nielsen

POSTER ADVERTISING STUDY

NIELSEN ON LOCATION REPORT
2017

Diane Williams | Director of Media Analytics | Nielsen

INTRODUCTION

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.

TABLE OF CONTENTS

HIGHLIGHTS

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.

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.

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.

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.

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.

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.

DATA COLLECTION

ONLINE SURVEYS
PEOPLE AGE 18 OR OLDER

10 U.S. MARKETS SURVEYED

OOH
36 POSTER CAMPAIGNS TESTED

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.

TOTAL SAMPLE

- 4,020 surveys
- Fielded Aug to Nov 2016
- Data wieghted to market populations by sex and age

CAMPAIGN TEST GROUP

- Subset 1,920 surveys
- Respondents who completed survey while test campaigns were active in their local market.

LARGE

- Baltimore, MD
- Philadelphia, PA
- Seattle, WA

MEDIUM

- Louisville, KY
- Norfolk/Newport News, VA
- Salt Lake City, UT
- San Diego, CA

SMALL

- Chico, CA
- Montgomery, AL
- Topeka, KS

PRODUCT CATEGORIES

- Beverage
- Cellular Services
- Educational Institution
- Financial Services
- Health Services
- Home Security
- Insurance
- Legal Services
- Local Broadcaster
- Local Event
- Political Campaign
- Restaurant
- Retail
- Theme Park

POSTER AD AWARENESS

TRAVELERS NOTICE POSTERS

POSTERS

OOH

NOTICED

PAST MONTH **51%**

PAST WEEK **38%**

**PAST MONTH
POSTER VIEWERSHIP BY AGE**

Age	Percentage
18+	51%
18-24	61%
25-34	71%
35-44	61%
45-54	45%
55-64	40%
65+	32%

AVERAGE

Over half of the adults surveyed (51%) noticed a poster advertisement in the past month and 38% noted a poster in the past week.

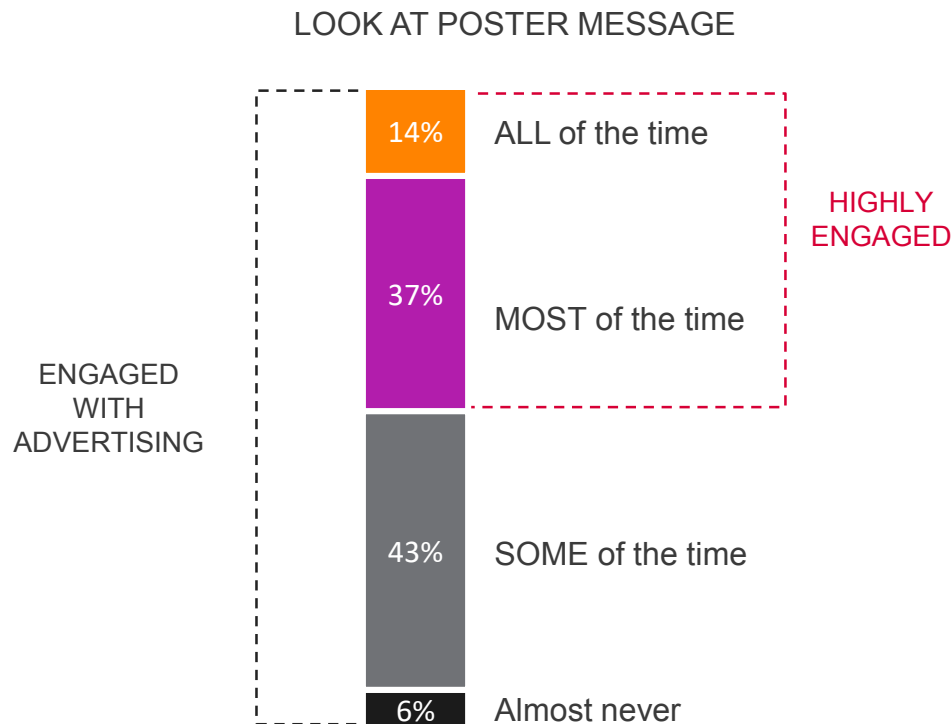**Younger adults were most likely to notice posters.** Poster viewership was highest among people age 25-34 with 71% noticing a poster in the past month.

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]

6

ENGAGEMENT WITH POSTERS

LOOK AT POSTER MESSAGE

14%	ALL of the time
37%	MOST of the time
43%	SOME of the time
6%	Almost never

HIGHLY ENGAGED

ENGAGED WITH ADVERTISING

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.

BASE: NOTICED POSTER IN THE PAST MONTH | n = 1,986
"When you have seen these poster billboards, how often do you notice the specific messages on the poster billboard?"
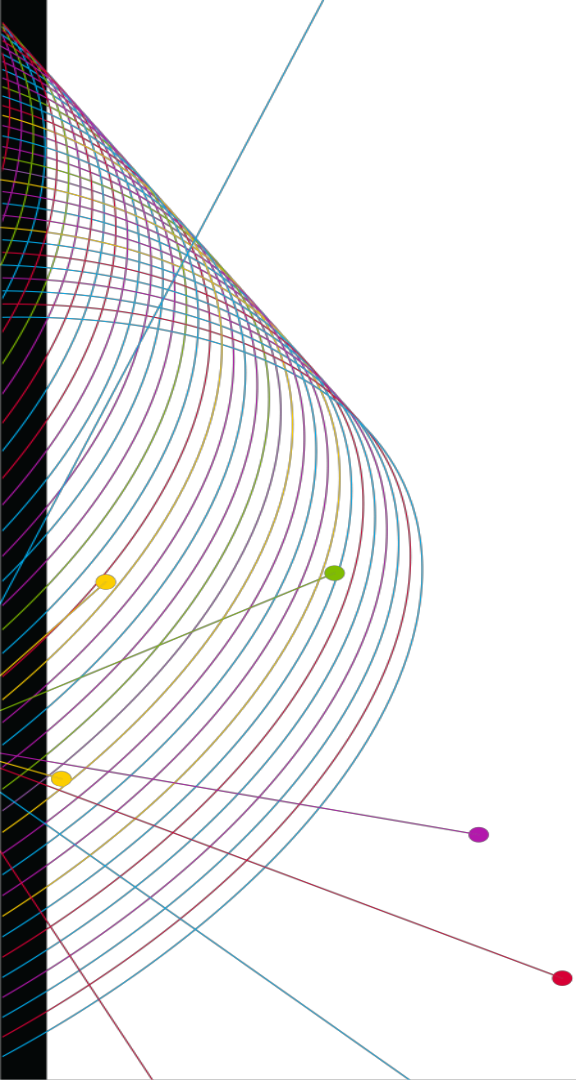
CONTENT RECALL

89%
Advertising

42%
Public Service
Information

14%
Other

Poster viewers were asked about the types of messages seen, **89% recalled seeing advertising** and 42% remembered public service information.

