



DIGITAL TRANSIT ADVERTISING REPORT

NIELSEN ON-LOCATION REPORT

2020 Commuter Rail/Train/Subway and Taxi Edition – Top 6 Transit Markets

TABLE OF CONTENTS

Welcome to the *Nielsen Digital Transit Advertising Report: 2020 Commuter Rail/Train/Subway Edition – Top 6 Transit Markets*.

This report provides a detailed examination of commuter rail, train, subway and taxi riders in six of the top transit advertising markets.

Among commuters, it measures exposure to digital advertising in transit station concourses and corridors and on station platforms. It also looks at advertising inside taxis among taxi riders and taxi top ads among all market residents age 16 or older.

The report explores actions taken after being exposed to transit advertising.

3 PROJECT BACKGROUND

4 HIGHLIGHTS

6 RAIL COMMUTERS

7-11 DIGITAL TRAIN STATION CONCOURSE
AND CORRIDOR ADVERTISING

12-16 DIGITAL TRAIN STATION PLATFORM
ADVERTISING

18 TAXI RIDERS

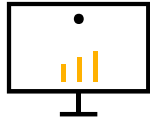
19-23 DIGITAL TAXI TOP ADVERTISING

24-28 DIGITAL/VIDEO TAXI INTERIOR
ADVERTISING

29-32 APPENDIX A – PROFILES AND REACH

33-38 APPENDIX B - SURVEY VISUAL AIDS

PROJECT BACKGROUND



411 completed
ONLINE SURVEYS



sampled from
6 Top Transit Markets



people
AGE 16 OR OLDER

Nielsen conducted 411 online surveys among U.S. residents age 16 or older, between February 24 to March 2, 2020.

Respondents were surveyed on their use of various forms of transit, including having ridden as a passenger on commuter rail, train, subway or taxi.

TRANSIT MODES USED IN THE PAST MONTH



Ridden as a passenger on a
**COMMUTER RAIL,
TRAIN, SUBWAY**



Ridden as a passenger in a
TAXI
(does not include Uber or
other ride sharing services)

The 6 Transit Markets (MD*)
measured for this report include:

- New York
- Chicago
- Philadelphia
- San Francisco/Oakland
- Boston
- Washington D.C.

Each market was given equal weight
in the result totals.

* MD stands for "Metropolitan Division." This term is used for a county or group of counties that are a distinct employment area within a metropolitan statistical area that has at least 2.5 million people. A metropolitan division is a part of a larger metropolitan statistical area but it is often a distinct social, economic, and cultural area within the larger region.

HIGHLIGHTS



NOTICED

Digital train station concourse-corridor ads and taxi interior ads have the highest awareness with 68% of rail commuters and taxi riders noticing each type of ad in the past 30 days.



ACTIONS TAKEN

The most common action taken after seeing a digital transit ad is visiting the advertiser's website or searching for them online, with at least 59% of respondents noting they had taken an action.



IN-STORE VISITS

48% or more of travelers immediately visited a store as a result of seeing various types of digital transit ads.



ENGAGEMENT

Digital transit ads drove engagement rates of at least 50% with travelers looking at the ads "some" or "all" of the time.



SMARTPHONE INTERACTION

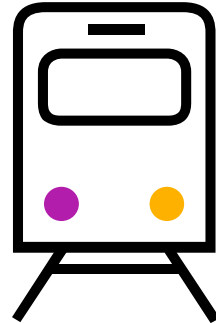
About 40% of travelers reported digital transit ads drove them to advertisers' websites or to use QR codes, SMS, URL or hashtags appearing on the displays.



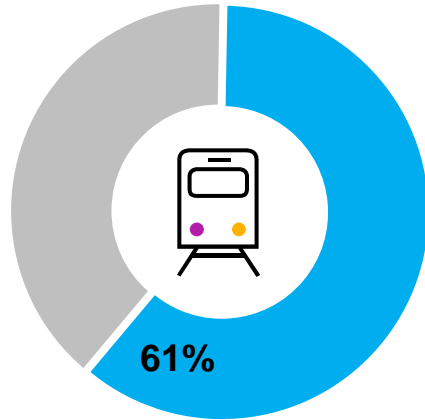
DRIVING SALES

When a digital transit ad was successful in motivating an immediate visit to a business, a purchase occurred 82% of the time or more.

COMMUTER RAIL, TRAIN, SUBWAY



RIDING THE RAILS



Ridden as a passenger on a
**COMMUTER RAIL,
TRAIN, SUBWAY**
past 30 days

NEW YORK

Amtrak
Light rail
LIRR (Long Island Rail Road)
Metro-North
New Jersey Transit train (commuter rail)
Other New Jersey Transit train
PATH
Subway

CHICAGO

CTA 'L'/Subway (Chicago)
Metra (suburbs)

PHILADELPHIA

Amtrak
PATCO Rail System
SEPTA Regional Rail - Paoli/Thorndale line
SEPTA Regional Rail - Trenton line
SEPTA Regional Rail - Wilmington/Newark line
Other SEPTA Regional Rail line
Subway
Other train or rail

SAN FRANCISCO/OAKLAND

BART
Cable car
Used Caltrain station at 4th and King
MUNI Light Rail
Santa Clara Light Rail/VTA Rail

BOSTON

MBTA commuter train
Subway - "The T"
Used Boston's South Street Station
Amtrak

WASHINGTON DC

Metro (subway)
Train
Virginia Railway Express (VRE) Train
Maryland Area Regional Commuter (MARC) Train
Amtrak

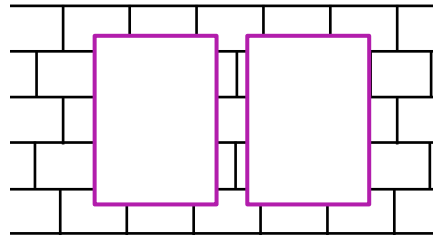
Nearly two-thirds of those age 16 or older living in the top transit markets (61%) have ridden as a passenger on a commuter rail, train or subway in the past 30 days.

To qualify as a rider, local market residents needed to have used one of the specific lines shown here.

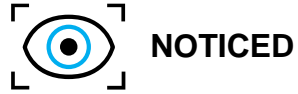
Q5. Have you ridden on any of the following ... in the past month?

