Welcome to the Nielsen Poster Advertising Study 2017.

The Outdoor Advertising Association of America (OAAA) commissioned Nielsen On Location to conduct a research study to better understand the role POSTER BILLBOARDS play in the out of home media landscape.

This benchmark case study examined awareness and attitudes towards posters in 10 markets and measured advertising recall for 36 brands using posters in those markets.
POSTER VIEWERSHIP
Over half of the adults surveyed (51%) noticed a poster advertisement in the past month and 38% noted a poster in the past week.

REACHING YOUNG ADULTS
Younger adults were more likely to notice posters. Poster viewership was highest among people age 25-34 with 71% noticing a poster in the past month.

HIGH ENGAGEMENT
Half of poster viewers (50%) are highly engaged with the ads and look at the messages either all or most of the time.

AD RECALL
The average ad recall per poster campaign tested was 47%; meaning 47% of poster viewers in the campaign’s local market, recalled seeing that specific ad.

MORE IS BETTER
The number of posters used by a brand directly impacted overall ad recall for the campaign. Brands using 40 or more posters yielded substantially higher ad recall levels.

POSTERS STAND OUT
Over half of poster viewers agree poster ads stand out more than ads seen in newspapers, online, on mobile devices or over the radio.
Nielsen conducted 4,020 online surveys, with local residents age 18 or older, in 10 U.S. markets, over a four month period between August and November 2016.

36 campaigns utilizing poster ad units were selected for testing across the survey markets.

Ad recall results are shown among respondents who participated in the survey while the test campaigns were active in their local market.
POSTER AD AWARENESS
Over half of the adults surveyed (51%) noticed a poster advertisement in the past month and 38% noted a poster in the past week.

Younger adults were most likely to notice posters. Poster viewership was highest among people age 25-34 with 71% noticing a poster in the past month.

Average past month poster viewership for the 18-44 demo group is 65%.

BASE: ALL RESPONDENTS | n = 4,020 | "Some billboards in your area are called "posters". These are smaller billboards, that you’re more likely to see in your neighborhood or on secondary roadways, as opposed to the larger billboards on interstate highways and may look something like the examples shown below." [sample images shown]
When you have seen these poster billboards, how often do you notice the specific messages on the poster billboard?

94% of those who have noticed a poster in the past month, report looking at the advertising messages either all, most or some of the time.

Half of poster viewers (51%) are highly engaged with the ads and look at the messages either all or most of the time.
Poster viewers were asked about the types of messages seen. **89% recalled seeing advertising** and 42% remembered public service information.

**CONTENT RECALL**

- **89%** Advertising
- **42%** Public Service Information
- **14%** Other

BASE: NOTICED POSTER IN THE PAST MONTH | n = 1,986 | “What types of messages do you recall seeing on poster billboards? Advertising | Public Service Information | Other Messages | None of the Above?”
POSTER CAMPAIGN PERFORMANCE
SCOPE OF THE POSTER AD TEST

Nielsen tested 36 poster campaigns for this benchmark study across 10 U.S. markets.

The 31 local and national brands measured were spread-out among 14 product categories.

The campaigns selected were representative of those typically placed in the local markets.
**AD RECALL MEASUREMENT**

**MEDIA VIEWER**
Those who noticed posters in the past month

**OPPORTUNITY TO SEE**
Poster ad was on display in their home market (DMA)

**BRAND AIDED AD RECALL**
BRAND NAMES for ads on display in their local market are shown.

“Which of the advertisers listed below, if any, do you recall seeing featured on a poster billboard?”

**VISUALLY AIDED AD RECALL**
IMAGES of ADVERTISING CREATIVE on display in their local market are shown.

“Do you recall seeing this poster billboard ad anywhere in your area?”

AD RECALL is the percent of media viewers, who recall seeing a specific ad, after having had an opportunity to see the ad.

For this poster study, “media viewers” are those who have noticed a poster in the past month, and an “opportunity to see” is defined as living in the local market where the poster ad was on display.