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

10
U.S. MARKETS

36
POSTER CAMPAIGNS
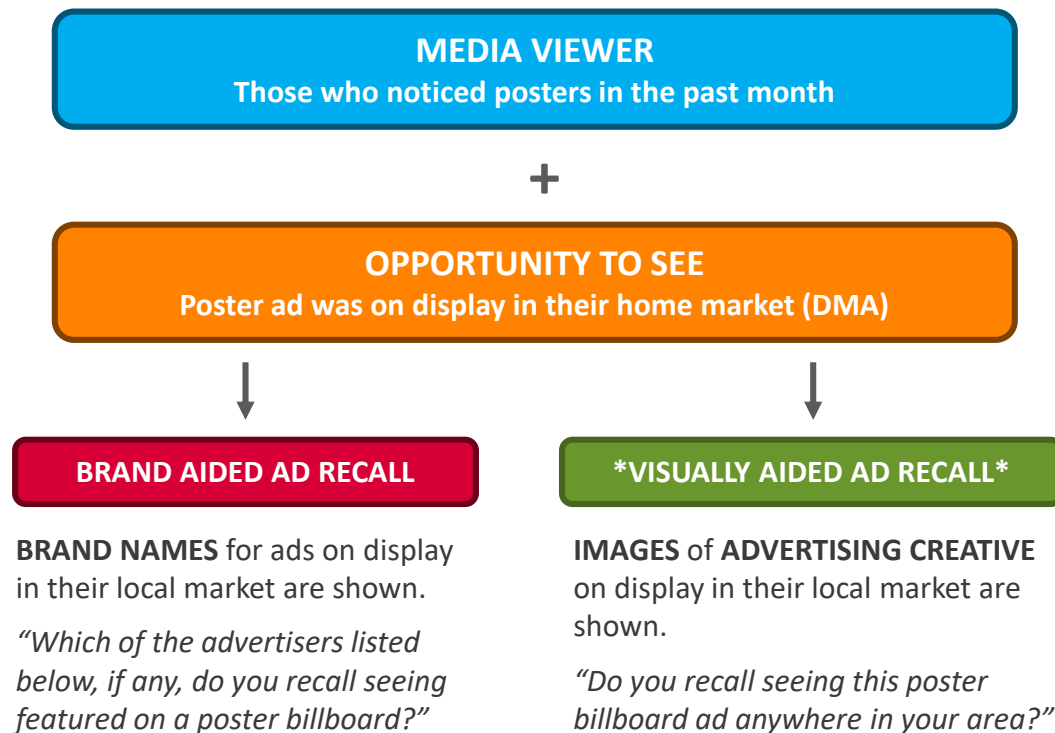
31
BRANDS

14
PRODUCT CATEGORIES

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.**
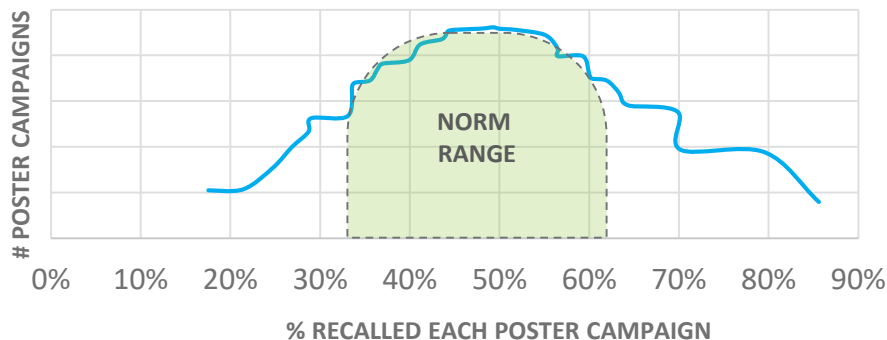
Nielsen used visually aided ad recall results for most analyses in this report.

11

AD RECALL RESULTS

AVERAGE AD RECALL
47%

POSTER AD RECALL
BELL CURVE

 # POSTER CAMPAIGNS

NORM
RANGE

0%   10%   20%   30%   40%   50%   60%   70%   80%   90%

% RECALLED EACH POSTER CAMPAIGN

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.

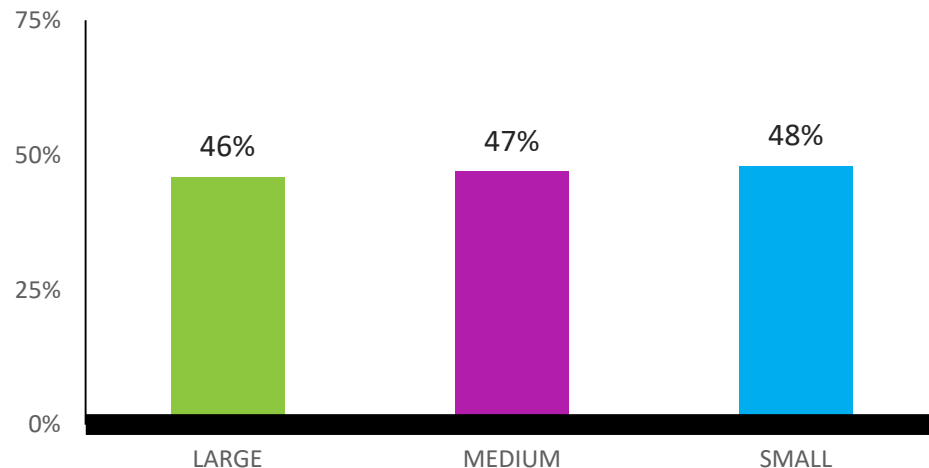The highest ad recall for a specific poster campaign tested was 86% and the lowest recall was 17%.