BASE: All Respondents | N = 411

TRAIN STATION CONCOURSE OR CORRIDOR DIGITAL ADVERTISING

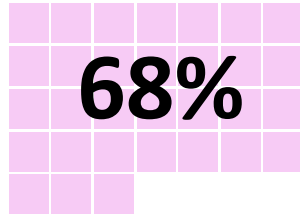


TRAIN STATION CONCOURSE OR CORRIDOR DIGITAL ADS AWARENESS + ENGAGEMENT

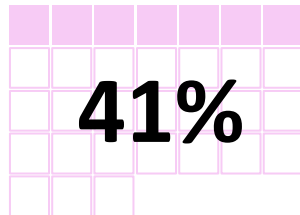


NOTICED

PAST 30 DAYS

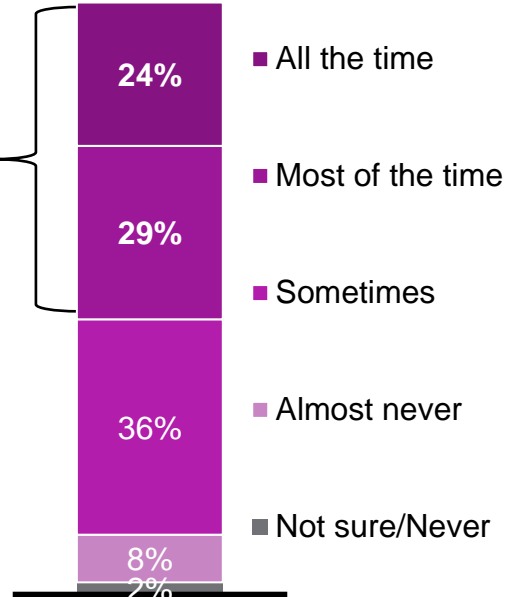


PAST WEEK



HIGHLY
ENGAGED

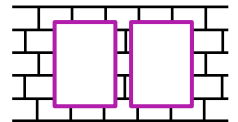
54%



LOOK @ ADS

68% of rail commuters have noticed digital train station concourse or corridor ads in the past 30 days, while 41% have noticed these ads in the past week.

54% of those who noticed digital train station concourse or corridor ads in the past 30 days are highly engaged and look at the ads “all” or “most” of the time.



Q8. When was the last time you noticed each of the following types of advertising? | BASE: P30D Rail Commuters | N = 250

Q9. How often do you look at advertising messages on digital display advertising in the corridor or main concourse at a train, rail, or subway station?

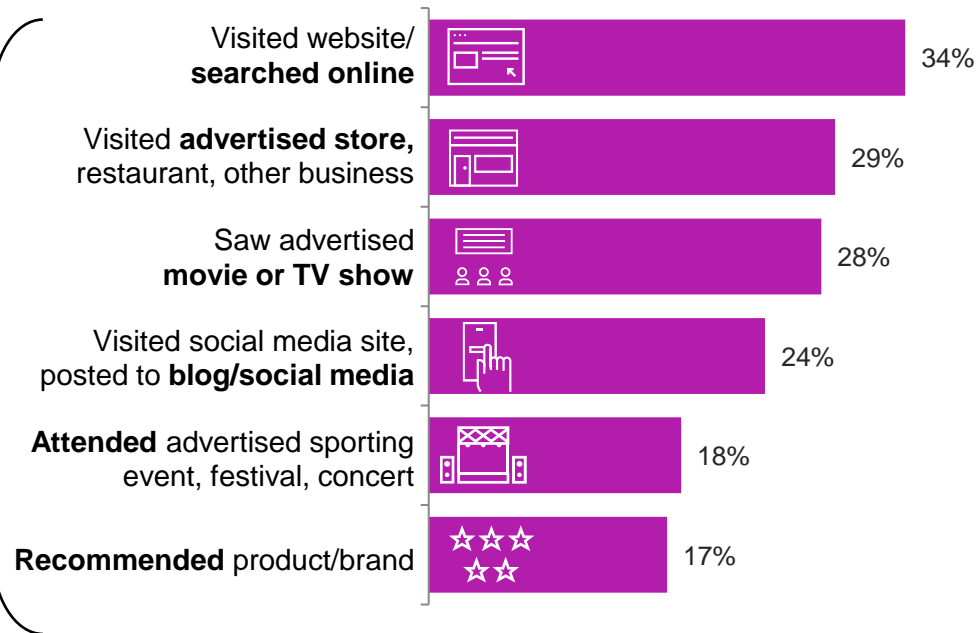
BASE: P30D Rail Commuters who noticed digital train/rail concourse ads past 30 days | N = 170

TRAIN STATION CONCOURSE OR CORRIDOR DIGITAL ADS

ACTIONS TAKEN

67%

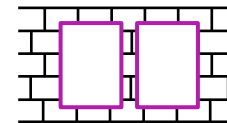
Engaged in
at least one
action



One-third of those who noticed digital train station concourse or corridor ads in the past 30 days (34%) visited an advertiser's website or searched for them online in the past year.

Nearly one-third (29%) have visited an advertised store, restaurant, or other business in the past year after seeing a digital train station concourse or corridor ad.

Just over two-thirds (67%) have engaged in at least one measured action in the past year after seeing a digital train station concourse or corridor ad.



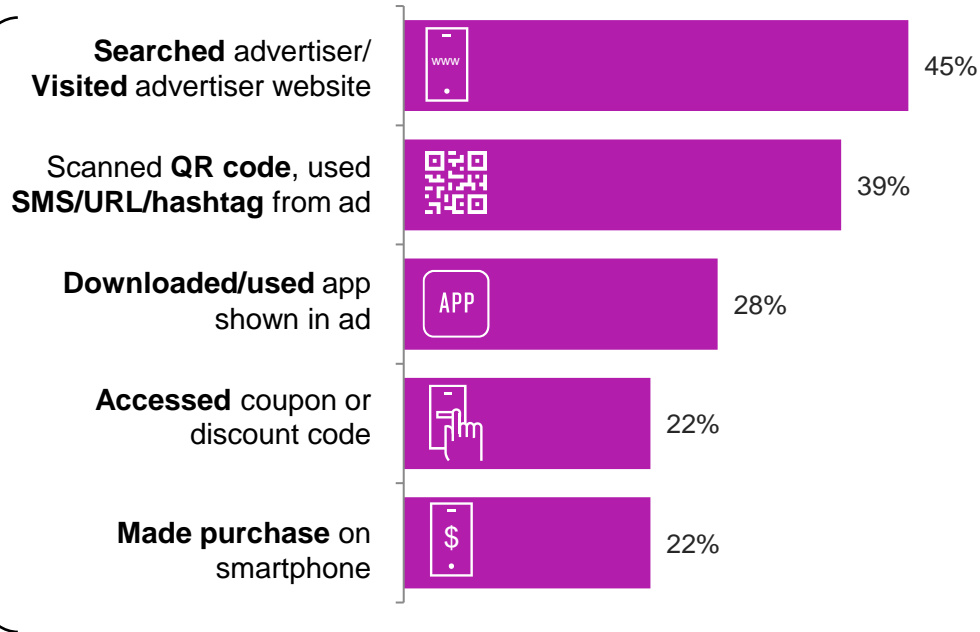
Q10. In the past year, have you done any of the following activities after seeing digital display advertising in the corridor or main concourse at a train, rail, or subway station?

BASE: P30D Rail Commuters who noticed digital train/rail concourse ads past 30 days | N = 170

TRAIN STATION CONCOURSE OR CORRIDOR DIGITAL ADS ACTIONS TAKEN ON MOBILE/SMARTPHONE

59%

Engaged in
at least one
action

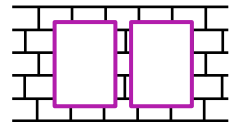


39% of smartphone users who noticed digital train station concourse or corridor ads in the past 30 days have scanned a QR code or interacted via SMS, URL, or hashtag with an ad in the past year.