To measure advertising recall, past month poster viewers were shown a list of brands and images of poster ads currently on display in their local market.

Nielsen used visually aided ad recall results for most analyses in this report.
The average visually aided ad recall for an individual ad, across all the campaigns tested, was 47%, meaning 47% of poster viewers in the campaign’s local market, recalled seeing that specific ad.

The highest ad recall for a specific poster campaign tested was 86% and the lowest recall was 17%.

Based on this dataset, the normative range for poster campaign ad recall is between 33% and 62%.
Ad recall levels were similar across the three market sizes, with small markets having a slight edge.

The average ad recall level for small market campaigns was 48%, average ad recall for medium size markets was 47% and large markets had an average ad recall of 46%.

BASE: NOTICED POSTER IN THE PAST MONTH – CAMPAIGN TEST GROUP | n = 949
“Do you recall seeing this poster billboard ad anywhere in your area?”
[RESPONDENTS SHOWN IMAGES FOR POST CAMPAIGNS CURRENTLY APPEARING IN THEIR LOCAL MARKET]
The number of posters used by a brand directly impacts overall ad recall for the campaign.

For example, among the campaigns tested in medium sized markets, brands using less than 10 posters had an ad recall level of 18%, brands using 10 to less than 25 posters had 34% ad recall, 25 to less than 40 posters had 45% ad recall and campaigns using 40 or more posters had an average ad recall level of 69%.

Small markets can generate higher recall levels with fewer posters.
Higher Reach and Frequency planning equated to higher ad recall.

Campaigns with a media plan Reach estimate of 50% or less had an ad recall level of 38%; campaigns targeting a Reach of 50% or more had an average ad recall of over 50%.

Frequency exposures of 11 or more times yielded an average ad recall of 55%; campaigns with lower frequencies of 5 to 7 exposures resulted in an average ad recall of 41%.

BASE: NOTICED POSTER IN THE PAST MONTH – CAMPAIGN TEST GROUP | n = 949
“Do you recall seeing this poster billboard ad anywhere in your area?”
[RESPONDENTS SHOWN IMAGES FOR POST CAMPAIGNS CURRENTLY APPEARING IN THEIR LOCAL MARKET]
*Reach and Frequency data provided to Nielsen by OAAA courtesy of Geopath OOH Ratings.
AD RECALL – TARGET RATING POINTS (TRPs)

The more Target Ratings Points (TRP)* bought for the campaign, the higher the ad recall.

Campaigns with 300 TRP’s or less had an average ad recall of 41%; campaigns consisting of 600 or more TRP’s, yielded average ad recall levels of 52%.

BASE: NOTICED POSTER IN THE PAST MONTH – CAMPAIGN TEST GROUP | n = 949
“Do you recall seeing this poster billboard ad anywhere in your area?”
[RESPONDENTS SHOWN IMAGES FOR POST CAMPAIGNS CURRENTLY APPEARING IN THEIR LOCAL MARKET]
*TRP data provided to Nielsen by OAAA courtesy of Geopath OOH Ratings.
The performance of local versus national brands varied by market size.

Poster campaigns for nationally recognized advertisers in medium size markets had higher ad recall compared to local advertisers, but in the small markets, local advertisers outperformed national brands.

The average ad recall level for national brands advertising on posters in medium sized markets was 59%, average ad recall for local advertisers in medium markets was 39%.
The average ad recall across the nine poster campaigns tested in large markets (Baltimore, Philadelphia and Seattle) was 46%.

The highest ad recall in the large markets was for a leading national insurance brand with 60% of poster viewers recalling the ad in the campaign’s local market.

BASE: NOTICED POSTER IN THE PAST MONTH – LARGE MARKET CAMPAIGN TEST GROUP | n = 357

“Which of the advertisers listed below, if any, do you recall seeing featured on a poster billboard?” | “Do you recall seeing this poster billboard ad anywhere in your area?”