Based on this dataset, the **normative range** for poster campaign ad recall is between **33% and 62%.**

BASE: NOTICED POSTER IN THE PAST MONTH – CAMPAIGN TEST GROUP | n = 949
"Do you recall seeing this poster billboard ad anywhere in your area?"
[RESPONENTS SHOWN IMAGES FOR POSTER CAMPAIGNS CURRENTLY APPEARING IN THEIR LOCAL MARKET]

AD RECALL – BY MARKET SIZE

75%

50%

46%   47%   48%

25%

0%

LARGE   MEDIUM   SMALL

Ad recall levels were similar across the three market sizes, with small markets having a slight edge.
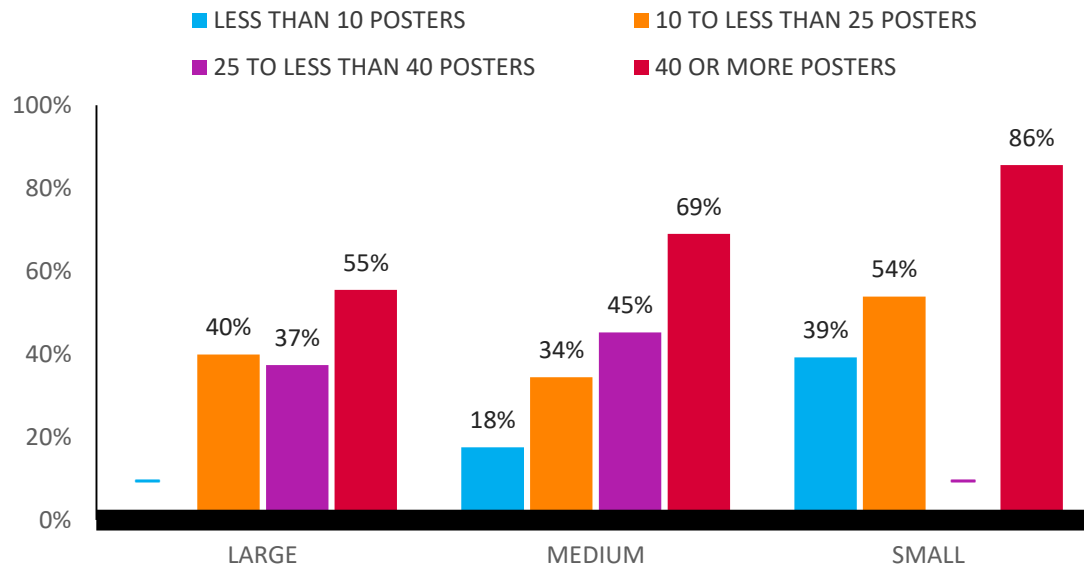
The average ad recall level for small market campaigns was 48%, average ad recall for medium size markets was 47% and large markets had an average ad recall of 46%.

BASE: NOTICED POSTER IN THE PAST MONTH – CAMPAIGN TEST GROUP | n = 949
"Do you recall seeing this poster billboard ad anywhere in your area?"
[RESPONENTS SHOWN IMAGES FOR POST CAMPAIGNS CURRENTLY APPEARING IN THEIR LOCAL MARKET]

AD RECALL – BY QUANTITY OF POSTERS

LESS THAN 10 POSTERS   **10 TO LESS THAN 25 POSTERS**
25 TO LESS THAN 40 POSTERS   **40 OR MORE POSTERS**

LARGE: 40%, 37%, 55%
MEDIUM: 18%, 34%, 45%, 69%
SMALL: 39%, 54%, 86%

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%.
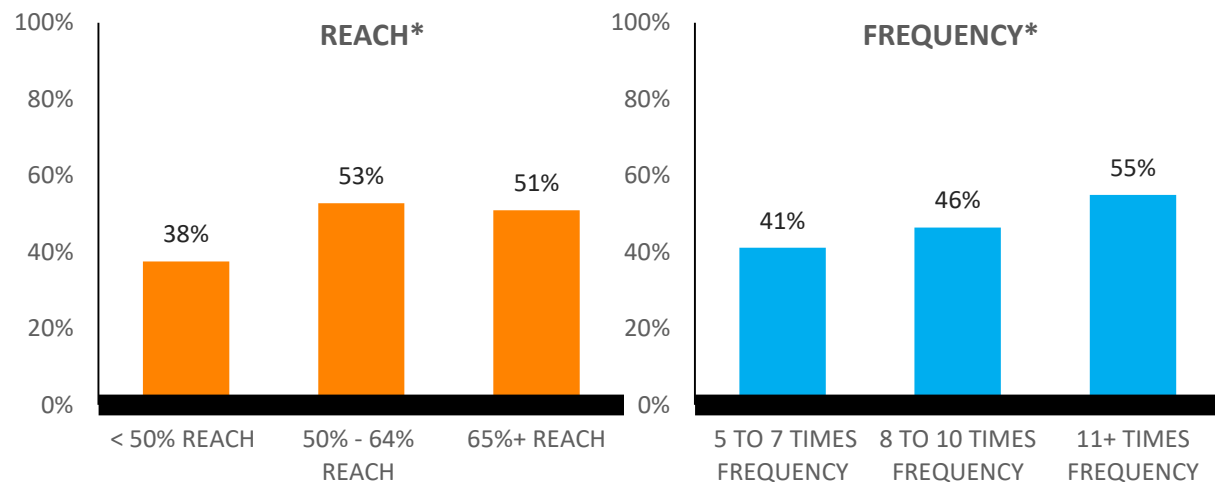
Small markets can generate higher recall levels with fewer posters.

