What is USA TouchPoints?

- Rich multidimensional study of consumers’ daily lives
- Captures behavior in real time, on a smartphone, helping marketers identify contextual factors that impact message receptivity
- High quality measurement of all media from a single sample
- Identifies the sequence of media exposure in the full context of daily lives
- Innovative foundation for fusing other data sources
USA TouchPoints Syndicated Study Methodology

Ascribed to 21,000+ respondents of GfK MRI’s Survey of the American Consumer™

**Recruitment & Training**
- National probability sample of 2,000 adults 18-64 from GfK MRI Sample
- Training call scheduled within 24 hours of recruitment

**Survey**
- Participants: Entries collected over 10 days

**After the Survey**
- Administration: Performance rates checked, participant compliance ensured (calls made to participants if needed), monitoring flags analyzed
- Data Editing Rules Applied
- Incentive, Thank Yous
- GfK MRI Respondents
  - USA TouchPoints® Diary

Training call scheduled within 24 hours of recruitment
What’s Measured?

Data Is Captured Every 30 Minutes Over 10 Days

Where
Activities
With Whom
Media
Emotions
Key Benefits of USA TouchPoints

Opportunity to increase advertising ROI by placing ads when and where consumers are likely to be receptive to the message …

In the right mood, with the right people, doing the right things, in the right place
While Consumers Are Away From Home, They’re Also Doing Things That Are Critical To Marketers

- They’re **Using Media And Being Reached By Messages**
- They’re **Socializing And Influencing Other People**
- They’re **Shopping and Making Purchasing Decisions**
The Importance Of Being Away From Home To Consumers’ Lives
‘Away From Home’
Consumer Definitions

**Traveling**
- Car or truck
- Motorcycle
- Airport
- Airplane
- Bicycle
- Walking

**Food Service**
- Quick service restaurant
- Restaurant or bar

**Outside**
- Outdoors away from home

**Retail**
- Grocery store
- Other store or mall

**Public Transportation**
- Bus
- Subway or train
- Boat or ferry

**Gym**
- Gym or health club
Most Americans interact every day with ‘away from home’ places & vehicles…
Americans Are ‘Away From Home’

Average Day

86%

Away From Home *

A18-64
Reported time: 6AM-12AM
*Also includes ‘Away From My Workplace’
‘Away From Home’ Has A Large Impact on Consumers’ Days

On the average day, you can reach 80% of consumers

A18-64
Reported time: 6AM-12AM
*Also includes ‘Away From My Workplace’
Peak Time for ‘Away From Home’ Is During the Afternoon

Away From Home* By Time Of Day

*Also includes ‘Away From My Workplace’
Different Demo Groups Have Similar Patterns For When They’re ‘Away From Home’

While Away From Home* By Time of Day

*Also includes ‘Away From My Workplace’
Americans Are ‘Away From Home’ on Weekday And Weekend a Similar Degree

Away From Home*

<table>
<thead>
<tr>
<th></th>
<th>Weekday</th>
<th>Weekend</th>
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</thead>
<tbody>
<tr>
<td>Reach (%)</td>
<td>88%</td>
<td>82%</td>
</tr>
</tbody>
</table>

A18-64
Reported time: 6AM-12AM
*Also includes ‘Away From My Workplace’
‘Away From Home’ Patterns Vary Dramatically On The Weekdays And Weekends

Away From Home* By Time Of Day - Weekday

Away From Home* By Time Of Day - Weekend

*Also includes ‘Away From My Workplace’
Afternoon Is The Peak For ‘Away From Home’ On Both Weekdays And Weekends

Away From Home* By Time Of Day

- **Weekday**
- **Weekend**

* Away From Home: represents also ‘Away From My Workplace’
Most Americans interact every day with ‘away from home’ places & vehicles…

… and their ‘away from home’ opportunities vary by Place…
Consumer Definitions Of ‘Away From Home’

**Traveling**
- Car or truck
- Motorcycle
- Airport
- Airplane
- Bicycle
- Walking

**Food Service**
- Quick service restaurant
- Restaurant or bar

**Outside**
- Outdoors away from home

**Retail**
- Grocery store
- Other store or mall

**Public Transportation**
- Bus
- Subway or train
- Boat or ferry

**Gym**
- Gym or health club
Travel Dominates ‘Away From Home’ Experiences

Share of Consumers Away From Home*
- Public Transport: 2%
- Gym: 4%
- Outside: 11%
- Food Service: 16%
- Retail: 19%
- Traveling: 48%

