DIGITAL OUT-OF-HOME ADVERTISING REPORT

NIELSEN ON-LOCATION
2020 Edition - top 30 Markets

This report provides a detailed examination of travelers in top markets and their exposure to digital out-of-home advertising including digital billboards, mobile digital billboards, street-level digital/video ads, airport digital ads, and place-based digital ads.

The study also examines actions that out-of-home advertising has driven respondents to taking.
Nielsen conducted 453 online surveys among U.S. residents age 16 or older, between February 24th to March 4th, 2020.

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.

**PROJECT BACKGROUND**

Nielsen conducted 453 online surveys among U.S. residents age 16 or older, between February 24th to March 4th, 2020.

Responses 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.

453 completed
ONLINE SURVEYS

sampled from
Top 30 MARKETS

people
AGE 16 OR OLDER

HAVE DONE ANY OF THE FOLLOWING ACTIVITIES IN THE PAST MONTH
(~98% of residents in top 30 markets)

**Top 30 Markets (CBSA*)**

Atlanta
Austin
Baltimore
Boston
Charlotte
Chicago
Cincinnati
Dallas-Fort Worth
Denver
Detroit
Houston
Las Vegas
Los Angeles
Miami
Minneapolis-St. Paul

New York
Orlando
Philadelphia
Phoenix
Pittsburgh
Portland
Riverside-San Bernardino
Sacramento
San Antonio
San Diego
San Francisco
Seattle
St. Louis
Tampa
Washington DC

*CBSA stands for “Core-Based Statistical Area.” These are census-based U.S. geographic areas consisting of one or more counties (or equivalents), anchored by an urban center of at least 10,000 people, plus adjacent counties that are socioeconomically tied to the urban center by commuting. The top 30 CBSA represent approximately 45% of the total U.S. adult population.
HIGHLIGHTS

**ALONG FOR THE RIDE**
Public transportation has the potential to reach more than half of the consumers age 16 or older in the top 30 markets per month. These modes of transit include rail, bus, taxi, or on-demand car service.

**MEDIA ON THE MOVE**
Close to one-third of people age 16 or older in the top 30 markets recalled seeing a mobile digital billboard in the past month. 6 in 10 of these viewers have taken an action on their smartphone after seeing an ad in the past year.

**ON THE FLY**
Airport advertising has the potential to reach nearly 6 in 10 people age 16 or older in the top 30 markets annually. Over 1 in 10 of these residents have flown in the past 30 days.

**TAKING IT TO THE STREETS**
Almost two-thirds of people age 16 or older in the top 30 markets have walked around a town, city or down-town area in the past month. Half of the residents in these markets have noticed street level digital advertising in the past month.

**DIGITAL BILLBOARDS**
Nearly two-thirds of people age 16 or older in the top 30 markets recalled seeing a digital billboard in the past month and 65% of those viewers have taken an action such as visiting a website or going to a movie after seeing a digital billboard in the past year.

**LOCATION, LOCATION, LOCATION**
Over 6 in 10 people age 16 or older in the top 30 markets noticed digital screens with ads at places such as gas stations, office buildings, shopping centers or bars in the past month. More than half of these viewers have taken an action on their mobile device after seeing an ad in the past year.
TRAVEL PATTERNS
AMERICA ON THE MOVE

TRANSPORTATION USED IN THE PAST MONTH

85% driven or ridden in a CAR, TRUCK OR OTHER PRIVATE VEHICLE

61% WALKED around town, city or downtown area

53% ridden as a passenger on any PUBLIC TRANSPORT including rail, bus, taxi, or on-demand car service

30% ridden as a passenger on a COMMUTER RAIL OR SUBWAY

85% of those age 16 or older in the top 30 markets have traveled in a private vehicle such as car, truck, or motorcycle in the past month.

Over half of those surveyed (53%) have used some form of public transit including rail/subway, buses, taxi, or on-demand car services in the past month.

30% have ridden as a passenger on a commuter rail/subway in the past month.

6 in 10 of those surveyed (61%) have walked in a town, city, or other downtown area.

Q5: Please indicate which of the following activities have you done in the last month.
BASE: People age 16 or older who have walked, driven, or ridden in a private vehicle or public transport in the past 30 days | N = 453
Q6a. When was the last time you took an airplane trip?

