Project RUSHMORE 2013
Out-of-home Advertising and Online Activations

Diane Williams  
Senior Media Research Analyst  
Arbitron Inc.  
212-887-1461  
diane.williams@arbitron.com

Ryan Pogy  
Media Research Analyst  
Arbitron Inc.  
212-887-1344  
ryan.pogy@arbitron.com
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Introduction

Welcome to the Arbitron report Project RUSHMORE 2013: Out-of-home Advertising and Online Activations. This study is a special examination of the relationship between out-of-home advertising and the Internet; specifically, the ability of out-of-home media to drive online search, website visits and social media activity.

Data for this project was collected in two parts. First Arbitron conducted a national survey of U.S. adults to measure the level of search, Facebook® and Twitter® activity being spurred by offline media including television, radio, print (newspaper and magazines) and out-of-home (billboards, bus shelters or other outdoor advertising). The second part focused on measuring the performance of an actual out-of-home campaign with a call-to-action involving a website, social media and voting.

The results paint a clearer picture of out-of-home media's role in the evolving interactive landscape.

What is Project RUSHMORE?

In order to measure the online activity generated by out-of-home media, we needed to select a test campaign. Established brands and events were excluded because it would be difficult to control for online activations resulting from prior awareness. The best chance for data purity was to fabricate an event exclusively for the purpose of the test. The promotion for this event would appear exclusively on outdoor billboards, posters and bus shelters in a limited number of markets. Any online activity generated could be attributed to the effects of out-of-home media.

The event engineered for the test was Rushmore Vote. The campaign encouraged the public to go online to a website created exclusively for the project: RUSHMOREVOTE.COM.

On that website, participants could vote for who should be the next face added to the iconic Mount Rushmore National Memorial in the Black Hills of South Dakota. Three voting choices were provided: "George W. Bush", "Barack Obama" or "Neither. Mount Rushmore should stay the way it is."

Along with their vote, participants were asked where they learned about the poll. The choices provided were: "Facebook", "Twitter", "Roadside billboard ad", "Bus stop ad" or "other" with a fill-in option.

In order to see the live results of the poll, voters were asked to take a short demographic survey including sex, age and zip code.
Methodology

Part I: National Survey

In February 2013, Arbitron conducted 1,021 telephone interviews with U.S. residents aged 18 or older using a random digit dialing (RDD) landline and cell phone sample. The results were weighted by sex, age, ethnicity and region to be representative of the U.S. population.

In addition to basic demographics, 12 questions were asked focusing on online activations within the past six months resulting from seeing or hearing something on TV, radio, print or OOH media.

Q1. In the past six months have you used Google, Bing or another Internet search engine to look up information after seeing/hearing something advertised… [a, b, c, d]?
Q2. In the past six months have you visited a Facebook page or posted a message on Facebook after seeing or hearing something advertised… [a, b, c, d]?
Q3. In the past six months have you posted a message on Twitter after seeing or hearing something advertised… [a, b, c, d]?
   a. on television
   b. on the radio
   c. in a newspaper or magazine
   d. on a billboard, bus shelter or other outdoor advertising

Part II: Rushmore Out-of-home Media Campaign

The Outdoor Advertising Association of America (OAAA) organized the execution of the Rushmore Vote campaign across 162 out-of-home media units in four local metros – Cincinnati, Sacramento, San Antonio and Phoenix.

In three of the four markets, the creative showed the URL address for RUSHMOREVOTE.COM in addition to a combination of other calls-to-action including a Facebook logo and fan page, Twitter logo and hash tag #rushmorevote, and an interactive element that allowed users to upload their face or a personal message onto a digital billboard. Examples of each creative execution is available in Appendix B.

Phoenix was the only market not to show the site URL and functioned as a control group to measure the effects of displaying a website address in out-of-home creative.

The campaign, voting website and Facebook fan pages were active for a four-week period between March 4th and 29th, 2013.

Google Analytics™ and Facebook site metrics were used to track traffic and social media activity related to Rushmore Vote.
**Definition of Terms**

Below are a summary of terms used throughout the report.

