March 2015

OOH and Today’s Mobile Consumer

Outdoor Advertising Association of America
OOH’S WEEKLY REACH OF 99% TOPS EVERY OTHER MEDIUM

<table>
<thead>
<tr>
<th>Type</th>
<th>% of Population Reached</th>
</tr>
</thead>
<tbody>
<tr>
<td>Any OOH Media</td>
<td>99%</td>
</tr>
<tr>
<td>Television</td>
<td>96%</td>
</tr>
<tr>
<td>AM/FM Radio</td>
<td>69%</td>
</tr>
<tr>
<td>Print Newspaper</td>
<td>15%</td>
</tr>
<tr>
<td>Computer</td>
<td>84%</td>
</tr>
<tr>
<td>Mobile/Tablet/eReader</td>
<td>75%</td>
</tr>
</tbody>
</table>

Source: USA TouchPoints, 2014.1
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CONSUMERS SPEND 19.6 HOURS PER WEEK WITH OOH – HIGHER THAN ANY MEDIUM OTHER THAN TV

Weekly Hours per User

- Any OOH Media: 19.6
- Television: 25.9
- AM/FM Radio: 9.1
- Print Newspaper: 2.2
- Computer: 14.9
- Mobile/Tablet/eReader: 7.6

Source: USA TouchPoints, 2014.1
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OOH REACHES CONSUMERS IN THE HOUR BEFORE 57% OF QSR VISITS

Exposure by medium hour before QSR visits

- Any OOH Media: 57%
- Place Based: 20%
- Billboards/Transit/Street Furniture: 48%
- Television: 15%
- AM/FM Radio: 16%
- Print Newspaper: 2%
- Computer: 15%
- Mobile/Tablet/eReader: 15%

Source: USA TouchPoints, 2014.1
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OOH REACHES CONSUMERS IN THE HOUR BEFORE 91% OF SHOPPING MALL VISITS

Exposure by medium hour before mall visits
(includes in-mall exposure prior to specific store shopping)

- Any OOH Media: 91%
- Place Based: 71%
- Billboards/Transit/Street Furniture: 53%
- Television: 14%
- AM/FM Radio: 18%
- Print Newspaper: 5%
- Computer: 6%
- Mobile/Tablet/eReader: 17%

Source: USA TouchPoints, 2014.1
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CONSUMERS REPORT “ACTION” RESPONSES IN THE SAME HALF-HOUR AS 22% OF OOH EXPOSURES

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

Source: USA TouchPoints, 2014.1
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CONSUMERS REPORT “FEELING” RESPONSES IN THE SAME HALF-HOUR AS 82% OF OOH EXPOSURES

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

Source: USA TouchPoints, 2014.1
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CONSUMERS AT AIRPORTS REPORT ACTION RESPONSES DURING 39% OF VISITS AND FEELING RESPONSES DURING 86% OF VISITS

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

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

Source: USA TouchPoints, 2014.1
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BUS/SUBWAY/TRAIN RIDERS REPORT ACTION RESPONSES DURING 10% OF EXPOSURES AND FEELING RESPONSES DURING 71% OF EXPOSURES

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

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

Weekly Reach
- 11% of Population
- 10% of Exposures

Feeling
- 71% of Exposures

Source: USA TouchPoints, 2014.1
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OOH reaches consumers in the same half-hour as 23% of online mobile activity, more than any other traditional medium.
OOH REACHES CONSUMERS IN THE SAME HALF-HOUR AS 42% OF ONLINE SHOPPING ACTIVITY ON MOBILE
OOH REACHES CONSUMERS IN THE HOUR BEFORE 43% OF MOBILE SHOPPING ACTIVITY

Exposure by medium hour before mobile shopping activity

- Any OOH Media: 43%
- Place Based: 23%
- Billboards/Transit/Street Furniture: 36%
- Television: 27%
- AM/FM Radio: 12%
- Print Newspaper: 3%

Source: USA TouchPoints, 2014.1
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OOH REACHES CONSUMERS IN THE HOUR BEFORE 32% OF ALL MOBILE SEARCH ACTIVITY

Exposure by medium hour before mobile search activity

- Any OOH Media: 32%
- Place Based: 15%
- Billboards/Transit/Street Furniture: 25%
- Television: 26%
- AM/FM Radio: 9%
- Print Newspaper: 2%