BASE: People age 16 or older who have walked, driven, or ridden in a private vehicle or public transport in the past 30 days  |  N = 453

- Flown in the past 30 days
- 1-6 months ago
- 7-12 months ago
- More than 1 year ago
- Have never flown

Over half those age 16 or older in the top 30 markets (58%) have traveled by airplane in the past 12 months.

13% of those surveyed have flown within the past 30 days.
DIGITAL BILLBOARDS
DIGITAL BILLBOARDS
AWARENESS + ENGAGEMENT

Q7: When was the last time you noticed a digital billboard? These are electronic roadside signs showing images that change every six or eight seconds. | BASE: People age 16 or older who have walked, driven, or ridden in a private vehicle or public transport in the past 30 days | N = 453

Q8. How often do you look at advertising messages on digital billboards? | BASE: Noticed digital billboard past 30 days | N = 279

Nearly two-thirds (62%) of those age 16 or older in the top 30 markets noticed digital billboards in the past month, while 38% have noticed digital billboards in the past week.

50% of those who’ve noticed digital billboards in the past month report high engagement, noticing them “all” or “most” of the time.
**DIGITAL BILLBOARDS**

**ACTIONS TAKEN**

Over one-third of digital billboard viewers (34%) visited an advertiser’s website or searched for them online after seeing a digital billboard in the past year.

About one-third have visited an advertised store, restaurant, or other business after seeing a digital billboard.

Nearly two-thirds of viewers have engaged in at least one measured action after seeing a digital billboard in the past year.

**65%** Engaged in at least one action

- **Visited website/ searched online**: 34%
- **Visited advertised store, restaurant, other business**: 32%
- **Saw advertised movie or TV show**: 25%
- **Visited social media site, posted to blog/social media**: 23%
- **Recommended product/brand**: 18%
- **Attended advertised sporting event, festival, concert**: 17%

Q9: In the past year, have you done any of the following activities after seeing an advertisement on digital billboards?

BASE: Noticed digital billboard past 30 days | N = 279
DIGITAL BILLBOARDS

ACTIONS TAKEN ON MOBILE/SMARTPHONE

One-third of digital billboard users with smartphones (33%) have interacted with a digital billboard ad via SMS, URL, hashtag or scanned a QR code in the past year.

52% of viewers with smartphones have engaged in at least one of these actions on their mobile device after seeing a digital billboard in the past year.

Q10: In the past year, have you done any of the following activities on your smartphone or mobile device after seeing an advertisement on digital billboards?
Q10B: In the past year, have you scanned a QR code, used SMS to respond by text, or used a URL/hashtag from the ad on digital billboards?
BASE: Noticed digital billboard past 30 days and use smartphone | N = 263
Q11. Have you ever noticed an advertisement on digital billboards, which gave you directions to a specific store, business or restaurant location?
BASE: Noticed digital billboard past 30 days  |  N = 279

Q12. Have you ever immediately (within 30 minutes) visited a store, business or restaurant specifically because you saw an advertisement on digital billboards?
BASE: Noticed directions  |  N = 146

Over half of viewers (52%) have ever noticed a digital billboard that gave directions to a store, business, or restaurant.

57% of those who noticed directions on a digital billboard have visited the business within 30 minutes of viewing the ad.

Of those who visited the business within 30 minutes, 93% have ended up making a purchase.

Q13. You indicated that you have immediately visited a store, business or restaurant specifically because you saw an advertisement on digital billboards. The last time that you did this, did you make a purchase at that store, business or restaurant?
BASE: Immediately went to store, business, restaurant  |  N=83
MOBILE DIGITAL BILLBOARDS

AWARENESS + ENGAGEMENT

Nearly one-third of those age 16 or older in the top 30 markets noticed mobile digital billboards in the past month, while 15% have noticed digital mobile billboards in the past week.

57% of those who’ve noticed mobile digital billboards in the past month, report high levels of engagement noticing them “all” or “most” of the time.

Q7: When was the last time you noticed a digital mobile billboard? | BASE: People age 16 or older who have walked, driven, or ridden in a private vehicle or public transport in the past 30 days | N = 453
Q8. How often do you look at advertising messages on digital mobile billboards? | BASE: Noticed mobile digital billboard past 30 days | N = 142
MOBILE DIGITAL BILLBOARDS

ACTIONS TAKEN

67%

Engaged in at least one action

Q9: In the past year, have you done any of the following activities after seeing an advertisement on mobile digital billboards?

