



# USA Touch Points™

May 2012



OUTDOOR ADVERTISING  
ASSOCIATION OF AMERICA



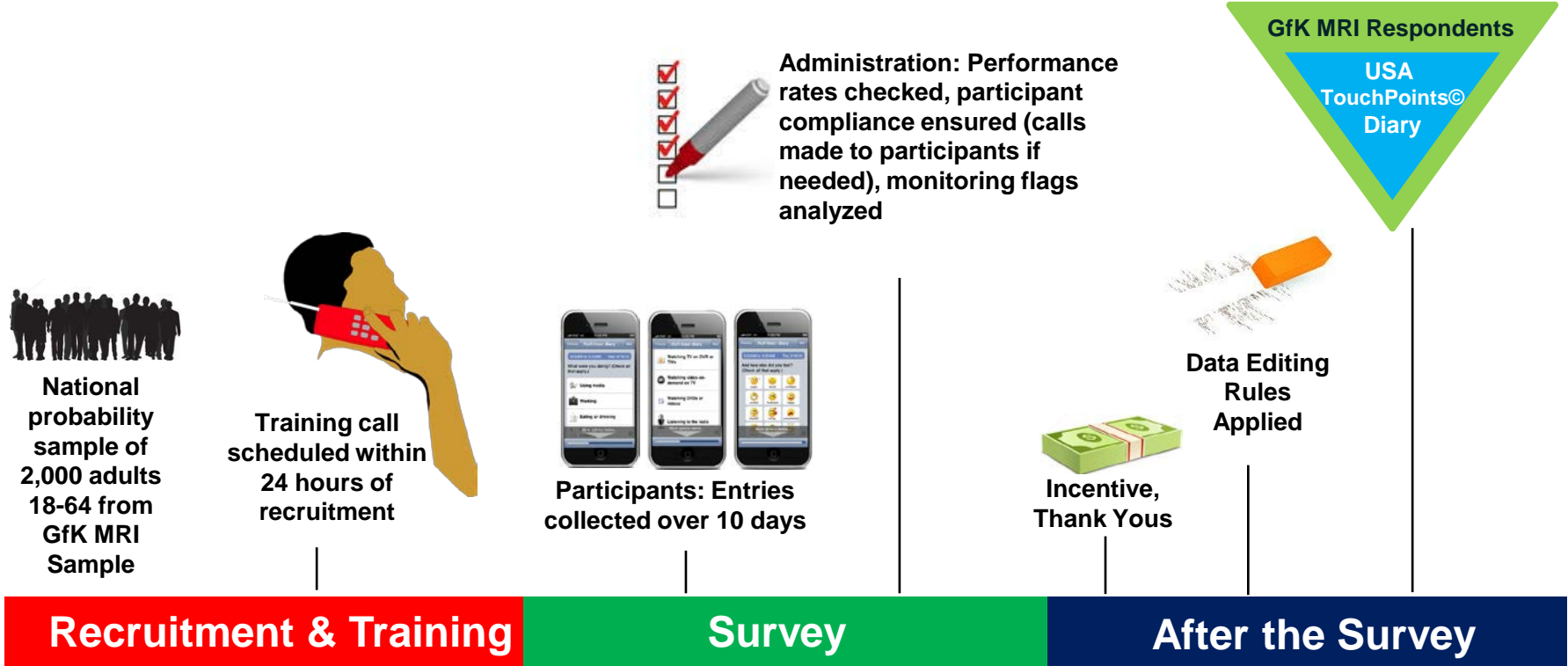
# What is USA TouchPoints?

- 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™



# What's Measured?

Data Is Captured Every 30 Minutes Over 10 Days



# 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

...

Who they're with



Where they are



Media



What they're doing

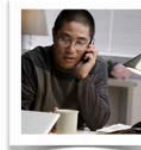
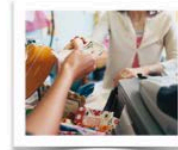


How they feel



When activities occur

What they buy, own, use

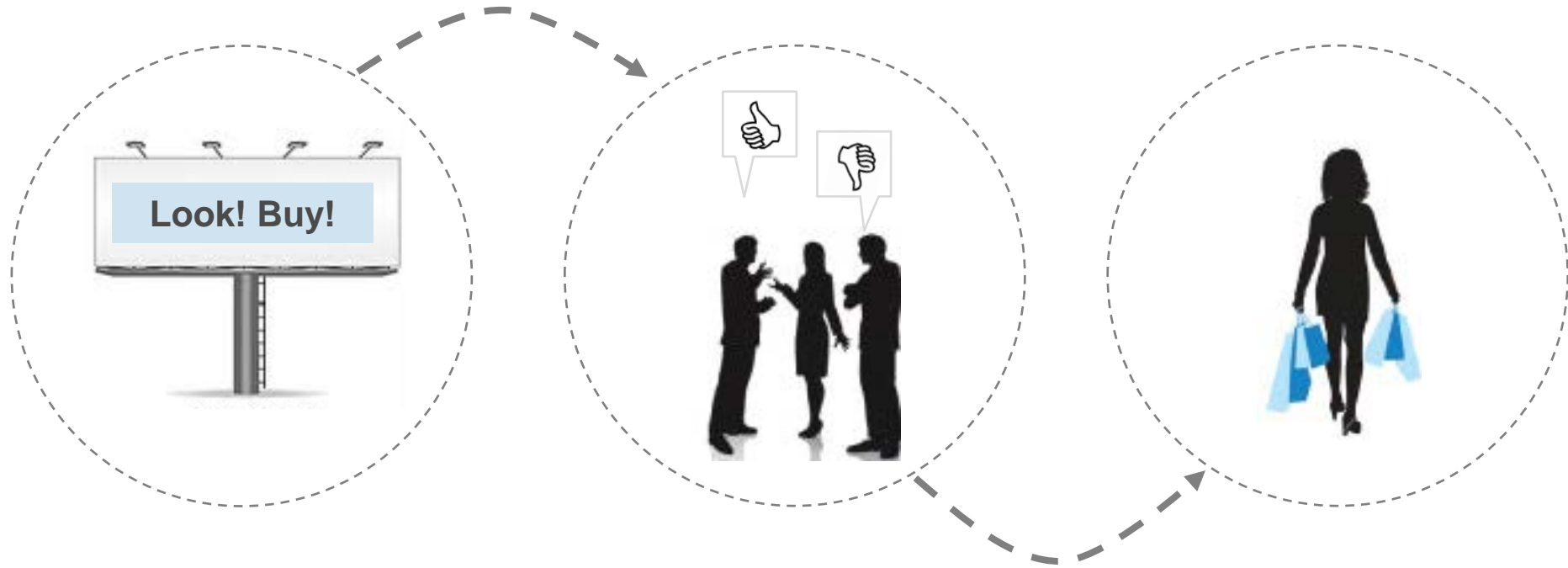


What kind of people they are

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

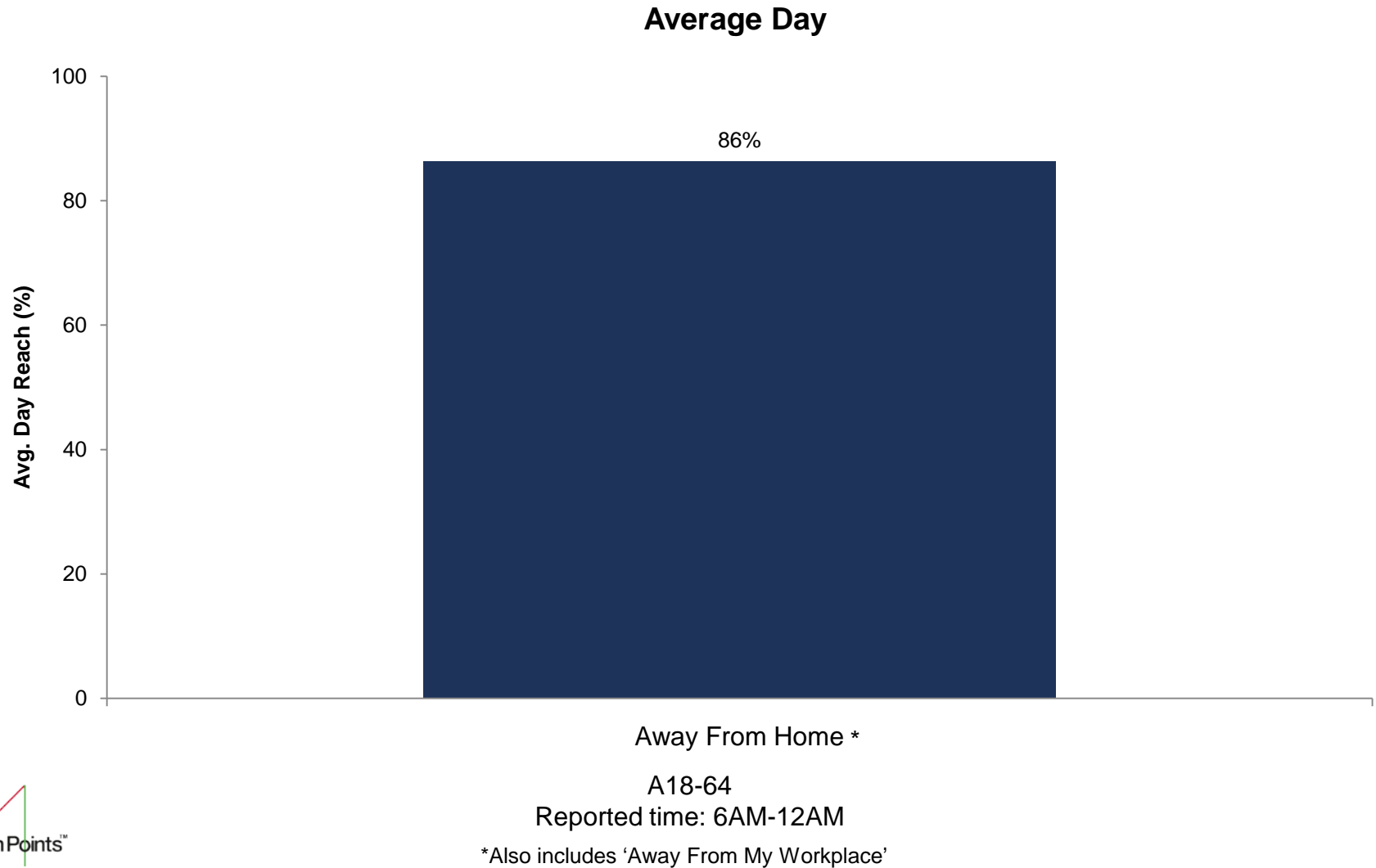




# Most Americans interact every day with 'away from home' places & vehicles...

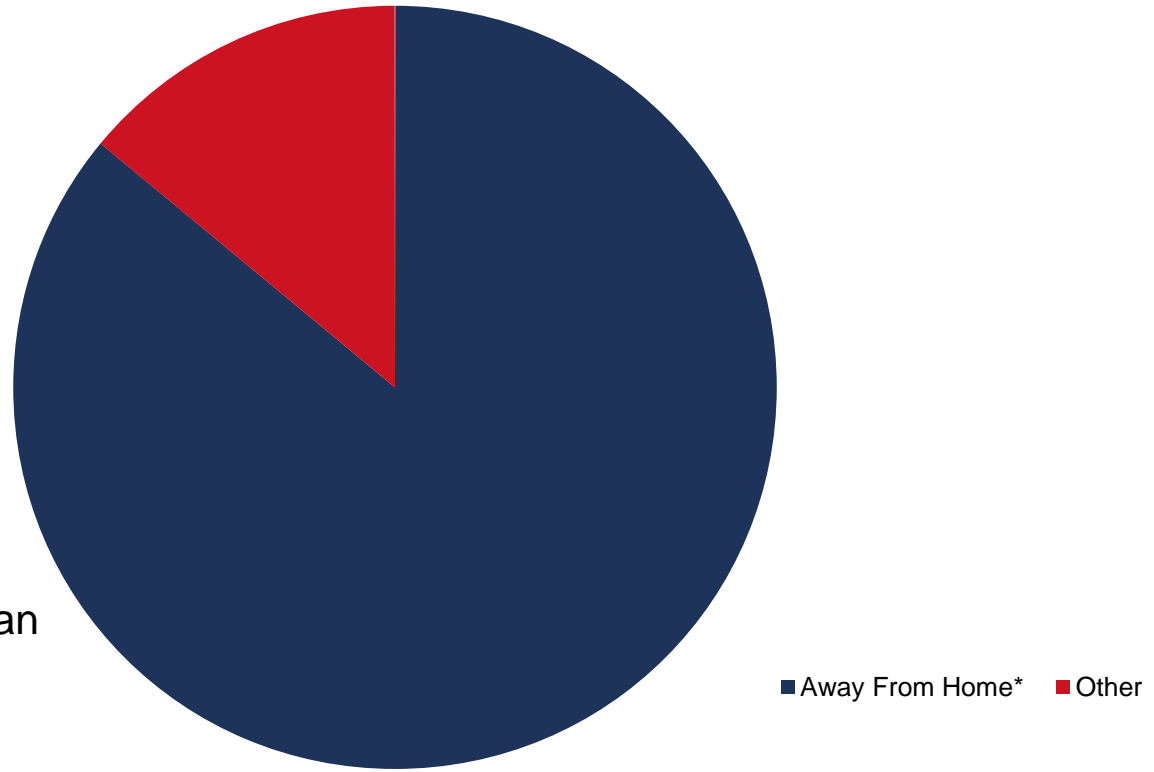


# Americans Are 'Away From Home'



# 'Away From Home' Has A Large Impact on Consumers' Days

Average Day



On the **average day**, you can reach 86% of consumers

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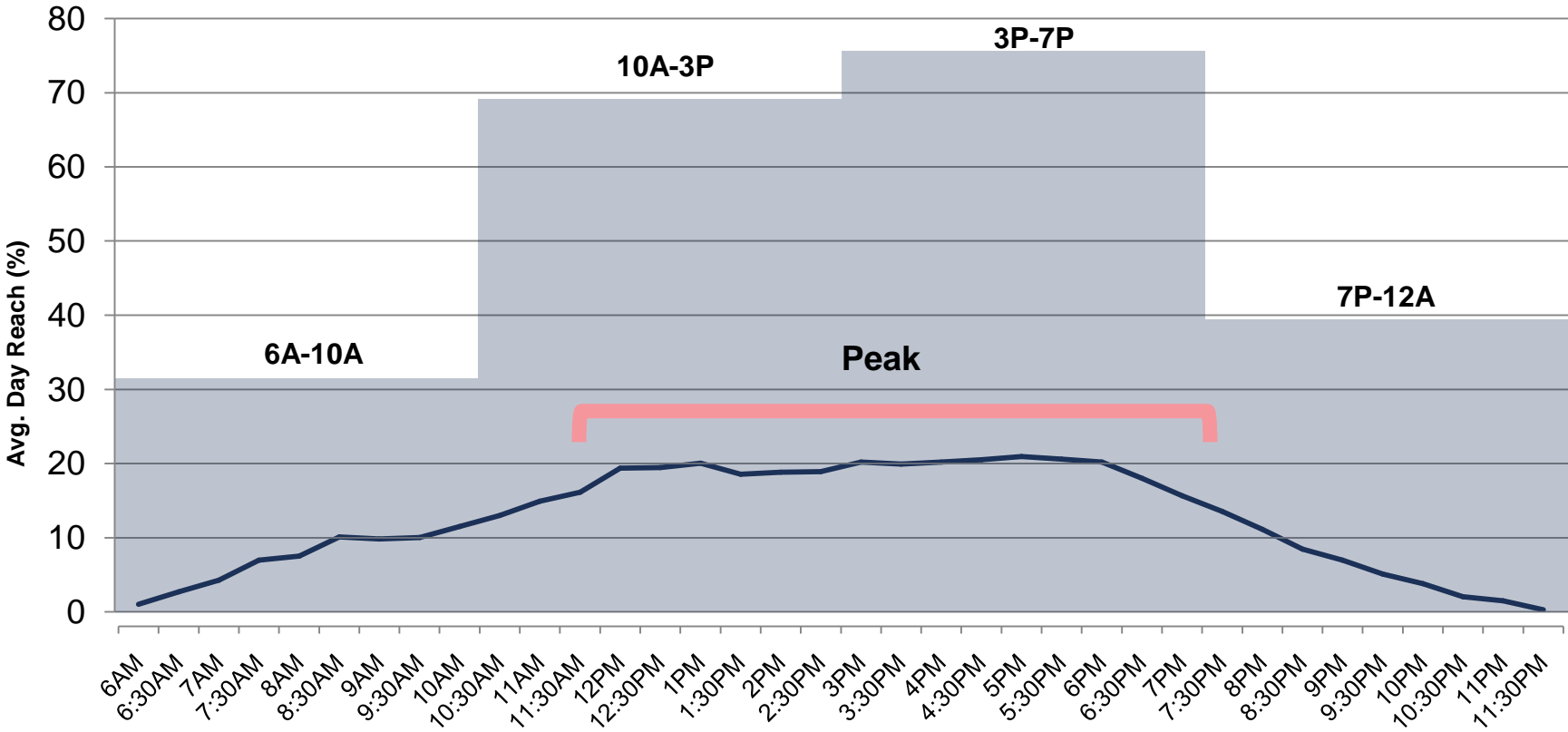
Reported time: 6AM-12AM

