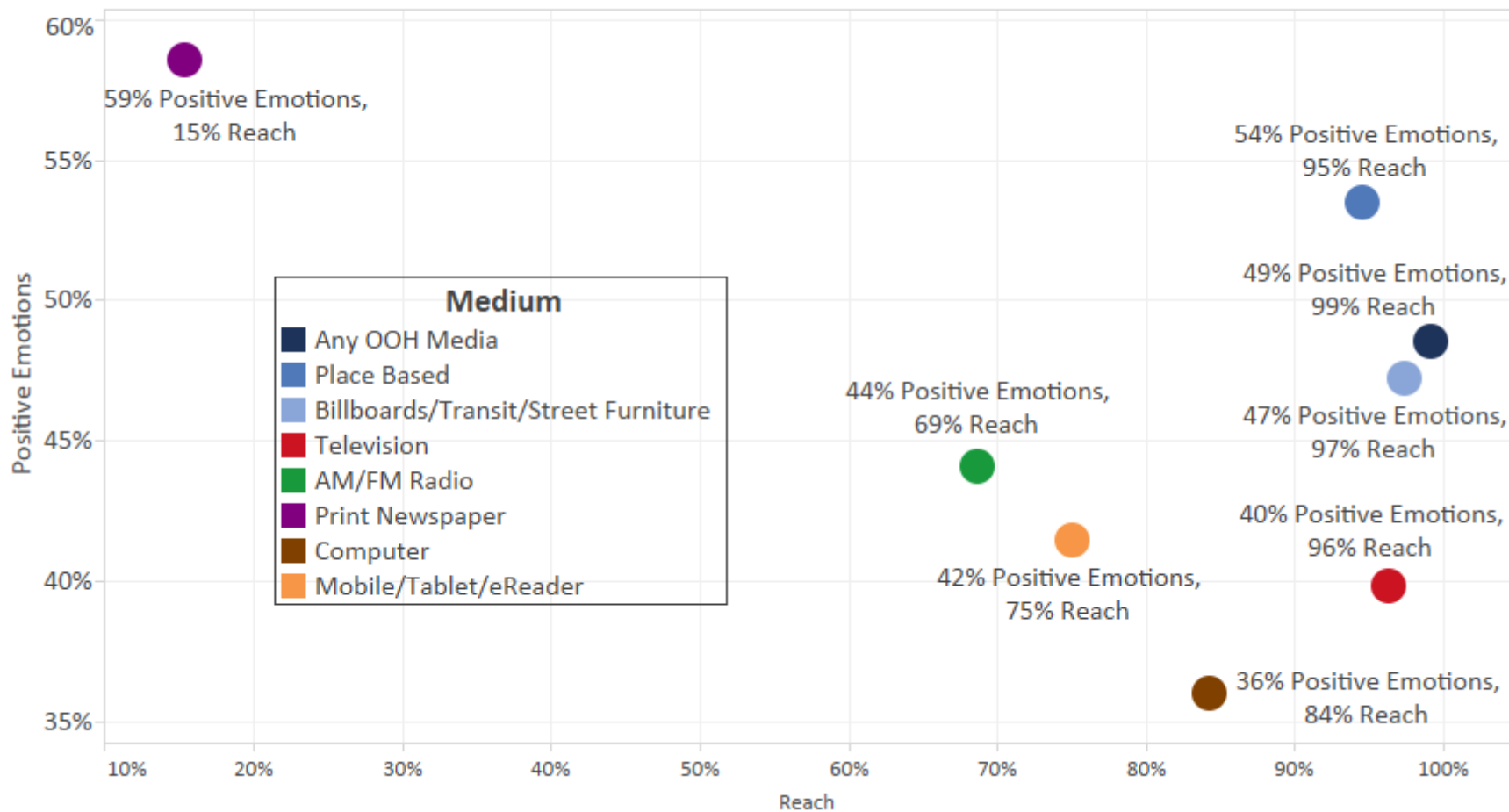
Exposure by medium hour before brand-related* social media activity

