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
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
- Ascribed to 21,000+ respondents of GfK MRI’s Survey of the American Consumer™
- Data Editing Rules Applied
- Incentive, Thank Yous

GfK MRI Respondents
USA TouchPoints® Diary
USA TouchPoints Syndicated Study Methodology
What’s Measured?

Data Is Captured Every 30 Minutes Over 10 Days

Where

Activities

With Whom

Where

Activities

With Whom
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’

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 86% 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

Average Day Reach (%)

- Peak Time for 'Away From Home' is during the afternoon.
- Also includes 'Away From My Workplace'.

A18-64

*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***

- Weekday: 88%
- Weekend: 82%

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

*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

* 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

**Outside**
- Outdoors away from home

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

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

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

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

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

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

A18-64
Reported time: 6AM-12AM

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

Away From Home* by Demo

- Traveling: +8%
- Retail: +14%
- Food Service: +18%
- Outside: +51%

Reported time: 6AM-12AM

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

Total Away From Home*

<table>
<thead>
<tr>
<th></th>
<th>Weekday</th>
<th>Weekend</th>
</tr>
</thead>
<tbody>
<tr>
<td>Avg. Day Reach (%)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Weekday</td>
<td>90</td>
<td>80</td>
</tr>
<tr>
<td>Weekend</td>
<td>80</td>
<td>90</td>
</tr>
</tbody>
</table>

Away From Home* Weekdays vs. Weekends

- Traveling: -9%
- Retail: +16%
- Food Service: +10%
- Outside: +27%
- Gym: -9%
- Public Transportation: -9%

A18-64
Reported time: 6AM-12AM

*Also includes ‘Away From My Workplace’
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”

Avg. Day Reach (%)
# Outside And Public Transportation Opportunities Have Distinct Primetimes

The chart shows the average day reach (%) for different primetime slots for two categories: Outside and Public Transportation. The chart highlights that:

- **6A-10A**
  - Outside: Low reach
  - Public Transportation: Low reach

- **10A-3P**
  - Outside: High reach
  - Public Transportation: Low reach

- **3P-7P**
  - Outside: High reach
  - Public Transportation: High reach

- **7P-12A**
  - Outside: Low reach
  - Public Transportation: Low reach

The chart indicates that outside and public transportation opportunities have distinct primetime windows with varying reach percentages.
Mid-Day Is Retail Primetime; Gym Peaks Slightly Mid-Morning And After Work
Unsurprisingly, Food Service Primetime Is Lunch/Dinner
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
OOH Marketplace Opportunities
OOH Marketplace

- OOH offers scale, impact, creativity and 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
OOH Potential Media Opportunities Can Supercharge Media Plans
Adding OOH To Other Media Can Potentially Increase Reach By Up To 300%

A18-64
Reported time: 6AM-12AM
Adding Billboards To Other Media Can Potentially Increase Reach By Up To 300%

A18-64
Reported time: 6AM-12AM
TV And Billboards Impacts Reach Throughout The Day

Billboards + Live TV

Avg. Day Reach (%)

A18-64
Billboards And Internet Together More Than Double Afternoon Reach

Billboards + Internet

Avg. Day Reach (%)

A18-64

Billboards
Internet
Billboards + Internet
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 + TV

[Graph showing the impact of adding an alternative to live TV on exposure.]

- **Alternative**: Blue dashed line
- **TV**: Red dashed line
- **Alternative + TV**: Blue solid line

**Y-axis**: Avg. Day Reach (%)

**X-axis**: Time of Day (6AM to 11PM)

**Legend**:
- Alternative
- TV
- Alternative + TV

**Title**: Adding Alternative To Live TV Increases Exposure
Alternative Adds 30% Reach To Internet

Alternative + Internet

Avg. Day Reach (%)

A18-64

Alternative
Internet
Alternative + Internet
Alternative Supplements Flat Media Reach Throughout The Day

**Alternative + Mobile**

- **Alternative**
- **Mobile App/Web**

The chart above shows the average daily reach (%) of Alternative and Mobile App/Web over the course of a day from 6AM to 11PM, highlighting peaks and troughs in audience engagement.
Alternative Supplements Flat Media Reach Throughout The Day