\*Also includes 'Away From My Workplace'



# Peak Time for 'Away From Home' Is During the Afternoon

Away From Home\* By Time Of Day

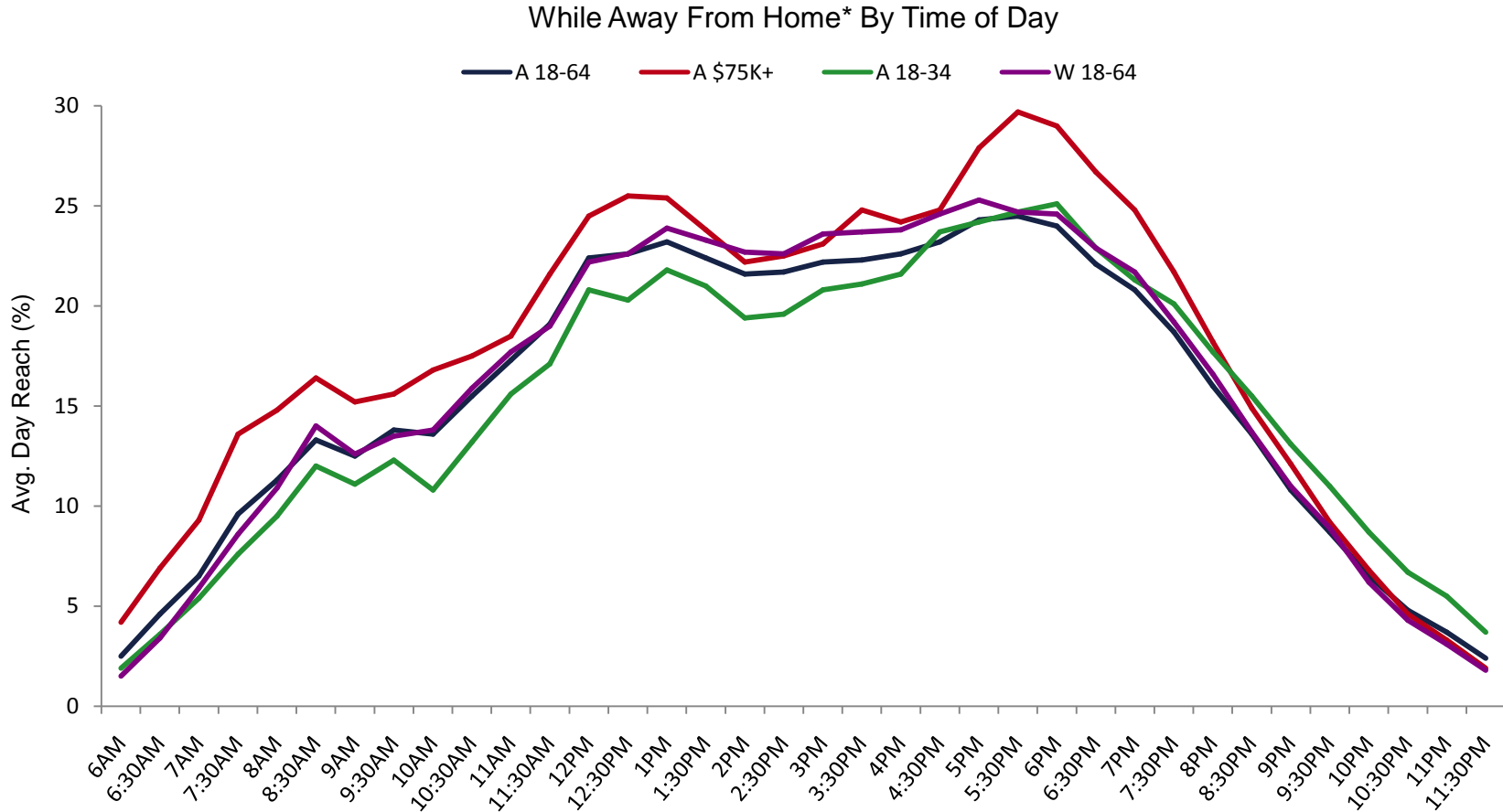


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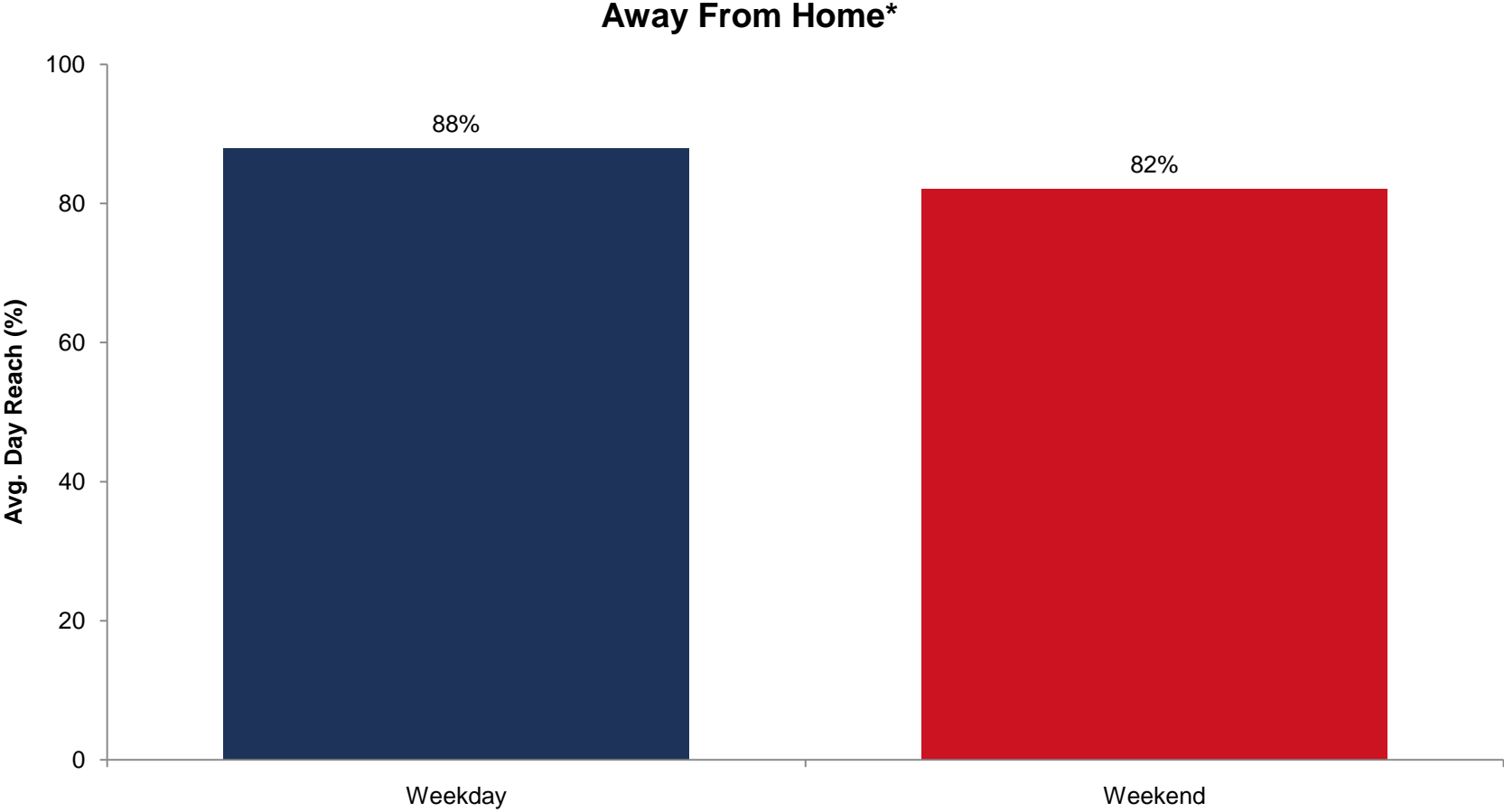
# Different Demo Groups Have Similar Patterns For When They're 'Away From Home'



\*Also includes 'Away From My Workplace'



# Americans Are 'Away From Home' on Weekday And Weekend a Similar Degree



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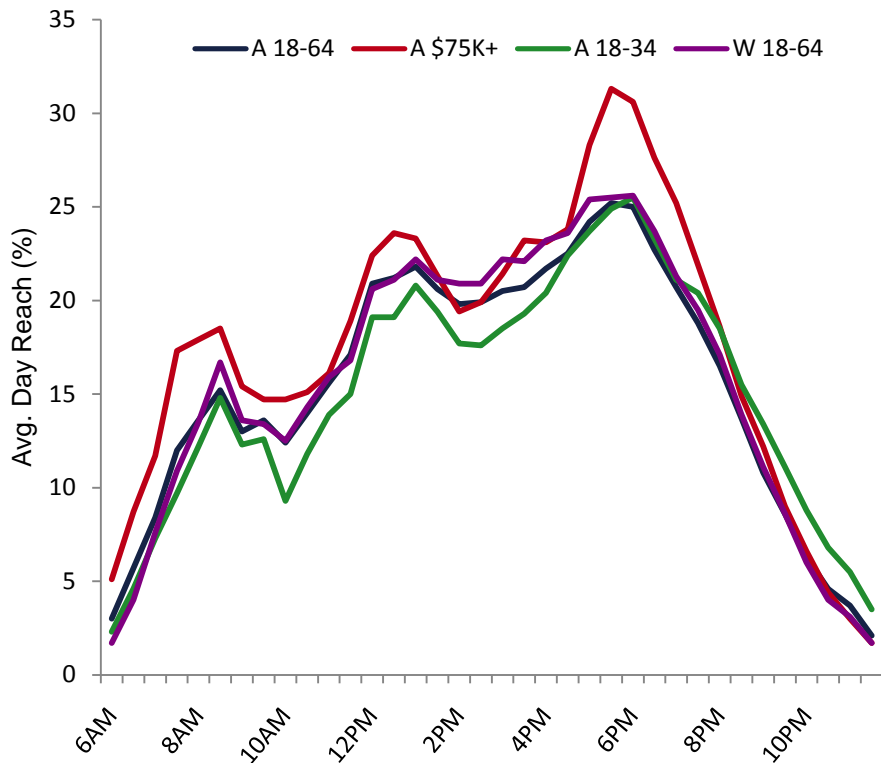
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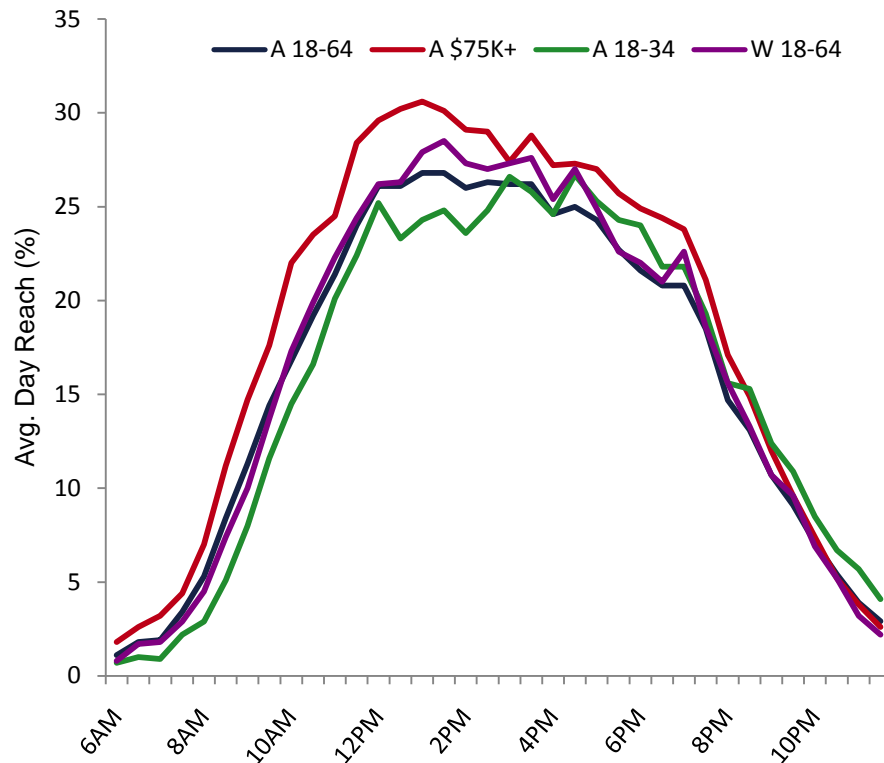