*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

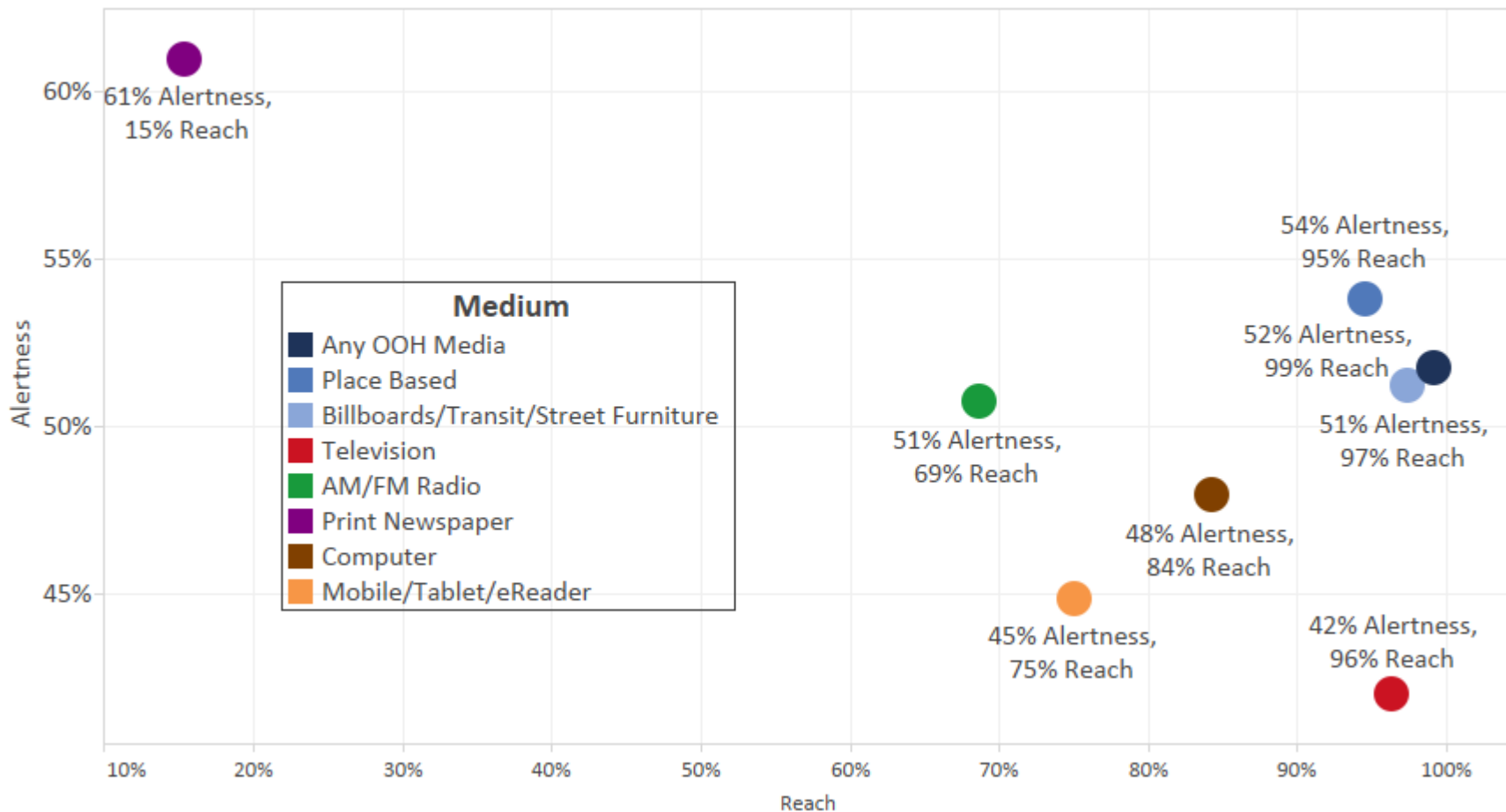


Source: USA TouchPoints, 2014.1

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

Alertness and Reach by Medium

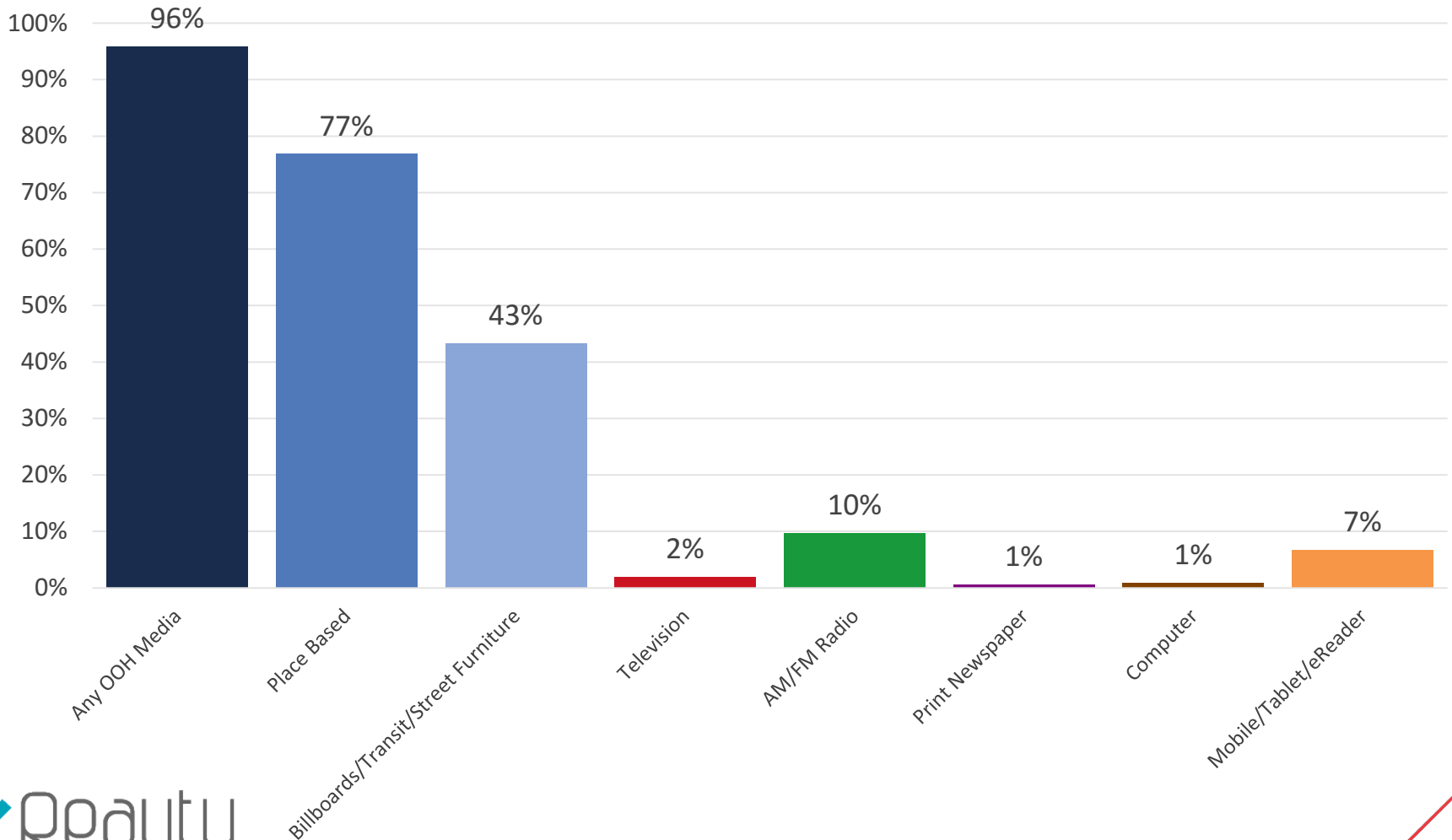


Source: USA TouchPoints, 2014.1

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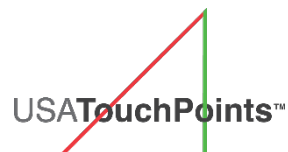
OOH REACHES CONSUMERS IN THE SAME HALF-HOUR AS 96% OF IN-STORE SHOPPING ACTIVITY