[RESPONDENTS SHOWN A LIST OF BRAND NAMES AND IMAGES FOR POST CAMPAIGNS CURRENTLY APPEARING IN THEIR LOCAL MARKET]
MEDIUM MARKET – AD RECALL – BY CATEGORY

RESTAURANT
66%
3 campaigns; Range 57% to 70%

THEME PARK
57%
1 campaign

LEGAL SERVICES
44%
1 campaign

HEALTH SERVICES
43%
2 campaigns; Range 22% to 64%

PRODUCTS & SERVICES
44%
6 campaigns; Range 18% to 80%

GOVERNMENT & POLITICS
29%
2 campaigns; Range 17% to 40%

MEDIUM MARKET – AVERAGE 47%

The average ad recall across the 15 poster campaigns tested in medium sized markets (Salt Lake City, San Diego, Norfolk/Newport News and Louisville) was 47%.

The highest average ad recall in the medium sized markets were for ads in the restaurant category.

BASE: NOTICED POSTER IN THE PAST MONTH – MEDIUM MARKET CAMPAIGN TEST GROUP | n = 448

“Which of the advertisers listed below, if any, do you recall seeing featured on a poster billboard?” | “Do you recall seeing this poster billboard ad anywhere in your area?”

[RESPONDENTS SHOWN A LIST OF BRAND NAMES AND IMAGES FOR POST CAMPAIGNS CURRENTLY APPEARING IN THEIR LOCAL MARKET]
SMALL MARKET – AD RECALL – BY CATEGORY

- **LEGAL SERVICES**: 86% (1 campaign)
- **EDUCATIONAL INSTITUTION**: 57% (2 campaigns; Range 52% to 62%)
- **RESTAURANT**: 47% (5 campaigns; Results range 29% to 59%)
- **LOCAL EVENT**: 44% (1 campaign)
- **FINANCIAL SERVICES**: 33% (1 campaign)
- **GOVERNMENT & POLITICS**: 33% (2 campaigns; Range 29% to 36%)

**SMALL MARKET – AVERAGE 48%**

The average ad recall across the 12 poster campaigns tested in small markets (Montgomery, Chico and Topeka) was 48%.

The highest ad recall in the small markets was for a law firm – with 86% of poster viewers recalling the ad.

BASE: NOTICED POSTER IN THE PAST MONTH – SMALL MARKET CAMPAIGN TEST GROUP | n = 144

“Which of the advertisers listed below, if any, do you recall seeing featured on a poster billboard?” | “Do you recall seeing this poster billboard ad anywhere in your area?”

[RESPONDENTS SHOWN A LIST OF BRAND NAMES AND IMAGES FOR POST CAMPAIGNS CURRENTLY APPEARING IN THEIR LOCAL MARKET]
In the small and medium size markets, campaigns featuring creative with a “Call-to-Action” had slightly higher ad recall compared to brand awareness ads.

The average ad recall level for small market campaigns with a “Call to Action” in their creative was 51%, average ad recall for branding campaigns in small markets was 46%.
USING AD RECALL TO EVALUATE THE CREATIVE

Among all campaigns tested, the average brand aided ad recall was 32% and visually aided recall was 47% – that is a 15 point difference in ad recall between the two metrics or a 46% increase. \( \frac{47\% - 32\%}{32\%} = 46\% \)

The difference in the recall rates between brand aided and visually aided recall tells a lot about the creative used for the ad.

Visually aided recall is typically higher than brand aided because a certain portion of the audience will see an ad but not necessarily remember the name of the product or brand featured.

A few campaigns tested for this study had very large differences between brand aided and visually aided recall. For example, one ad’s brand aided recall was 2% but the visually aided recall was 44% – that tells us the poster creative succeeded in getting the message in front of consumers, but failed in communicating the brand name.

BRAND AIDED RECALL
BRAND NAMES for ads on display in their local market are shown.