# 'Away From Home' Patterns Vary Dramatically On The Weekdays And Weekends

Away From Home\* By Time Of Day - Weekday



Away From Home\* By Time Of Day - Weekend

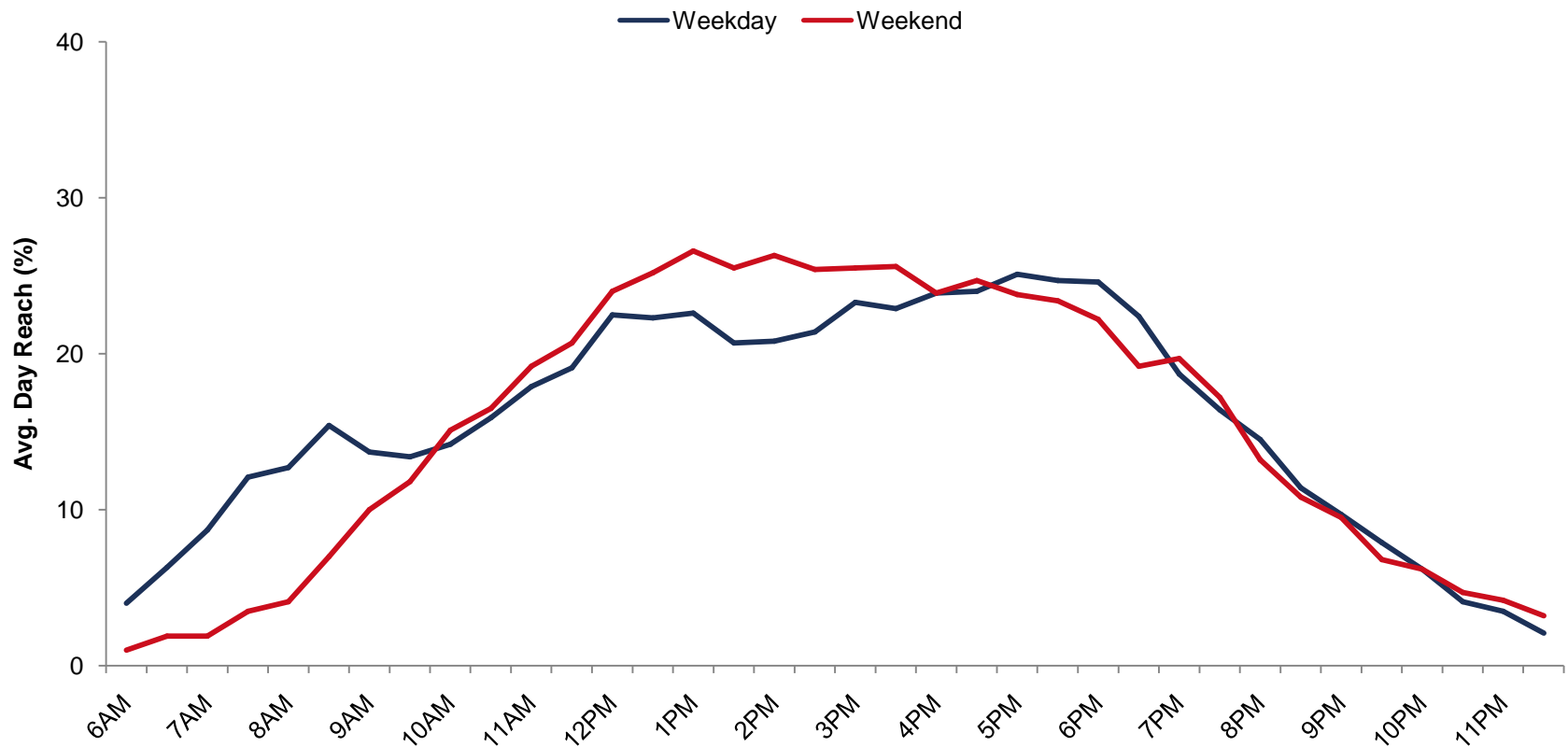


\*Also includes 'Away From My Workplace'



# Afternoon Is The Peak For 'Away From Home' On Both Weekdays And Weekends

## Away From Home\* By Time Of Day



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\* 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

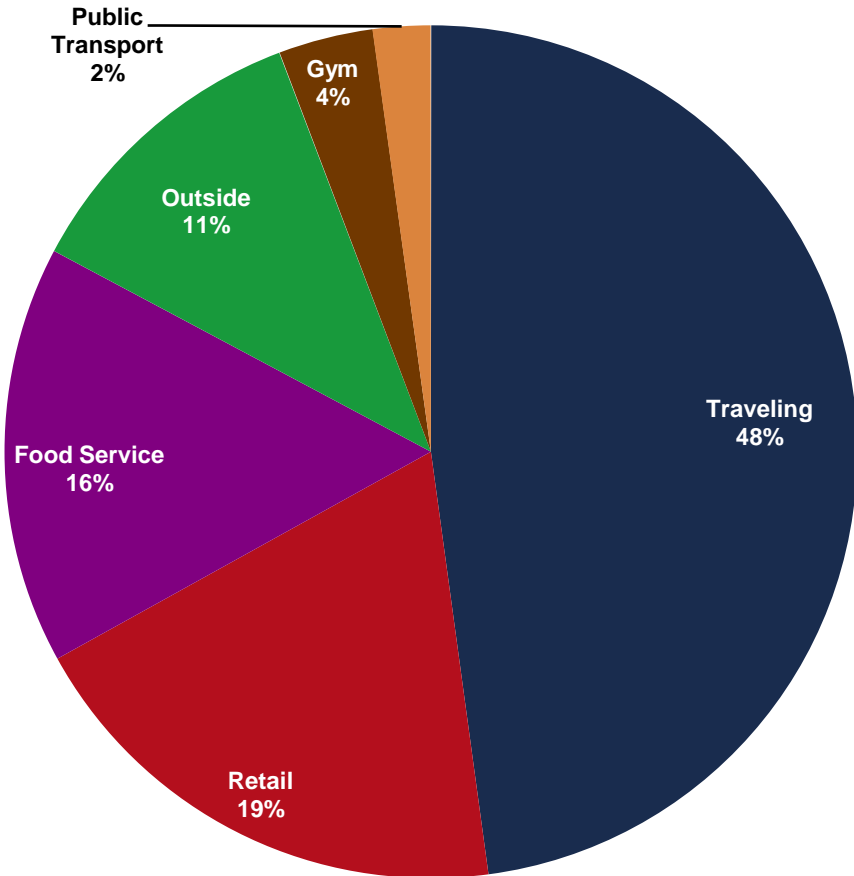
## Gym

Gym or health club

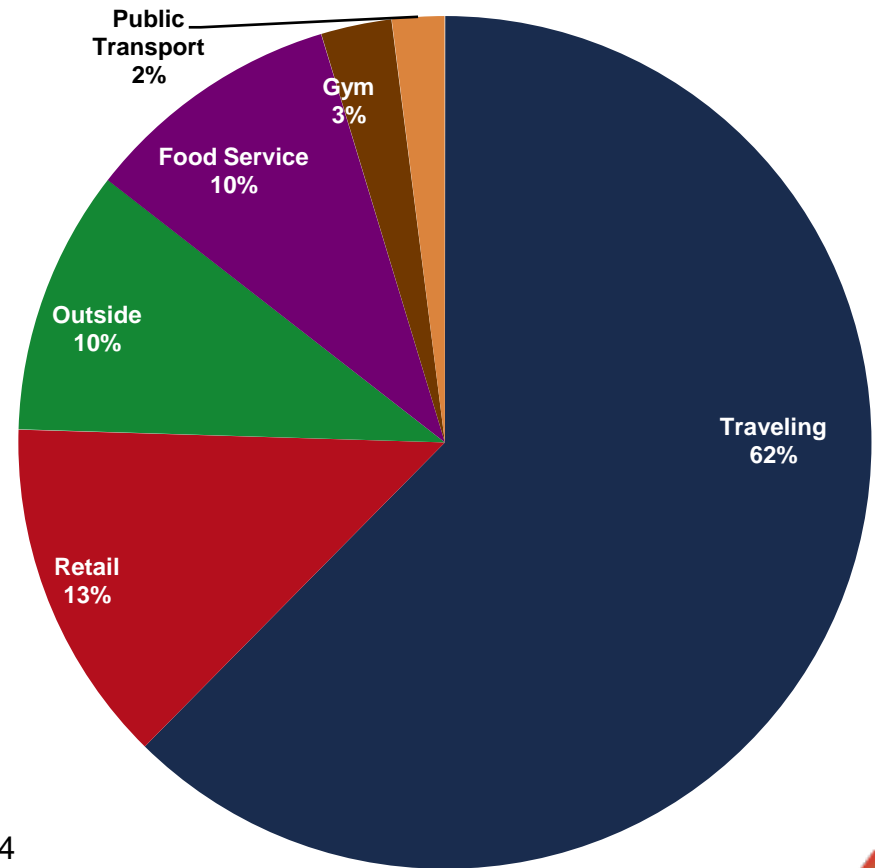


# Travel Dominates 'Away From Home' Experiences

Share of Consumers Away From Home\*



Share of Time Away From Home\*



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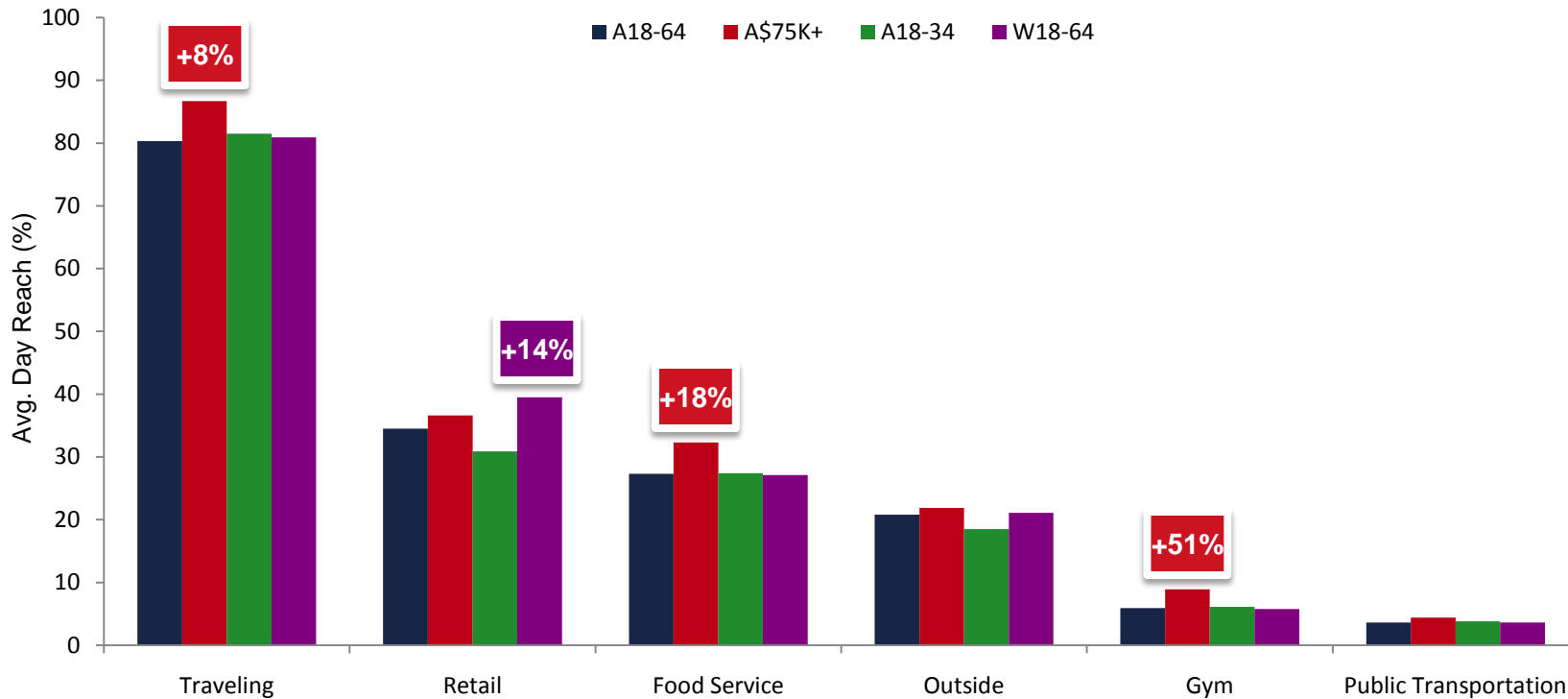
Reported time: 6AM-12AM

\*Also includes 'Away From My Workplace'



# Different Places Have Different Reach By Demographic

Away From Home\* by Demo



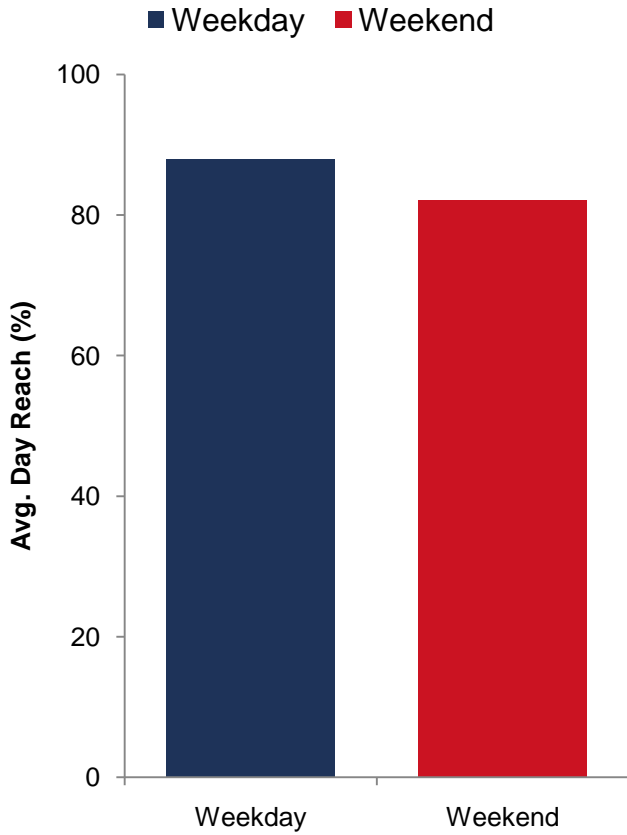
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\*Also includes 'Away From My Workplace'