Exposure by medium during in-store shopping activity



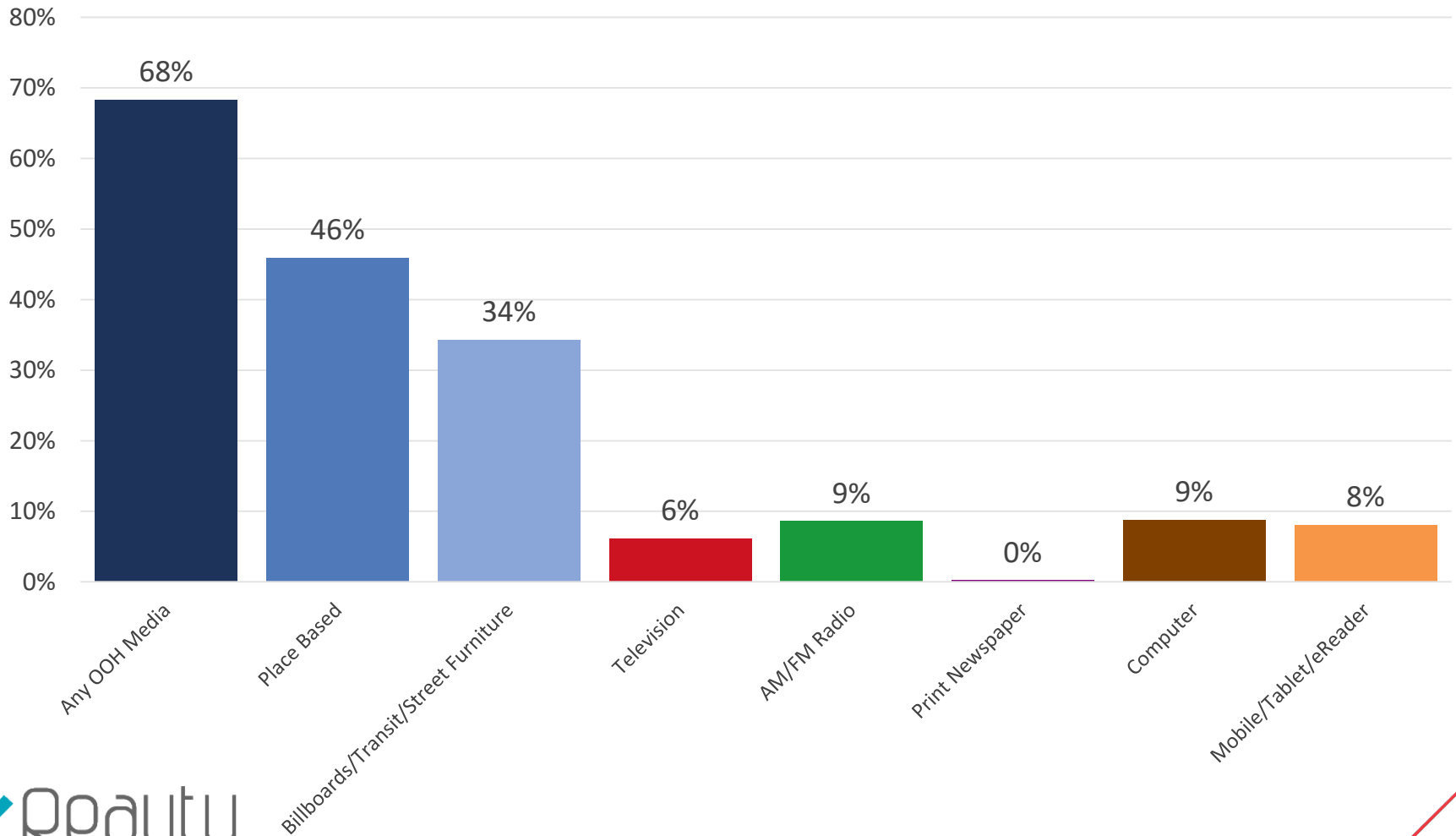
Source: USA TouchPoints, 2014.1

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

Exposure by medium during purchase activity



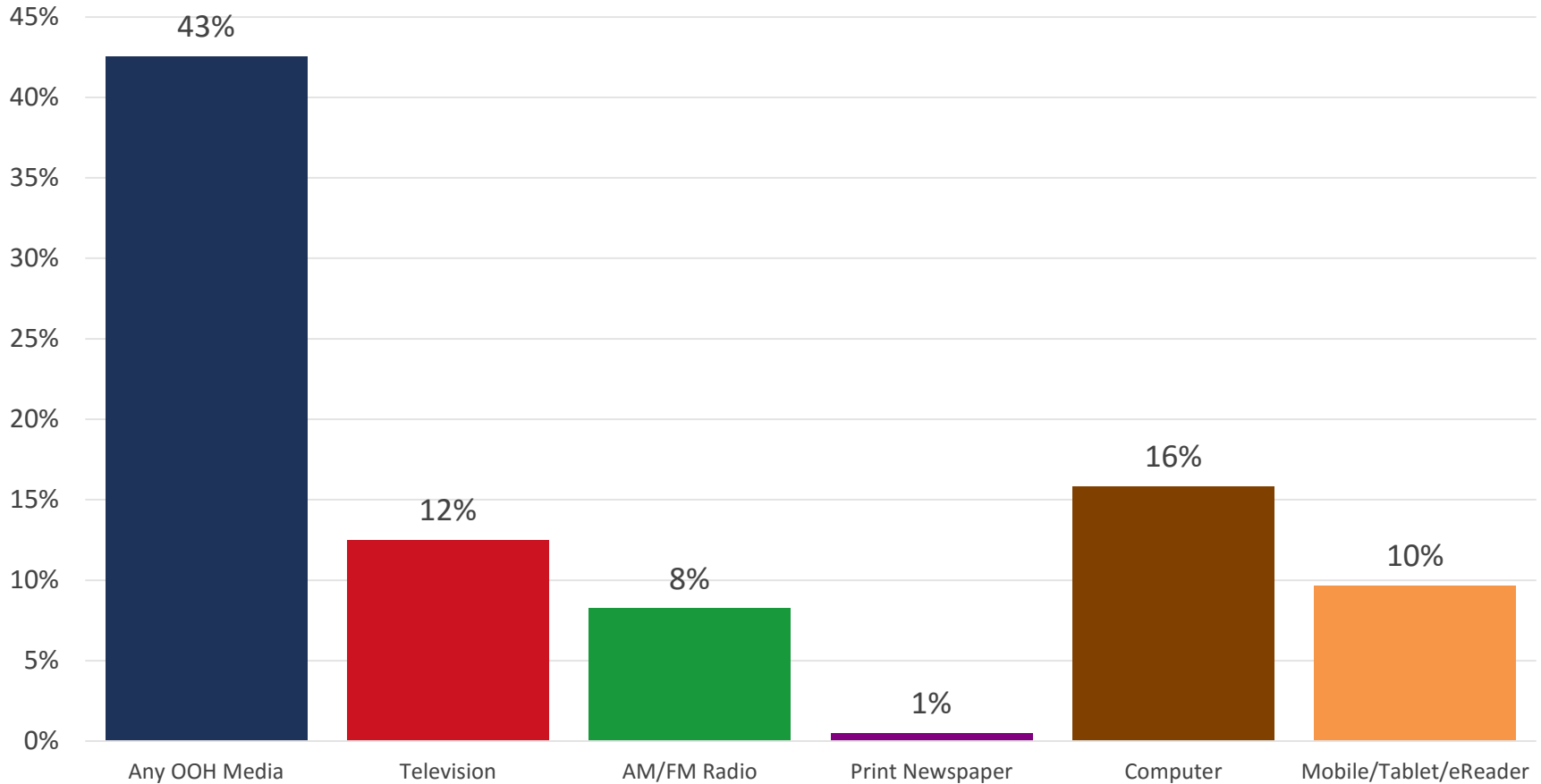
Source: USA TouchPoints, 2014.1

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

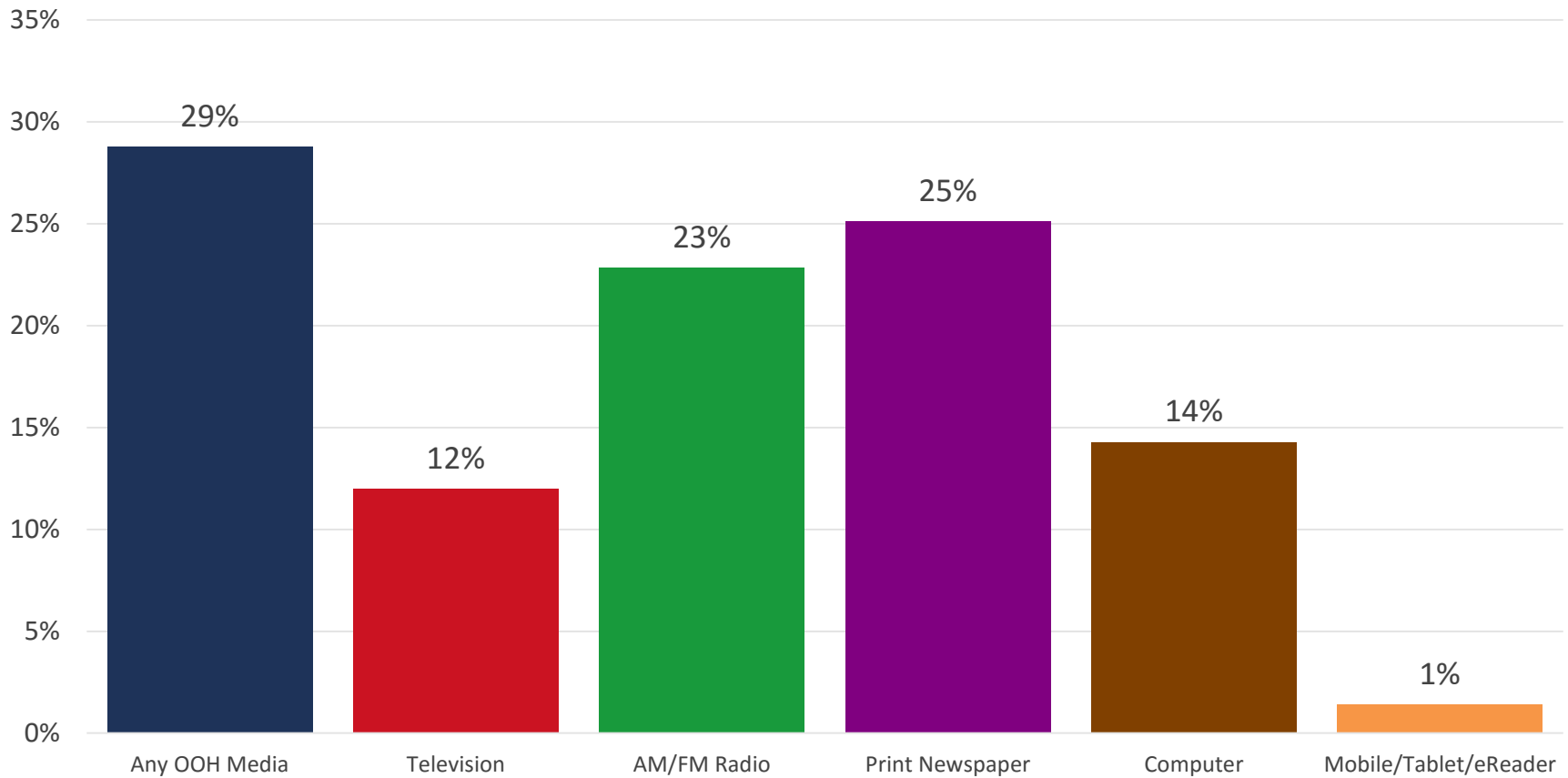
Exposure by medium during any path to purchase* activity