VISUALLY AIDED RECALL
IMAGES of the SPECIFIC ADVERTISING CREATIVE on display in their local market are shown.
ATTITUDES TOWARDS POSTERS
POSTERS STAND OUT AGAINST OTHER MEDIA

Advertisements on POSTERS STAND OUT MORE than ads on...

Nearly 6 in 10 poster viewers (59%) agree poster ads stand out more than advertisements in newspapers and over one-third (36%) agree posters stand out more than TV commercials.

BASE: NOTICED POSTER IN THE PAST MONTH | n = 1,986

"Using a 5-point scale, with 1 being strongly disagree and 5 being strongly agree, please rate how much you agree or disagree with the following statements about poster billboards." An answer of 4 or 5 out a possible 5 is considered being in agreement.
POSTERS ARE INFORMATIVE

In all markets, poster viewers agree... “Poster Billboards...

61% ...are a good way to learn about NEW BUSINESSES in the area.”

61% ...are a good way to learn about SALES AND EVENTS.”

57% ...often catch my ATTENTION.”

Over 6 in 10 poster viewers (61%) agree posters are a good way to learn about new businesses or sales and events.

58% of all poster viewers surveyed agree posters are informative.

Analysis of attitudes by market size, show poster viewers in small and medium size markets see posters as even more informative than those who live in larger markets.

BASE: NOTICED POSTER IN THE PAST MONTH | n = 1,986

“Using a 5-point scale, with 1 being strongly disagree and 5 being strongly agree, please rate how much you agree or disagree with the following statements about poster billboards.”

An answer of 4 or 5 out a possible 5 is considered being in agreement.
Nearly two-thirds of poster viewers (65%) noticed a sign directing them to a nearby store, business or restaurant.

55% of those who noticed a directional poster have changed their plans to visit the business seen advertised.

Base: Noticed Directional Posters

“Have you ever noticed a poster billboard that provided specific directions to a nearby store, business or restaurant?”

Base: Noticed Poster in the Past Month + Noticed Directional Posters | n = 1,289

“Have you ever changed your plans to visit a store, business or restaurant based on what you saw featured on a poster billboard?”
POSTERS PROMPT CONSUMER ACTION

40% Visited the business advertised
24% Made a purchase at business advertised
18% Attended event advertised

40% Talked about what they saw with friends/family
13% Recommended advertiser to others
19% Watched TV program featured
14% Tuned to Radio Station Advertised

BASE: NOTICED POSTER IN THE PAST MONTH | n = 1,986
“After seeing a poster billboard, have you ever...”
POSTERS PROMPT ONLINE ACTION

14% Accessed a coupon from mobile device

12% Downloaded an app

12% Snapped a photo of an ad with a mobile device

30% Searched online for more details about the featured message

29% Visited advertiser’s website

24% Searched for the advertiser online

8% Posted online

BASE: NOTICED POSTER IN THE PAST MONTH | n = 1,986
“After seeing a poster billboard, have you ever...”
CONSUMER ACTION BY MARKET SIZE

Poster viewers in small markets are more likely to take action after seeing a poster ad.

Nearly half of poster viewers living in small markets (45%) have visited a business after seeing a message on a poster, compared to 38% of large market poster viewers.

BASE: NOTICED POSTER IN THE PAST MONTH | n = 1,986
“After seeing a poster billboard, have you ever...”
WHAT DID WE LEARN?

Use posters to **target younger adults** age 18 to 44.

Expect a poster campaign to generate visually aided **ad recall in the 33% to 62% range.**

If there is a **substantial difference** between brand name aided and visually aided recall, consider **revising the creative** to better communicate the brand name. For example, make sure the brand name or logo is prominent.

Use an adequate **quantity** of posters in a market to increase ad recall. Campaigns using **40 posters or more** tested best in medium and large markets. **Small markets** generate higher recall levels using **fewer posters.**

Plan poster campaigns with **50%+ Reach, 11+ Frequency and 600+ TRPs** to generate higher ad recall results.