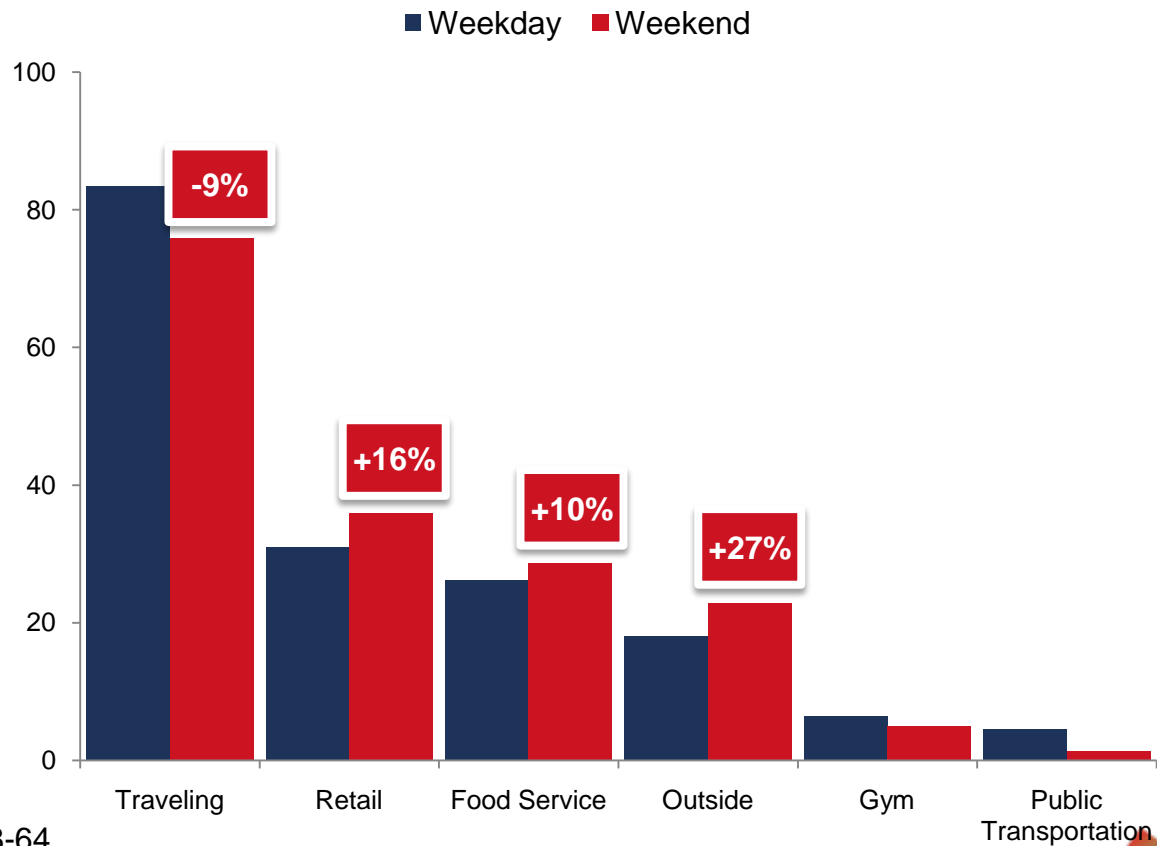


# On Weekends, 'Away From Home' Experiences Shift

Total Away From Home\*



Away From Home\* Weekdays vs. Weekends



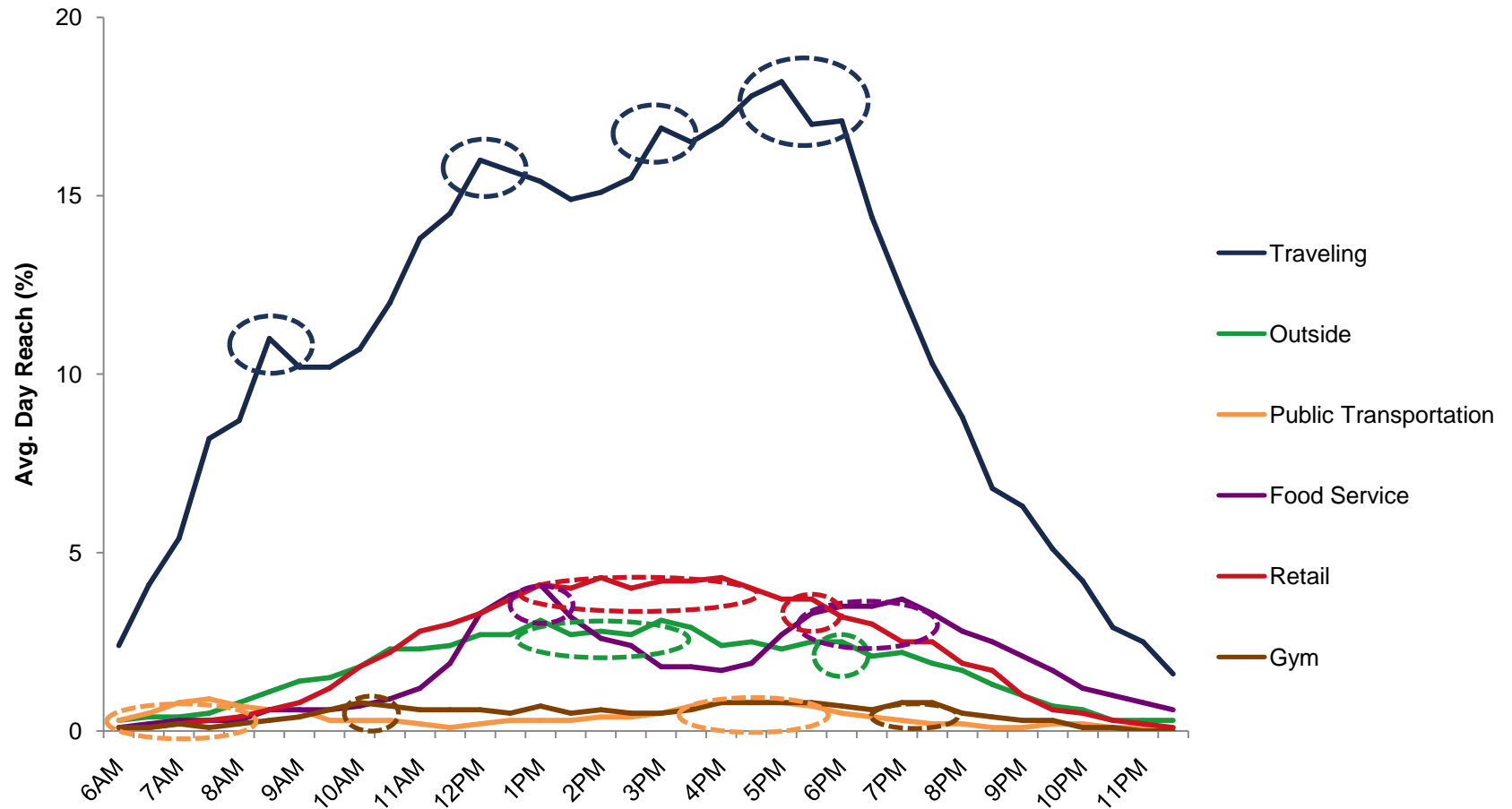
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Reported time: 6AM-12AM

\*Also includes 'Away From My Workplace'



# While 'Away From Home', There Are Distinct Primetimes To Different Places



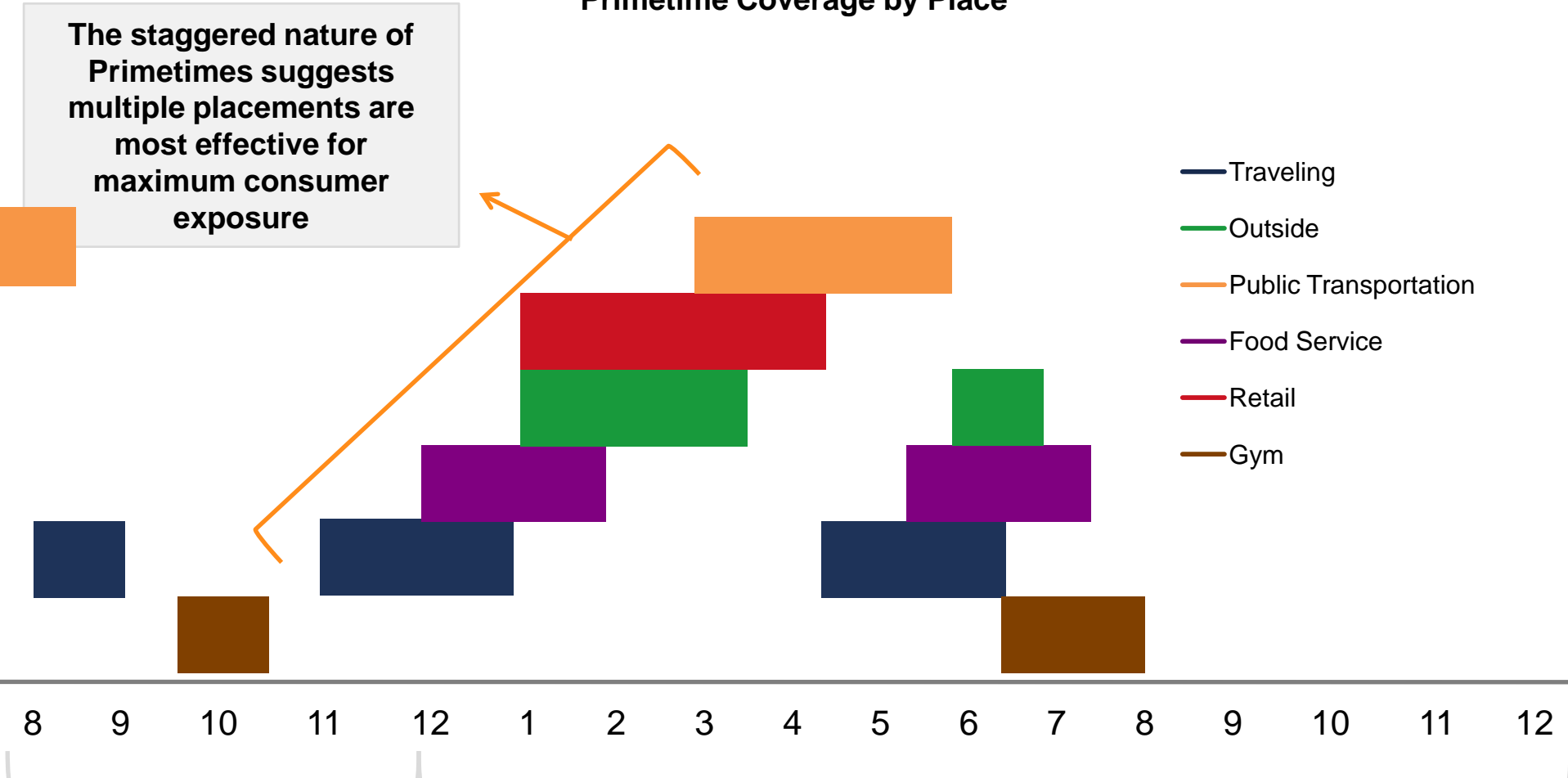
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# While 'Away From Home', There Are Distinct Primetimes To Different Places

Primetime Coverage by Place

The staggered nature of Primetimes suggests multiple placements are most effective for maximum consumer exposure



- Traveling
- Outside
- Public Transportation
- Food Service
- Retail
- Gym

AM

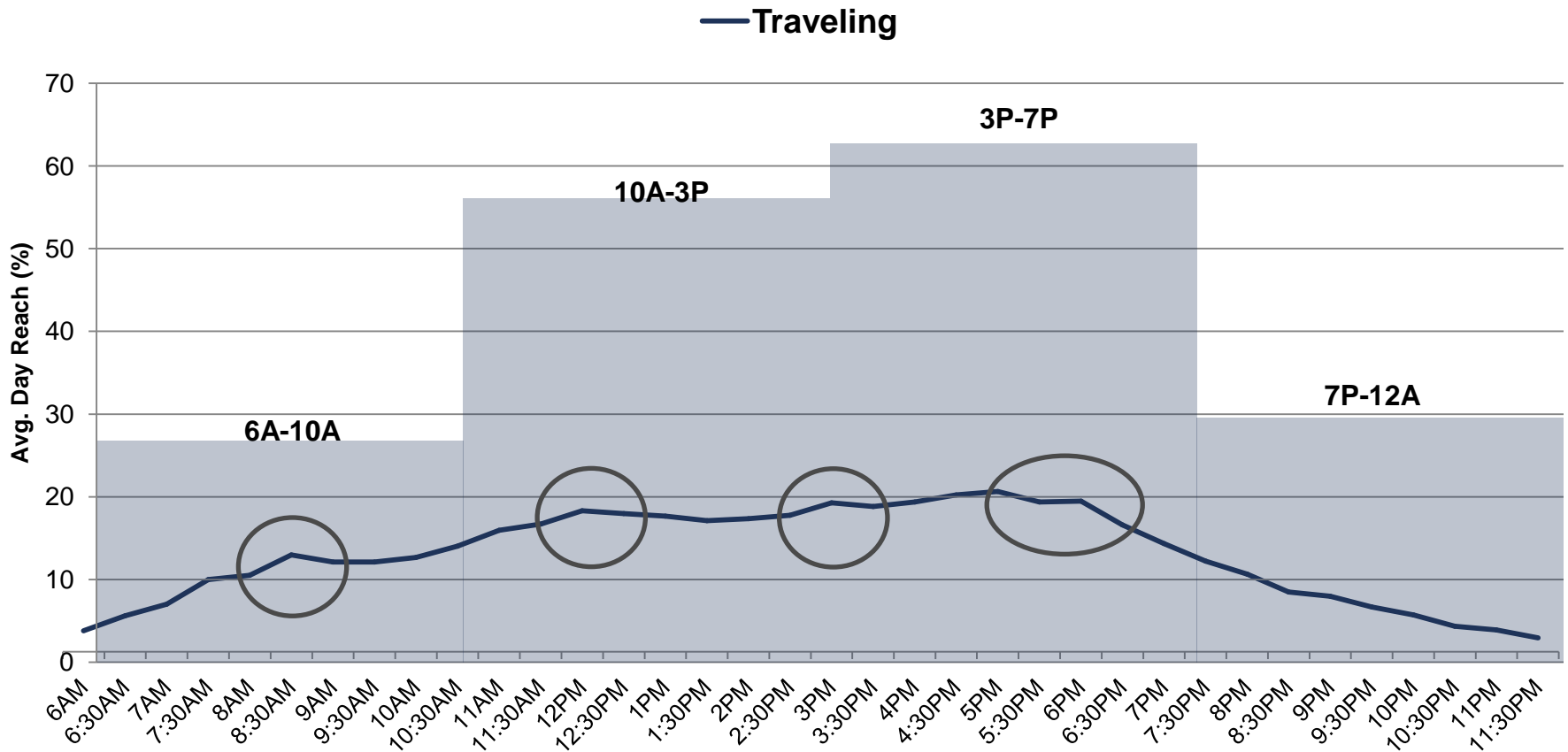
PM

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# Travel Opportunities Have Four Peaks On The Average Day

“Four Prime Times”