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



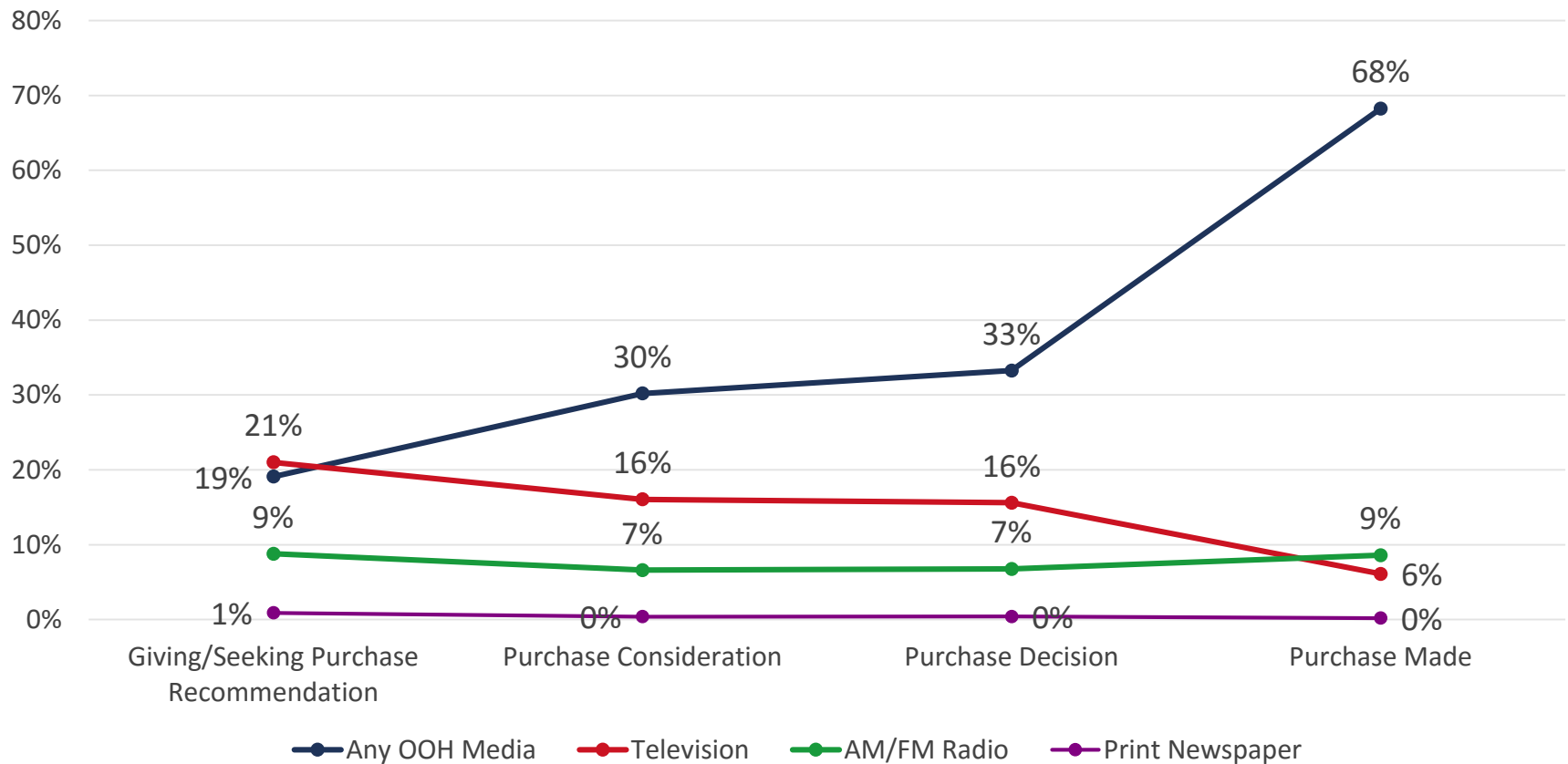
OOH REACHES CONSUMERS IN THE HOUR BEFORE 29% OF PURCHASE RECOMMENDATIONS

Exposure by medium hour before giving/seeking purchase recommendation



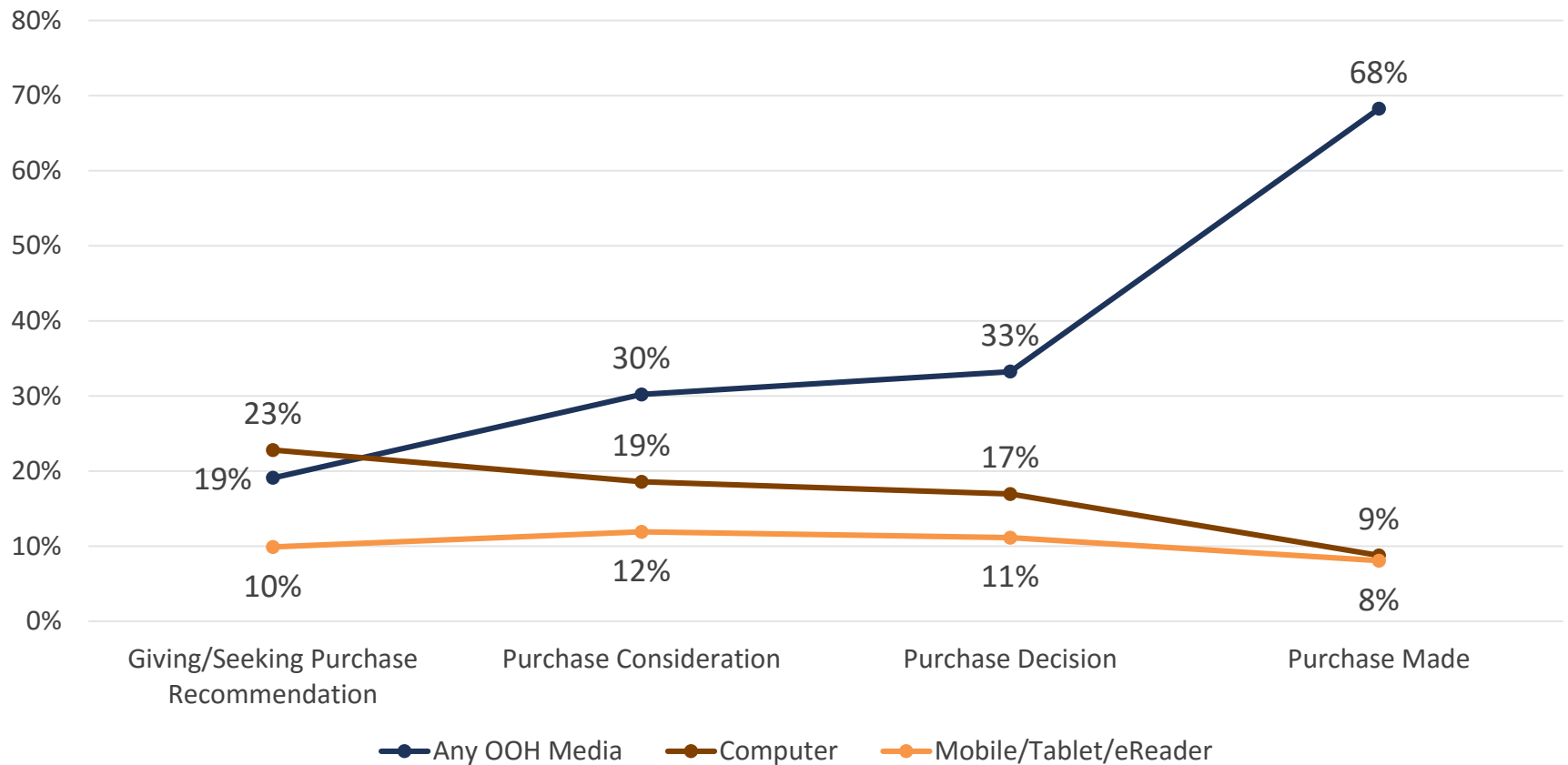
OOH OUTPERFORMS TRADITIONAL MEDIA IN REACHING CONSUMERS IN THE SAME HALF-HOUR THEY CONSIDER PURCHASES, DECIDE ON PURCHASES, AND MAKE PURCHASES