BASE: Noticed mobile digital billboard past 30 days | N = 142

<table>
<thead>
<tr>
<th>Activity</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visited website/searched online</td>
<td>35%</td>
</tr>
<tr>
<td>Visited advertised store, restaurant, other business</td>
<td>35%</td>
</tr>
<tr>
<td>Saw advertised movie or TV show</td>
<td>28%</td>
</tr>
<tr>
<td>Visited social media site, posted to blog/social media</td>
<td>28%</td>
</tr>
<tr>
<td>Attended advertised sporting event, festival, concert</td>
<td>23%</td>
</tr>
<tr>
<td>Recommended product/brand</td>
<td>20%</td>
</tr>
</tbody>
</table>

Over one-third of viewers (35%) visited the advertised store, restaurant or business after seeing a digital mobile billboard in the past year.

28% have seen a movie or TV show after seeing a mobile digital billboard.

Over two-thirds (67%) of viewers have engaged in at least one measured actions after seeing a mobile digital billboard in the past year.
MOBILE DIGITAL BILLBOARDS

ACTIONS TAKEN ON MOBILE/SMARTPHONE

61% Engaged in at least one action

- Scanned QR code, used SMS/URL/hashtag from ad (45%)
- Searched advertiser/Visited advertiser website (41%)
- Accessed coupon or discount code (29%)
- Made purchase on smartphone (26%)
- Downloaded/used app shown in ad (25%)

Nearly half of viewers with smartphones (45%) have interacted with a digital mobile billboard via SMS, URL, hashtag or scanned a QR code in the past year.

61% of those surveyed have engaged in at least one action on their smartphone in the past year, after seeing a mobile digital billboard.
Over half viewers (52%) have ever noticed a mobile digital billboard that gave directions to a store, business, or restaurant.

69% of those who noticed directions on a mobile digital billboard have visited the business within 30 minutes of viewing the ad.

Of those who visited the business within 30 minutes, 98% have ever ended up making a purchase.

Q11. Have you ever noticed an advertisement on mobile digital billboards, which gave you directions to a specific store, business or restaurant location?
BASE: Noticed mobile digital billboard past 30 days | N = 142

Q12. Have you ever immediately (within 30 minutes) visited a store, business or restaurant specifically because you saw an advertisement on mobile digital billboards?
BASE: Noticed directions | N = 74

Q13. You indicated that you have immediately visited a store, business or restaurant specifically because you saw an advertisement on mobile digital billboards. The last time that you did this, did you make a purchase at that store, business or restaurant?
BASE: Immediately went to store, business, restaurant | N=51*
*small base size
STREET-LEVEL DIGITAL ADVERTISING
Just under half (49%) of those age 16 or older in the top 30 markets noticed street-level digital advertising in the past month, while 28% have noticed street-level digital advertising in the past week.

52% of those who’ve noticed street-level digital advertising in the past month report high engagement noticing them “all” or “most” of the time.
STREET-LEVEL DIGITAL ADVERTISING

ACTIONS TAKEN

Over one-third of viewers (34%) visited an advertiser’s website or searched for them online after seeing street-level digital advertisements in the past year.

7 in 10 viewers have engaged in at least one of these measured actions after seeing street-level digital advertising in the past year.

69%

Engaged in at least one action

- Visited advertised store, restaurant, other business (34%)
- Visited website/searched online (31%)
- Saw advertised movie or TV show (29%)
- Visited social media site, posted to blog/social media (25%)
- Attended advertised sporting event, festival, concert (23%)
- Recommended product/brand (19%)

Q9: In the past year, have you done any of the following activities after seeing an advertisement on street-level digital or video displays?
BASE: Noticed street-level digital or video displays past 30 days | N = 223
STREET-LEVEL DIGITAL ADVERTISING

ACTIONS TAKEN ON MOBILE/SMARTPHONE

62% Engaged in at least one action

- Searched advertiser/Visited advertiser website: 50%
- Scanned QR code, used SMS/URL/hashtag from ad: 40%
- Downloaded/used app shown in ad: 25%
- Accessed coupon or discount code: 25%
- Made purchase on smartphone: 23%

50% of viewers with smartphones have searched for an advertiser or visited its website on their smartphone after seeing street-level digital advertising in the past year.

62% of those viewers have engaged in at least one of these actions on their smartphone after seeing street-level digital advertising in the past year.