Share of Time Away From Home*
- Public Transport: 2%
- Gym: 3%
- Food Service: 10%
- Outside: 10%
- Retail: 13%
- Traveling: 62%

A18-64
Reported time: 6AM-12AM

*Also includes ‘Away From My Workplace’
Different Places Have Different Reach By Demographic

Away From Home* by Demo

Reported time: 6AM-12AM

*Also includes ‘Away From My Workplace’
**On Weekends, ‘Away From Home’ Experiences Shift**

### Total Away From Home*

- **Weekday**: 90
- **Weekend**: 60

### Away From Home* Weekdays vs. Weekends

- **Traveling**: -9%
- **Retail**: +16%
- **Food Service**: +10%
- **Outside**: +27%

*Also includes ‘Away From My Workplace’

**A18-64**

Reported time: 6AM-12AM
While ‘Away From Home’, There Are Distinct Primetimes To Different Places
While ‘Away From Home’, There Are Distinct Primetimes To Different Places

The staggered nature of Primetimes suggests multiple placements are most effective for maximum consumer exposure.
Travel Opportunities Have Four Peaks On The Average Day

“Four Prime Times”

[Graph showing the time of day with peaks at 6A-10A, 10A-3P, 3P-7P, and 7P-12A]
Outside And Public Transportation Opportunities Have Distinct Primetimes
Mid-Day Is Retail Primetime; Gym Peaks Slightly Mid-Morning And After Work
Unsurprisingly, Food Service Primetime Is Lunch/Dinner

![Graph showing average daily reach (%) by time slot for A18-64 group.]

- 6A-10A
- 10A-3P
- 3P-7P
- 7P-12A

Legend:
- Purple line: Food Service
Most Americans interact every day with ‘away from home’ places & vehicles…

... and their ‘away from home’ opportunities vary by place...

...offering valuable proximity to important consumer activities
While Consumers Are ‘Away From Home’, They’re Also Doing Things That Are Critical To Marketers

They’re Using Media And Being Reached By Messages

They’re Socializing And Influencing Others

They’re Shopping and Making Purchasing Decisions
Media Use, Socializing, And Shopping Are The Most Common Consumers’ Activities While ‘Away From Home’

% of People Engaged In Other Activities While Away From Home*

* Away From Home: represents also ‘Away From My Workplace’

A18-64
Reported time: 6AM-12AM
Media Use, Socializing, And Shopping While ‘Away From Home’ Have Different Time of Day Patterns

![Graph showing time of day patterns for media use, socializing, and shopping away from home.]

- Red line: Using media Away From Home
- Green line: Socializing Away From Home
- Purple line: Shopping Away From Home

A18-64
OOH Marketplace Opportunities
OOH Marketplace

- Scale
- Impact
- Creativity
- Targeting

Effectively and efficiently surround your audience
Variety of vehicles increases options
Strategic alignment whether in primary or secondary role with other media
Stronger emotional touchpoint to messaging
Marketplace Definitions Of OOH

**Billboards**
- Car or truck (driver)
- Car or truck (passenger)
- Outside away from home
- Motorcycle

**Transit**
- Walking
- Bus
- Subway or train
- Bicycle
- Boat or ferry
- Airport
- Airplane
- Car or Truck

**Alternative**
- Quick service restaurant
- Restaurant or bar
- Gym or health club
- Grocery store
- Hotel or motel

**Street Furniture**
- Bus
- Walking
- Other store or mall
Consumer Are Exposed To A Variety Of ‘Away From Home’ Places
OOH Media Average-Day Potential Reach

A18-64
Reported time: 6AM-12AM

<table>
<thead>
<tr>
<th>Medium</th>
<th>Weekday</th>
<th>Weekend</th>
</tr>
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<tbody>
<tr>
<td>Billboards</td>
<td>83</td>
<td>84</td>
</tr>
<tr>
<td>Alternative</td>
<td>42</td>
<td>41</td>
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<tr>
<td>Transit</td>
<td>82</td>
<td>44</td>
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<tr>
<td>Street Furniture</td>
<td>28</td>
<td>77</td>
</tr>
</tbody>
</table>