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



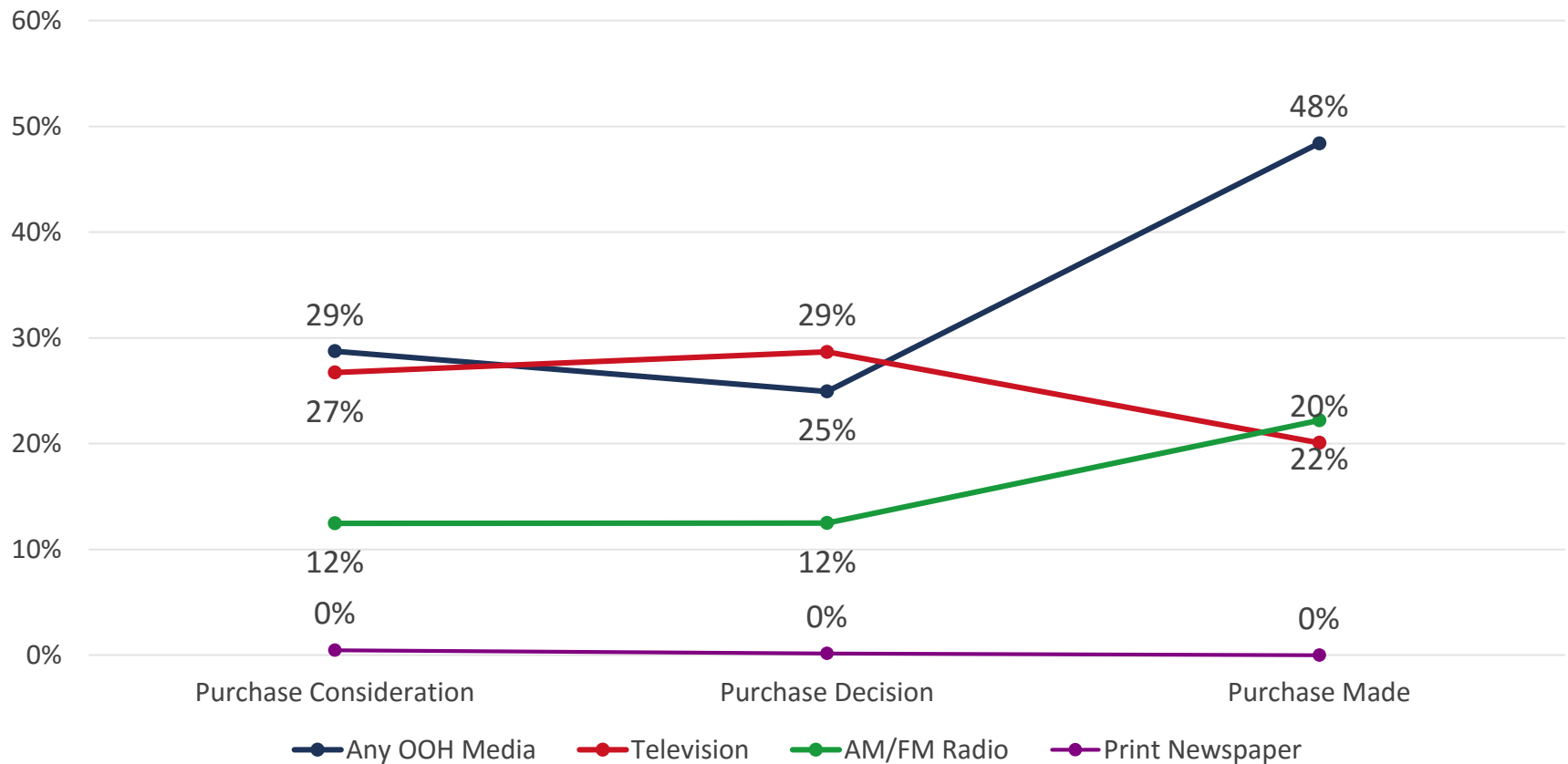
OOH OUTPERFORMS ONLINE MEDIA IN REACHING CONSUMERS IN THE SAME HALF-HOUR THEY CONSIDER PURCHASES, DECIDE ON PURCHASES, AND MAKE PURCHASES

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



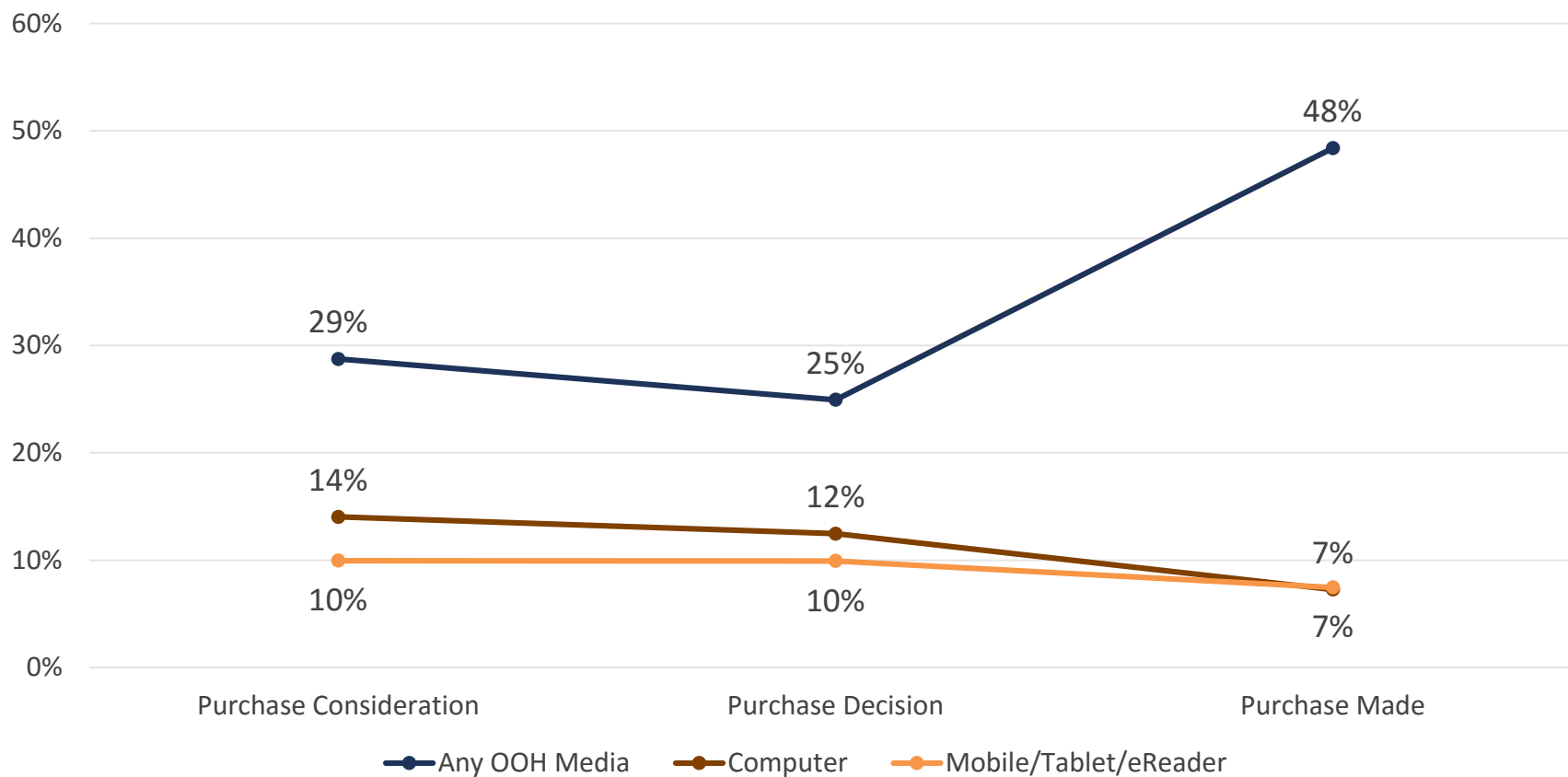
OOH OUTPERFORMS TRADITIONAL MEDIA IN REACHING CONSUMERS IN THE SAME HALF-HOUR THEY CONSIDER PURCHASES AND MAKE PURCHASES IN THE AUTOMOTIVE CATEGORY