Q10: In the past year, have you done any of the following activities on your smartphone or mobile device after seeing street-level digital or video displays?
BASE: Noticed street-level digital or video displays past 30 days and use smartphone | N = 213
STREET-LEVEL DIGITAL ADVERTISING DRIVING IN-STORE TRAFFIC

Over half of viewers (51%) have ever noticed street-level digital advertising that gave directions to a store, business, or restaurant.

Nearly two-thirds (65%) of those who noticed directions on street-level digital advertising have ever visited the business within 30 minutes of viewing the ad.

Of those who visited the business within 30 minutes, 92% ended up making a purchase.

Q11. Have you ever noticed an advertisement on street-level digital or video displays, which gave you directions to a specific store, business or restaurant location? 
BASE: Noticed street-level advertising past 30 days | N = 223

Q12. Have you ever immediately (within 30 minutes) visited a store, business or restaurant specifically because you saw an advertisement on street-level digital or video displays? | BASE: Noticed directions | N = 113

Q13. You indicated that you have immediately visited a store, business or restaurant specifically because you saw an advertisement on street-level digital or video displays. The last time that you did this, did you make a purchase at that store, business or restaurant? 
BASE: Immediately went to store, business, restaurant | N=74
PLACE-BASED DIGITAL ADVERTISING
Nearly two-thirds (62%) of those age 16 or older in the top 30 markets noticed place-based digital ads in the past month, while 38% have noticed place-based digital ads in the past week.

50% of those who’ve noticed place-based digital ads in the past month report high engagement, noticing them “all” or “most” of the time.

Q7: When was the last time you noticed video screens with advertising at a place of business such as gas stations, health clubs, office buildings, shopping centers, movie theaters, stadiums, bars or other retail locations? | BASE: People age 16 or older who have walked, driven, or ridden in a private vehicle or public transport in the past 30 days | N = 453
Q8. How often do you look at advertising messages on digital or video screens at a place of business? | BASE: Noticed digital or video screens at a place of business past 30 days | N = 279
**PLACE-BASED DIGITAL ADVERTISING**

**ACTIONS TAKEN**

- Over one-third of viewers (32%) visited an advertiser’s website or searched for them online after seeing place-based digital ads in the past year.

- Nearly two-thirds (64%) of viewers have engaged in at least one measured action after seeing place-based digital ads in the past year.

Q9: In the past year, have you done any of the following activities after seeing an advertisement on digital or video screens at a place of business?

**BASE: Noticed digital or video screens at a place of business past 30 days | N = 279**

- **Visited advertised store, restaurant, other business**: 32%
- **Visited website/searched online**: 28%
- **Saw advertised movie or TV show**: 25%
- **Visited social media site, posted to blog/social media**: 24%
- **Recommended product/brand**: 20%
- **Attended advertised sporting event, festival, concert**: 15%
PLACE-BASED DIGITAL ADVERTISING

ACTIONS TAKEN ON MOBILE/SMARTPHONE

Just over one-third of viewers with smartphones (36%) have interacted with place-based digital ads via SMS, URL, hashtag or scanned a QR code in the past year.

54% of those viewers have engaged in at least one of these actions on their smartphone after seeing place-based digital ads in the past year.

Q10: In the past year, have you done any of the following activities on your smartphone or mobile device after seeing digital or video screens at a place of business?
BASE: Noticed digital or video screens at a place of business past 30 days and use smartphone | N = 262
PLACE-BASED DIGITAL ADVERTISING
DRIVING IN-STORE TRAFFIC

45% of viewers ever noticed a place-based digital ad that gave directions to a store, business, or restaurant.

7 in 10 of those who noticed directions on a place-based digital ad have ever visited the business within 30 minutes of viewing it.

Of those who visited the business within 30 minutes, 89% have ever ended up making a purchase.

Q11. Have you ever noticed an advertisement on digital or video screens at a place of business, which gave you directions to a specific store, business or restaurant location? | BASE: Noticed place-based advertising past 30 days | N = 279

Q12. Have you ever immediately (within 30 minutes) visited a store, business or restaurant specifically because you saw an advertisement on digital or video screens at a place of business? | BASE: Noticed directions | N = 126

Q13. You indicated that you have immediately visited a store, business or restaurant specifically because you saw an advertisement on digital or video screens at a place of business. The last time that you did this, did you make a purchase at that store, business or restaurant?

BASE: Immediately went to store, business, restaurant | N = 88
Almost 7 in 10 (69%) of airline travelers surveyed noticed digital advertising at the airport on their most recent trip.