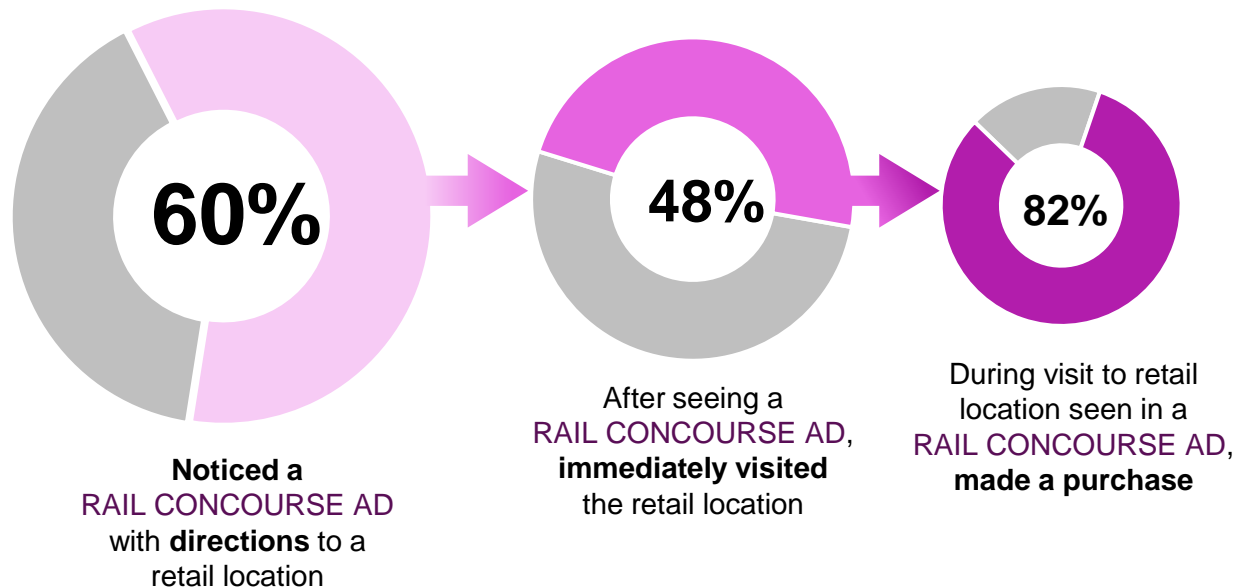
59% have engaged in at least one action on their smartphone in the past year after seeing a digital train station concourse or corridor ad.

Q11: In the past year, have you done any of the following activities on your smartphone or mobile device after seeing digital display advertising in the corridor or main concourse at a train, rail, or subway station? BASE: P30D Rail Commuters who noticed digital train/rail concourse ads past 30 days | N = 170

Q11B: 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 display advertising in the corridor or main concourse at a train, rail, or subway station? | BASE: P30D Rail Commuters who noticed digital train/rail concourse ads past 30 days and use smartphone | N = 165



TRAIN STATION CONCOURSE OR CORRIDOR DIGITAL ADS DRIVING IN-STORE TRAFFIC



6 in 10 of those who noticed digital train station concourse or corridor ads in the past 30 days (60%) have ever noticed an ad that gave directions to a store, business, or restaurant.

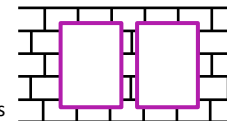
48% of those who noticed directions on a digital train station concourse or corridor ad have ever visited the business within 30 minutes of viewing it.

Of those who visited a business within 30 minutes, 82% have ever ended up making a purchase.

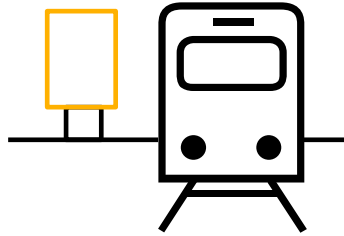
Q12. Have you ever noticed digital display advertising in the corridor or main concourse at a train, rail, or subway station, which gave you directions to a specific store, business or restaurant location? | BASE: P30D Rail Commuters who noticed digital train/rail concourse ad past 30 days | N = 170

Q13. Have you ever immediately (within 30 minutes) visited a store, business or restaurant specifically because you saw digital display advertising on the platform of a train, rail, or subway station? | BASE: P30D Rail Commuters who noticed directions on digital train/rail concourse ad | N = 102

Q14. You indicated that you have immediately visited a store, business or restaurant specifically because you saw digital display advertising in the corridor or main concourse at a train, rail, or subway station. The last time that you did this, did you make a purchase at that store, business or restaurant? | BASE: P30D Rail Commuters who immediately went to store, business, restaurant after digital corridor/concourse ad | N=49* (*small base size)



TRAIN STATION PLATFORM DIGITAL ADVERTISING



TRAIN STATION PLATFORM DIGITAL ADS AWARENESS + ENGAGEMENT



NOTICED

PAST 30 DAYS

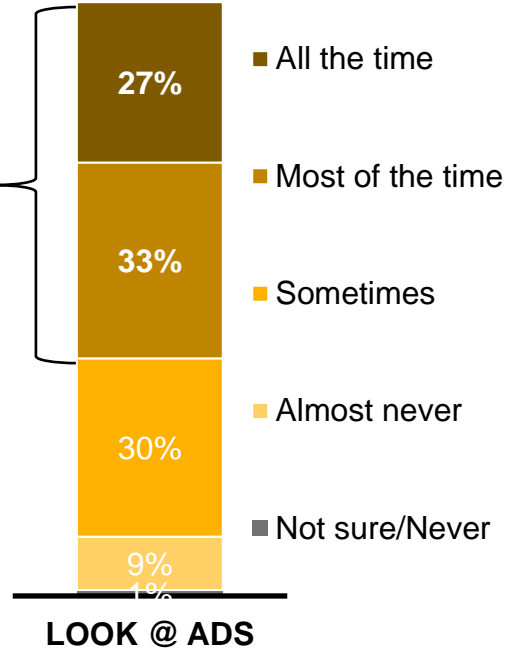
66%

PAST WEEK

38%

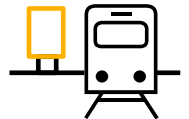
HIGHLY
ENGAGED

60%



66% of rail commuters noticed digital train station platform ads in the past 30 days, while 38% have noticed them in the past week.

60% of those who noticed digital train station platform ads in the past 30 days are highly engaged and look at them “all” or “most” of the time.