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



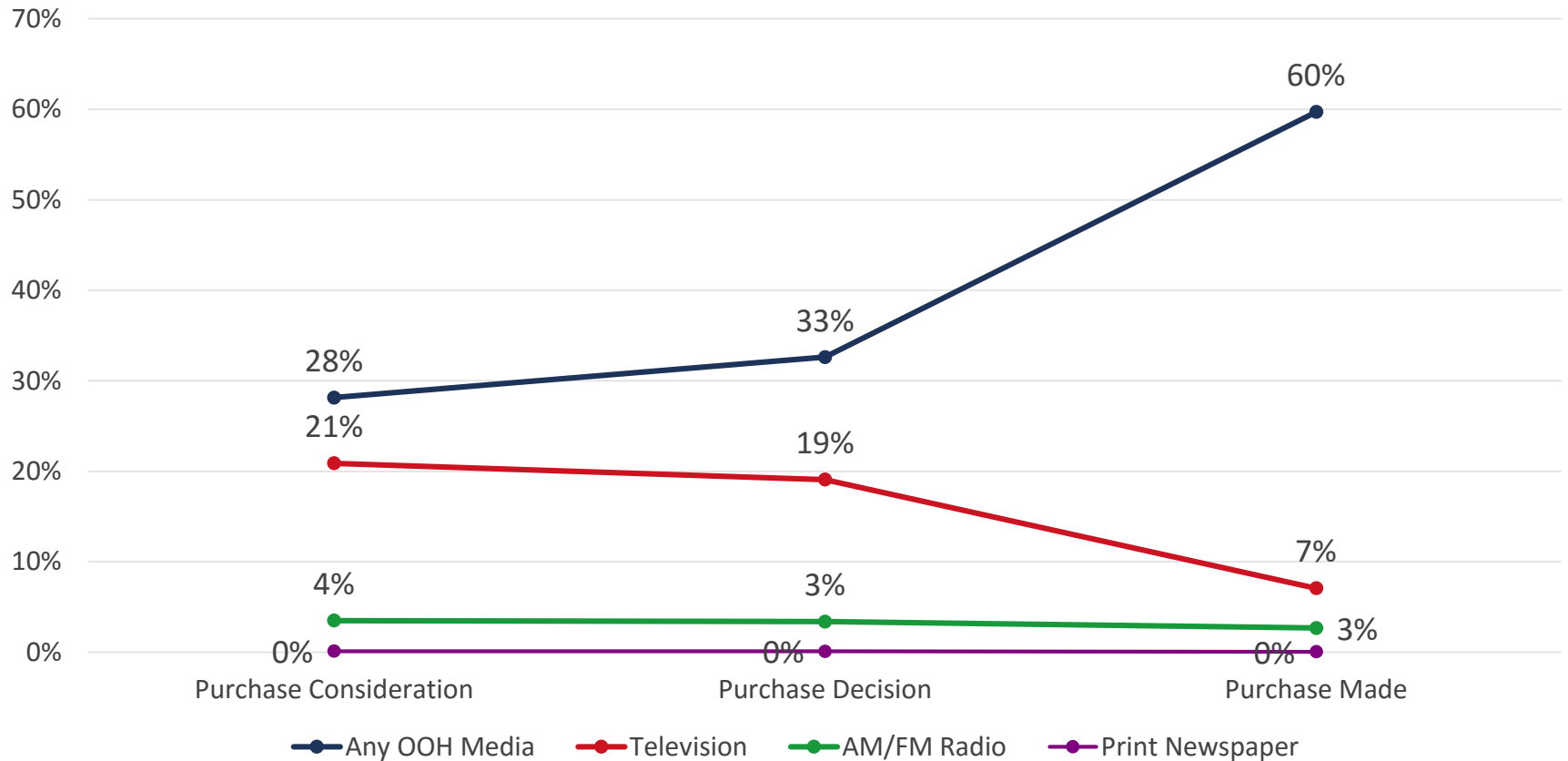
OOH OUTPERFORMS ONLINE MEDIA IN REACHING CONSUMERS IN THE SAME HALF-HOUR THEY CONSIDER PURCHASES, DECIDE ON PURCHASES, AND MAKE PURCHASES IN THE AUTOMOTIVE CATEGORY

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



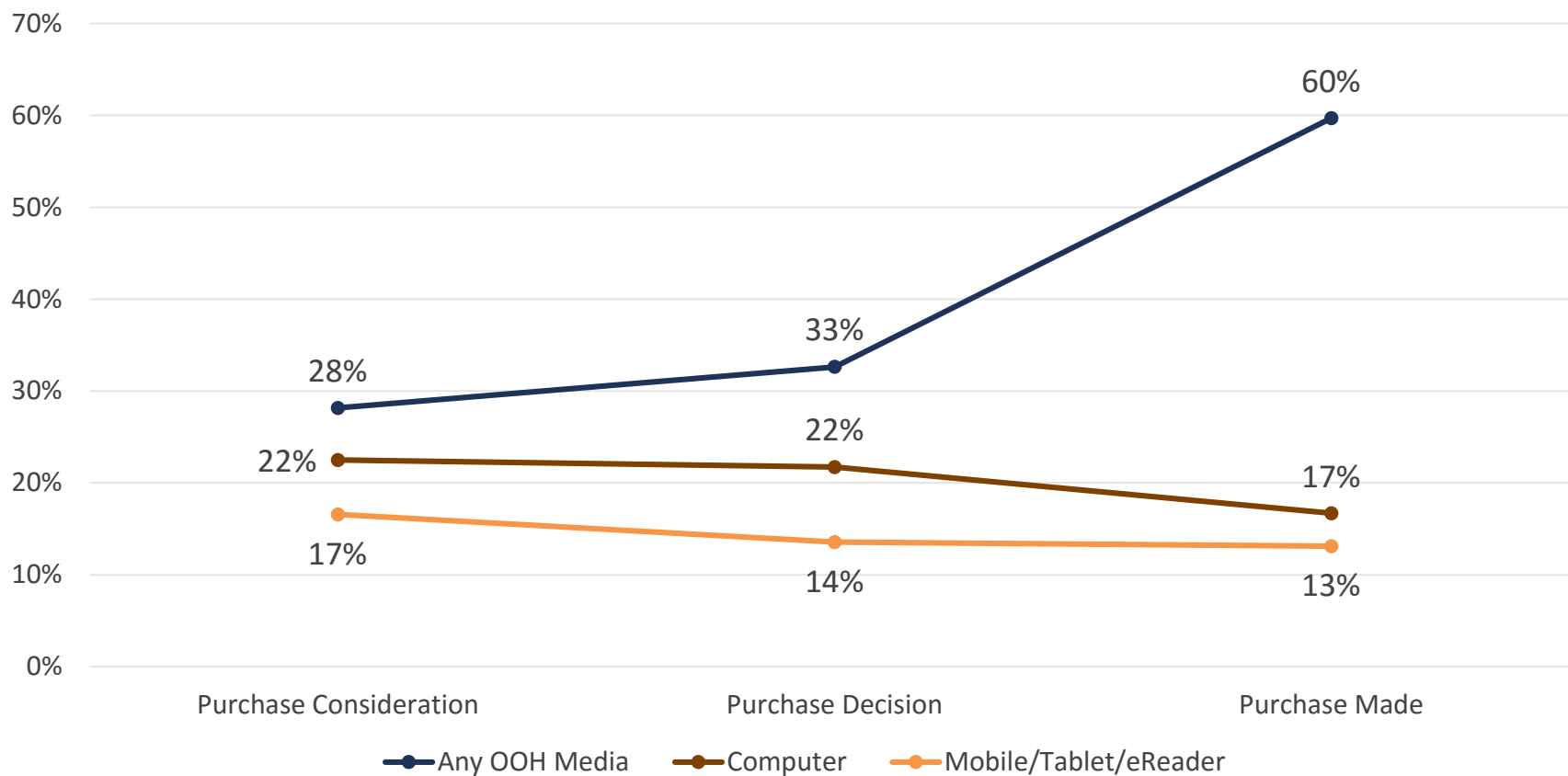
OOH OUTPERFORMS TRADITIONAL MEDIA IN REACHING CONSUMERS IN THE SAME HALF-HOUR THEY CONSIDER PURCHASES, DECIDE ON PURCHASES, AND MAKE PURCHASES IN THE FASHION & APPAREL CATEGORY