54% of those who’ve noticed airport digital ads during their most recent trip report high engagement, noticing them “all” or “most” of the time.

Q6b. The last time you were in an airport terminal, did you notice any digital or video screens with advertising?
BASE: People age 16 or older who have taken an airplane trip in the past 12 months | N = 265

Q8. How often do you look at advertising messages on digital or video screens in an airport?
BASE: Noticed digital or video screens in an airport past 12 months | N = 183
AIRPORT DIGITAL ADVERTISING

ACTIONS TAKEN

68% Engaged in at least one action

- Visited website/ searched online: 36%
- Visited advertised store, restaurant, other business: 30%
- Visited social media site, posted to blog/social media: 30%
- Saw advertised movie or TV show: 27%
- Recommended product/brand: 20%
- Attended advertised sporting event, festival, concert: 15%

36% of viewers visited an advertiser’s website or searched for them online after seeing an airport digital ad in the past year.

Over two-thirds (68%) of viewers have engaged in at least one of these measured actions after seeing an airport digital ad in the past year.

Q9: In the past year, have you done any of the following activities after seeing an advertisement on digital or video screens in an airport?
BASE: Noticed digital or video screens in an airport past 12 months | N = 183
AIRPORT DIGITAL ADVERTISING

ACTIONS TAKEN ON MOBILE/SMARTPHONE

59% Engaged in at least one action

<table>
<thead>
<tr>
<th>Action Description</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scanned QR code, used SMS/URL/hashtag from ad</td>
<td>47%</td>
</tr>
<tr>
<td>Searched advertiser/Visited advertiser website</td>
<td>45%</td>
</tr>
<tr>
<td>Accessed coupon or discount code</td>
<td>29%</td>
</tr>
<tr>
<td>Downloaded/used app shown in ad</td>
<td>27%</td>
</tr>
<tr>
<td>Made purchase on smartphone</td>
<td>25%</td>
</tr>
</tbody>
</table>

Nearly half of viewers with a smartphone (47%) have interacted with an airport digital ad via SMS, URL, hashtag or scanned a QR code in the past year.

59% of those viewers have engaged in at least one of the measured actions on their smartphone after seeing an airport digital ad in the past year.

Q10: In the past year, have you done any of the following activities on your smartphone or mobile device after seeing an advertisement on digital or video screens in an airport?

BASE: Noticed digital or video screens in an airport past 12 months | N = 175
AIRPORT DIGITAL ADVERTISING

DRIVING IN-STORE TRAFFIC

Nearly two-thirds of viewers (62%) have ever noticed an airport digital ad that gave directions to a store, business, or restaurant.

70% of those who noticed directions on an airport digital ad have visited the business within 30 minutes of viewing the ad.

Of those who visited the business within 30 minutes, 96% have ended up making a purchase.

Q11. Have you ever noticed an advertisement on digital or video screens in an airport, which gave you directions to a specific store, business or restaurant location? BASE: Noticed airport advertising past 30 days | N = 183

Q12. Have you ever immediately (within 30 minutes) visited a store, business or restaurant specifically because you saw an advertisement on digital or video screens in an airport? | BASE: Noticed directions | N = 114

Q13. You indicated that you have immediately visited a store, business or restaurant specifically because you saw an advertisement on digital or video screens in an airport. The last time that you did this, did you make a purchase at that store, business or restaurant? BASE: Immediately went to store, business, restaurant | N=80
APPENDIX A
VIEWER PROFILE + OOH MEDIA REACH
# APPENDIX A — DEFINITIONS