Q8. When was the last time you noticed each of the following types of advertising | BASE: P30D Rail Commuters | N = 250

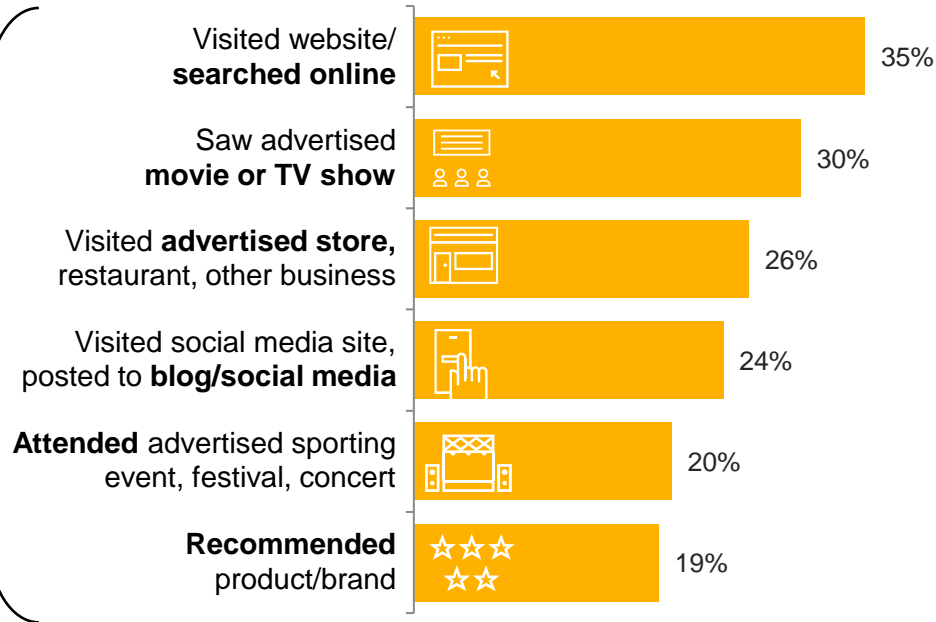
Q9. How often do you look at advertising messages on digital display advertising on the platform of a train, rail, or subway station? | BASE: P30D Rail Commuters who noticed digital train/rail platform ads past 30 days | N = 164

TRAIN STATION PLATFORM DIGITAL ADS

ACTIONS TAKEN

69%

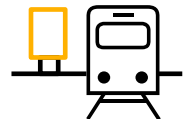
Engaged in
at least one
action



Over one-third of those who noticed digital train station platform ads in the past 30 days (35%) visited an advertiser's website or searched for them online after seeing an ad in the past year.

30% have seen a movie or TV show in the past year after seeing a digital train station platform ad.

Over two-thirds (69%) have engaged in at least one measured action in the past year after seeing digital train station platform ads.



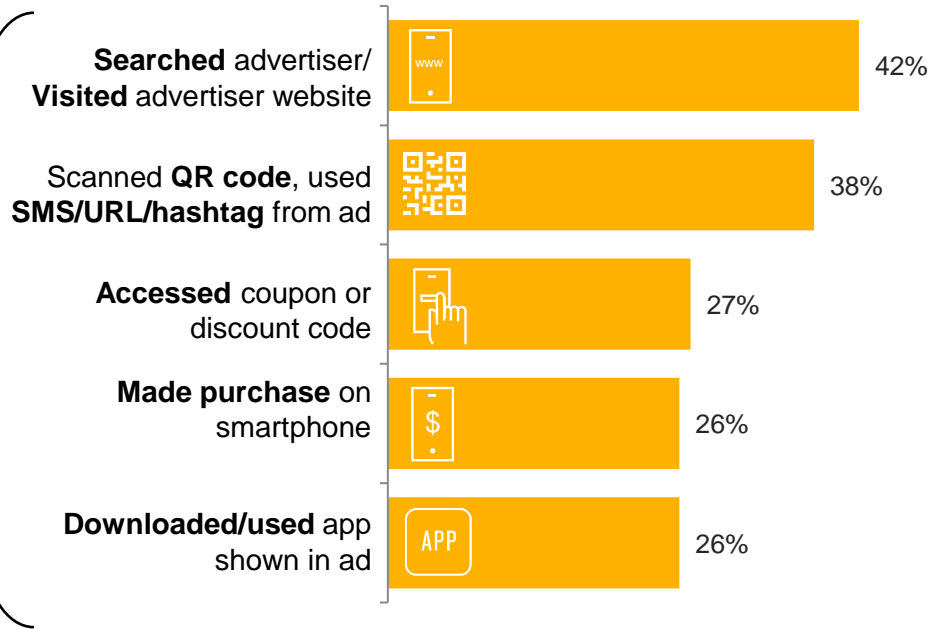
Q10. In the past year, have you done any of the following activities after seeing digital display advertising on the platform of a train, rail, or subway station?

BASE: P30D Rail Commuters who noticed digital train/rail platform ads past 30 days | N = 164

TRAIN STATION PLATFORM DIGITAL ADS

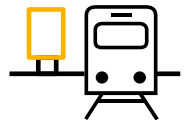
ACTIONS TAKEN ON MOBILE/SMARTPHONE

61%
Engaged in
at least one
action



38% of smartphone users who noticed digital train station platform ads in the past 30 days have scanned a QR code or interacted via SMS, URL or hashtag with an ad in the past year.

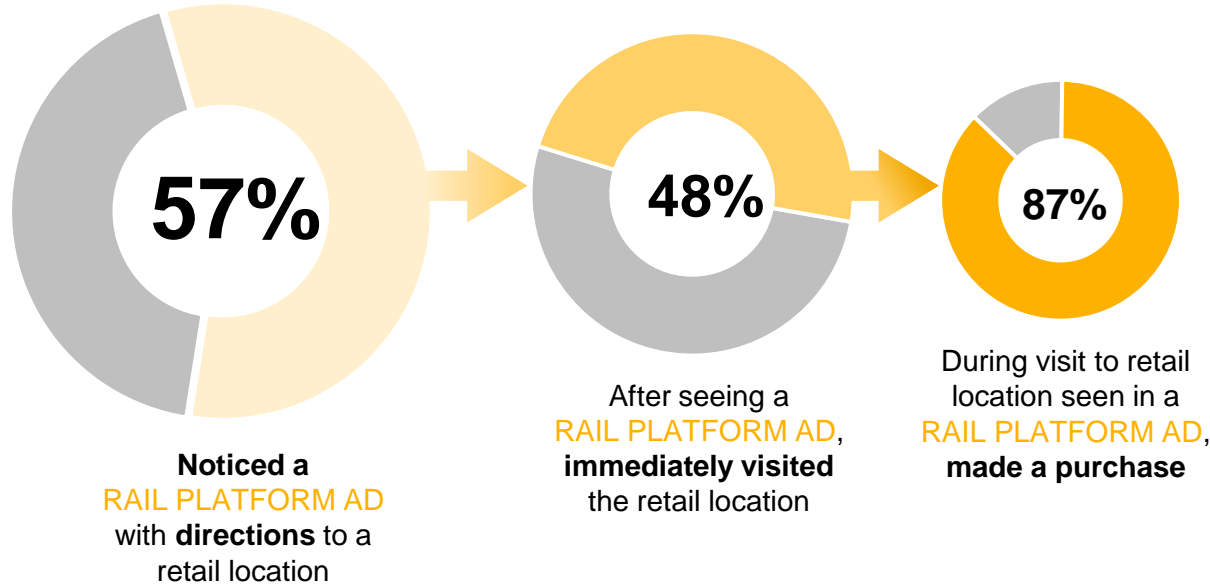
61% have engaged in at least one action on their smartphone in the past year after seeing a digital train station platform ad.