BASE: NOTICED POSTER IN THE PAST MONTH – CAMPAIGN TEST GROUP | n = 949
"Do you recall seeing this poster billboard ad anywhere in your area?"
[RESPONENTS SHOWN IMAGES FOR POST CAMPAIGNS CURRENTLY APPEARING IN THEIR LOCAL MARKET]

14

AD RECALL – BY REACH + FREQUENCY

REACH*

- < 50% REACH — 38%
- 50% - 64% REACH — 53%
- 65%+ REACH — 51%

FREQUENCY*

- 5 TO 7 TIMES FREQUENCY — 41%
- 8 TO 10 TIMES FREQUENCY — 46%
- 11+ TIMES FREQUENCY — 55%

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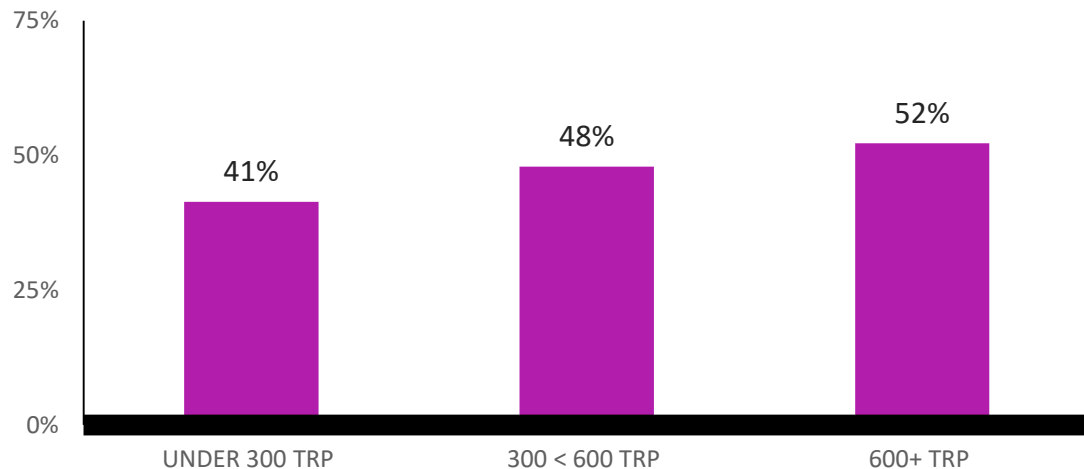
BASE: NOTICED POSTER IN THE PAST MONTH – CAMPAIGN TEST GROUP | n = 949
"Do you recall seeing this poster billboard ad anywhere in your area?"
[RESPONENTS SHOWN IMAGES FOR POST CAMPAIGNS CURRENTLY APPEARING IN THEIR LOCAL MARKET]
*Reach and Frequency data provided to Nielsen by OAAA courtesy of Geopath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

15

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%.
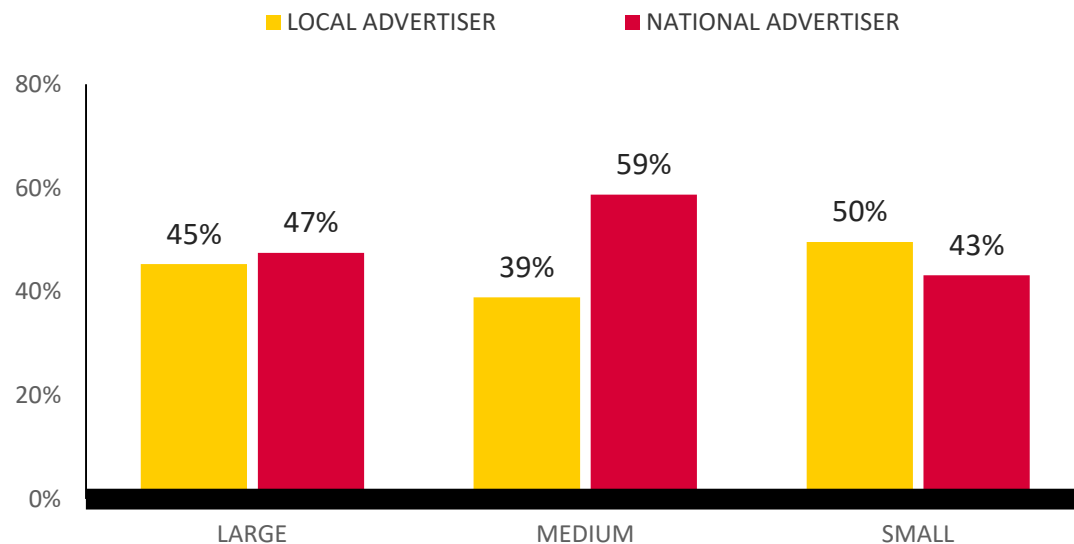
BASE: NOTICED POSTER IN THE PAST MONTH – CAMPAIGN TEST GROUP | n = 949
"Do you recall seeing this poster billboard ad anywhere in your area?"
[RESPONENTS SHOWN IMAGES FOR POST CAMPAIGNS CURRENTLY APPEARING IN THEIR LOCAL MARKET]
*TRP data provided to Nielsen by OAAA courtesy of Geopath OOH Ratings.

AD RECALL – LOCAL VS. NATIONAL BRANDS

■ LOCAL ADVERTISER   ■ NATIONAL ADVERTISER

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.
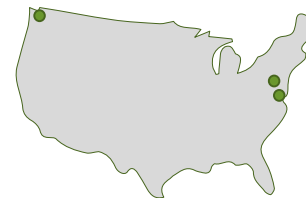
The average ad recall level for national brands advertising on posters in medium sized markets was 59%, average ad recall for local advertisers in medium markets was 39%.

BASE: NOTICED POSTER IN THE PAST MONTH – CAMPAIGN TEST GROUP | n = 949
"Do you recall seeing this poster billboard ad anywhere in your area?"
[RESPONENTS SHOWN IMAGES FOR POST CAMPAIGNS CURRENTLY APPEARING IN THEIR LOCAL MARKET]

17

LARGE MARKET – AD RECALL – BY CATEGORY

INSURANCE
60%
1 campaign

LOCAL EVENT
56%
2 campaigns;
Range 48%-65%

RESTAURANT
53%
2 campaigns;
Range 45% to 60%

LOCAL BROADCASTER
37%
1 campaign

PRODUCTS & SERVICES
37%
2 campaigns;
Range 25%-50%

HEALTH SERVICES
27%
1 CAMPAIGN

LARGE MARKET – AVERAGE 46%

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?"