<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
<th>Coverage</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>TOTAL</strong></td>
<td>People age 16 or older living in the top 30 CBSA defined markets 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)</td>
<td></td>
</tr>
<tr>
<td><strong>OOH VIEWER</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>DIGITAL BILLBOARD</strong></td>
<td>Respondents who noticed a digital billboard in the past month. (62% of total respondents)</td>
<td></td>
</tr>
<tr>
<td><strong>MOBILE DIGITAL BILLBOARD</strong></td>
<td>Respondents who noticed a mobile digital billboard in the past month. (31% of total respondents)</td>
<td></td>
</tr>
<tr>
<td><strong>DIGITAL STREET-LEVEL ADS</strong></td>
<td>Respondents who noticed any street-level digital advertising, including video displays, such as bus shelters, or sidewalk kiosks, or panels in the past month. (49% of total respondents)</td>
<td></td>
</tr>
<tr>
<td><strong>DIGITAL PLACE-BASED ADS</strong></td>
<td>Respondents who noticed any digital/video screens with advertising at a place of business such as gas stations, health clubs, office buildings, shopping centers, movie theaters, stadiums, bars, or other retail locations in the past month. (62% of total respondents)</td>
<td></td>
</tr>
<tr>
<td><strong>DIGITAL AIRPORT ADS</strong></td>
<td>Respondents who noticed digital ads at an airport in the past 12 months. (40% of total respondents)</td>
<td></td>
</tr>
<tr>
<td><strong>ANY DIGITAL OOH ADS</strong></td>
<td>Respondents who noticed digital billboards or mobile digital billboards or digital street-level digital ads or place-based digital ads or used airline travel in the past 30 days and noticed digital advertising during their most recent airport visit. (79% of total respondents)</td>
<td></td>
</tr>
</tbody>
</table>
### APPENDIX A – OOH VIEWER PROFILE

<table>
<thead>
<tr>
<th></th>
<th>TOTAL</th>
<th>DIGITAL BILLBOARD</th>
<th>MOBILE DIGITAL BILLBOARD</th>
<th>STREET-LEVEL DIGITAL ADS</th>
<th>PLACE-BASED DIGITAL ADS</th>
<th>AIRPORT DIGITAL ADS</th>
<th>ANY DIGITAL OOH ADVERTISING</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>SEX</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Male</td>
<td>50%</td>
<td>52%</td>
<td>51%</td>
<td>54%</td>
<td>52%</td>
<td>66%</td>
<td>51%</td>
</tr>
<tr>
<td>Female</td>
<td>50%</td>
<td>48%</td>
<td>49%</td>
<td>46%</td>
<td>48%</td>
<td>34%</td>
<td>49%</td>
</tr>
<tr>
<td><strong>AGE</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>16-17</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
<td>3%</td>
<td>1%</td>
</tr>
<tr>
<td>18-24</td>
<td>5%</td>
<td>4%</td>
<td>6%</td>
<td>5%</td>
<td>6%</td>
<td>0%</td>
<td>5%</td>
</tr>
<tr>
<td>25-34</td>
<td>22%</td>
<td>26%</td>
<td>29%</td>
<td>29%</td>
<td>27%</td>
<td>29%</td>
<td>24%</td>
</tr>
<tr>
<td>35-44</td>
<td>17%</td>
<td>21%</td>
<td>24%</td>
<td>22%</td>
<td>22%</td>
<td>16%</td>
<td>20%</td>
</tr>
<tr>
<td>45-54</td>
<td>13%</td>
<td>14%</td>
<td>15%</td>
<td>14%</td>
<td>11%</td>
<td>11%</td>
<td>13%</td>
</tr>
<tr>
<td>55-64</td>
<td>19%</td>
<td>17%</td>
<td>13%</td>
<td>15%</td>
<td>16%</td>
<td>13%</td>
<td>18%</td>
</tr>
<tr>
<td>65+</td>
<td>23%</td>
<td>17%</td>
<td>13%</td>
<td>14%</td>
<td>17%</td>
<td>29%</td>
<td>20%</td>
</tr>
<tr>
<td><strong>HOUSEHOLD INCOME</strong> (based on ~95% of sample who provided income information)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Less than $25,000</td>
<td>12%</td>
<td>8%</td>
<td>6%</td>
<td>10%</td>
<td>11%</td>
<td>8%</td>
<td>11%</td>
</tr>
<tr>
<td>$25,000 to less than $75,000</td>
<td>42%</td>
<td>41%</td>
<td>37%</td>
<td>40%</td>
<td>40%</td>
<td>58%</td>
<td>41%</td>
</tr>
<tr>
<td>$75,000 to $99,999</td>
<td>19%</td>
<td>21%</td>
<td>27%</td>
<td>20%</td>
<td>21%</td>
<td>18%</td>
<td>20%</td>
</tr>
<tr>
<td>$100,000 to $149,999</td>
<td>14%</td>
<td>16%</td>
<td>16%</td>
<td>18%</td>
<td>15%</td>
<td>5%</td>
<td>16%</td>
</tr>
<tr>
<td>$150,000 or more</td>
<td>13%</td>
<td>14%</td>
<td>14%</td>
<td>12%</td>
<td>12%</td>
<td>11%</td>
<td>12%</td>
</tr>
</tbody>
</table>