Poster advertising stands **on par or surpasses** advertising on **print, radio and digital platforms.**
APPENDIX I – MARKET BREAKOUTS
## Types of Messages Noticed by Market Size

<table>
<thead>
<tr>
<th>Category</th>
<th>Small</th>
<th>Medium</th>
<th>Large</th>
</tr>
</thead>
<tbody>
<tr>
<td>Advertising</td>
<td>91%</td>
<td>89%</td>
<td>88%</td>
</tr>
<tr>
<td>Public Service Information</td>
<td>45%</td>
<td>45%</td>
<td>40%</td>
</tr>
<tr>
<td>Other</td>
<td>17%</td>
<td>15%</td>
<td>13%</td>
</tr>
</tbody>
</table>

**Base:** Noticed Poster in the Past Month

- Large n = 695; Medium n = 974; Small n = 317

“What types of messages do you recall seeing on poster billboards?
Advertising | Public Service Information | Other Messages | None of the Above?”
## COMPARISON TO OTHER MEDIA
### BY MARKET SIZE

Posters STAND OUT more than advertisements…

<table>
<thead>
<tr>
<th>Medium</th>
<th>SMALL</th>
<th>MEDIUM</th>
<th>LARGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Television</td>
<td>36%</td>
<td>37%</td>
<td>36%</td>
</tr>
<tr>
<td>Online</td>
<td>59%</td>
<td>52%</td>
<td>58%</td>
</tr>
<tr>
<td>Radio</td>
<td>59%</td>
<td>52%</td>
<td>52%</td>
</tr>
<tr>
<td>Newspaper</td>
<td>65%</td>
<td>61%</td>
<td>57%</td>
</tr>
<tr>
<td>Cell Phones, Smart Phones, Mobile Devises</td>
<td>58%</td>
<td>54%</td>
<td>53%</td>
</tr>
</tbody>
</table>

BASE: NOTICED POSTER IN THE PAST MONTH | LARGE n = 695; MEDIUM n = 974; SMALL n = 317

"Using a 5-point scale, with 1 being strongly disagree and 5 being strongly agree, please rate how much you agree or disagree with the following statements about poster billboards." An answer of 4 or 5 out a possible 5 is considered being in agreement.
# Attitudes by Market Size

## Poster Billboards…

<table>
<thead>
<tr>
<th></th>
<th>Small</th>
<th>Medium</th>
<th>Large</th>
</tr>
</thead>
<tbody>
<tr>
<td>...often catch my attention.</td>
<td>60%</td>
<td>57%</td>
<td>56%</td>
</tr>
<tr>
<td>...are a good way to learn about new businesses in the area.</td>
<td>69%</td>
<td>64%</td>
<td>59%</td>
</tr>
<tr>
<td>...are a good way to learn about sales and events.</td>
<td>65%</td>
<td>62%</td>
<td>60%</td>
</tr>
<tr>
<td>...are informative.</td>
<td>66%</td>
<td>60%</td>
<td>56%</td>
</tr>
</tbody>
</table>

**Base:** Noticed poster in the past month | Large $n = 695$; Medium $n = 974$; Small $n = 317$

"Using a 5-point scale, with 1 being strongly disagree and 5 being strongly agree, please rate how much you agree or disagree with the following statements about poster billboards." An answer of 4 or 5 out a possible 5 is considered being in agreement.
POSTERS GUIDE CONSUMER ACTION
BY MARKET SIZE

“Have you ever noticed a poster billboard that provided specific directions to a nearby store, business or restaurant?”

“Have you ever changed your plans to visit a store, business or restaurant based on what you saw featured on a poster billboard?”