Source: USA TouchPoints, 2014.1
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OOH REACHES CONSUMERS IN THE HOUR BEFORE 28% OF MOBILE SOCIAL ACTIVITY

Exposure by medium hour before mobile social media activity

- Any OOH Media: 28%
- Place Based: 10%
- Billboards/Transit/Street Furniture: 23%
- Television: 27%
- AM/FM Radio: 8%
- Print Newspaper: 1%

Source: USA TouchPoints, 2014.1
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OOH REACHES CONSUMERS IN THE HOUR BEFORE 34% OF BRAND-RELATED SOCIAL MEDIA ACTIVITY

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

*Location-based services (checking in) or interacting with brands, products, services, celebrities, personalities, fan pages, non-profits, charities, or cause-driven organizations

- Any OOH Media: 34%
- Place Based: 20%
- Billboards/Transit/Street Furniture: 31%
- Television: 34%
- AM/FM Radio: 15%
- Print Newspaper: 7%

Source: USA TouchPoints, 2014.1
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CONSUMERS REPORT POSITIVE EMOTIONS IN THE SAME HALF-HOUR AS 49% OF OOH EXPOSURES

Source: USA TouchPoints, 2014.1
© 2015 RealityMine
CONSUMERS REPORT ALERTNESS IN THE SAME HALF-HOUR AS 52% OF OOH EXPOSURES

Source: USA TouchPoints, 2014.1
© 2015 RealityMine
OOH REACHES CONSUMERS IN THE SAME HALF-HOUR AS 96% OF IN-STORE SHOPPING ACTIVITY

Exposure by medium during in-store shopping activity

- Any OOH Media: 96%
- Place Based: 77%
- Billboards/Transit/Street Furniture: 43%
- Television: 2%
- AM/FM Radio: 10%
- Print Newspaper: 1%
- Computer: 1%
- Mobile/Tablet/eReader: 7%
OOH REACHES CONSUMERS IN THE SAME HALF-HOUR AS 68% OF PURCHASE ACTIVITY

Exposure by medium during purchase activity

- Any OOH Media: 68%
- Place Based: 46%
- Billboards/Transit/Street Furniture: 34%
- Television: 6%
- AM/FM Radio: 9%
-Print Newspaper: 0%
- Computer: 9%
- Mobile/Tablet/eReader: 8%

Source: USA TouchPoints, 2014.1
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OOH reaches consumers in the same half-hour as 43% of path to purchase activities.

Exposure by medium during any path to purchase* activity
*giving/seeking purchase recommendation, purchase consideration, purchase decision, or purchase made

Any OOH Media: 43%
Television: 12%
AM/FM Radio: 8%
Print Newspaper: 1%
Computer: 16%
Mobile/Tablet/eReader: 10%
OOH REACHES CONSUMERS IN THE HOUR BEFORE 29% OF PURCHASE RECOMMENDATIONS

Exposure by medium hour before giving/seeking purchase recommendation

<table>
<thead>
<tr>
<th>Medium</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Any OOH Media</td>
<td>29%</td>
</tr>
<tr>
<td>Television</td>
<td>12%</td>
</tr>
<tr>
<td>AM/FM Radio</td>
<td>23%</td>
</tr>
<tr>
<td>Print Newspaper</td>
<td>25%</td>
</tr>
<tr>
<td>Computer</td>
<td>14%</td>
</tr>
<tr>
<td>Mobile/Tablet/eReader</td>
<td>1%</td>
</tr>
</tbody>
</table>

Source: USA TouchPoints, 2014.1 © 2015 RealityMine
OOH OUTPERFORMS TRADITIONAL MEDIA IN REACHING CONSUMERS IN THE SAME HALF-HOUR THEY CONSIDER PURCHASES, DECIDE ON PURCHASES, AND MAKE PURCHASES

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

- Giving/Seeking Purchase Recommendation: Any OOH Media 19%, Television 9%, AM/FM Radio 7%, Print Newspaper 1%
- Purchase Consideration: Any OOH Media 21%, Television 16%, AM/FM Radio 7%, Print Newspaper 0%
- Purchase Decision: Any OOH Media 30%, Television 16%, AM/FM Radio 7%, Print Newspaper 0%
- Purchase Made: Any OOH Media 68%, Television 9%, AM/FM Radio 6%, Print Newspaper 0%