[RESPONENTS 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 campaigns

LEGAL SERVICES
44%
1 campaign

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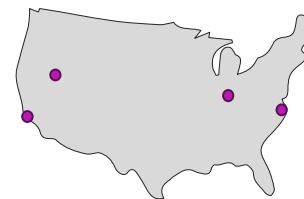Range 22% to 64%

PRODUCTS & SERVICES
44%
6 campaigns;
Range 18%-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?"
[RESPONENTS 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

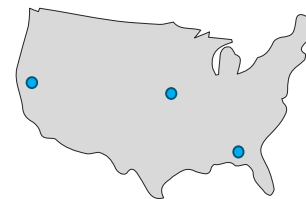**FINANCIAL SERVICES**
33%
1 campaign

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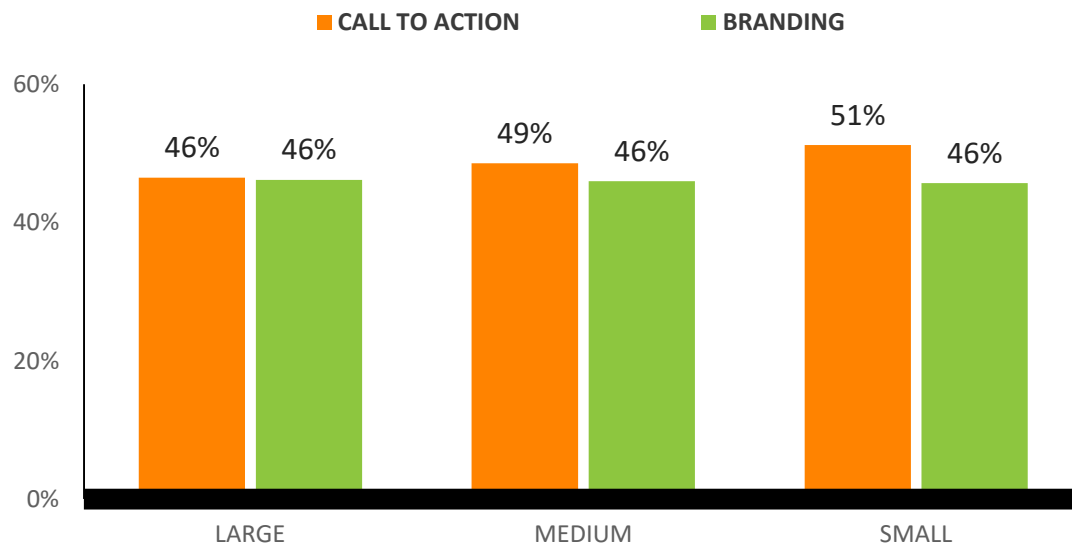
The highest ad recall in the small markets was for a law firm – with 86% of poster viewers recalling the ad.

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?"
[RESPONENTS SHOWN A LIST OF BRAND NAMES AND IMAGES FOR POST CAMPAIGNS CURRENTLY APPEARING IN THEIR LOCAL MARKET]

AD RECALL – CALL TO ACTION VS. BRANDING

■ CALL TO ACTION   **■ BRANDING**

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%.
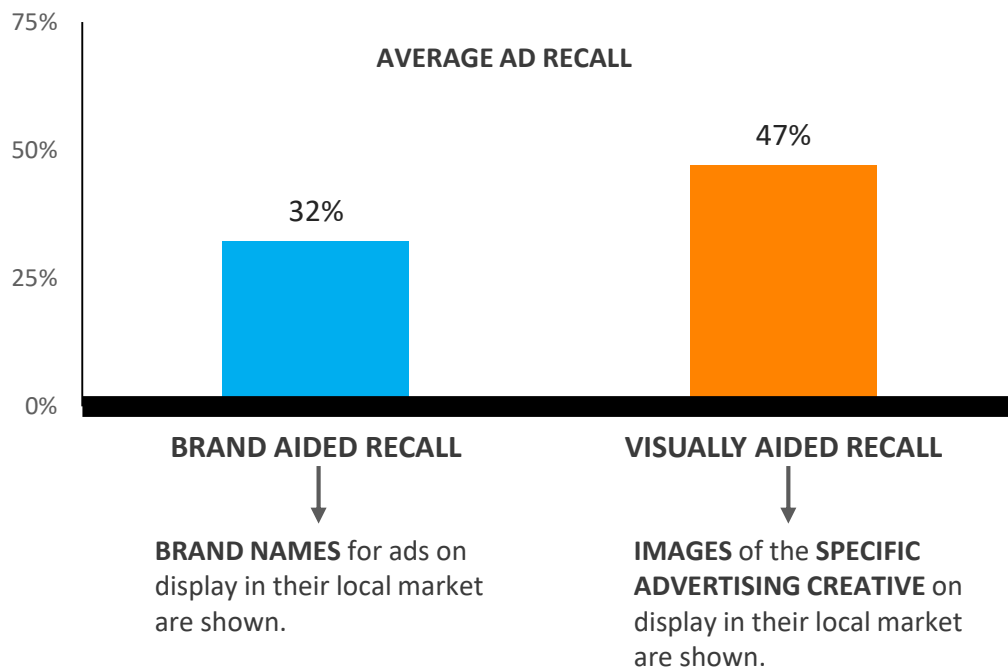
BASE: NOTICED POSTER IN THE PAST MONTH – CAMPAIGN TEST GROUP | n = 949
"Do you recall seeing this poster billboard ad anywhere in your area?"
[RESPONENTS SHOWN IMAGES FOR POST CAMPAIGNS CURRENTLY APPEARING IN THEIR LOCAL MARKET]

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. (47% – 32%) / 32% = 46%

AVERAGE AD RECALL

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.