BASE: NOTICED POSTER IN THE PAST MONTH | LARGE n = 695; MEDIUM n = 974; SMALL n = 317

70% noticed directional posters
44% changed plans to visit advertiser
66%
40%
63%
45%
## ACTIONS TAKEN AFTER SEEING POSTERS BY MARKET SIZE

<table>
<thead>
<tr>
<th>Action</th>
<th>SMALL</th>
<th>MEDIUM</th>
<th>LARGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visited the business (e.g. store or restaurant) advertised</td>
<td>45%</td>
<td>41%</td>
<td>38%</td>
</tr>
<tr>
<td>Talked about what they saw with friends/family</td>
<td>38%</td>
<td>40%</td>
<td>40%</td>
</tr>
<tr>
<td>Searched online for more details about the featured message</td>
<td>30%</td>
<td>29%</td>
<td>30%</td>
</tr>
<tr>
<td>Visited the advertiser’s website</td>
<td>33%</td>
<td>31%</td>
<td>28%</td>
</tr>
<tr>
<td>Searched for the advertiser online</td>
<td>26%</td>
<td>26%</td>
<td>23%</td>
</tr>
<tr>
<td>Made a purchase at business advertised</td>
<td>32%</td>
<td>25%</td>
<td>22%</td>
</tr>
<tr>
<td>Attended event advertised</td>
<td>24%</td>
<td>21%</td>
<td>16%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Action</th>
<th>SMALL</th>
<th>MEDIUM</th>
<th>LARGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Watched TV program featured</td>
<td>13%</td>
<td>18%</td>
<td>20%</td>
</tr>
<tr>
<td>Tuned to radio station advertised</td>
<td>16%</td>
<td>15%</td>
<td>13%</td>
</tr>
<tr>
<td>Accessed a coupon from mobile device</td>
<td>14%</td>
<td>13%</td>
<td>14%</td>
</tr>
<tr>
<td>Recommended advertiser to others</td>
<td>18%</td>
<td>14%</td>
<td>12%</td>
</tr>
<tr>
<td>Snapped a photo of an ad with a mobile device</td>
<td>13%</td>
<td>13%</td>
<td>11%</td>
</tr>
<tr>
<td>Downloaded an app</td>
<td>13%</td>
<td>11%</td>
<td>13%</td>
</tr>
<tr>
<td>Posted online</td>
<td>9%</td>
<td>8%</td>
<td>8%</td>
</tr>
</tbody>
</table>

**Base:** Noticed poster in the past month | Large n = 695; Medium n = 974; Small n = 317

“After seeing a poster billboard, have you ever...”
APPENDIX II – TRAVEL HABITS
“Thinking about a typical week, including week days and weekends - approximately how many miles do you travel combined, either as a driver or a passenger in any vehicle?”

BASE: NOTICED POSTER IN THE PAST MONTH | n = 1,986

Over half of poster viewers (54%) travel more than 100 miles per week in a vehicle as either a driver or passenger.

Mean miles per week = 210
“Thinking about a typical week day – that is Monday through Friday - approximately how much time do you spend traveling combined, either as a driver or a passenger in any vehicle? Your best estimate is fine.”

“Thinking about a typical weekend day – that is Saturday or Sunday - approximately how much time do you spend traveling combined, either as a driver or a passenger in any vehicle? Your best estimate is fine.”
APPENDIX III – DEMOGRAPHICS
### PERSONAL DEMOGRAPHICS BY MARKET SIZE

<table>
<thead>
<tr>
<th>Gender</th>
<th>ALL 10 MARKETS</th>
<th>SMALL</th>
<th>MEDIUM</th>
<th>LARGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td>53%</td>
<td>51%</td>
<td>54%</td>
<td>53%</td>
</tr>
<tr>
<td>Female</td>
<td>47%</td>
<td>49%</td>
<td>46%</td>
<td>47%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Age Range</th>
<th>ALL 10 MARKETS</th>
<th>SMALL</th>
<th>MEDIUM</th>
<th>LARGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>18 - 24</td>
<td>7%</td>
<td>12%</td>
<td>9%</td>
<td>6%</td>
</tr>
<tr>
<td>25 - 34</td>
<td>31%</td>
<td>22%</td>
<td>30%</td>
<td>33%</td>
</tr>
<tr>
<td>35 - 44</td>
<td>21%</td>
<td>22%</td>
<td>25%</td>
<td>18%</td>
</tr>
<tr>
<td>45 - 54</td>
<td>14%</td>
<td>13%</td>
<td>12%</td>
<td>16%</td>
</tr>
<tr>
<td>55 - 64</td>
<td>13%</td>
<td>16%</td>
<td>12%</td>
<td>13%</td>
</tr>
<tr>
<td>65 and over</td>
<td>13%</td>
<td>15%</td>
<td>12%</td>
<td>14%</td>
</tr>
</tbody>
</table>