Source: USA TouchPoints, 2014.1
© 2015 RealityMine
OOH OUTPERFORMS ONLINE MEDIA IN REACHING CONSUMERS IN THE SAME HALF-HOUR THEY CONSIDER PURCHASES, DECIDE ON PURCHASES, AND MAKE PURCHASES

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

Source: USA TouchPoints, 2014.1
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OOH OUTPERFORMS TRADITIONAL MEDIA IN REACHING CONSUMERS IN THE SAME HALF-HOUR THEY CONSIDER PURCHASES AND MAKE PURCHASES IN THE AUTOMOTIVE CATEGORY

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

- Any OOH Media
- Television
- AM/FM Radio
- Print Newspaper

Source: USA TouchPoints, 2014.1
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Exposure by medium during Automotive path to purchase activities: OOH & online media comparison

- Purchase Consideration:
  - Any OOH Media: 29%
  - Computer: 14%
  - Mobile/Tablet/eReader: 10%

- Purchase Decision:
  - Any OOH Media: 25%
  - Computer: 12%
  - Mobile/Tablet/eReader: 10%

- Purchase Made:
  - Any OOH Media: 48%
  - Computer: 7%
  - Mobile/Tablet/eReader: 7%

Source: USA TouchPoints, 2014.1
© 2015 RealityMine
OOH OUTPERFORMS TRADITIONAL MEDIA IN REACHING CONSUMERS IN THE SAME HALF-HOUR THEY CONSIDER PURCHASES, DECIDE ON PURCHASES, AND MAKE PURCHASES IN THE FASHION & APPAREL CATEGORY.

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

- Any OOH Media
- Television
- AM/FM Radio
- Print Newspaper

Source: USA TouchPoints, 2014.1
© 2015 RealityMine
OOH OUTPERFORMS ONLINE MEDIA IN REACHING CONSUMERS IN THE SAME HALF-HOUR THEY CONSIDER PURCHASES, DECIDE ON PURCHASES, AND MAKE PURCHASES IN THE FASHION & APPAREL CATEGORY

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

- **Any OOH Media**
  - Purchase Consideration: 28%
  - Purchase Decision: 33%
  - Purchase Made: 60%

- **Computer**
  - Purchase Consideration: 22%
  - Purchase Decision: 22%
  - Purchase Made: 17%

- **Mobile/Tablet/eReader**
  - Purchase Consideration: 17%
  - Purchase Decision: 14%
  - Purchase Made: 13%

Source: USA TouchPoints, 2014.1
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OOH OUTPERFORMS TRADITIONAL MEDIA IN REACHING CONSUMERS IN THE SAME HALF-HOUR THEY CONSIDER PURCHASES, DECIDE ON PURCHASES, AND MAKE PURCHASES IN THE FAST FOOD CATEGORY

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

Source: USA TouchPoints, 2014.1
© 2015 RealityMine
OOH OUTPERFORMS ONLINE MEDIA IN REACHING CONSUMERS IN THE SAME HALF-HOUR THEY CONSIDER PURCHASES, DECIDE ON PURCHASES, AND MAKE PURCHASES IN THE FAST FOOD CATEGORY

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

Source: USA TouchPoints, 2014.1
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OOH OUTPERFORMS TRADITIONAL MEDIA IN REACHING CONSUMERS IN THE SAME HALF-HOUR THEY CONSIDER PURCHASES, DECIDE ON PURCHASES, AND MAKE PURCHASES IN THE MOBILE/CELLULAR SERVICE CATEGORY

Exposure by medium during Mobile/Cellular Service path to purchase activities: OOH & traditional media comparison

- Any OOH Media
- Television
- AM/FM Radio
- Print Newspaper

Source: USA TouchPoints, 2014.1
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OOH OUTPERFORMS ONLINE MEDIA IN REACHING CONSUMERS IN THE SAME HALF-HOUR THEY CONSIDER PURCHASES AND DECIDE ON PURCHASES IN THE MOBILE/CELLULAR SERVICE CATEGORY