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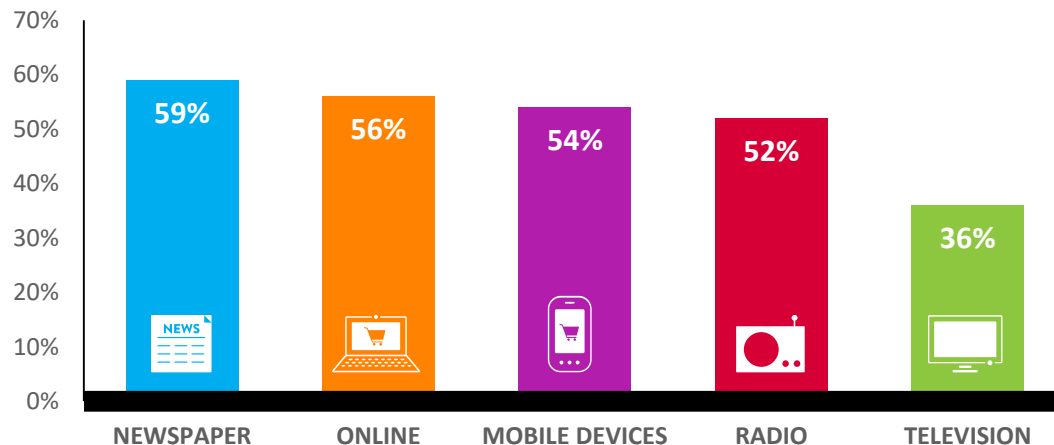
A few campaigns tested for this study had very large differences between brand aided and visually aided recall. For example, one ad's brand aided recall was 2% but the visually aided recall was 44% – **that tells us the poster creative succeeded in getting the message in front of consumers, but failed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

22

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.
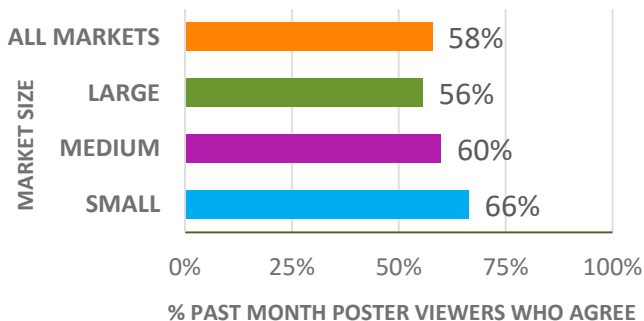
POSTERS ARE INFORMATIVE

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."

"Posters Billboards are INFORMATIVE."

MARKET SIZE

ALL MARKETS	58%
LARGE	56%
MEDIUM	60%
SMALL	66%

0%   25%   50%   75%   100%

% PAST MONTH POSTER VIEWERS WHO AGREE

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

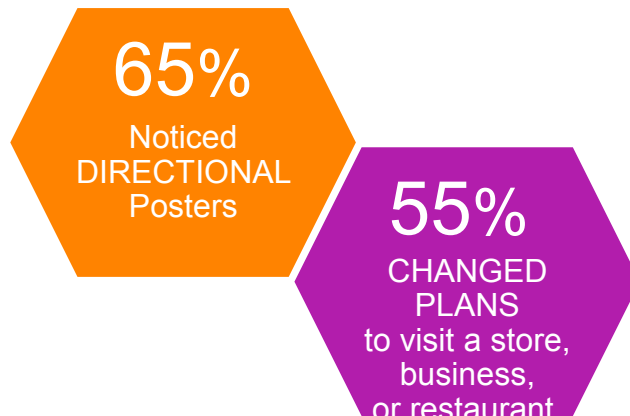58% of all poster viewers surveyed agree posters are informative.

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.

POSTERS GUIDE CONSUMER ACTION

65%
Noticed
DIRECTIONAL
Posters

55%
CHANGED
PLANS
to visit a store,
business,
or restaurant

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 POSTER IN THE PAST MONTH | n = 1,986
"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
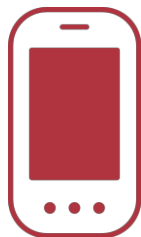
19% Watched TV program featured