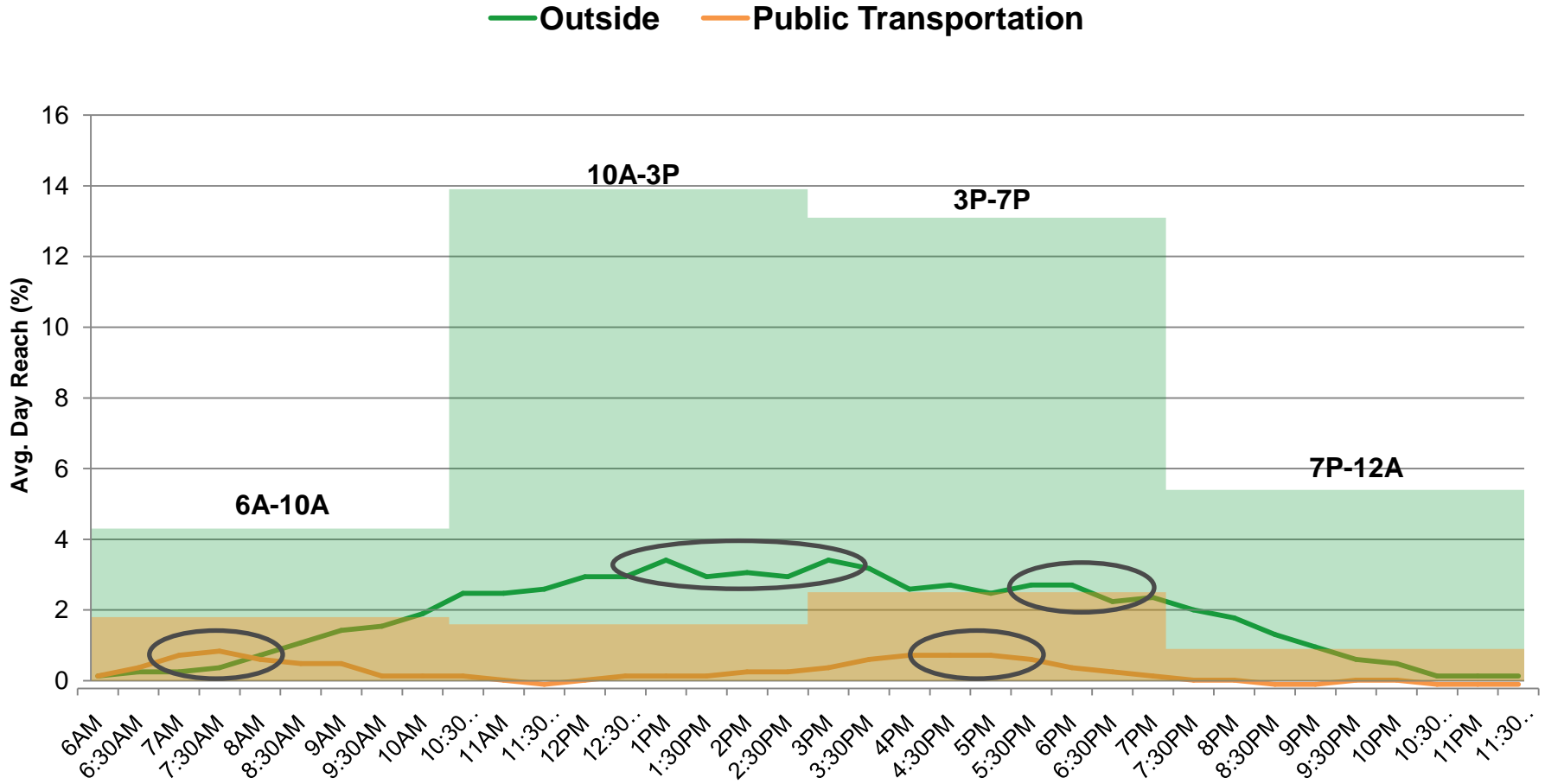


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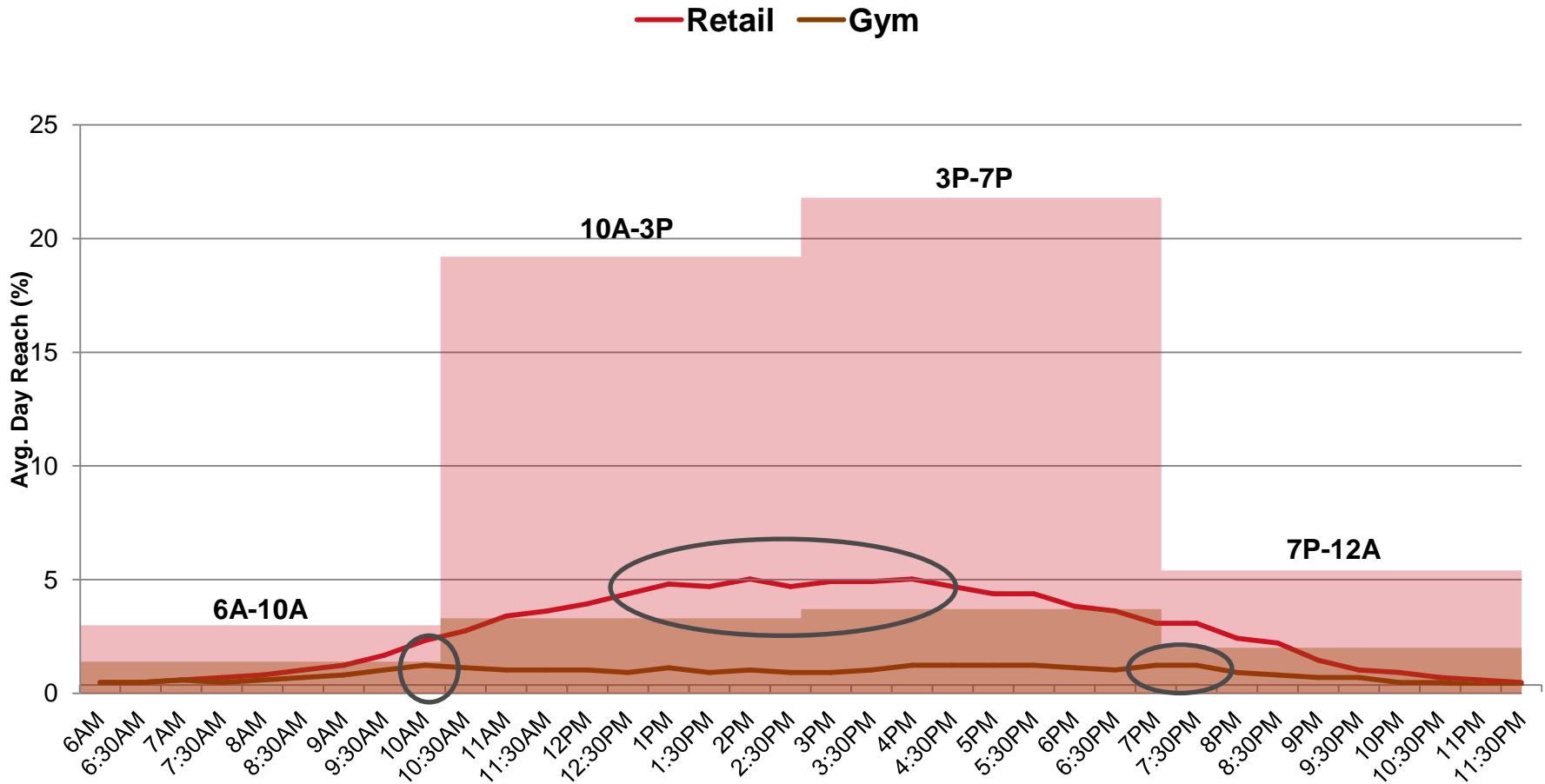
# Outside And Public Transportation Opportunities Have Distinct Primetimes



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# Mid-Day Is Retail Primetime; Gym Peaks Slightly Mid-Morning And After Work

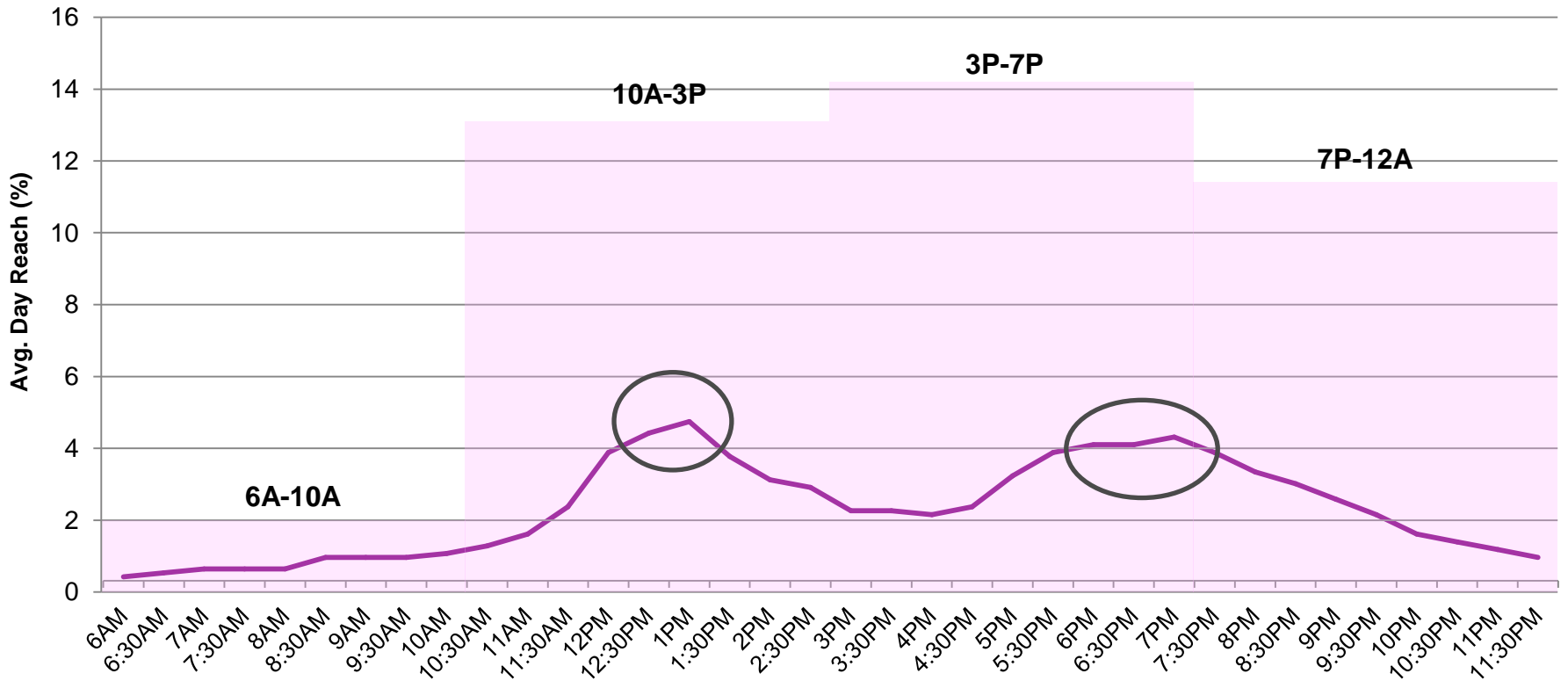


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# Unsurprisingly, Food Service Primetime Is Lunch/Dinner

— Food Service



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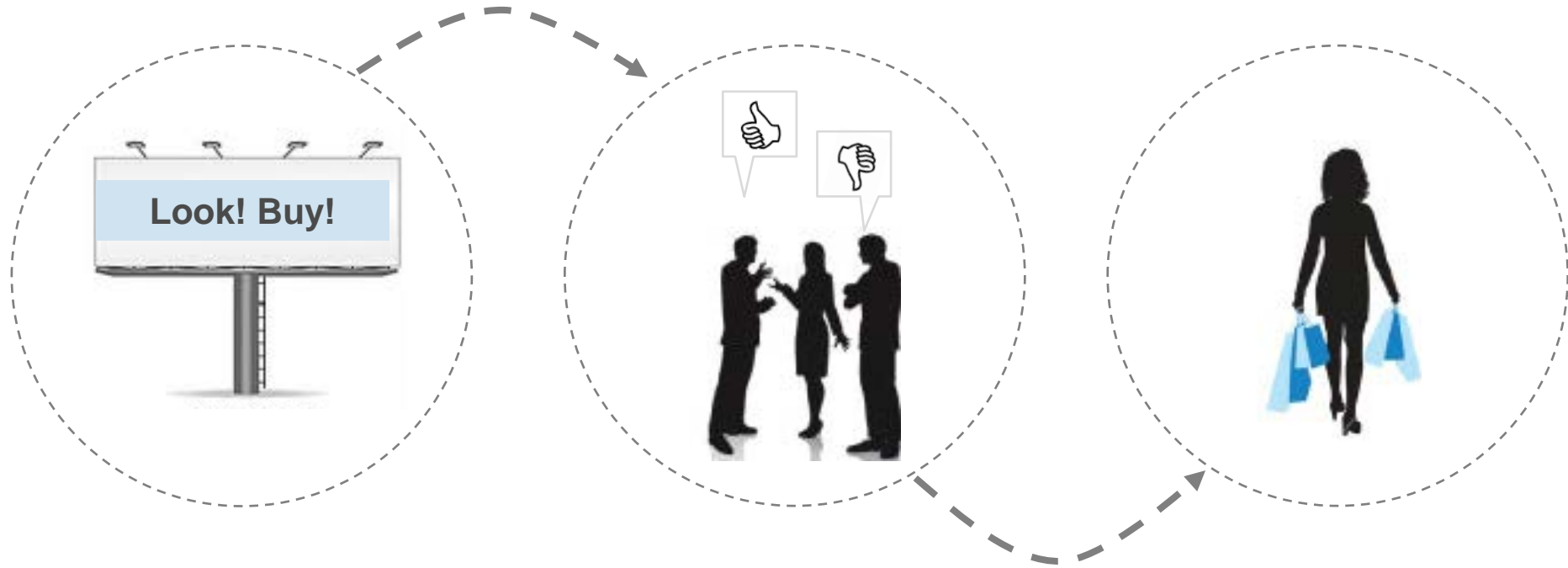
Most Americans interact every day with 'away from home' places & vehicles...

... 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

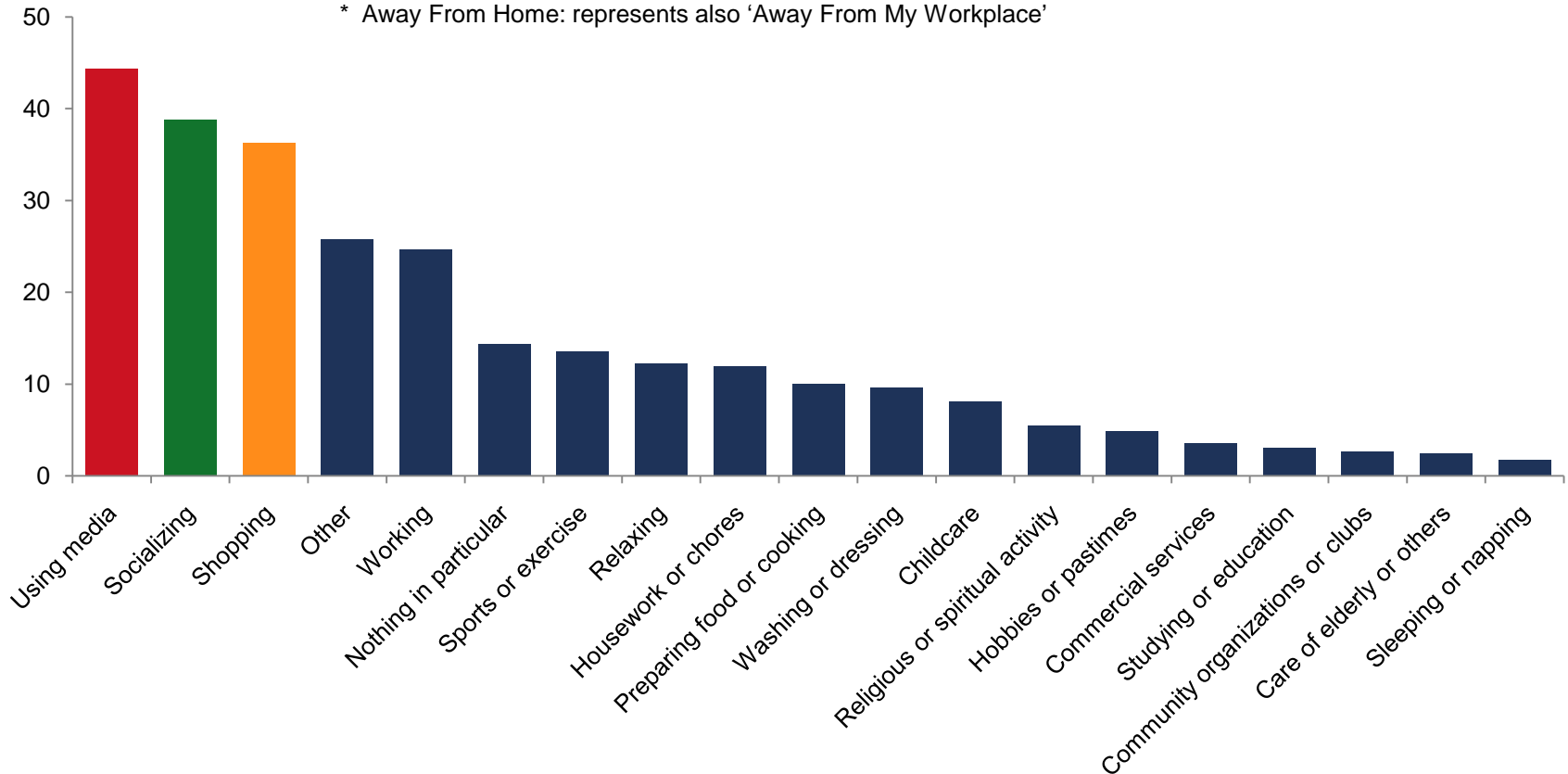
They're Shopping  
and Making  
Purchasing  
Decisions