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
</table>
| **Activation Share**        | A medium's share of gross online activations generated by the four offline media measured (television, radio, print and out-of-home). Formula: \[
\frac{\text{MEDIUM'S ACTIVATION}}{\text{OOH ACTIVATION + RADIO ACTIVATION + NEWSPAPER/MAGAZINE ACTIVATION + TELEVISION ACTIVATION}}\] |
| Activation                  | An online behavior prompted by an advertisement; may include use of a search engine, page visit/posts on Facebook or posts on Twitter.         |
| Direct Traffic              | Website visits from people who typed the URL (RUSHMOREVOTE.COM) directly into their web browser, scanned a QR code or used a bookmark saved from a previous visit. |
| Facebook Activations        | Percentage of the U.S. population age 18 or older who have visited a Facebook fan page or posted a message on Facebook after seeing or hearing something advertised on an offline medium in the past six months. |
| Locations                   | The geographic origin of a website visitor; derived using IP address mapping.                                                                |
| Organic Search              | Website visits resulting from unpaid search using engines such as Google, Bing or Yahoo.                                                      |
| Referral Traffic            | Website visits resulting from following a link on another website or social media network.                                                   |
| Search Activations          | Percentage of the U.S. population age 18 or older who have used Google, Bing or another Internet search engine to look up information after seeing or hearing something advertised on an offline medium in the past six months. |
| Spend Share                 | A medium's share of the total ad spend generated by the four offline media measured (television, radio, print and out-of-home). Formula: \[
\frac{\text{MEDIUM'S SPEND}}{\text{OOH SPEND + RADIO SPEND + NEWSPAPER/MAGAZINE SPEND + TELEVISION SPEND}}\] |
| Spend Vs. Activation Share Index | Illustrates the relationship between the spend share for a medium and the share of activations it generates. Formula: \[
\frac{\text{ACTIVATION SHARE}}{\text{SPEND SHARE}} \times 100\]                                                      |
| Twitter Activations         | Percentage of the U.S. population age 18 or older who posted a message on Twitter after seeing or hearing something advertised on an offline medium in the past six months. |
Significant Highlights

Part I: National Survey

- Out-of-home media delivers more online activity per ad dollar spent compared to television, radio and print (newspapers and magazines). The online activations including search, Facebook and Twitter activity generated by out-of-home advertising indexes at nearly three times the rate we would expect given its relative ad spend. For example, outdoor media accounts for 17% of gross search activations generated by television, radio, print and out-of-home combined but it only accounts for 6% of the total combined advertising spend.

Part II: Rushmore Vote Campaign Results

- Well over half the visitors to RUSHMOREVOTE.COM accessed the website using a mobile device; 57% of site visitors used a mobile web browser on a smartphone or tablet to vote for the next face on Mount Rushmore.

- The Rushmore Vote campaign went viral. Nearly two-thirds of those who visited the polling website lived outside the four metro areas participating in the out-of-home advertising campaign.

- People living in the markets where they had an opportunity to see the Rushmore Vote ads were nearly three times as likely to use a search engine to find the polling site. Roughly one-third of website visitors in the four test markets found the site using unpaid search compared to only 13% of those in the rest of the country.

- Facebook alone accounted for nearly 1 in 10 visitors to RUSHMOREVOTE.COM. Over one-third of website visitors arrived using links from another sites including blogs and social networks. Facebook was the top social media draw accounting for 9% of total site visitors. Close to 7,000 Facebook users saw content related to Rushmore Vote, even if they didn't go to the official website to vote; content was viewed either by personally visiting the fan page or seeing it in a friend's newsfeed.

- Even people who learned about the vote online still knew the campaign originated on billboards. Website visitors were asked where they learned about the Rushmore poll. Even though only 38% of visitors lived in a metro participating in the out-of-home ad schedule, three-quarters of website visitors (75%) credit roadside billboards or bus shelters for starting the campaign.
Key Findings: Part I

source: national survey

Out-of-Home Media and Online Activations

Nearly 3 in 10 U.S. residents age 18 or older (28%) have used Google, Bing or another Internet search engine to look up information after seeing or hearing something advertised on a billboard, bus shelter or other outdoor advertising in the past six months.

Over 1 in 10 U.S. adults (11%) have visited a Facebook page or posted a message on Facebook after seeing an out-of-home advertisement.

Only 3% of U.S. adults have posted a message on Twitter after seeing an out-of-home advertisement, but keep in mind, according to Arbitron’s 2013 Infinite Dial Study, only 13% of U.S. residents aged 18 or older have ever personally "Tweeted" (posted content to Twitter). Twitter activations are low, mostly because Twitter’s contributor base is still narrow.

TV, Radio, Print and Online Activations

Over half of U.S. adults (54%) have used Google, Bing or another search engine to respond to a commercial they saw on television in the past six months and nearly half (46%) have used search to look up information after seeing a newspaper or magazine ad.

Facebook activations in response to TV commercials in the past six months are roughly 1 in 5 (20%); radio has generated Facebook activity among 14% of U.S. adults.