Q11: In the past year, have you done any of the following activities on your smartphone or mobile device after seeing digital display advertising on the platform of a train, rail, or subway station?

Q11B: 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 display advertising on the platform of a train, rail, or subway station? | BASE: P30D Rail Commuters who noticed digital train/rail platform ads past 30 days and use smartphone | N = 159

TRAIN STATION PLATFORM DIGITAL ADS DRIVING IN-STORE TRAFFIC



Over half of those who noticed digital train station platform ads in the past 30 days (57%) have ever noticed an ad that gave directions to a store, business, or restaurant.

48% of those who noticed directions on a digital train station platform ad have ever visited the business within 30 minutes of viewing it.

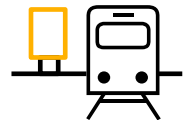
Of those who visited a business within 30 minutes, 87% have ever ended up making a purchase.

Q12. Have you ever noticed digital display advertising on the platform of a train, rail, or subway station, which gave you directions to a specific store, business or restaurant location?

BASE: P30D Rail Commuters who noticed digital train/rail platform ad past 30 days | N = 164

Q13. Have you ever immediately (within 30 minutes) visited a store, business or restaurant specifically because you saw digital display advertising on the platform of a train, rail, or subway station? | BASE: P30D Rail Commuters who noticed directions on digital train/rail platform ad | N = 94

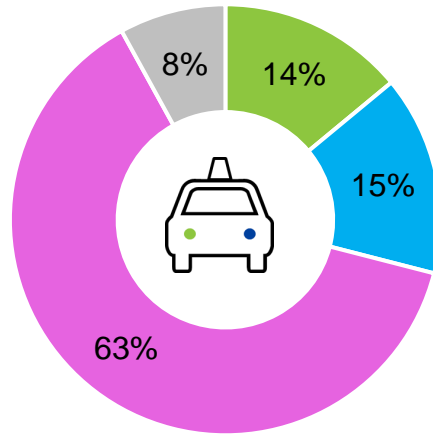
Q14. You indicated that you have immediately visited a store, business or restaurant specifically because you saw digital display advertising on the platform of a train, rail, or subway station. The last time that you did this, did you make a purchase at that store, business or restaurant? | BASE: P30D Rail Commuters who immediately went to store, business, restaurant after digital platform ad | N=45* (*small base size)



TAXI RIDERS



TAXI RIDERS



Ridden as a passenger in a
TAXI
in the past 30 days

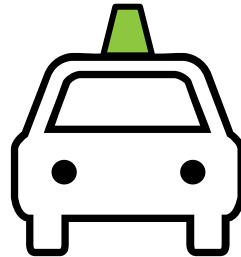
(does not include Uber or
other ride sharing services)

- Less than 7 days ago
- Within the past 8 to 30 days
- More than 30 days ago
- Have never ridden in a taxi

Over one-quarter of those age 16 or older living in the top transit markets (29%) have ridden as a passenger in a taxi in the past 30 days.

Rideshare services such as Uber or Lyft did NOT count towards taxi ridership.

TAXI TOP DIGITAL ADVERTISING



TAXI TOP DIGITAL ADS AWARENESS + ENGAGEMENT



NOTICED

PAST 30 DAYS

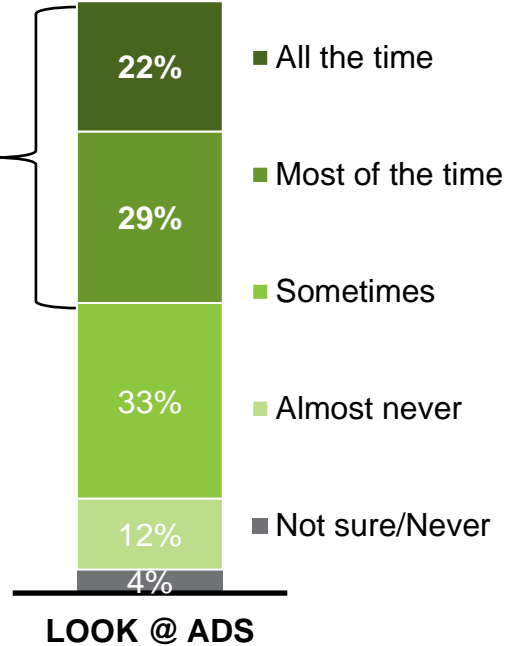
41%

PAST WEEK

22%

HIGHLY
ENGAGED

51%



41% of those age 16 or older in the measured markets noticed digital taxi top ads in the past 30 days, 22% have noticed digital taxi top ads in the past week.

Just over half (51%) of those who've noticed digital taxi top ads in the past 30 days are highly engaged and look at them "all" or "most" of the time.



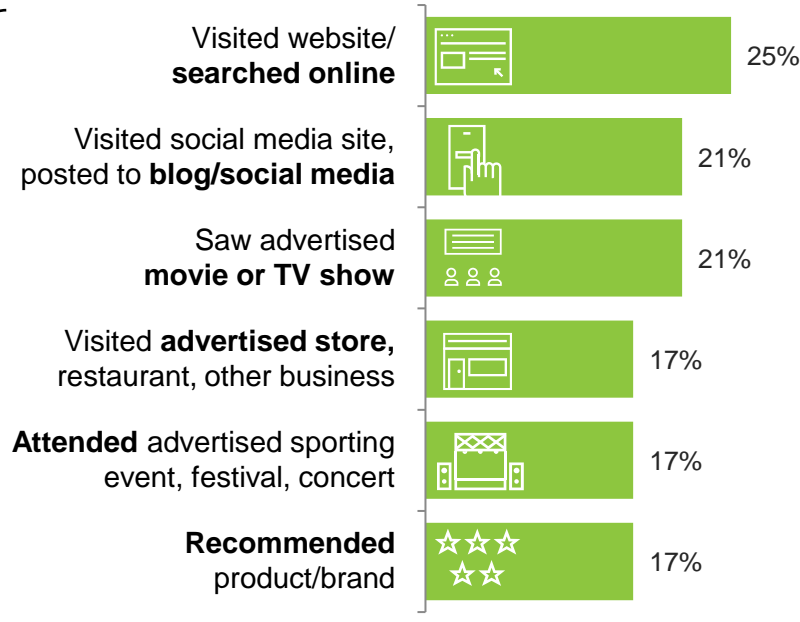
Q8. When was the last time you noticed each of the following types of advertising? | BASE: People age 16 or older in 7 measured MDs | N = 411

Q9. How often do you look at advertising messages on digital display advertising on top of a taxi? | BASE: Age 16+ in 7 MDs and noticed digital taxi-top ads past 30 days | N = 167

TAXI TOP DIGITAL ADS ACTIONS TAKEN

59%

Engaged in
at least one
action



25% of those who noticed digital taxi top ads in the past 30 days visited an advertiser's website or searched for them online in the past year after seeing a digital taxi top ad.