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



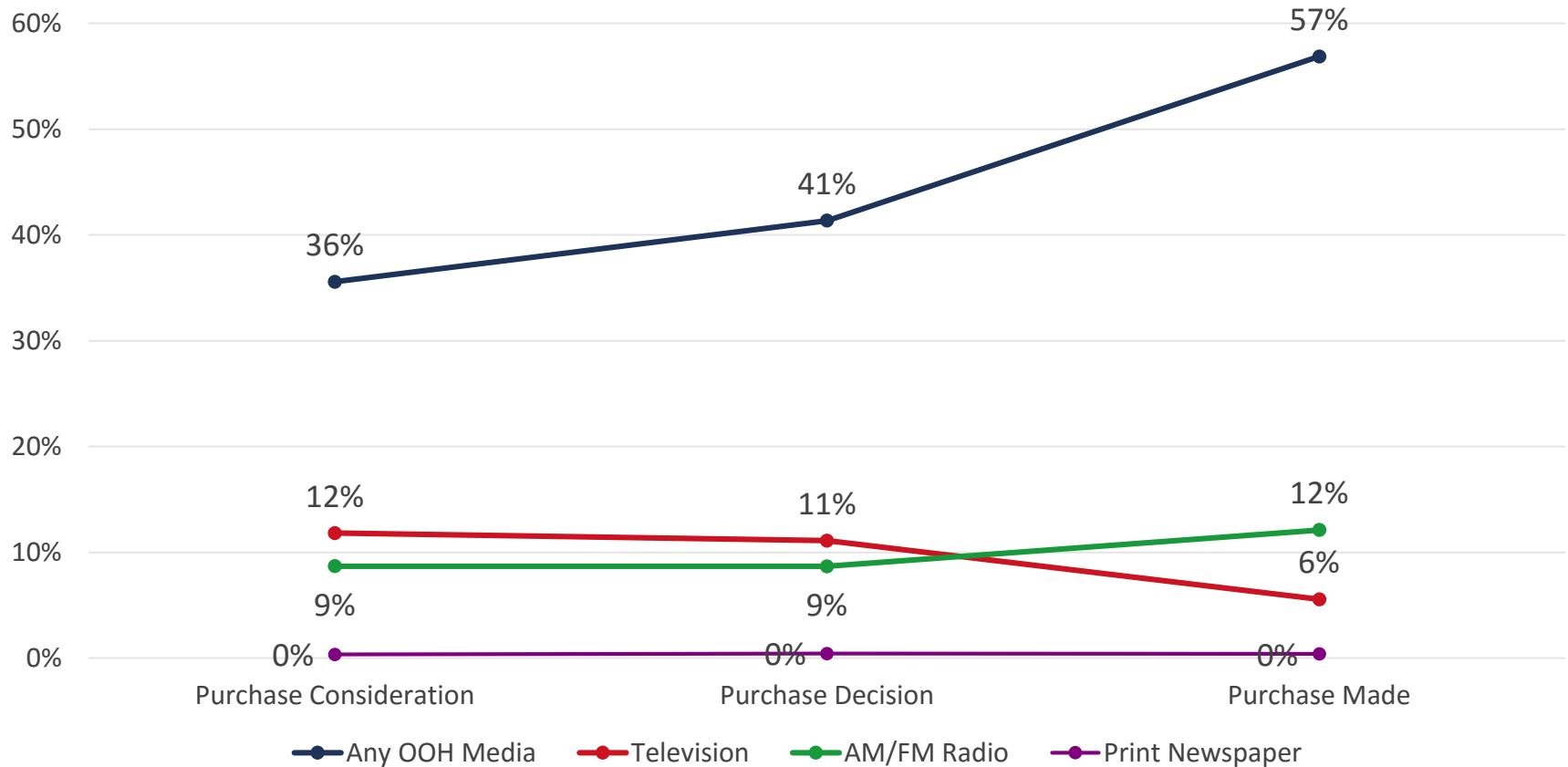
OOH OUTPERFORMS ONLINE MEDIA IN REACHING CONSUMERS IN THE SAME HALF-HOUR THEY CONSIDER PURCHASES, DECIDE ON PURCHASES, AND MAKE PURCHASES IN THE FASHION & APPAREL CATEGORY

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



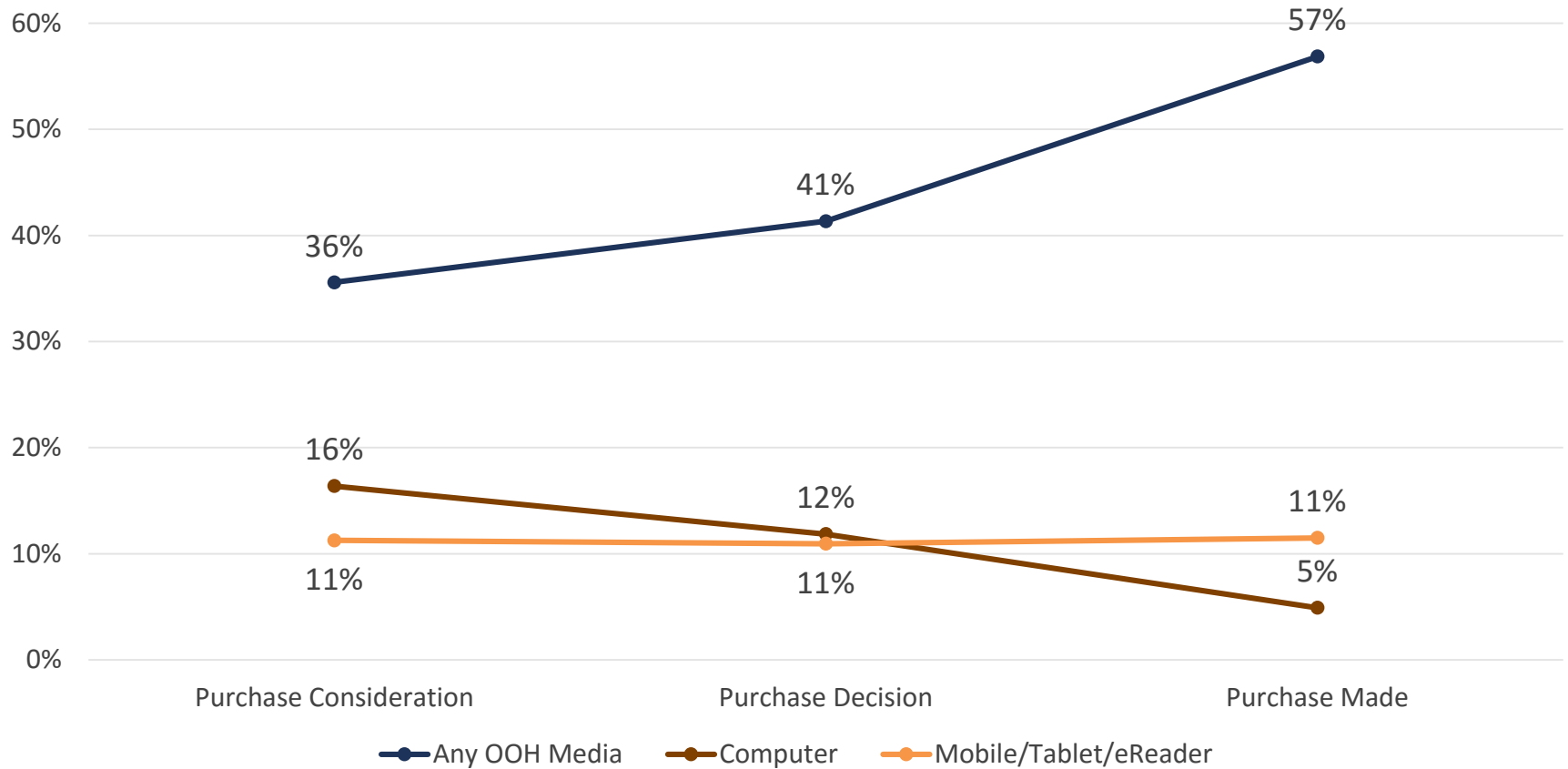
OOH OUTPERFORMS TRADITIONAL MEDIA IN REACHING CONSUMERS IN THE SAME HALF-HOUR THEY CONSIDER PURCHASES, DECIDE ON PURCHASES, AND MAKE PURCHASES IN THE FAST FOOD CATEGORY