# 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'

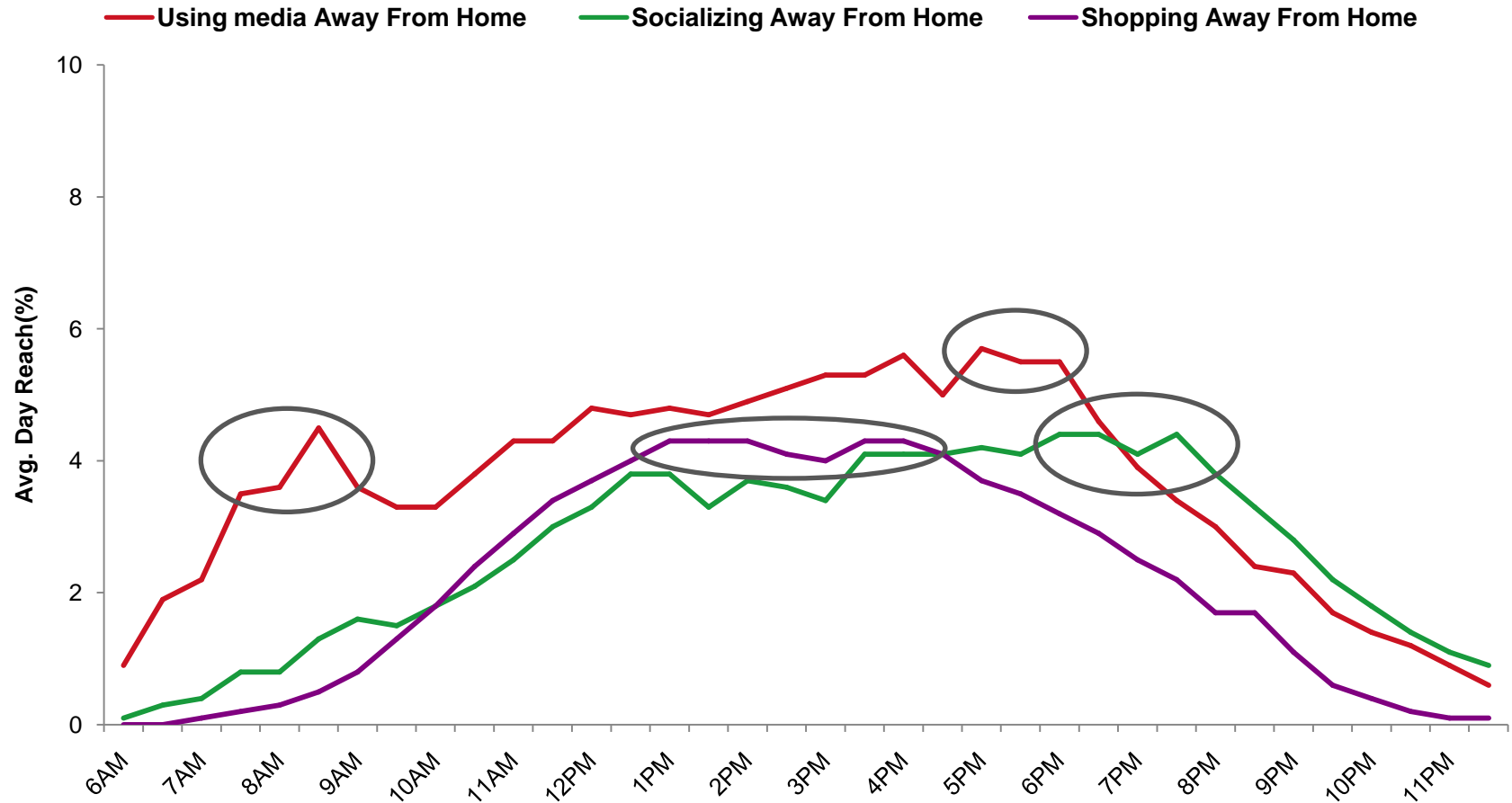


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Reported time: 6AM-12AM



# Media Use, Socializing, And Shopping While 'Away From Home' Have Different Time of Day Patterns



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# OOH Marketplace Opportunities





# OOH Marketplace

AWARENESS  
FREQUENCY <sup>BIG</sup> INNOVATIVE  
STRATEGIC IMPACT VISUAL  
PRIMARY STRATEGIC CREATIVE TARGETED  
SCALE REACH TACTICAL MICRO-TARGETED  
CONVERGENCE  
INNOVATION LOCAL MASS  
INTERACTIVE



# 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

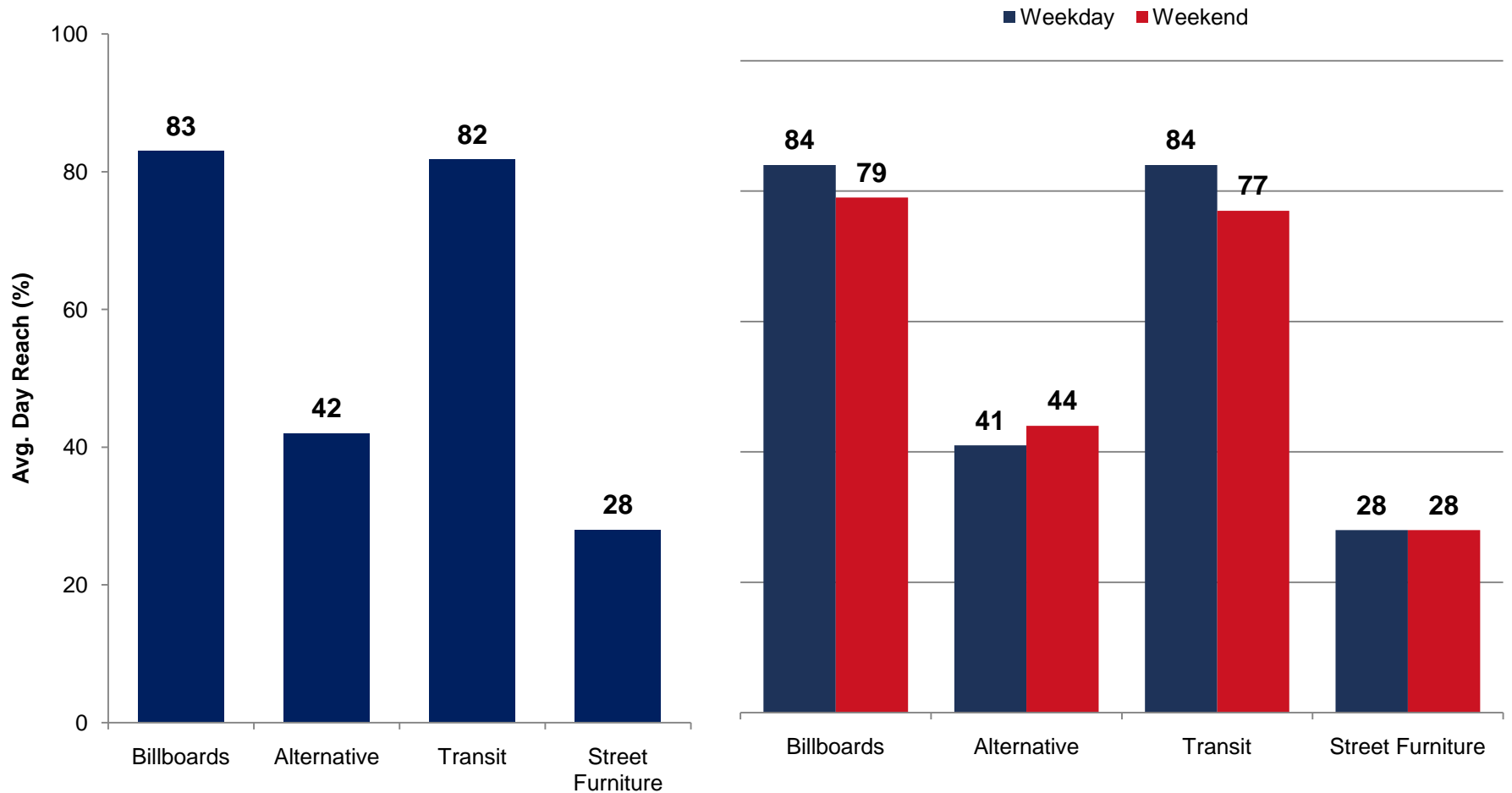
- Bus
- Walking
- Other store or mall



# Consumer Are Exposed To A Variety Of 'Away From Home' Places



# OOH Media Average-Day Potential Reach

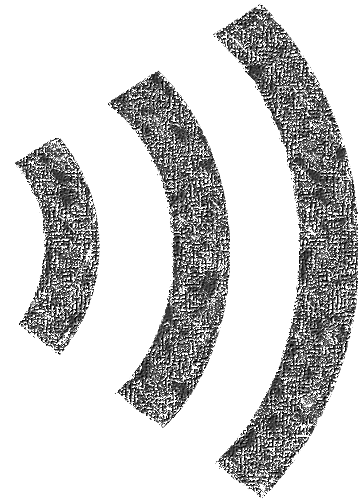
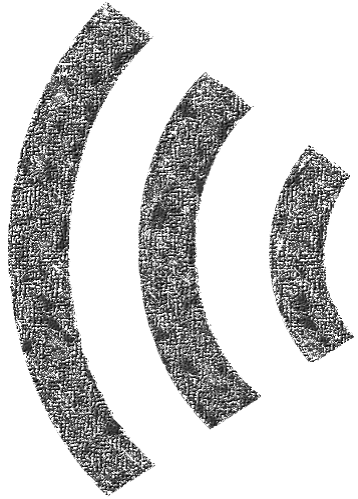


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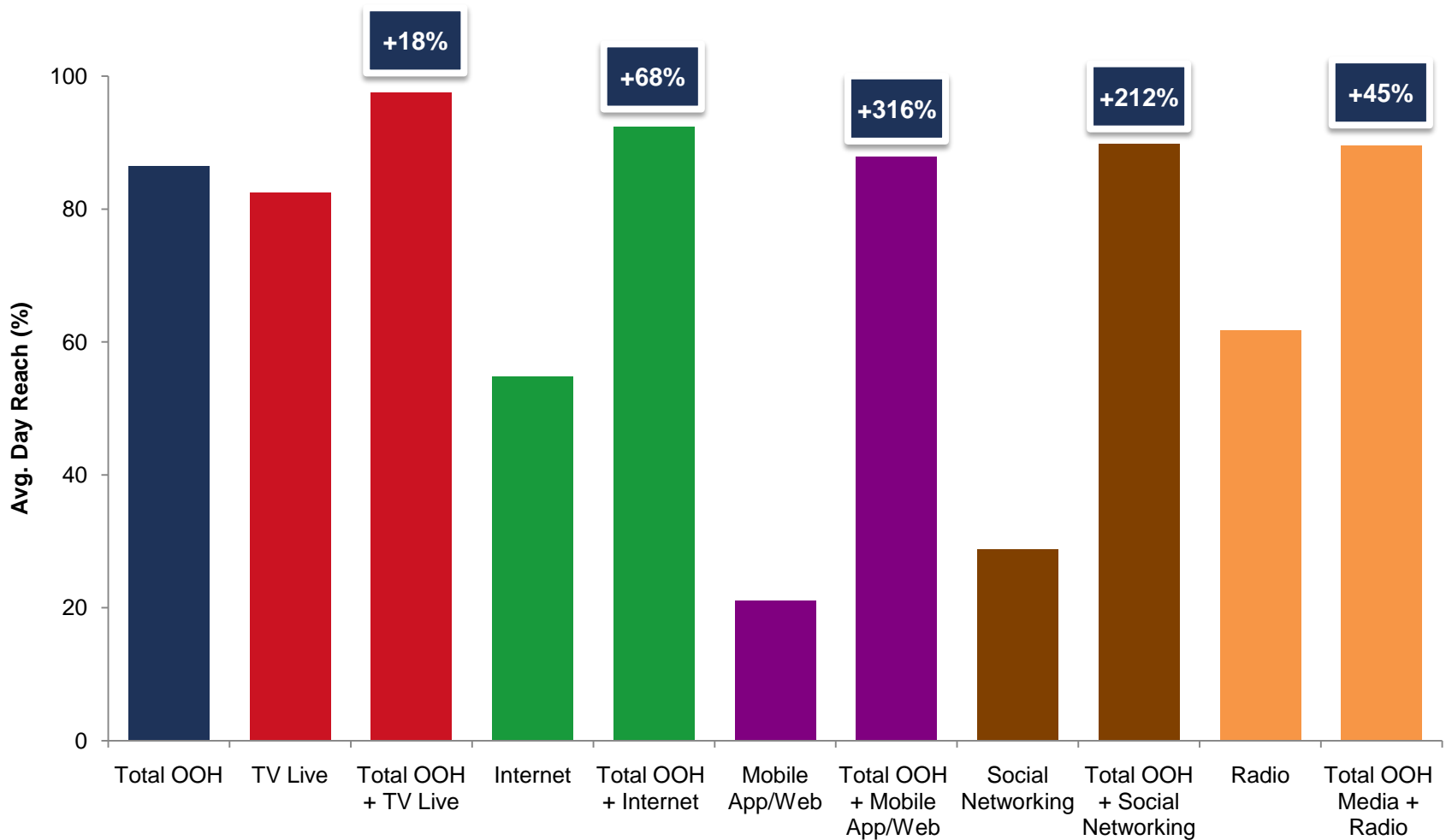
Reported time: 6AM-12AM