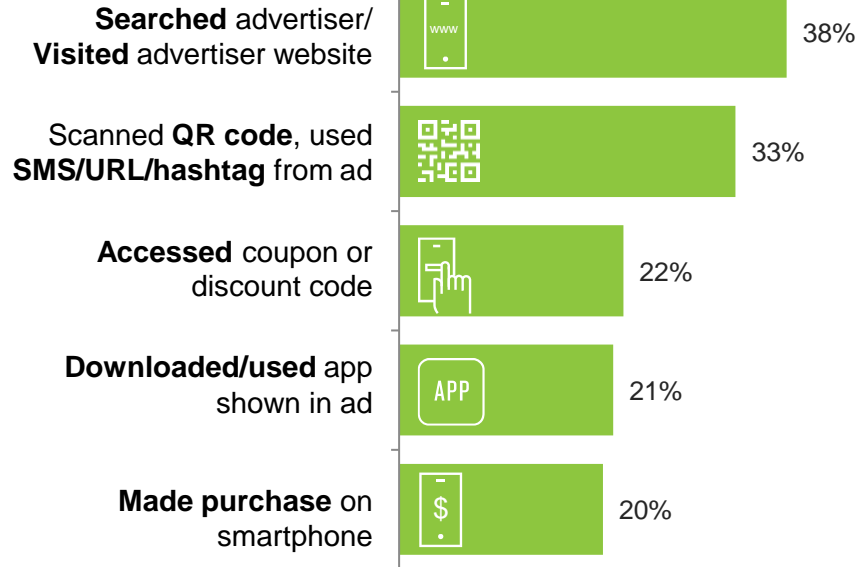
59% have engaged in at least one action in the past year after seeing digital taxi top ads.



TAXI TOP DIGITAL ADS ACTIONS TAKEN ON MOBILE/SMARTPHONE

46%

Engaged in
at least one
action



38% of smartphone users who noticed digital taxi top ads in the past 30 days have searched for an advertiser or visited its website on their smartphone after seeing an ad.

46% have engaged in at least one action on their smartphone in the past year after seeing digital taxi top ads.

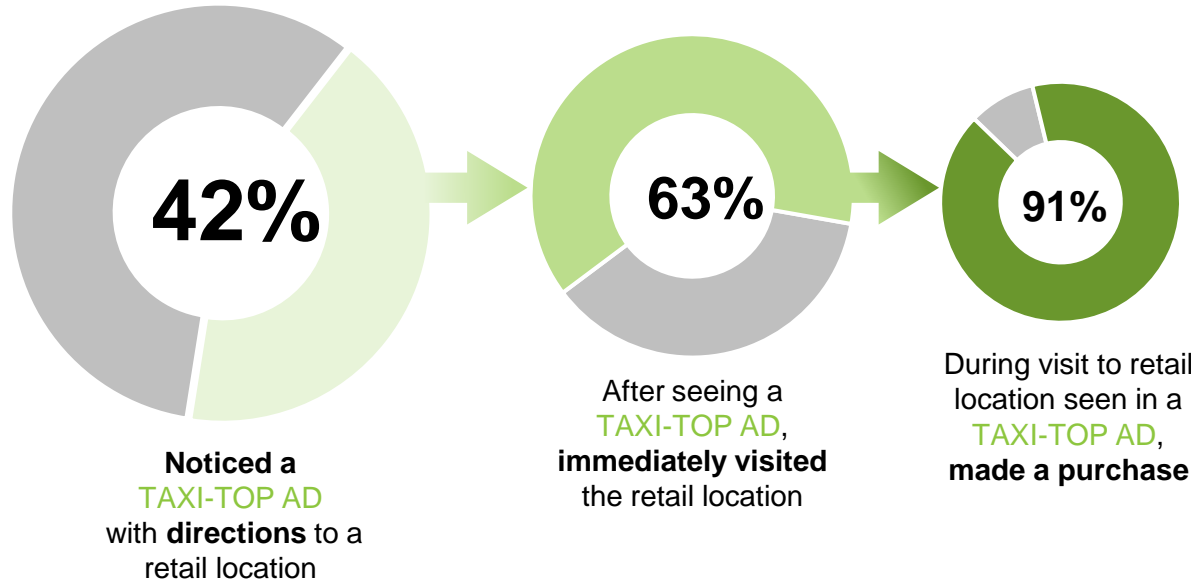


Q11: In the past year, have you done any of the following activities on your smartphone or mobile device after seeing digital display advertising on top of a taxi?

Q11B: 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 display advertising on top of a taxi? |

BASE: Age 16+ in 7 MDs who noticed digital taxi-top ads past 30 days and use smartphone | N = 163

TAXI TOP DIGITAL ADS DRIVING IN-STORE TRAFFIC



42% of those who noticed digital taxi top ads in the past 30 days have ever noticed an ad that gave directions to a store, business, or restaurant.

Nearly two-thirds of those who noticed directions on digital taxi top ads (63%) have ever visited the business within 30 minutes of viewing it.

Of those who visited a business within 30 minutes, 91% ended up making a purchase.

Q12. Have you ever noticed digital display advertising on top of a taxi, which gave you directions to a specific store, business or restaurant location? | BASE: Age 16+ in 7 MDs and who noticed digital taxi-top ad past 30 days | N = 167

Q13. Have you ever immediately (within 30 minutes) visited a store, business or restaurant specifically because you saw digital display advertising on top of a taxi? | BASE: Age 16+ in 7 MDs and who noticed directions in digital taxi-top ad | N = 70* (*small base size)

Q14. You indicated that you have immediately visited a store, business or restaurant specifically because you saw digital display advertising on top of a taxi. The last time that you did this, did you make a purchase at that store, business or restaurant? | BASE: Age 16+ in 7 MDs who immediately went to store, business, restaurant after digital taxi-top ad | N=44* (*small base size)



TAXI INTERIOR DIGITAL ADVERTISING



DIGITAL ADS – INSIDE TAXI

AWARENESS + ENGAGEMENT



NOTICED

PAST 30 DAYS

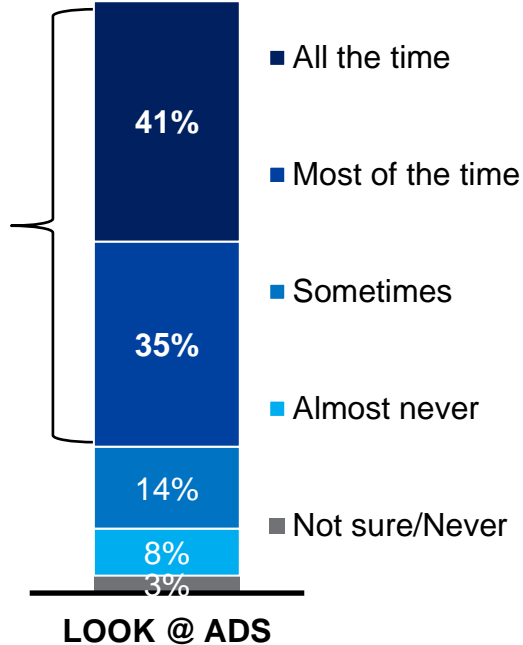
68%

PAST WEEK

40%

HIGHLY
ENGAGED

76%



Nearly 7 in 10 (68%) of taxi riders noticed digital ads inside a taxi in the past 30 days, while 40% noticed them in the past week.