BASE: NOTICED POSTER IN THE PAST MONTH | LARGE n = 695; MEDIUM n = 974; SMALL n = 317 | ALL 10 MARKETS n = 1,986
## RACE & ETHNICITY
### BY MARKET SIZE

<table>
<thead>
<tr>
<th></th>
<th>ALL 10 MARKETS</th>
<th>SMALL</th>
<th>MEDIUM</th>
<th>LARGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>White</td>
<td>83%</td>
<td>82%</td>
<td>84%</td>
<td>82%</td>
</tr>
<tr>
<td>Black</td>
<td>7%</td>
<td>10%</td>
<td>7%</td>
<td>7%</td>
</tr>
<tr>
<td>Asian or Pacific Islander</td>
<td>5%</td>
<td>2%</td>
<td>4%</td>
<td>6%</td>
</tr>
<tr>
<td>Native American or Alaskan Native</td>
<td>1%</td>
<td>3%</td>
<td>1%</td>
<td>2%</td>
</tr>
<tr>
<td>Mixed Race/Other</td>
<td>4%</td>
<td>3%</td>
<td>4%</td>
<td>3%</td>
</tr>
<tr>
<td>Declined to Answer</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
<td>0%</td>
</tr>
</tbody>
</table>

| Spanish or Hispanic Origin | 6% | 6% | 7% | 5% |

BASE: NOTICED POSTER IN THE PAST MONTH | LARGE n = 695; MEDIUM n = 974; SMALL n = 317 | ALL 10 MARKETS n = 1,986
# EDUCATION
## BY MARKET SIZE

<table>
<thead>
<tr>
<th>Education Level</th>
<th>All 10 Markets</th>
<th>Small</th>
<th>Medium</th>
<th>Large</th>
</tr>
</thead>
<tbody>
<tr>
<td>Some high school or less</td>
<td>1%</td>
<td>2%</td>
<td>2%</td>
<td>1%</td>
</tr>
<tr>
<td>Completed high school</td>
<td>11%</td>
<td>15%</td>
<td>12%</td>
<td>10%</td>
</tr>
<tr>
<td>Job-specific training program(s)</td>
<td>4%</td>
<td>2%</td>
<td>3%</td>
<td>5%</td>
</tr>
<tr>
<td>Some college, but no degree</td>
<td>19%</td>
<td>26%</td>
<td>22%</td>
<td>16%</td>
</tr>
<tr>
<td>Associates Degree</td>
<td>10%</td>
<td>10%</td>
<td>12%</td>
<td>10%</td>
</tr>
<tr>
<td>College (such as B.A., B.S.)</td>
<td>28%</td>
<td>23%</td>
<td>25%</td>
<td>31%</td>
</tr>
<tr>
<td>Some graduate school, but no degree</td>
<td>4%</td>
<td>5%</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>Graduate degree (such as MBA, MS, M.D., Ph.D.)</td>
<td>23%</td>
<td>18%</td>
<td>22%</td>
<td>24%</td>
</tr>
</tbody>
</table>

BASE: NOTICED POSTER IN THE PAST MONTH | LARGE n = 695; MEDIUM n = 974; SMALL n = 317 | ALL 10 MARKETS n = 1,986
# EMPLOYMENT BY MARKET SIZE