How to read: 52% of digital billboard viewers are males; 54% of street-level digital ads are male.
## APPENDIX A – OOH VIEWER PROFILE INDEX

<table>
<thead>
<tr>
<th></th>
<th>TOTAL</th>
<th>DIGITAL BILLBOARD</th>
<th>MOBILE DIGITAL BILLBOARD</th>
<th>STREET-LEVEL DIGITAL ADS</th>
<th>PLACE-BASED DIGITAL ADS</th>
<th>AIRPORT DIGITAL ADS</th>
<th>ANY DIGITAL OOH ADVERTISING</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>SEX</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Male</td>
<td>100</td>
<td>104</td>
<td>102</td>
<td>108</td>
<td>104</td>
<td>132</td>
<td>102</td>
</tr>
<tr>
<td>Female</td>
<td>100</td>
<td>96</td>
<td>98</td>
<td>92</td>
<td>96</td>
<td>68</td>
<td>98</td>
</tr>
<tr>
<td><strong>AGE</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>16-17</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>18-24</td>
<td>100</td>
<td>80</td>
<td>120</td>
<td>100</td>
<td>120</td>
<td>-</td>
<td>100</td>
</tr>
<tr>
<td>25-34</td>
<td>100</td>
<td>118</td>
<td>132</td>
<td>132</td>
<td>123</td>
<td>132</td>
<td>109</td>
</tr>
<tr>
<td>35-44</td>
<td>100</td>
<td>124</td>
<td>141</td>
<td>129</td>
<td>129</td>
<td>94</td>
<td>118</td>
</tr>
<tr>
<td>45-54</td>
<td>100</td>
<td>108</td>
<td>115</td>
<td>108</td>
<td>85</td>
<td>85</td>
<td>100</td>
</tr>
<tr>
<td>55-64</td>
<td>100</td>
<td>89</td>
<td>68</td>
<td>79</td>
<td>84</td>
<td>68</td>
<td>95</td>
</tr>
<tr>
<td>65+</td>
<td>100</td>
<td>74</td>
<td>57</td>
<td>61</td>
<td>74</td>
<td>126</td>
<td>87</td>
</tr>
<tr>
<td><strong>HOUSEHOLD INCOME</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Less than $25,000</td>
<td>100</td>
<td>67</td>
<td>50</td>
<td>83</td>
<td>92</td>
<td>67</td>
<td>92</td>
</tr>
<tr>
<td>$25,000 to less than $75,000</td>
<td>100</td>
<td>98</td>
<td>88</td>
<td>95</td>
<td>95</td>
<td>138</td>
<td>98</td>
</tr>
<tr>
<td>$75,000 to $99,999</td>
<td>100</td>
<td>111</td>
<td>142</td>
<td>105</td>
<td>111</td>
<td>95</td>
<td>105</td>
</tr>
<tr>
<td>$100,000 to $149,999</td>
<td>100</td>
<td>114</td>
<td>114</td>
<td>129</td>
<td>107</td>
<td>36</td>
<td>114</td>
</tr>
<tr>
<td>$150,000 or more</td>
<td>100</td>
<td>108</td>
<td>108</td>
<td>92</td>
<td>92</td>
<td>85</td>
<td>92</td>
</tr>
</tbody>
</table>

How to read: Digital billboard viewers index at 104 for being male; meaning digital billboard viewers are 4% more likely be male compared to the general population age 16 or older in the measured markets.
## APPENDIX A – OOH MEDIA REACH