Exposure by medium during Mobile/Cellular Service path to purchase activities: OOH & online media comparison

- **Purchase Consideration**
  - Any OOH Media: 28%
  - Computer: 24%
  - Mobile/Tablet/eReader: 15%

- **Purchase Decision**
  - Any OOH Media: 25%
  - Computer: 19%
  - Mobile/Tablet/eReader: 17%

- **Purchase Made**
  - Any OOH Media: 28%
  - Computer: 27%
  - Mobile/Tablet/eReader: 22%

Source: USA TouchPoints, 2014.1
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Methodology & Terminology

- Data is drawn from USA TouchPoints release 2014.1, which includes the following data:
  - Sample of 1837 panelists participating for seven days
  - Location, mode of transport, activity media behavior, purchase behavior, and emotional context were collected via smartphone eDiary at each half-hour throughout the day
  - Results are projected to the US A18-64 population, excluding unacculturated Hispanics, via data fusion with the Fall 2013 release of MRI’s Survey of the American Consumer.
- “exposures”, “activity”, “visits”, “occasions” mean total half-hour periods in which the location/medium/activity/emotion was reported during the survey week
- “during” and “same half-hour” mean that the locations/media/activities/emotions were both reported at any point within the same half-hour period
- “before” and “previous hour” mean that one location/medium/activity/emotion was reported in either of the two half-hour periods before the half-hour period in which the other was reported
- Exposures for computer, mobile, and tablet/eReader are limited to online activities: email/web on computer, and email/web/apps on mobile/tablet/eReader
- OOH media is defined using eDairy locations, activities, and mode of transport according to the definitions on the following page
## OOH Media Definitions

### Any OOH Media

<table>
<thead>
<tr>
<th>Activity</th>
<th>Entertainment (movie, concert or sporting event)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location</td>
<td>Airport</td>
</tr>
<tr>
<td>Location</td>
<td>Car or other traveling</td>
</tr>
<tr>
<td>Location</td>
<td>Convenience store</td>
</tr>
<tr>
<td>Location</td>
<td>Grocery store</td>
</tr>
<tr>
<td>Location</td>
<td>Gym or health club</td>
</tr>
<tr>
<td>Location</td>
<td>Mall</td>
</tr>
<tr>
<td>Location</td>
<td>Medical Facility</td>
</tr>
<tr>
<td>Location</td>
<td>Office Elevator</td>
</tr>
<tr>
<td>Location</td>
<td>Other store</td>
</tr>
<tr>
<td>Location</td>
<td>Outdoors away from home</td>
</tr>
<tr>
<td>Location</td>
<td>Restaurant or bar</td>
</tr>
</tbody>
</table>

### Place Based

<table>
<thead>
<tr>
<th>Activity</th>
<th>Entertainment (movie, concert or sporting event)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location</td>
<td>Convenience store</td>
</tr>
<tr>
<td>Location</td>
<td>Grocery store</td>
</tr>
<tr>
<td>Location</td>
<td>Gym or health club</td>
</tr>
<tr>
<td>Location</td>
<td>Mall</td>
</tr>
<tr>
<td>Location</td>
<td>Medical Facility</td>
</tr>
<tr>
<td>Location</td>
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</tr>
<tr>
<td>Location</td>
<td>Other store</td>
</tr>
<tr>
<td>Location</td>
<td>Restaurant or bar</td>
</tr>
</tbody>
</table>

### Billboards/Transit/Street Furniture

<table>
<thead>
<tr>
<th>Mode of Transport</th>
<th>Airport</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mode of Transport</td>
<td>Outdoors away from home</td>
</tr>
<tr>
<td>Mode of Transport</td>
<td>Bicycle</td>
</tr>
<tr>
<td>Mode of Transport</td>
<td>Bus, subway, or train</td>
</tr>
<tr>
<td>Mode of Transport</td>
<td>Car or SUV</td>
</tr>
<tr>
<td>Mode of Transport</td>
<td>Motorcycle</td>
</tr>
<tr>
<td>Mode of Transport</td>
<td>Taxi</td>
</tr>
<tr>
<td>Mode of Transport</td>
<td>Truck</td>
</tr>
<tr>
<td>Mode of Transport</td>
<td>Walking</td>
</tr>
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</table>