Reported time: 6AM-12AM
OOH Potential Media Opportunities Can Supercharge Media Plans
Adding OOH To Other Media Can Potentially Increases Reach By Up To 300%
Adding Billboards To Other Media Can Potentially Increases Reach By Up To 300%
TV And Billboards Impacts Reach Throughout The Day

Billboards + Live TV

<table>
<thead>
<tr>
<th>Time</th>
<th>Billboards</th>
<th>Live TV</th>
<th>Billboards + Live TV</th>
</tr>
</thead>
<tbody>
<tr>
<td>6AM</td>
<td></td>
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<td>11PM</td>
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</tbody>
</table>

A18-64
Billboards And Internet Together More Than Double Afternoon Reach
Adding Billboards to Mobile App/Web Increases Reach by 300%
Adding Billboards to Social Networking Increases Reach by 200%
Billboards And Radio Increases Afternoon Reach By 70%
Strategic Addition of Alternative To Other Media Can Potentially Increase Exposure By Up To 148%
Adding Alternative To Live TV Increases Exposure
Alternative Adds 30% Reach To Internet

Average Day Reach (%)

A18-64

Alternative
Internet
Alternative + Internet

6AM 7AM 8AM 9AM 10AM 11AM 12PM 1PM 2PM 3PM 4PM 5PM 6PM 7PM 8PM 9PM 10PM 11PM

USA TouchPoints®
Alternative Supplements Flat Media
Reach Throughout The Day

Alternative + Mobile

Avg. Day Reach (%)

6AM 7AM 8AM 9AM 10AM 11AM 12PM 1PM 2PM 3PM 4PM 5PM 6PM 7PM 8PM 9PM 10PM 11PM

A18-64
Alternative Supplements Flat Media
Reach Throughout The Day

**Alternative + Social Networking**

![Graph showing reach throughout the day for Alternative and Social Networking combined.](image)

- **Y-axis:** Avg. Day Reach (%)
- **X-axis:** Time of Day (6AM to 11PM)

Legend:
- **Dashed Blue Line:** Alternative
- **Dotted Brown Line:** Social Networking
- **-solid Blue Line:** Alternative + Social Networking

**A18-64**
Alternative Adds 20% Reach To Radio

Alternative + Radio

A18-64

Avg. Day Reach (%)

6AM 7AM 8AM 9AM 10AM 11AM 12PM 1PM 2PM 3PM 4PM 5PM 6PM 7PM 8PM 9PM 10PM 11PM

Alternative
Radio
Alternative + Radio
## Adding Transit To Other Media Increases Reach

<table>
<thead>
<tr>
<th>Media</th>
<th>Avg. Day Reach (%)</th>
<th>Increase (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transit*</td>
<td>80</td>
<td></td>
</tr>
<tr>
<td>Live TV</td>
<td>80</td>
<td></td>
</tr>
<tr>
<td>Transit* + Live TV</td>
<td>80 + 17%</td>
<td>17%</td>
</tr>
<tr>
<td>Internet</td>
<td>60</td>
<td>+64%</td>
</tr>
<tr>
<td>Transit* + Internet</td>
<td>60 + 64%</td>
<td>+298%</td>
</tr>
<tr>
<td>Mobile App/Web</td>
<td>40</td>
<td>+200%</td>
</tr>
<tr>
<td>Transit* + Mobile App/Web</td>
<td>40 + 200%</td>
<td>+41%</td>
</tr>
</tbody>
</table>

*Source: USA TouchPoints®*
Adding Transit To Live TV Increases Exposure

Transit + Live TV

Avg. Day Reach (%)

6AM 7AM 8AM 9AM 10AM 11AM 12PM 1PM 2PM 3PM 4PM 5PM 6PM 7PM 8PM 9PM 10PM 11PM

A18-64

Transit
Live TV
Transit + Live TV
Adding Transit To Internet Increases Exposure

Transit + Internet

- Transit
- Internet
- Transit + Internet

Avg. Day Reach (%)