Alternative + Social Networking

Avg. Day Reach (%)

A18-64
Alternative Adds 20% Reach To Radio

Average Day Reach (%)

Alternative + Radio

A18-64

- Alternative
- Radio
- Alternative + Radio
Adding Transit To Other Media Increases Reach
Adding Transit To Live TV Increases Exposure

Transit + Live TV

![Graph showing the average day reach percentages for Transit, Live TV, and Transit + Live TV over time. The graph indicates that adding Transit to Live TV increases exposure.](image-url)
Adding Transit To Internet Increases Exposure

Transit + Internet

Avg. Day Reach (%)

Transit
Internet
Transit + Internet

A18-64
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

Avg. Day Reach (%)

Transit
Social Networking
Transit + Social Networking

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

A18-64
Adding Transit To Radio Increases Exposure

Transit + Radio

Avg. Day Reach (%)
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

Average Day Reach (%) over time from 6AM to 11PM.

- Street Furniture
- Live TV
- Street Furniture + Live TV
Street Furniture Adds Over 20% Reach To Internet
Street Furniture Almost Doubles the Reach To Internet

Street Furniture + Mobile App/Web

Avg. Day Reach (%)

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

Street Furniture
Mobile App/Web
Street Furniture + Mobile App/Web
Street Furniture Compliments
Social Networking Reach

Street Furniture + Social Networking

[Graph showing the average daily reach (%) for Street Furniture, Social Networking, and Street Furniture + Social Networking over the day from 6AM to 11PM.]
Street Furniture Adds Over 15% Reach To Radio

Street Furniture + Radio

Avg. Day Reach (%)
Consumers Experience OOH Media In Very Positive Mindsets
Emotional Index Of OOH Audiences To Live TV

% of OOH Audience Index to TV

Index

Confident

Relieved

Happy

Hopeful

Angry

Bored

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

% of OOH Audience Index to Radio

Index

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!

A18-64
Reported time: 6AM-12AM
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

Hopeful

Bored

Excited

Relieved

Happy

Confident

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.
Emotional Index Of Alternative Audiences To Live TV

% of Alternative Audience Index to TV

Index To Live TV

- Frustrated
- Overwhelmed
- Worried
- 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.
Emotional Index Of Alternative Audiences To Radio

% of Alternative Audience Index to Radio

Index To Radio

- Happy
- Overwhelmed
- Bored
- Worried
- Frustrated
- Angry
- 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.
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.

A18-64
Reported time: 6AM-12AM
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

A18-64
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

Radio
Mobile Talk
Mobile Text/App/Web
Live TV
Emails
Internet

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

A18-64
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

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

- Radio: 71%
- Mobile Talk: 32%
- Mobile Text/App/Web: 21%
- Emails: 15%
- TV Live: 13%
- Internet: 11%

HHI$75K+
Reported time: 6AM-12AM

USA TouchPoints™
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+

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

- AM/FM: 22%
- Mobile Text/App/Web: 14%
- Mobile Talk: 12%
- Live TV: 11%
- Internet: 4%
- Email: 4%
- Print: 3%

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

<table>
<thead>
<tr>
<th>Media</th>
<th>0%</th>
<th>20%</th>
<th>40%</th>
<th>60%</th>
<th>80%</th>
<th>100%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Radio</td>
<td>27</td>
<td></td>
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</tr>
<tr>
<td>Mobile Talk</td>
<td>21</td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Mobile Text/App/Web</td>
<td>21</td>
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<td>Print</td>
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<tr>
<td>Emails</td>
<td>10</td>
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<td></td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

A18-64
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%

A18-34
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, 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

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

A18-64
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

- AM/FM: 58%
- Mobile Talk: 20%
- Mobile Text/App/Web: 16%
- Live TV: 12%
- Email: 8%
- Internet: 7%
- Print: 4%

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

- Radio: 27%
- Mobile Text/App/Web: 26%
- Mobile Talk: 21%
- Social Networking: 8%
- Internet: 6%
- Emails: 6%

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