# OOH Potential Media Opportunities Can Supercharge Media Plans



# Adding OOH To Other Media Can Potentially Increase Reach By Up To 300%

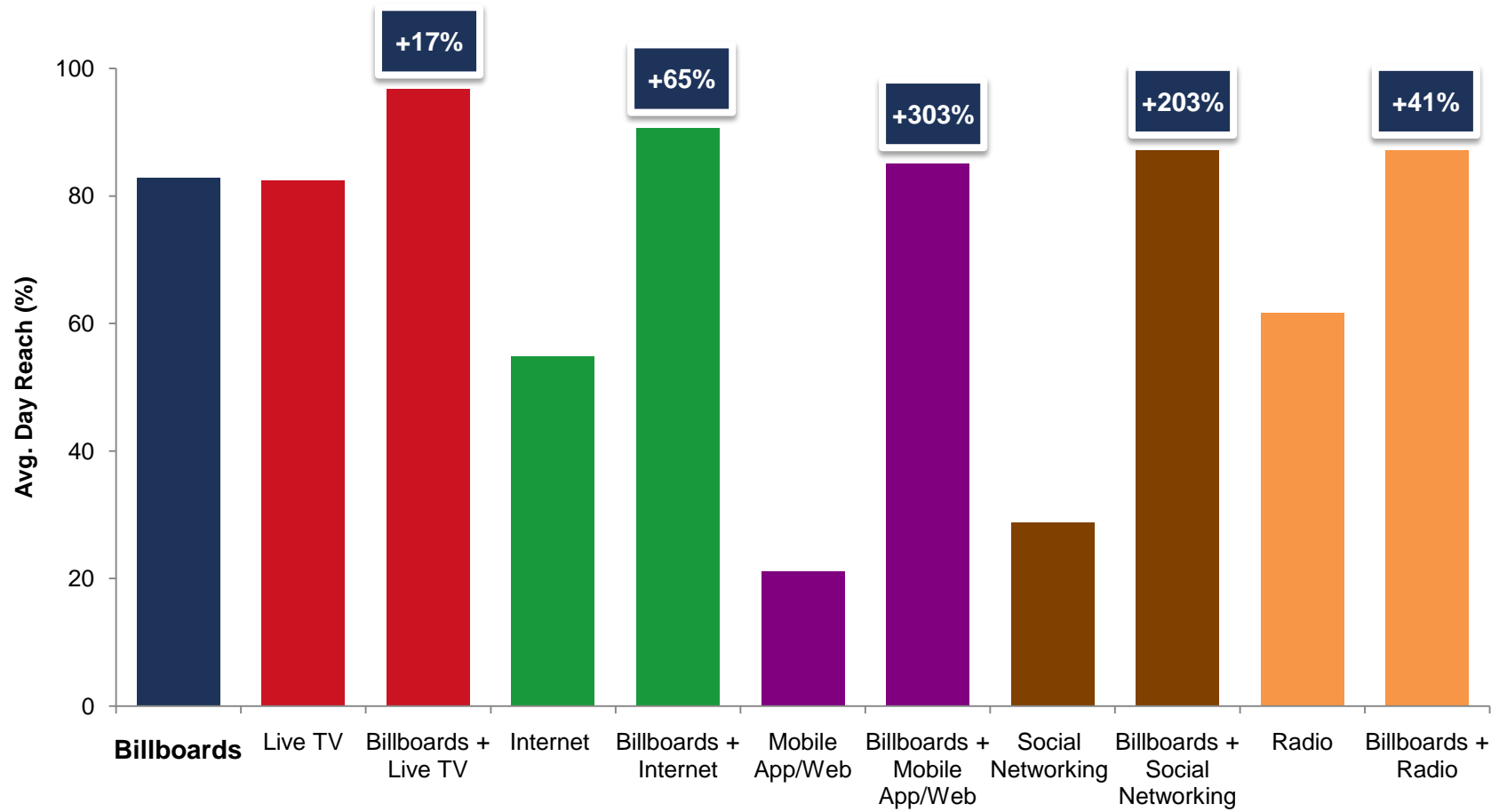


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Reported time: 6AM-12AM



# Adding Billboards To Other Media Can Potentially Increase Reach By Up To 300%

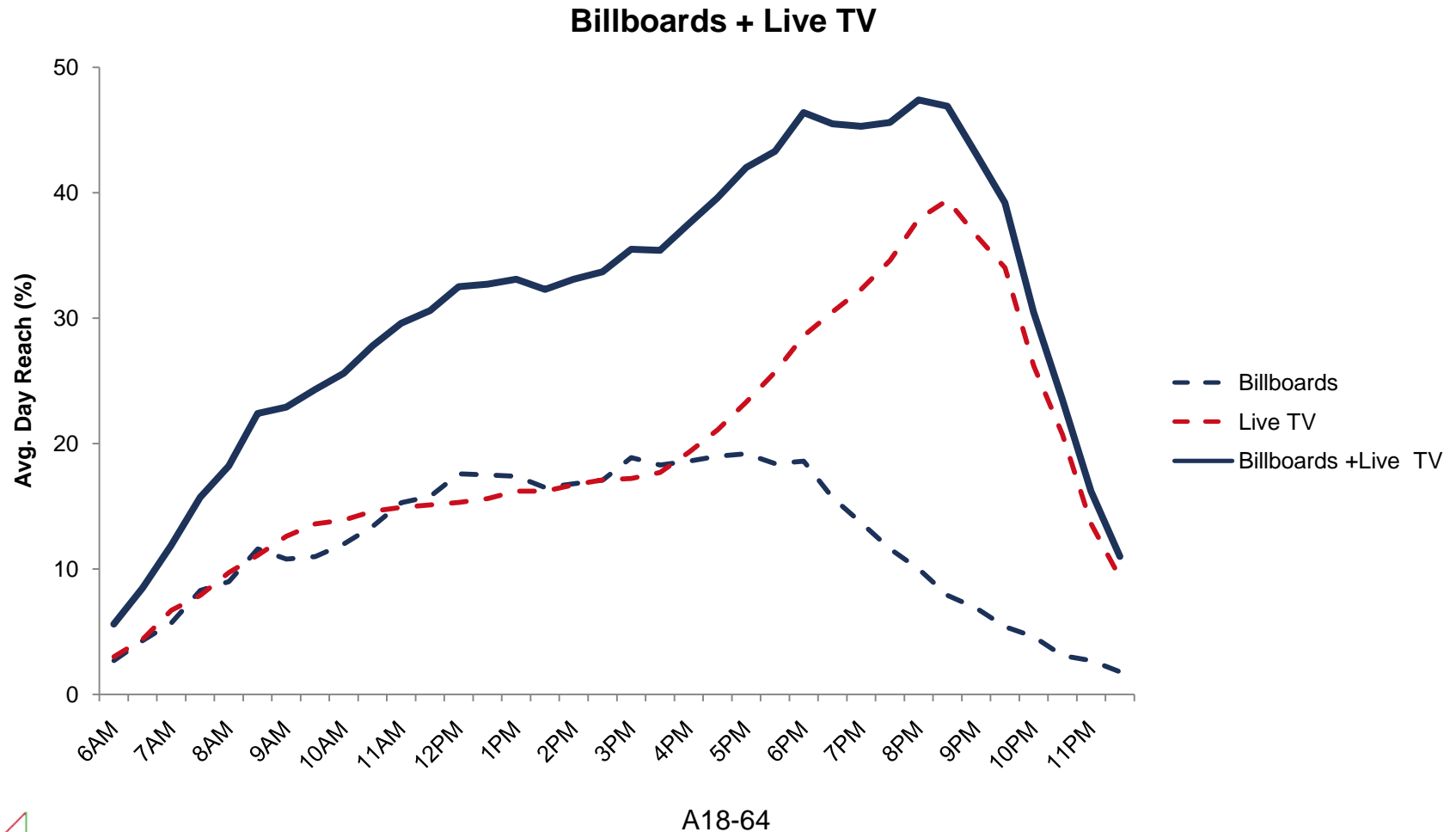


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Reported time: 6AM-12AM



# TV And Billboards Impacts Reach Throughout The Day

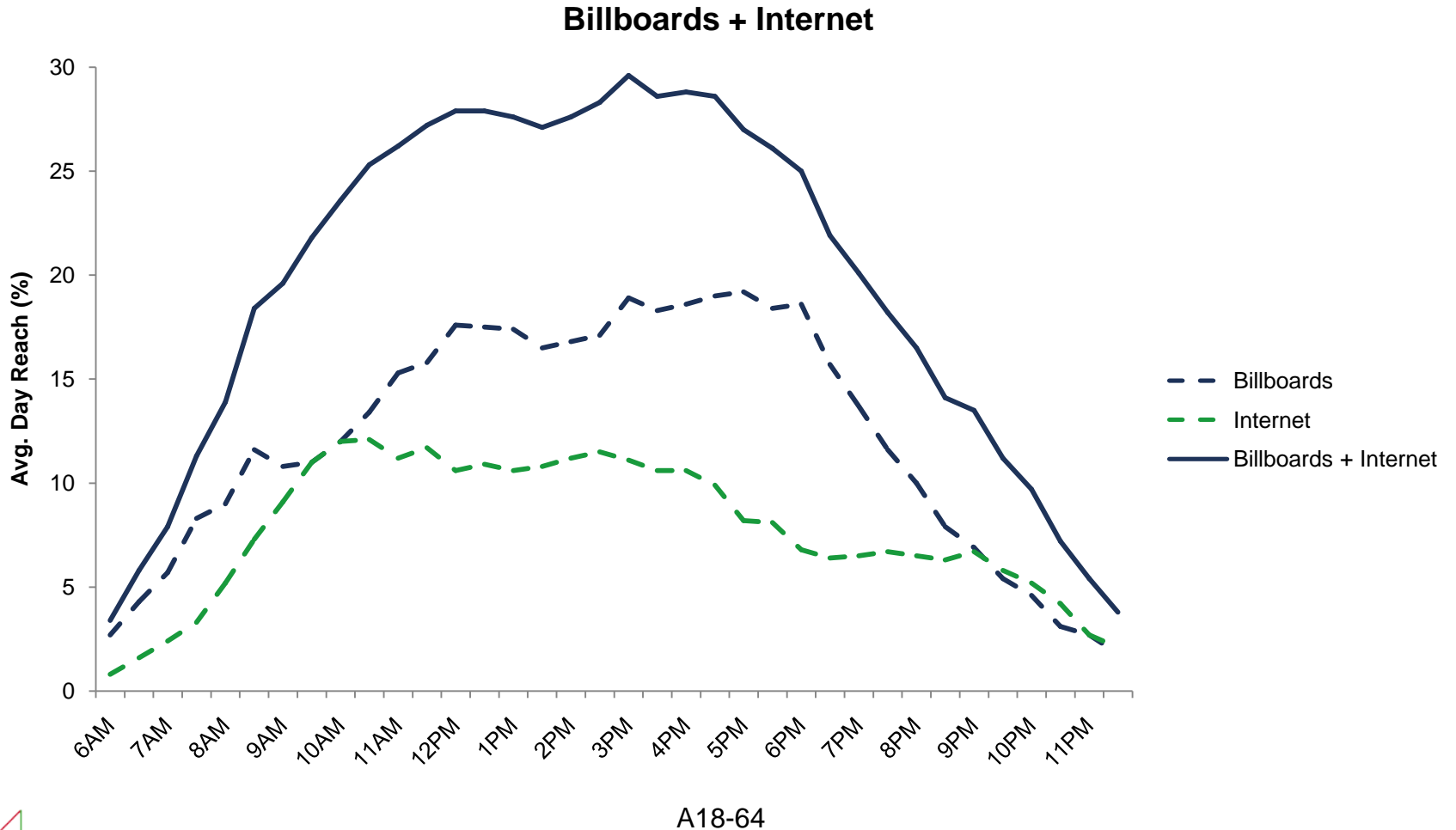


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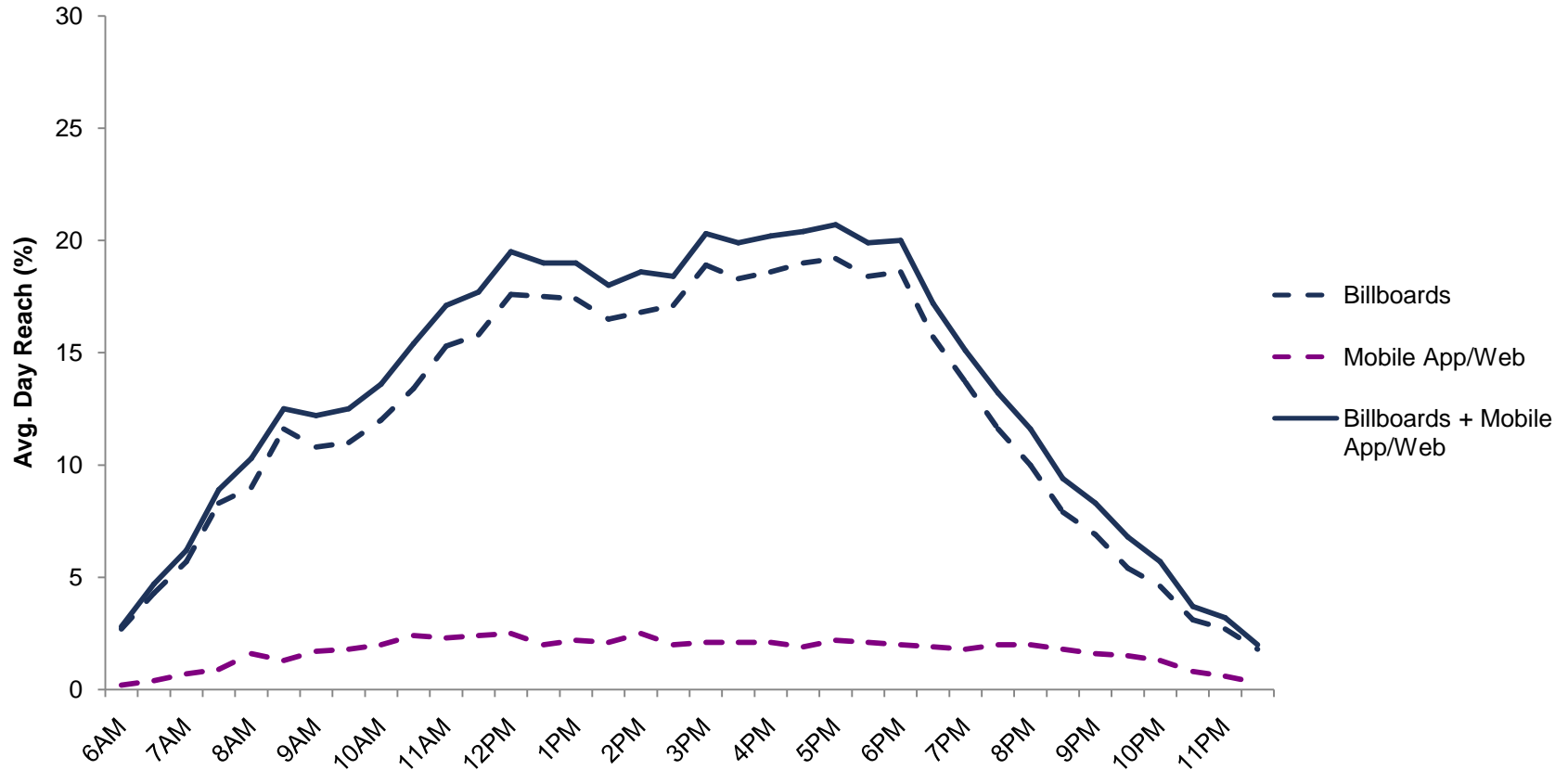