<table>
<thead>
<tr>
<th></th>
<th>AGE DEMOS</th>
<th></th>
<th></th>
<th></th>
<th>RACE/ETHNICITY</th>
<th></th>
<th></th>
<th>HH INCOME</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>16+</td>
<td>18-34</td>
<td>18-49</td>
<td>25-54</td>
<td>55+</td>
<td>White</td>
<td>Black</td>
<td>Hispanic</td>
<td>$100K+</td>
</tr>
<tr>
<td>Digital Billboards</td>
<td>62%</td>
<td>71%</td>
<td>70%</td>
<td>72%</td>
<td>49%</td>
<td>60%</td>
<td>59%</td>
<td>67%</td>
<td>67%</td>
</tr>
<tr>
<td>Mobile Digital Billboards</td>
<td>31%</td>
<td>41%</td>
<td>40%</td>
<td>41%</td>
<td>19%</td>
<td>30%</td>
<td>39%</td>
<td>45%</td>
<td>35%</td>
</tr>
<tr>
<td>Street-level Digital Ads</td>
<td>49%</td>
<td>63%</td>
<td>61%</td>
<td>61%</td>
<td>34%</td>
<td>45%</td>
<td>57%</td>
<td>76%</td>
<td>56%</td>
</tr>
<tr>
<td>Place-based Digital Ads</td>
<td>62%</td>
<td>77%</td>
<td>75%</td>
<td>72%</td>
<td>47%</td>
<td>58%</td>
<td>71%</td>
<td>76%</td>
<td>65%</td>
</tr>
<tr>
<td>Airport Digital Ads</td>
<td>40%</td>
<td>56%</td>
<td>53%</td>
<td>51%</td>
<td>27%</td>
<td>40%</td>
<td>33%</td>
<td>49%</td>
<td>56%</td>
</tr>
<tr>
<td>Any Digital OOH Ads</td>
<td>79%</td>
<td>88%</td>
<td>87%</td>
<td>86%</td>
<td>69%</td>
<td>77%</td>
<td>84%</td>
<td>90%</td>
<td>82%</td>
</tr>
</tbody>
</table>

How to read: 62% of people age 16 or older living in the measured markets have noticed a digital billboard in the past month; 31% of people age 16 or older living in the measured markets noticed a mobile digital billboard in the past month.
APPENDIX A – OOH MEDIA REACH INDEX

<table>
<thead>
<tr>
<th>AGE DEMOS</th>
<th>RACE/ETHNICITY</th>
<th>HH INCOME</th>
</tr>
</thead>
<tbody>
<tr>
<td>16+</td>
<td>18-34</td>
<td>18-49</td>
</tr>
<tr>
<td>Digital Billboards</td>
<td>100</td>
<td>115</td>
</tr>
<tr>
<td>Mobile Digital Billboards</td>
<td>100</td>
<td>132</td>
</tr>
<tr>
<td>Street-level Digital Ads</td>
<td>100</td>
<td>129</td>
</tr>
<tr>
<td>Place-based Digital Ads</td>
<td>100</td>
<td>124</td>
</tr>
<tr>
<td>Airport Digital Ads</td>
<td>100</td>
<td>140</td>
</tr>
<tr>
<td>Any Digital OOH Ads</td>
<td>100</td>
<td>111</td>
</tr>
</tbody>
</table>

How to read: Adults age 18-34 living in the measured markets index at 115 for having noticed digital billboards in the past 30 days; that means 18-34 year olds are 15% more likely to be digital billboard viewers compared to the general population of people age 16 or older in the measured markets.

Adults age 55 or older living in the measured markets index at 79 for having noticed digital billboards in the past 30 days; that means those age 55 or older are 21% less likely to be digital billboard viewers compared to the general population of people age 16 or older in the measured markets.
APPENDIX B
SURVEY VISUAL AIDS
DIGITAL BILLBOARD IMAGES

DIGITAL SPECTACULAR
Digital Spectacular - Large scale digital signage in busy downtown areas.

DIGITAL BILLBOARD
Digital billboard - electronic signs showing images that change every six or eight seconds.

DIGITAL POSTER
Digital poster - smaller electronic signs that appear on city streets.

Photos provided courtesy of the OAAA
MOBILE DIGITAL BILLBOARD IMAGE

Digital mobile billboards

Photos provided courtesy of the OAAA
STREET-LEVEL DIGITAL AD IMAGES

VIDEO DISPLAY - URBAN PANEL

Street-level digital advertising – urban panel

VIDEO DISPLAY - SIDEWALK KIOSK

Street-level digital advertising – sidewalk kiosk

BUS SHELTER – DIGITAL

Digital ads on bus shelters

Photos provided courtesy of the OAAA
PLACE-BASED DIGITAL SCREEN IMAGES

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
AIRPORT DIGITAL AD IMAGES

Digital ads at airports

Photos provided courtesy of the OAAA
In the past year, have you scanned a QR (quick response) code, used SMS to respond by text, or used a URL/hashtag from the ad on [AD FORMAT TYPE]?

Photos provided courtesy of the OAAA
For more information please contact:
Diane Williams
Vice President Media Analytics
Nielsen
diane.williams@nielsen.com