6AM 7AM 8AM 9AM 10AM 11AM 12PM 1PM 2PM 3PM 4PM 5PM 6PM 7PM 8PM 9PM 10PM 11PM

A18-64

Reach (%)
Transit Adds Almost 300% Reach To Mobile App/Web

Transit + Mobile App/Web

Avg. Day Reach (%)
Transit Adds 200% Reach To Social Networking

Transit + Social Networking

![Graph showing the average daily reach of transit, social networking, and transit + social networking across different times of the day.]
Adding Transit To Radio Increases Exposure

Transit + Radio

Avg. Day Reach (%)

6AM 7AM 8AM 9AM 10AM 11AM 12PM 1PM 2PM 3PM 4PM 5PM 6PM 7PM 8PM 9PM 10PM 11PM

A18-64
Adding Street Furniture To Other Media Can Potentially Increase Reach By Almost 100%

A18-64
Reported time: 6AM-12AM
Adding Street Furniture To Live TV Increases Exposure

Street Furniture + Live TV

Avg. Day Reach (%)

6AM 7AM 8AM 9AM 10AM 11AM 12PM 1PM 2PM 3PM 4PM 5PM 6PM 7PM 8PM 9PM 10PM 11PM

A18-64
Street Furniture Adds Over 20% Reach To Internet
Street Furniture Almost Doubles the Reach To Internet

Street Furniture + Mobile App/Web

<table>
<thead>
<tr>
<th>Time</th>
<th>Street Furniture</th>
<th>Mobile App/Web</th>
<th>Street Furniture + Mobile App/Web</th>
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<td>11PM</td>
<td>34</td>
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</tr>
</tbody>
</table>
Street Furniture Compliments
Social Networking Reach

Street Furniture + Social Networking

Avg. Day Reach (%)

Street Furniture
Social Networking
Street Furniture + Social Networking

A18-64
Street Furniture Adds Over 15% Reach To Radio

Street Furniture + Radio

Avg. Day Reach (%)

6AM 7AM 8AM 9AM 10AM 11AM 12PM 1PM 2PM 3PM 4PM 5PM 6PM 7PM 8PM 9PM 10PM 11PM

A18-64

- Street Furniture
- Radio
- Street Furniture + Radio
Consumers Experience OOH Media In Very Positive Mindsets
Emotional Index Of OOH Audiences To Live TV

% of OOH Audience Index to TV

- Happy
- Relieved
- Confident
- Bored
- Angry

A18-64
Reported time: 6AM-12AM
Emotional Index Of OOH Audiences To Radio

% of OOH Audience Index to Radio

A18-64
Reported time: 6AM-12AM
A Higher Percentage Of Billboard Audiences Feel Positive Compared To Live TV Audiences

15% of Live TV Audiences are Bored – only 9% of Billboard audiences are!
Emotional Index Of Billboard Audiences To Live TV

% of Billboard Audience Index to TV

Index To Live TV

- Excited
- Confident
- Happy
- Sad
- Bored

A18-64
Reported time: 6AM-12AM
Billboards Have Higher Percentage Of Its Audience Feeling Happy Than Radio

68% of Radio Audiences are Happy while 72% of Billboards Audiences are Happy

A18-64
Reported time: 6AM-12AM
Emotional Index Of Billboard Audiences To Radio

% of Billboard Audience Index to Radio

Index To Radio

- Loving
  - Excited
  - Relieved
- Hopeful
  - Happy
  - Confident
- Bored

A18-64
Reported time: 6AM-12AM
Alternative Has Far Fewer Percent Of Its Audience Feeling Negative Than Live TV

Only 5% of Alternative audiences are bored vs. 15% of Live TV audiences who feel the same way.

A18-64
Reported time: 6AM-12AM
Emotional Index Of Alternative Audiences To Live TV

% of Alternative Audience Index to TV

Index To Live TV

- Frustrated
- Overwhelmed
- Worried
- Angry
- Bored
- Sad

A18-64
Reported time: 6AM-12AM
Alternative Audience Is Also Less Negative Than Radio Audience

Only 8% of Alternative audiences are frustrated vs. 16% of Radio audiences who feel the same way.