Taxi interior ads boast very high engagement with 76% of viewers looking at them “all” or “most” of the time.



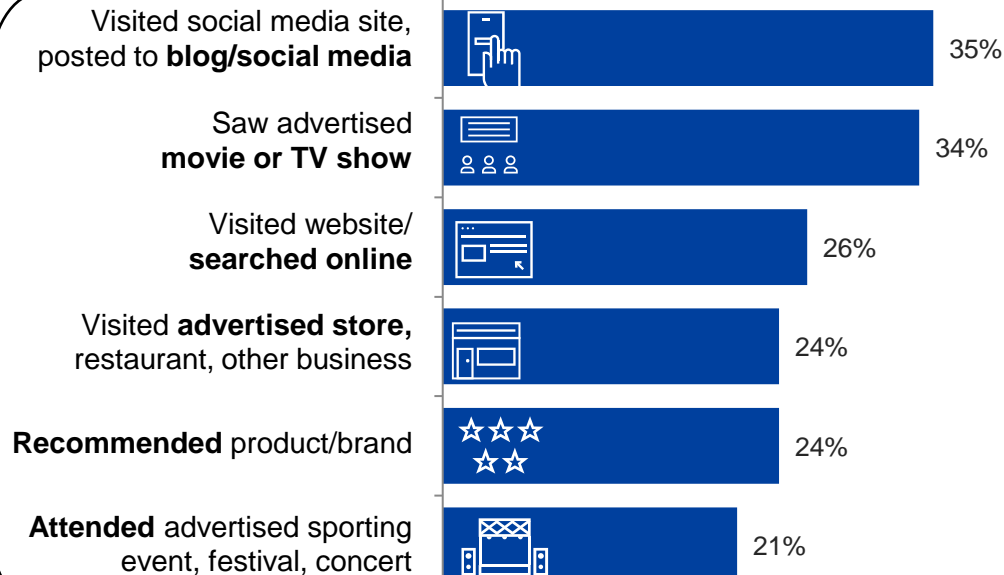
Q8. When was the last time you noticed each of the following types of advertising? | BASE: P30D Taxi Rider | N = 117

Q9. How often do you look at advertising messages on digital display advertising inside a taxi? | BASE: P30D Taxi Riders who noticed digital in-taxi ads past 30 days | N = 80

TAXI INTERIOR DIGITAL ADVERTISING ACTIONS TAKEN

76%

Engaged in at least one action



Just over one-third (35%) of taxi riders who've noticed digital ads inside a taxi in the past 30 days visited an advertiser's social media site or posted to social media/blog, after seeing digital taxi interior ads.

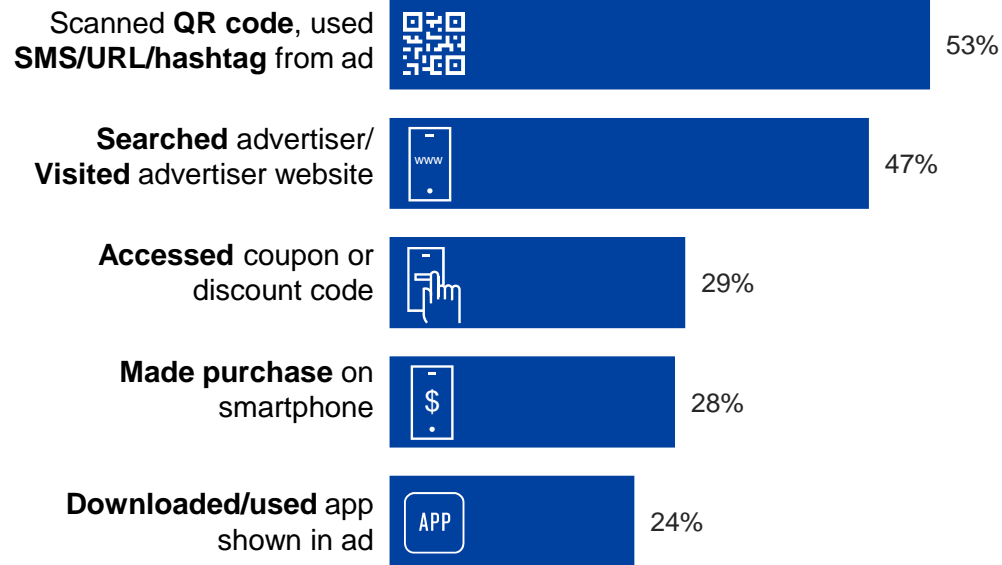
Over three-fourths (76%) have engaged in at least one action in the past year after seeing digital taxi interior ads.



TAXI INTERIOR DIGITAL ADVERTISING ACTIONS TAKEN ON MOBILE/SMARTPHONE

67%

Engaged in
at least one
action



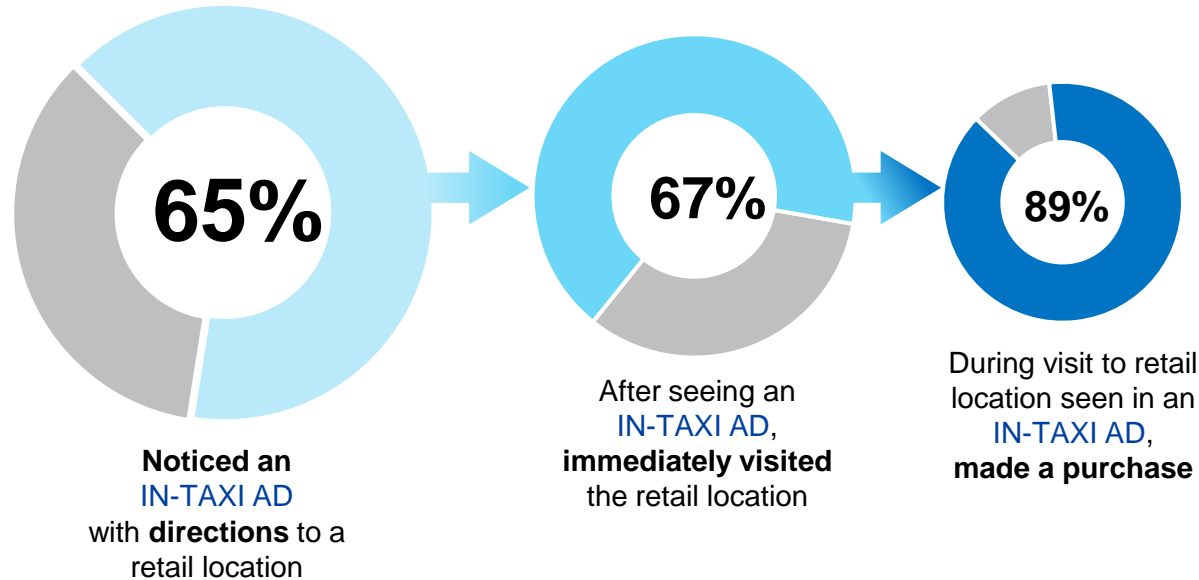
Over half of smartphone users who noticed digital ads inside a taxi in the past 30 days (53%) have scanned a QR code or interacted via SMS, URL, or hashtag with an ad in the past year.