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

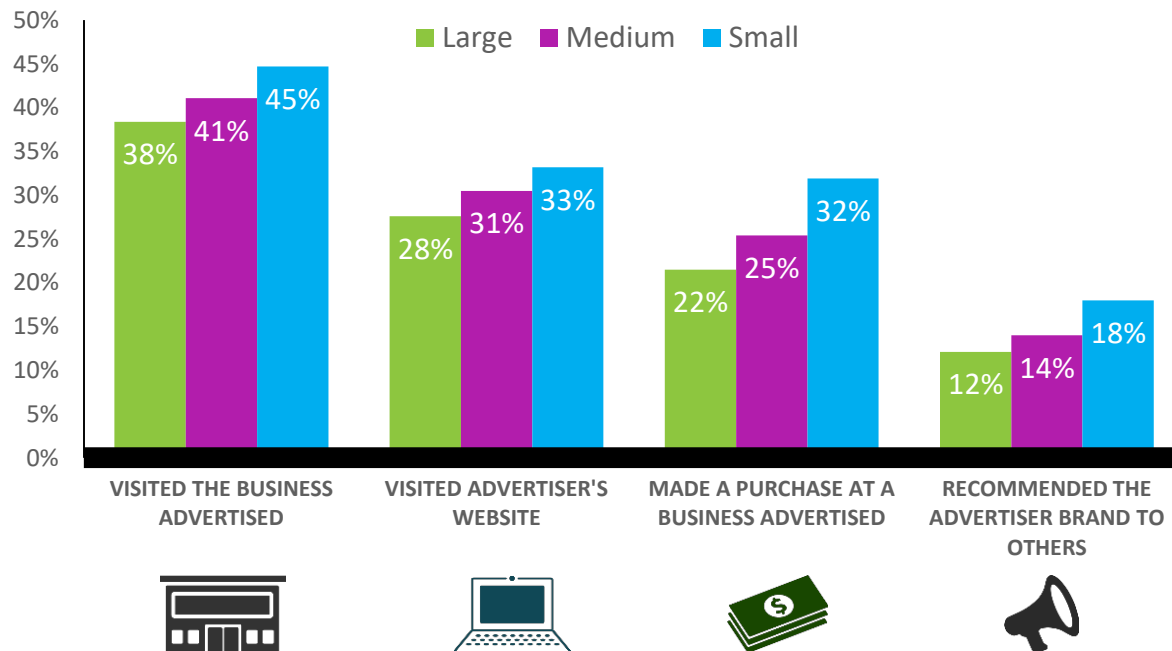**29%** Visited advertiser's website

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

Large ■ **Medium** ■ **Small**

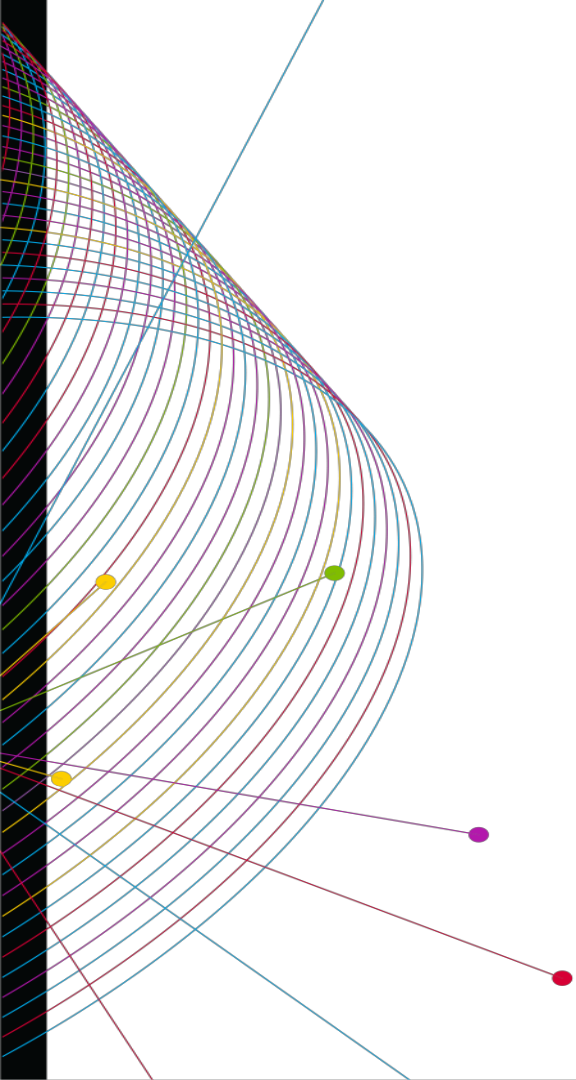|	Large	Medium	Small
VISITED THE BUSINESS ADVERTISED	38%	41%	45%
VISITED ADVERTISER'S WEBSITE	28%	31%	33%
MADE A PURCHASE AT A BUSINESS ADVERTISED	22%	25%	32%
RECOMMENDED THE ADVERTISER BRAND TO OTHERS	12%	14%	18%

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…"

CONCLUSIONS

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

		SMALL	MEDIUM	LARGE
ADVERTISING		91%	89%	88%
PUBLIC SERVICE INFORMATION		45%	45%	40%
OTHER		17%	15%	13%

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?"

33

COMPARISON TO OTHER MEDIA
BY MARKET SIZE

Posters STAND OUT more than advertisements…	SMALL	MEDIUM	LARGE
Television	36%	37%	36%
Online	59%	52%	58%
Radio	59%	52%	52%
Newspaper	65%	61%	57%
Cell Phones, Smart Phones, Mobile Devises	58%	54%	53%

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

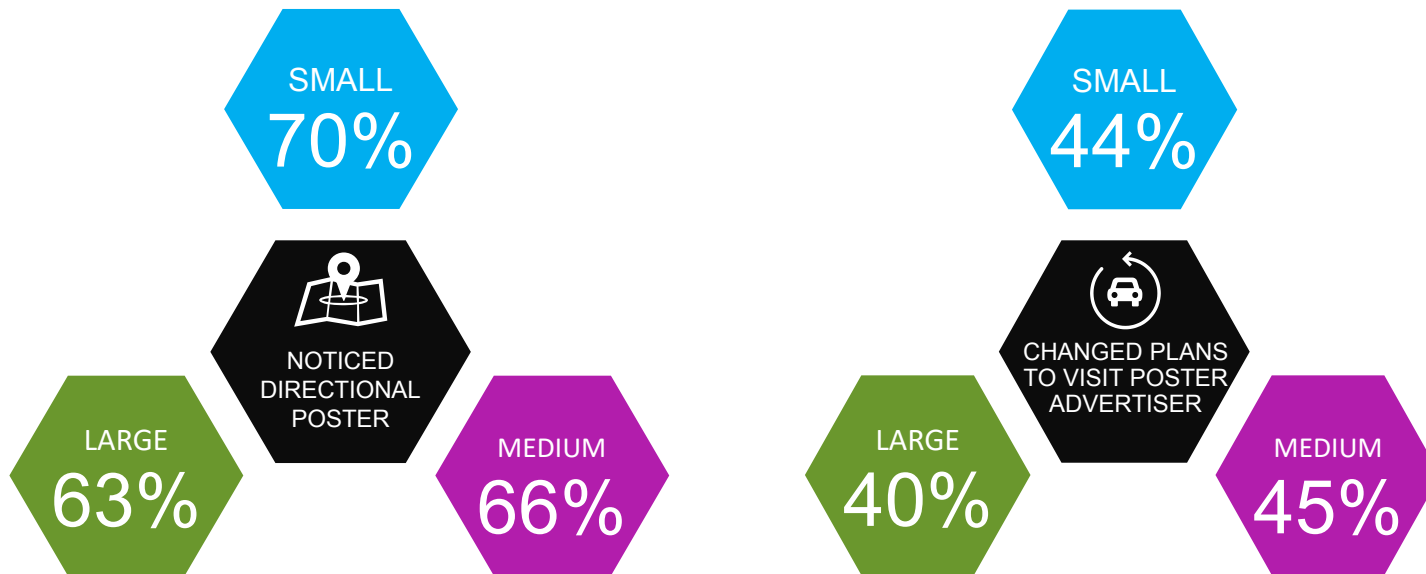| POSTER BILLBOARDS…	SMALL	MEDIUM	LARGE
…often catch my ATTENTION.	60%	57%	56%
…are a good way to learn about NEW BUSINESSES in the area.	69%	64%	59%
…are a good way to learn about SALES AND EVENTS.	65%	62%	60%
…are INFORMATIVE.	66%	60%	56%