Twitter response rates hover around 5% or less for all offline media measured.
**Delivering the Most Online Activations for the Dollar**

**Share of Ad Spend and Online Activations**

The total amount spent on out-of-home advertising in 2012 was $6.7 billion; that accounts for roughly 6% of the total offline media ad spend for television, radio, print and out-of-home combined.

*Source: OAAA, MagnaGlobal, Bureau of Labor Statistics, National Bureau of Economic Research*

<table>
<thead>
<tr>
<th></th>
<th>Ad Spend Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>Out-of-home ($6.7B)</td>
<td>6%</td>
</tr>
<tr>
<td>Television ($62.1B)</td>
<td>53%</td>
</tr>
<tr>
<td>Radio ($15.1B)</td>
<td>28%</td>
</tr>
<tr>
<td>Newspaper/Magazine ($32.7B)</td>
<td>13%</td>
</tr>
</tbody>
</table>

| Search Activation Share |
|---|---|
| Out-of-home | 17% |
| Television | 28% |
| Radio | 32% |
| Newspaper/Magazine | 23% |

Online activations can also be expressed as a share; for example:

As we reviewed in the previous section of this report, OOH ads generate a search response among 28% of U.S. adults during a six month period; TV's search ad response is 54%, radio is 39% and print is 46%. Therefore, OOH advertising's share of gross search activations is 17%.

The math is below…

<table>
<thead>
<tr>
<th>Facebook Activation Share</th>
<th>Twitter Activation Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>Out-of-home</td>
<td>18%</td>
</tr>
<tr>
<td>Television</td>
<td>32%</td>
</tr>
<tr>
<td>Radio</td>
<td>23%</td>
</tr>
<tr>
<td>Newspaper/Magazine</td>
<td>27%</td>
</tr>
</tbody>
</table>

\[
[28\% \text{ (OOH)} + 54\% \text{ (TV)} + 39\% \text{ (Radio)} + 46\% \text{ (Print)} = 167\% \text{ (Gross Search Activations)}] \\
28\% \text{ (OOH)} ÷ 167\% \text{ (Gross Search Activations)} = 17\% \text{ (OOH Search Activation Share)}]

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Online Activations Indexed Against Media Spend

If we index the relationship between the ad spend share for each medium and the share of online activations they generate, it becomes abundantly clear that **out-of-home media delivers substantially more online activity per ad dollar spent compared to other offline media.**

An index of 100 means the online activations generated by the medium is equal to the medium's portion of advertising spend (even line); an index above 100 means the medium over-delivers and under 100 means the medium's performance is relatively weak.

**Out-of-home advertising indexes for online activations at nearly three times the rate we would expect given its relative ad spend.** For example, out-of-home accounts for 17% of search activations but only 6% of the media ad spend; therefore OOH's search activation index is 294.

Here's the math…

$$[17\% \text{ (OOH Search Share)} \div 6\% \text{ (OOH Ad Spend Share)} \times 100 = 294]$$

<table>
<thead>
<tr>
<th></th>
<th>Search activations</th>
<th>Facebook activations</th>
<th>Twitter activations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Out-of-home</td>
<td>294</td>
<td>311</td>
<td>350</td>
</tr>
<tr>
<td>Television</td>
<td>61</td>
<td>61</td>
<td>63</td>
</tr>
<tr>
<td>Radio</td>
<td>98</td>
<td>98</td>
<td>95</td>
</tr>
<tr>
<td>Print</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

An index of 100 means the online activations generated by the medium is equal to the medium's portion of advertising spend (even line); an index above 100 means the medium over-delivers and under 100 means the medium's performance is relatively weak.
Key Findings: Part II
source: Rushmore Vote outdoor campaign

Project RUSHMORE at a Glance
The Rushmore Vote campaign used 164 bulletins, digital bulletins, posters and bus shelters across the four test metros of Cincinnati, Sacramento, San Antonio and Phoenix to attract nearly 16,000 unique visitors to the polling site RUSHMOREVOTE.COM, generate close to 18,000 separate user sessions and collect more than 11,000 votes for the next face to be added to Mt. Rushmore.

The polling site's URL address and a combination of social media cues helped drive online activations during the campaign's four week run.

The site's URL was excluded from the Phoenix creative to provide a control for the effects of including a website address as a copy point.

Point of Activation
Nearly 6 in 10 visitors (57%) to RUSHMOREVOTE.COM used a smartphone or tablet to access the site.

This finding underscores the relationship between out-of-home advertising and mobile devices; and makes a case for direct response messaging such as e-coupons and promotional codes.
From Local to National

RUSHMOREVOTE.COM received visitors from all 50 U.S. states. Nearly two-thirds (62%) of the traffic came from outside the four home metros for the campaign.