67% have engaged in at least one action on their smartphone in the past year after seeing taxi interior digital ads.



Q11: In the past year, have you done any of the following activities on your smartphone or mobile device after seeing digital display advertising inside a taxi?
Q11B: 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 display advertising inside a taxi?
BASE: P30D Taxi Riders who noticed digital in-taxi ads past 30 days and use smartphone | N = 78

TAXI INTERIOR DIGITAL ADVERTISING DRIVING IN-STORE TRAFFIC



65% of taxi riders who've noticed digital ads inside a taxi in the past 30 days have ever noticed an ad that gave directions to a store, business, or restaurant.

67% of those who noticed directions on an taxi interior digital ad have ever visited the business within 30 minutes of viewing it.

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

Q12. Have you ever noticed digital display advertising inside a taxi, which gave you directions to a specific store, business or restaurant location? | BASE: P30D Taxi Riders who noticed digital in-taxi ad past 30 days | N = 80

Q13. Have you ever immediately (within 30 minutes) visited a store, business or restaurant specifically because you saw digital display advertising inside a taxi? |BASE: P30D Taxi Riders who noticed directions in digital in-taxi ad | N = 52* (*small base size)

Q14. You indicated that you have immediately visited a store, business or restaurant specifically because you saw digital display advertising inside a taxi. The last time that you did this, did you make a purchase at that store, business or restaurant?
BASE: P30D Taxi Riders who immediately went to store, business, restaurant after digital in-taxi ad | N=35* (*small base size)



APPENDIX A – PROFILES AND REACH

APPENDIX A – DEFINITIONS

TOTAL

TRAIN COMMUTER

TAXI PASSENGER

DIGITAL TRAIN STATION CONCOURSE/CORRIDOR ADS

DIGITAL TRAIN STATION PLATFORM ADS

DIGITAL TAXI TOP ADS

DIGITAL TAXI INTERIOR ADS

TRAVEL METHOD

New York, Chicago, Philadelphia, San Francisco/Oakland, Boston and Washington D.C. Metropolitan Division (MD) residents age 16 or older. (100% of respondents)

Ridden as a passenger on a COMMUTER RAIL, TRAIN or SUBWAY in the past 30 days. (61% of total respondents)

Ridden as a passenger in a TAXI in the past 30 days. Does not include rideshare services. (29% of total respondents)

DIGITAL ADVERTISING PLATFORMS

Noticed digital display advertising in a corridor or main concourse of a commuter rail, train or subway station in the past 30 days. (68% of Past 30 Day Rail Commuters)

Noticed digital display advertising on the platform of a commuter rail, train or subway station in the past 30 days. (66% of Past 30 Day Rail Commuters)

Respondents age 16+ who noticed a digital display that rotates through a series of ads on top of a taxi in the past 30 days. (41% of total respondents)

Taxi Riders who noticed digital or video screens inside a taxi in the past 30 days. (68% of Past 30 Day Taxi Riders)

APPENDIX A – PROFILE

	TOTAL	TRAIN COMMUTER	NOTICED TRAIN CONCOURSE ADS	NOTICED TRAIN PLATFORM ADS	TAXI RIDER	NOTICED TAXI INTERIOR ADS	NOTICED TAXI TOP ADS
SEX							
Male	51%	54%	55%	58%	58%	65%	60%
Female	49%	46%	44%	41%	42%	35%	40%
AGE							
16-17	1%	0%	1%	1%	0%	0%	1%
18-24	9%	12%	14%	14%	13%	15%	10%
25-34	19%	26%	31%	30%	31%	38%	27%
35-44	19%	20%	24%	21%	25%	23%	22%
45-54	12%	11%	9%	10%	9%	10%	11%
55-64	21%	18%	13%	14%	15%	10%	18%
65+	20%	12%	9%	10%	9%	5%	11%
HOUSEHOLD INCOME (based on ~93% of sample who provided income information)							
Less than \$25,000	12%	11%	11%	11%	10%	9%	9%
\$25,000 to less than \$75,000	36%	37%	40%	39%	37%	35%	43%
\$75,000 to \$99,999	15%	17%	16%	18%	22%	26%	20%
\$100,000 to \$149,999	15%	13%	13%	15%	14%	15%	14%
\$150,000 or more	16%	18%	16%	14%	15%	15%	12%

APPENDIX A – REACH

	AGE DEMOS					RACE/ETHNICITY			HH INCOME
	16+	18-34	18-49	25-54	55+	White	Black	Hispanic	\$100K+
Train Commuter	61%	86%	75%	70%	44%	54%	82%	84%	63%
Digital Train Station Concourse/Corridor Ads	41%	68%	57%	53%	22%	35%	63%	69%	40%
Digital Train Station Platform Ads	40%	64%	54%	49%	24%	34%	61%	58%	38%
Taxi Passenger	29%	46%	39%	37%	16%	26%	39%	47%	27%
Digital Taxi Top Ads	41%	55%	49%	49%	29%	37%	51%	60%	35%
Digital Taxi Interior Ads	19%	38%	29%	27%	7%	19%	21%	36%	19%

How to read: 61% of people age 16 or older living in the measured markets have ridden as a passenger on a commuter rail, train or subway in the past 30 days; 41% of people age 16 or older living in the measured markets noticed digital display advertising in a corridor or main concourse of a commuter rail, train or subway station in the past 30 days.

APPENDIX B – SURVEY VISUAL AIDS

DIGITAL TRAIN STATION CONCOURSE-CORRIDOR IMAGE



Digital display advertising in the corridor or main concourse of a train, rail, or subway station

DIGITAL TRAIN STATION PLATFORM IMAGES



Digital display advertising on the platform of a train, rail, or subway station

Photos provided courtesy of the OAAA

DIGITAL TAXI TOP IMAGE



Digital display advertising on top of a taxi that rotates through a series of ads

Photos provided courtesy of the OAAA

DIGITAL/VIDEO TAXI INTERIOR IMAGES



Digital or video screens inside a taxi

QR CODE IMAGE



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]?

For more information please contact:

Diane Williams
VP Media Analytics, Nielsen
diane.williams@nielsen.com

nielsen
● ● ● ● ● ● ● ● ●

SHAPING A SMARTER MARKET™

This artwork was created using Nielsen data.

Copyright © 2020 The Nielsen Company (US), LLC. Confidential and proprietary. Do not distribute.