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



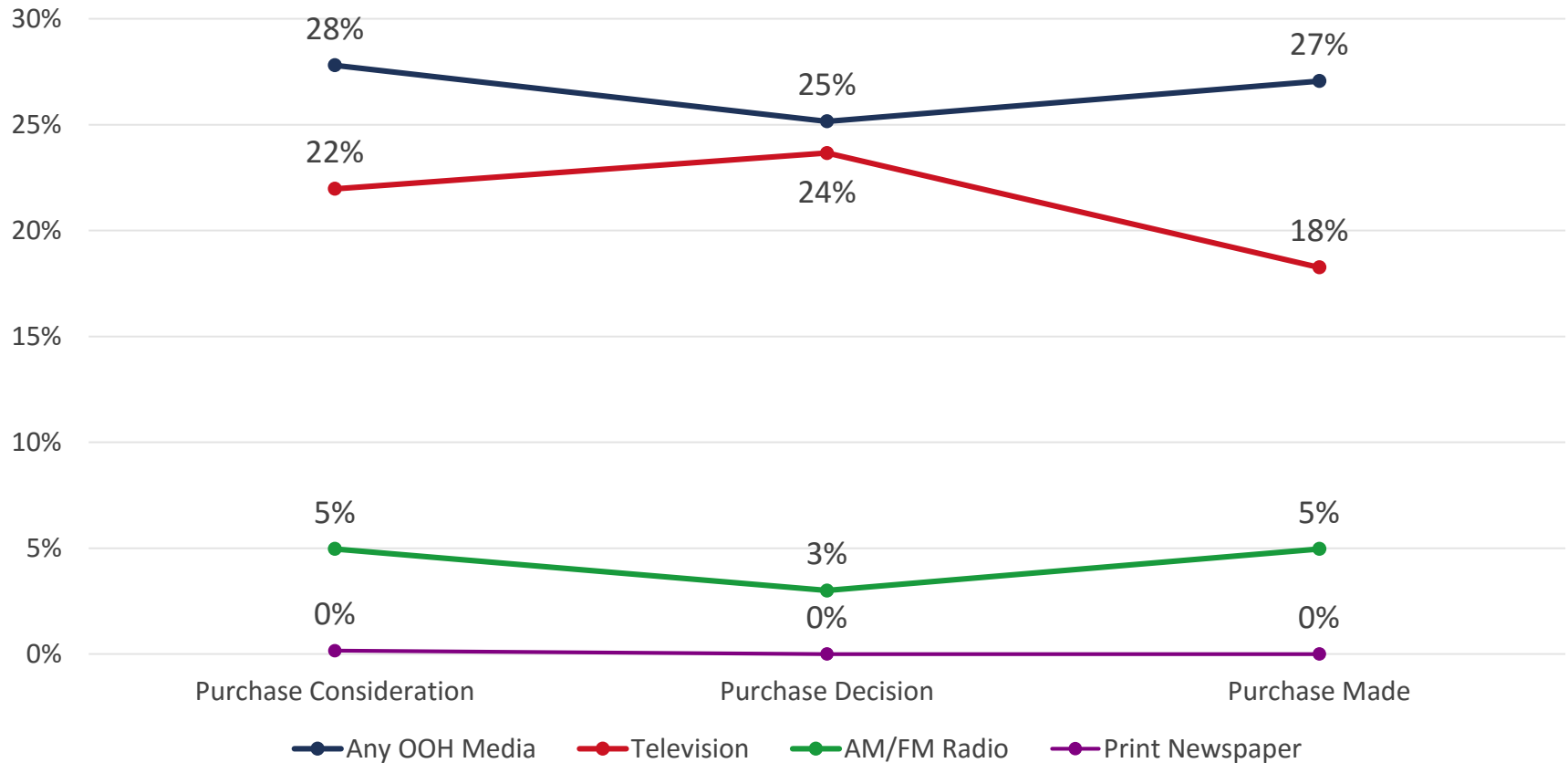
OOH OUTPERFORMS ONLINE MEDIA IN REACHING CONSUMERS IN THE SAME HALF-HOUR THEY CONSIDER PURCHASES, DECIDE ON PURCHASES, AND MAKE PURCHASES IN THE FAST FOOD CATEGORY

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



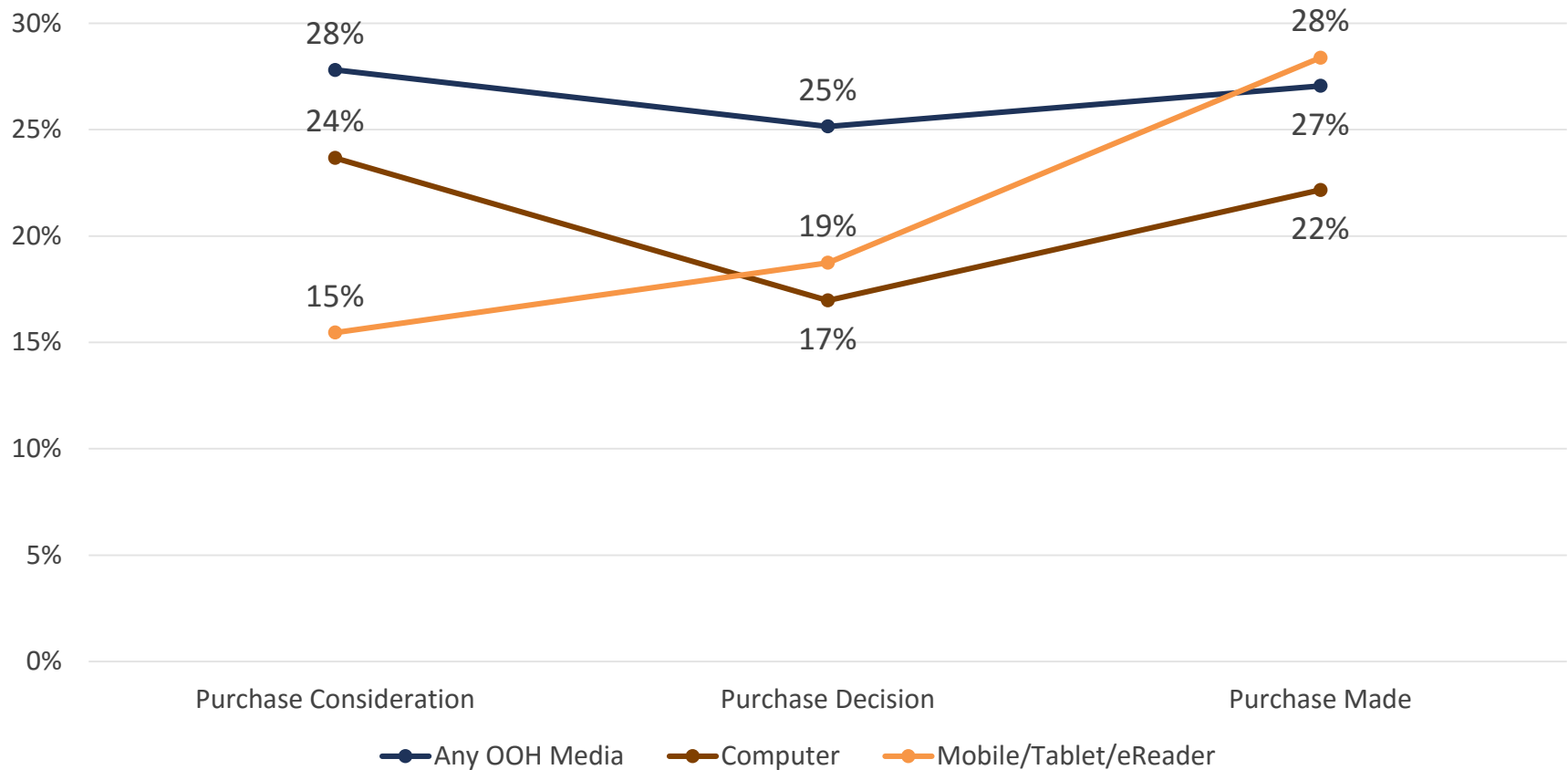
OOH OUTPERFORMS TRADITIONAL MEDIA IN REACHING CONSUMERS IN THE SAME HALF-HOUR THEY CONSIDER PURCHASES, DECIDE ON PURCHASES, AND MAKE PURCHASES IN THE MOBILE/CELLULAR SERVICE CATEGORY

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 eDairy 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 |