This result demonstrates the potential for out-of-home advertising to reach far beyond the local geographic area of the ad units.

The viral traffic was concentrated mostly in large metros or areas in relative proximity to where the out-of-home campaign ran. One notable exception is President Obama's home town of Honolulu.

Note: The website traffic metros are defined by Google Analytics and may differ from Arbitron defined metros.

Day by Day Results

The RUSHMOREVOTE.COM campaign officially began on March 4th and ended on March 29th. The website maintained a steady flow of approximately 570 visitors per day; spikes in traffic on certain days coincided with posts about the campaign on outside websites and blogs.
Web Traffic Onramp

The source of the website traffic to RUSHMOREVOTE.COM was tracked by metro markets and placed into one of three categories:

Search traffic (also known as Organic search) involved using a search engine such as Google to follow an unpaid search results link. The key words most commonly used were "Rushmore" and "Vote".

Direct traffic was generated by typing the exact phrase "rushmorevote.com" into the URL address line of a web browser.

Referral Traffic involved following a link found on another website including blogs and social media.

People living in the metros where they had an opportunity to see the out-of-home ads were nearly three times as likely to use a search engine to find the polling site. Roughly one-third of website visitors in the four test markets found the site using search compared to only 13% of those in the rest of the country.

The circumstances driving direct traffic to the website may have come from two sources. Those living in or near the metros displaying the URL "RUSHMOREVOTE.COM" remembered the simple address and typed it into their browser. Those located in or near metros that did not have signage may have learned about the campaign by seeing the full web address mentioned or pictured on blogs or social media.

Phoenix on the other hand, had the lowest composition of direct traffic and that may have stemmed from people learning about the voting through the outdoor ads and relying on search to get them to the polling site. Phoenix residents exposed to the campaign pitch without the URL address were most likely to arrive at the website through a referral link.
Over one-third of referral traffic (37%) across all the markets came from social networks and among the social network traffic, Facebook was by far the leader at 79%; that means that 9% of ALL traffic to RUSHMOREVOTE.COM came from Facebook.

Nearly 7,000 Facebook users saw content related to Rushmore Vote, even if they didn't go to the official website to vote; content was viewed either by personally visiting the fan page or seeing it in a friend's newsfeed.

<table>
<thead>
<tr>
<th>Referral Sources</th>
<th>Social Network Sources</th>
</tr>
</thead>
<tbody>
<tr>
<td>Social Networks</td>
<td>Facebook</td>
</tr>
<tr>
<td>Other websites or blogs</td>
<td>Reddit</td>
</tr>
<tr>
<td>63%</td>
<td>37%</td>
</tr>
<tr>
<td>3%</td>
<td>17%</td>
</tr>
<tr>
<td>1%</td>
<td></td>
</tr>
</tbody>
</table>

Out-of-home Credited for Campaign

Website visitors were asked where they learned about the Rushmore poll. Even though only 38% of visitors lived in a metro participating in the campaign, three-quarters (75%) of website visitors credit roadside billboards or bus shelters. The implication is even people who learned about the vote online still knew the campaign originated on outdoor billboards.
Appendix A

Who won?

In case you’re curious. Voters overwhelmingly agreed Mount Rushmore is fine just the way it is.

Appendix B

Creative Executions

NO URL
Facebook icon
Twitter icon

URL
Facebook icon
Twitter icon

Facebook fan page
Interactive pic upload

Twitter #tag
Tweet display

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About

Arbitron

Arbitron Inc. (NYSE: ARB) is an international media and marketing research firm serving the media—radio, television, cable and out-of-home; the mobile industry as well as advertising agencies and advertisers around the world. Arbitron's businesses include: measuring network and local market radio audiences across the United States; surveying the retail, media and product patterns of U.S. consumers; providing mobile audience measurement and analytics in the United States, Europe, Asia and Australia, and developing application software used for analyzing media audience and marketing information data.

The Company has developed the Portable People Meter™ (PPM™) and the PPM 360™, new technologies for media and marketing research.

Outdoor Advertising Association of America (OAAA)

OAAA is the national trade association for the out of home (OOH) advertising industry. Founded in 1891, the association represents more than 90 percent of the US industry based on revenues. OAAA is dedicated to leading and uniting a responsible OOH industry committed to serving advertisers, consumers, and communities.

*Information supplied by OAAA.

Contributors

Special thanks go to the following companies; this project would not have been possible without their participation and generosity:

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