<table>
<thead>
<tr>
<th>Employment Status</th>
<th>ALL 10 MARKETS</th>
<th>SMALL</th>
<th>MEDIUM</th>
<th>LARGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employed full time</td>
<td>51%</td>
<td>42%</td>
<td>48%</td>
<td>53%</td>
</tr>
<tr>
<td>Employed part time</td>
<td>10%</td>
<td>7%</td>
<td>12%</td>
<td>9%</td>
</tr>
<tr>
<td>Self-employed</td>
<td>5%</td>
<td>9%</td>
<td>6%</td>
<td>5%</td>
</tr>
<tr>
<td>Not employed, but looking for work</td>
<td>4%</td>
<td>6%</td>
<td>5%</td>
<td>4%</td>
</tr>
<tr>
<td>Not employed and not looking for work</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>1%</td>
</tr>
<tr>
<td>Retired</td>
<td>15%</td>
<td>19%</td>
<td>14%</td>
<td>15%</td>
</tr>
<tr>
<td>Not employed, unable to work due to a disability or illness</td>
<td>4%</td>
<td>5%</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>Student</td>
<td>3%</td>
<td>5%</td>
<td>5%</td>
<td>2%</td>
</tr>
<tr>
<td>Stay-at-home spouse or partner</td>
<td>8%</td>
<td>7%</td>
<td>7%</td>
<td>8%</td>
</tr>
</tbody>
</table>

BASE: NOTICED POSTER IN THE PAST MONTH | LARGE n = 695; MEDIUM n = 974; SMALL n = 317 | ALL 10 MARKETS n = 1,986
### HOUSEHOLD INCOME BY MARKET SIZE

<table>
<thead>
<tr>
<th>Income Level</th>
<th>SMALL</th>
<th>MEDIUM</th>
<th>LARGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than $15,000</td>
<td>9%</td>
<td>5%</td>
<td>4%</td>
</tr>
<tr>
<td>$15,000 to less than $25,000</td>
<td>13%</td>
<td>8%</td>
<td>5%</td>
</tr>
<tr>
<td>$25,000 to less than $35,000</td>
<td>12%</td>
<td>11%</td>
<td>5%</td>
</tr>
<tr>
<td>$35,000 to less than $50,000</td>
<td>11%</td>
<td>13%</td>
<td>10%</td>
</tr>
<tr>
<td>$50,000 to less than $75,000</td>
<td>18%</td>
<td>20%</td>
<td>21%</td>
</tr>
<tr>
<td>$75,000 to less than $100,000</td>
<td>17%</td>
<td>23%</td>
<td>22%</td>
</tr>
<tr>
<td>$100,000 to less than $125,000</td>
<td>7%</td>
<td>7%</td>
<td>10%</td>
</tr>
<tr>
<td>$125,000 to less than $150,000</td>
<td>5%</td>
<td>5%</td>
<td>7%</td>
</tr>
<tr>
<td>$150,000 to less than $200,000</td>
<td>4%</td>
<td>3%</td>
<td>6%</td>
</tr>
<tr>
<td>$200,000 to less than $250,000</td>
<td>1%</td>
<td>2%</td>
<td>1%</td>
</tr>
<tr>
<td>$250,000 or more</td>
<td>2%</td>
<td>1%</td>
<td>2%</td>
</tr>
</tbody>
</table>

BASE: NOTICED POSTER IN THE PAST MONTH | LARGE n = 695; MEDIUM n = 974; SMALL n = 317 | ALL 10 MARKETS n = 1,986
ABOUT NIELSEN

Nielsen N.V. (NYSE: NLSN) is a global performance management company that provides a comprehensive understanding of what consumers Watch and Buy. Nielsen’s Watch segment provides media and advertising clients with Total Audience measurement services across all devices where content—video, audio and text—is consumed. The Buy segment offers consumer packaged goods manufacturers and retailers the industry’s only global view of retail performance measurement. By integrating information from its Watch and Buy segments and other data sources, Nielsen provides its clients with both world-class measurement as well as analytics that help improve performance. Nielsen, an S&P 500 company, has operations in over 100 countries that cover more than 90 percent of the world’s population.

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