A18-64
Reported time: 6AM-12AM
Emotional Index Of Alternative Audiences To Radio

% of Alternative Audience Index to Radio

Index To Radio

- Happy
- Overwhelmed
- Worried
- Angry
- Bored
- Frustrated
- Sad

A18-64
Reported time: 6AM-12AM
Fewer Transit Audiences Are Frustrated And Bored Than Live TV Audiences

14% of Live TV Audiences feel frustrated compared to 10% of Transit Audiences

Reported time: 6AM-12AM
Emotional Index Of Transit Audiences To Live TV

% of Transit Audience Index to TV

Index To Live TV

- Confident
- Angry
- Overwhelmed
- Sad
- Frustrated
- Bored

A18-64
Reported time: 6AM-12AM
Fewer Transit Audiences Are Frustrated And Bored Than Radio Audiences

16% of Radio Audiences feel frustrated; 11% of Transit

A18-64
Reported time: 6AM-12AM
Emotional Index Of Transit Audiences To Radio

% of Transit Audience Index to Radio

Index To Radio

- Loving
- Relieved
- Overwhelmed
- Frustrated

A18-64
Reported time: 6AM-12AM
Street Furniture Audiences Are Far Less Bored Than Live TV Audiences

Only 6% of Street Furniture audiences are Bored vs. 15% of Live TV audiences who feel the same way.
Emotional Index Of Street Furniture Audiences To Live TV

% of Street Furniture Audience Index to TV

Index To Live TV

Overwhelmed
Frustrated
Angry
Worried
Sad
Bored

A18-64
Reported time: 6AM-12AM
Street Furniture Audiences Are Far Less Bored Than Radio Audiences

Only 6% of Street Furniture audiences are Bored vs. 8% of Radio audiences who feel the same way.

Reported time: 6AM-12AM
Emotional Index Of Street Furniture Audiences To Radio

% of Street Furniture Audience Index to Radio

Index To Radio

Angry

Overwhelmed

Worried

Frustrated

Sad

Bored

A18-64
Reported time: 6AM-12AM
OOH Offers Strategic Cross-Platform And Promotional Opportunity With Other Media Within The Same Half-hour
OOH Media Are Strategic Additions To Radio And Mobile To Complement Messaging

% of OOH Audience Also Using Other Media In the Same Half-hour

- **Radio**: 61%
- **Mobile Talk**: 29%
- **Mobile Text/App/Web**: 22%
- **Live TV**: 18%
- **Emails**: 11%
- **Internet**: 9%

Reported time: 6AM-12AM

Note: The US Census Bureau estimates that the average commute time is 25.1 minutes.
Billboards Are Strategic Additions To Radio And Mobile To Complement Messaging

% of Billboards Audience Also Using Other Media In the Same Half-hour

- Radio: 63%
- Mobile Talk: 28%
- Mobile Text/App/Web: 20%
- Live TV: 14%
- Emails: 9%
- Internet: 8%

A18-64
Reported time: 6AM-12AM

Note: The US Census Bureau estimates that the average commute time is 25.1 minutes.
Increase Of Mobile Usage Within The Same Half-hour For The Younger Group

% of Billboards Audience Also Using Other Media In the Same Half-hour

- Radio: 56%
- Mobile Talk: 31%
- Mobile Text/App/Web: 31%
- Live TV: 12%
- Emails: 10%
- Internet: 9%

A18-34
Reported time: 6AM-12AM

Note: The US Census Bureau estimates that the average commute time is 25.1 minutes.
Radio And Mobile Are Used Most Commonly Within The Same Half-hour While Consumers Are Exposed To Billboards

Reported time: 6AM-12AM
Billboards Are Strategic Additions To Radio And Mobile To Complement Messaging

% of Billboard Audience Also Using Other Media in the Same Half-hour

- AM/FM: 57%
- Mobile Talk: 21%
- Mobile Text/App/Web: 17%
- Live TV: 13%
- Email: 9%
- Internet: 8%

W18-64
Reported time: 6AM-12AM

Note: The US Census Bureau estimates that the average commute time is 25.1 minutes.
Radio Is Used, Within The Same Half-hour, With OOH Alternative