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

NOTICED DIRECTIONAL POSTER
- SMALL 70%
- LARGE 63%
- MEDIUM 66%

CHANGED PLANS TO VISIT POSTER ADVERTISER
- SMALL 44%
- LARGE 40%
- MEDIUM 45%

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

ACTIONS TAKEN AFTER SEEING POSTERS
BY MARKET SIZE

	SMALL	MEDIUM	LARGE
VISITED the business (e.g. store or restaurant) advertised	45%	41%	38%
TALKED about what they saw with friends/family	38%	40%	40%
SEARCHED online for more details about the featured message	30%	29%	30%
VISITED the advertiser's website	33%	31%	28%
SEARCHED for the advertiser online	26%	26%	23%
MADE a purchase at business advertised	32%	25%	22%
ATTENDED event advertised	24%	21%	16%

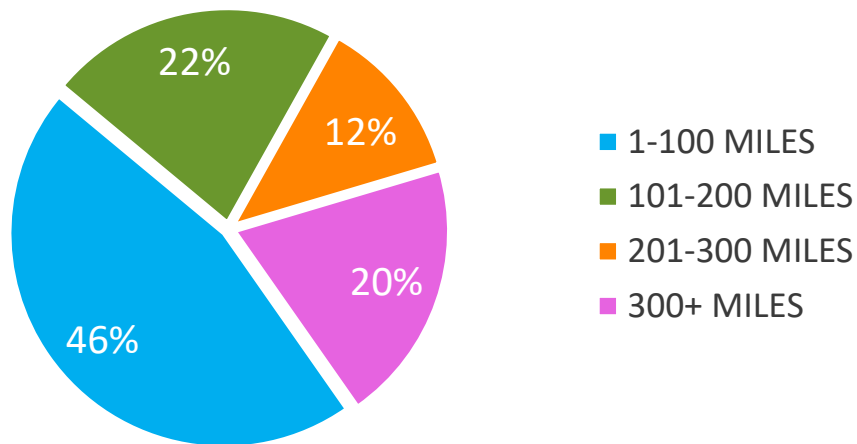|	SMALL	MEDIUM	LARGE
WATCHED TV program featured	13%	18%	20%
TUNED to radio station advertised	16%	15%	13%
Accessed a coupon from mobile device	14%	13%	14%
RECOMMENDED advertiser to others	18%	14%	12%
SNAPPED a photo of an ad with a mobile device	13%	13%	11%
DOWNLOADED an app	13%	11%	13%
POSTED online	9%	8%	8%

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

MILES TRAVELED PER WEEK

- 1-100 MILES
- 101-200 MILES
- 201-300 MILES
- 300+ MILES

Over half of poster viewers (54%) travel more than 100 miles per week in a vehicle as either a driver or passenger.
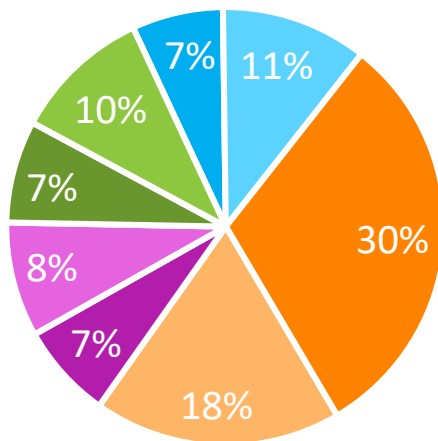
Mean miles per week = 210

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

TIME SPENT TRAVELING

WEEKDAY

- LESS THAN 30 MINUTES
- 30 MINS TO 1 HR
- 1 HR TO 2 HRS
- 2 HOURS TO 3 HRS
- 3 HRS TO 4 HRS
- 4 HRS TO 6 HRS
- 6 HRS TO 10 HRS
- 10+ HRS

WEEKEND

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

"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

	ALL 10 MARKETS	SMALL	MEDIUM	LARGE
Male	53%	51%	54%	53%
Female	47%	49%	46%	47%
AGE 18 - 24	7%	12%	9%	6%
25 - 34	31%	22%	30%	33%
35 – 44	21%	22%	25%	18%
45 - 54	14%	13%	12%	16%
55 - 64	13%	16%	12%	13%
65 and over	13%	15%	12%	14%

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

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

	ALL 10 MARKETS	SMALL	MEDIUM	LARGE
Some high school or less	1%	2%	2%	1%
Completed high school	11%	15%	12%	10%
Job-specific training program(s)	4%	2%	3%	5%
Some college, but no degree	19%	26%	22%	16%
Associates Degree	10%	10%	12%	10%
College (such as B.A., B.S.)	28%	23%	25%	31%
Some graduate school, but no degree	4%	5%	4%	4%
Graduate degree (such as MBA, MS, M.D., Ph.D.)	23%	18%	22%	24%

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

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

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

	ALL 10 MARKETS	SMALL	MEDIUM	LARGE
Less than $15,000	5%	9%	5%	4%
$15,000 to less than $25,000	6%	13%	8%	5%
$25,000 to less than $35,000	8%	12%	11%	5%
$35,000 to less than $50,000	11%	11%	13%	10%
$50,000 to less than $75,000	21%	18%	20%	21%
$75,000 to less than $100,000	22%	17%	23%	22%
$100,000 to less than $125,000	9%	7%	7%	10%
$125,000 to less than $150,000	6%	5%	5%	7%
$150,000 to less than $200,000	5%	4%	3%	6%
$200,000 to less than $250,000	1%	1%	2%	1%
$250,000 or more	2%	2%	1%	2%

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.

For more information about this report, please contact:

Diane Williams
Director of Media Analytics
Nielsen On Location
New York, NY
diane.williams@nielsen.com
www.nielsen.com

For more information about the study findings or its
Limitations and Permissible Uses, please contact:

Diane Williams
Senior Product Manager
Nielsen On Location
diane.williams@nielsen.com

nielsen

AN UNCOMMON SENSE
OF THE CONSUMER™