% of Alternative Audience Also Using Other Media In the Same Half-hour

- Radio: 28%
- Mobile Talk: 15%
- Mobile Text/App/Web: 14%
- Live TV: 13%
- Emails: 6%
- Internet: 4%

A18-64
Reported time: 6AM-12AM
Increase Of Mobile Usage Within The Same Half-hour For The Younger Group

% of Alternative Audience Also Using Other Media In the Same Half-hour

A18-34
Reported time: 6AM-12AM
Radio Is Used, Within The Same Half-hour, With OOH Alternative

% of Alternative Audience Also Using Other Media In the Same Half-hour, HHI$75K+

- Radio: 30%
- Mobile Talk: 16%
- Mobile Text/App/Web: 14%
- TV Live: 11%
- Emails: 8%
- Internet: 5%

HHI$75K+
Reported time: 6AM-12AM
Radio Is Used, Within The Same Half-hour, With OOH Alternative

% of Alternate Audience Also Using Other Media in the Same Half-hour

W18-64
Reported time: 6AM-12AM
Radio and mobile talk are used, within the same half-hour, with OOH transit.

% of transit audience also using other media in the same half-hour:

- Radio: 92%
- Mobile talk: 80%
- Mobile text/app/web: 60%
- Print: 40%
- Internet: 20%
- Emails: 10%

Reported time: 6AM-12AM
Within The Same Half-hour Usage Of Mobile Text/App/Web, Social Networking Get Bigger For The Younger Group

% of Transit Audience Also Using Other Media In the Same Half-hour

- Mobile Text/App/Web: 31%
- Mobile Talk: 24%
- Radio: 22%
- Social Networking: 14%
- Internet: 13%
- Emails: 9%

Reported time: 6AM-12AM
Radio And Mobile Talk Are Used, Within The Same Half-hour, With OOH Transit

<table>
<thead>
<tr>
<th>Media</th>
<th>% of Transit Audience Also Using Other Media</th>
<th>HHI$75K+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Radio</td>
<td>32</td>
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</tr>
<tr>
<td>Mobile Text/App/Web</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>Emails</td>
<td>18</td>
<td></td>
</tr>
<tr>
<td>Mobile Talk</td>
<td>18</td>
<td></td>
</tr>
<tr>
<td>Print</td>
<td>17</td>
<td></td>
</tr>
<tr>
<td>Internet</td>
<td>11</td>
<td></td>
</tr>
</tbody>
</table>

HHI$75K+
Reported time: 6AM-12AM
Radio Is Used, Within The Same Half-hour, With OOH Street Furniture

% of Street Furniture Audience Also Using Other Media In the Same Half-hour

- Radio: 31%
- Mobile Talk: 19%
- Mobile Text/App/Web: 16%
- Emails: 6%
- TV Live: 5%
- Internet: 5%

Reported time: 6AM-12AM
Radio And Mobile Talk are Used, Within The Same Half-hour, With OOH Transit

% of Transit Audience Also Using Other Media in the Same Half-hour

W18-64

Reported time: 6AM-12AM
Increase Of Mobile, Within The Same Half-hour, For The Younger Group, While Exposed To Street Furniture

% of Street Furniture Audience Also Using Other Media In the Same Half-hour

A18-34
Reported time: 6AM-12AM
Radio Is Used, Within The Same Half-hour, With OOH Street Furniture

% of Street Furniture Audience Also Using Other Media In the Same Half-hour, HHI$75K+

HHI$75K+
Reported time: 6AM-12AM
Radio Is Used, Within The Same Half-hour, With OOH Street Furniture

% of Street Furniture Audience Also Using Other Media in the Same Half-hour

AM/FM: 24%
Mobile Text/App/Web: 17%
Mobile Talk: 17%
Live TV: 6%
Email: 5%
Internet: 5%
Print: 4%

W18-64
Reported time: 6AM-12AM
Summary Of OOH Marketplace

1. OOH offers scale, impact, creativity, and targeting

2. Variety of vehicles available increases the ability to surround your audience consistently throughout the day

3. OOH allows for tactical and strategic additions to traditional media plans

4. Stronger emotional congruence to messaging and environmental context

5. OOH lends itself to strategic alignment with other media in primary or secondary role