# Billboards And Internet Together More Than Double Afternoon Reach



# Adding Billboards to Mobile App/Web Increases Reach by 300%

## Billboards + Mobile App/Web

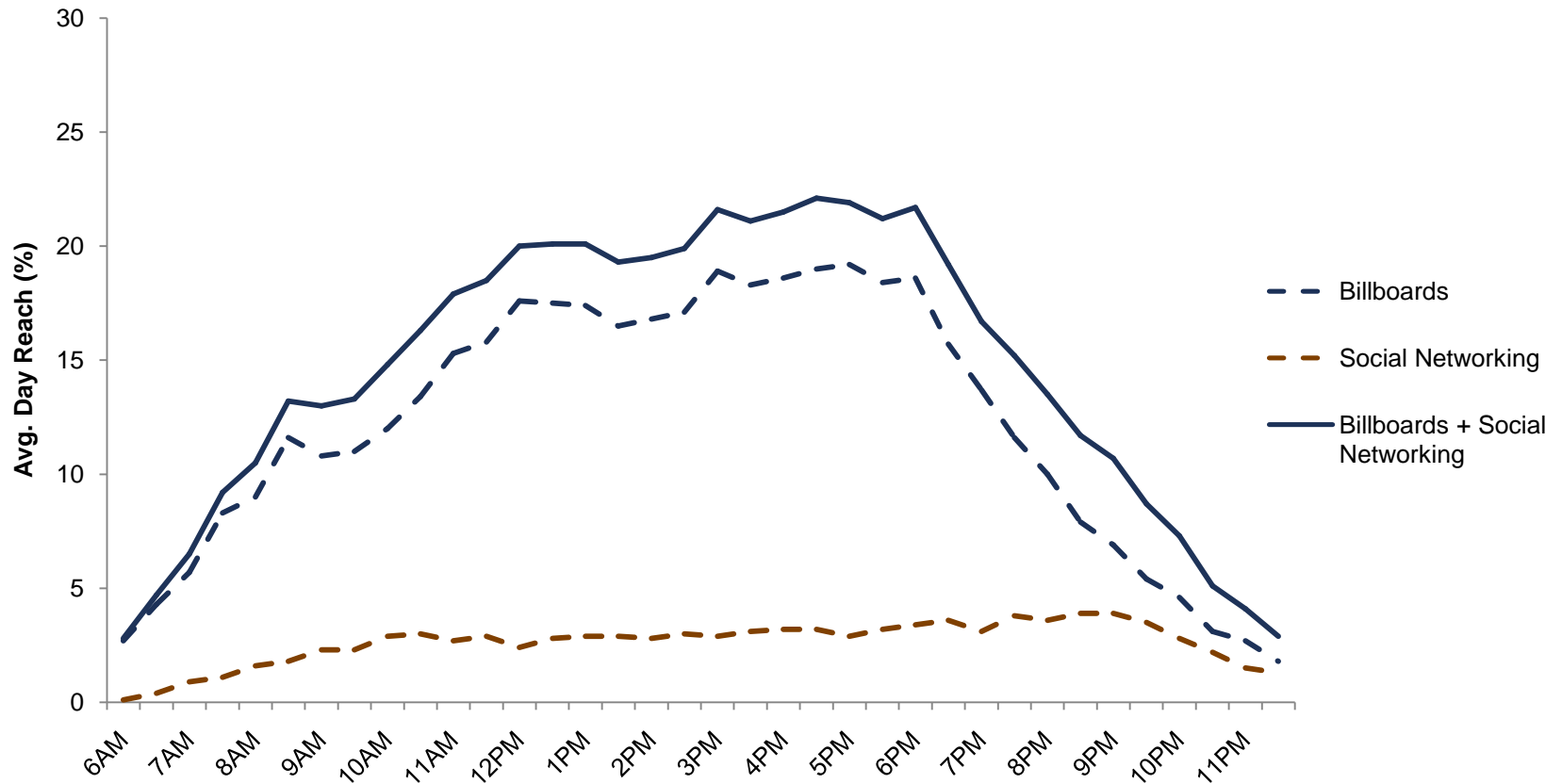


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# Adding Billboards to Social Networking Increases Reach by 200%

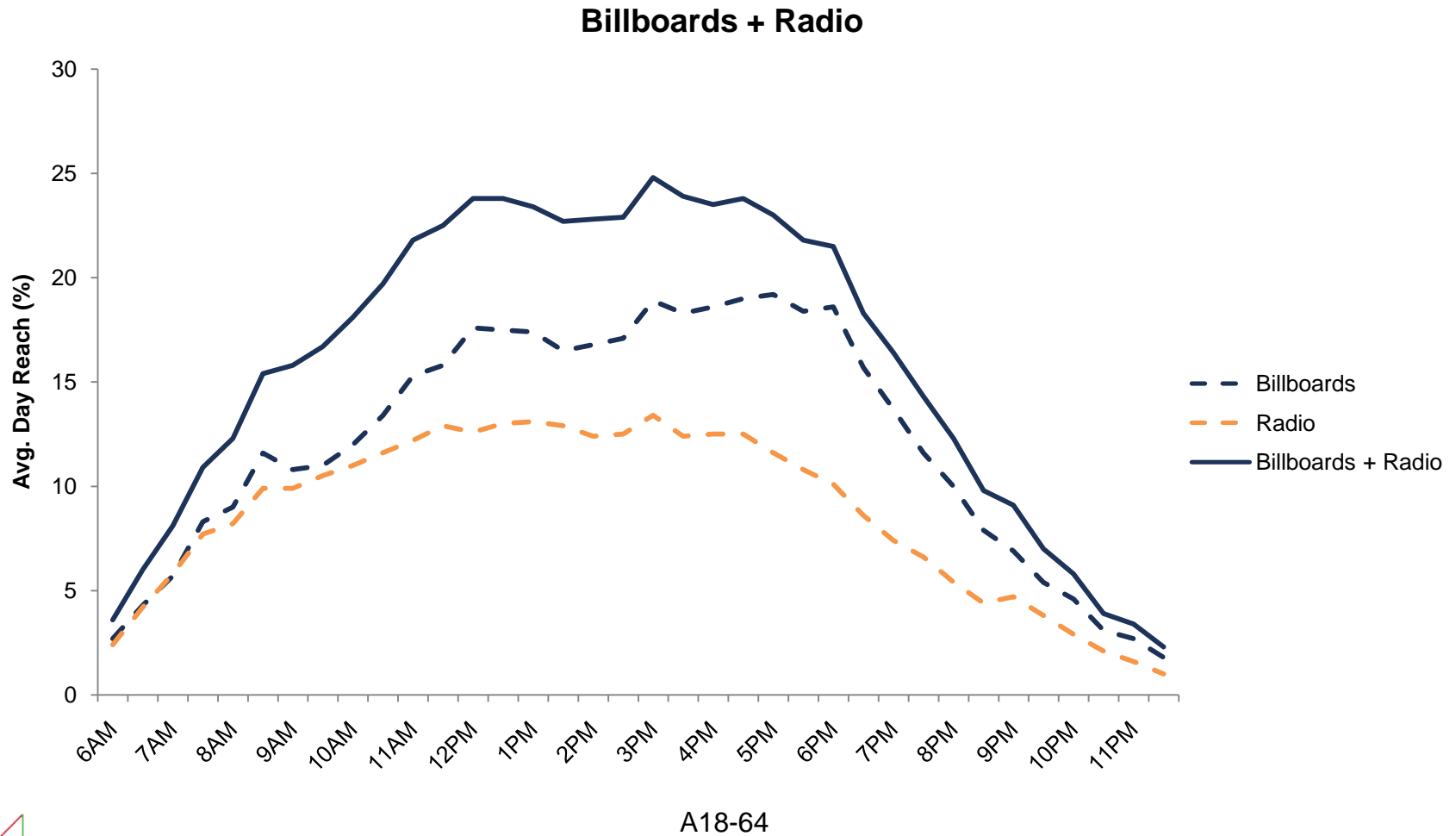
## Billboards + Social Networking



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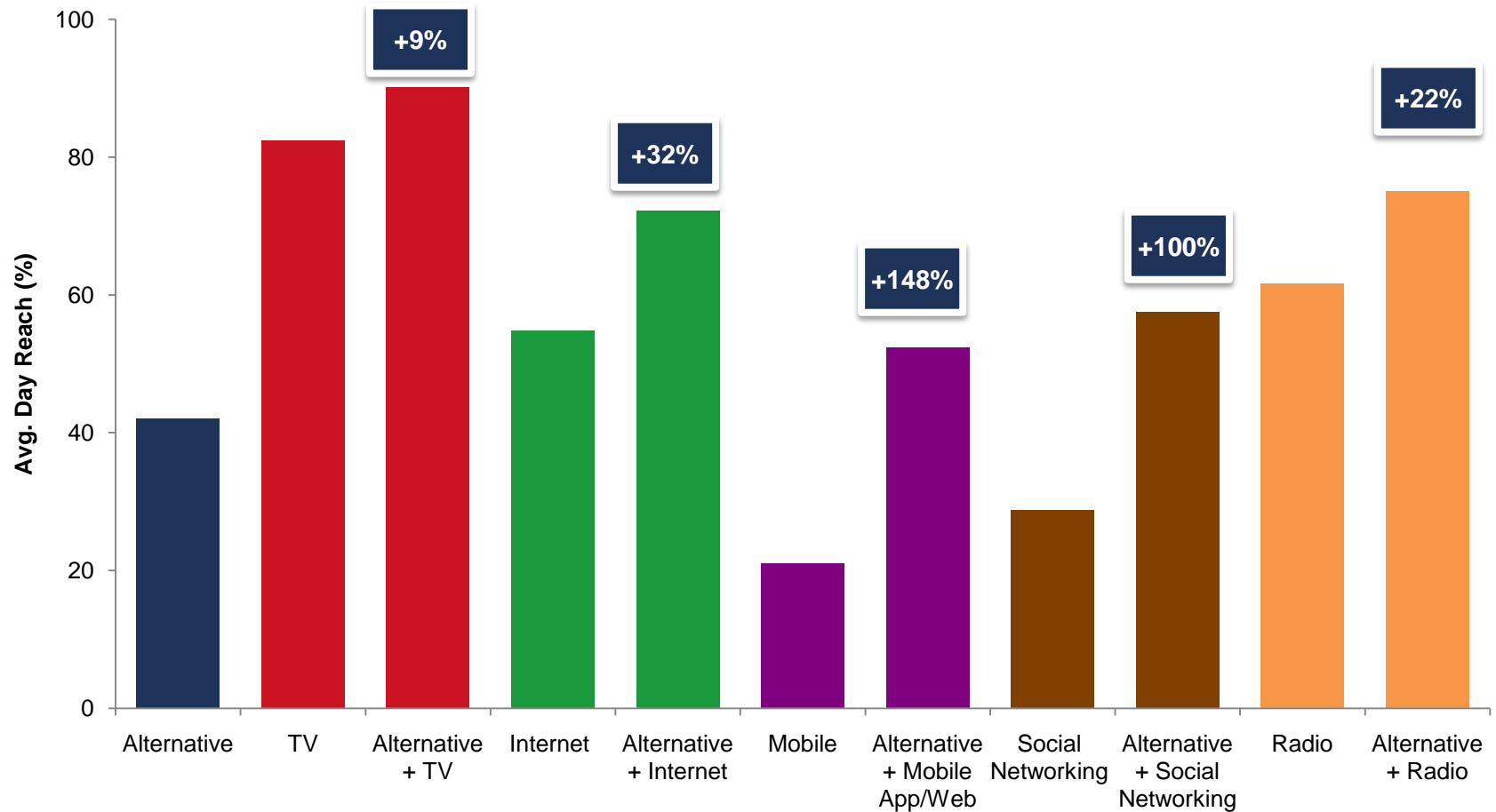
# Billboards And Radio Increases Afternoon Reach By 70%



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# Strategic Addition of Alternative To Other Media Can Potentially Increase Exposure By Up To 148%



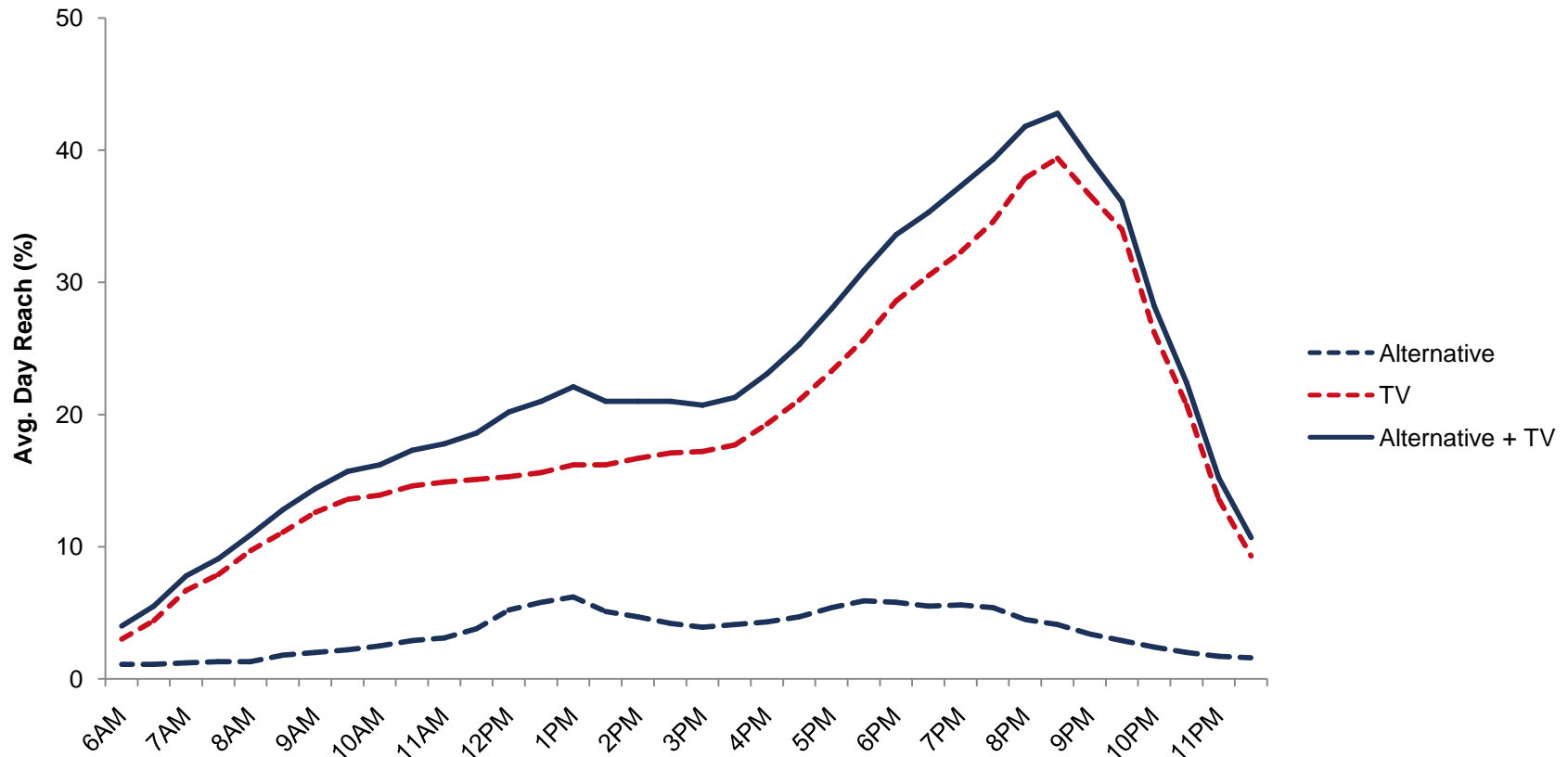
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Reported time: 6AM-12AM



# Adding Alternative To Live TV Increases Exposure

## Alternative + TV

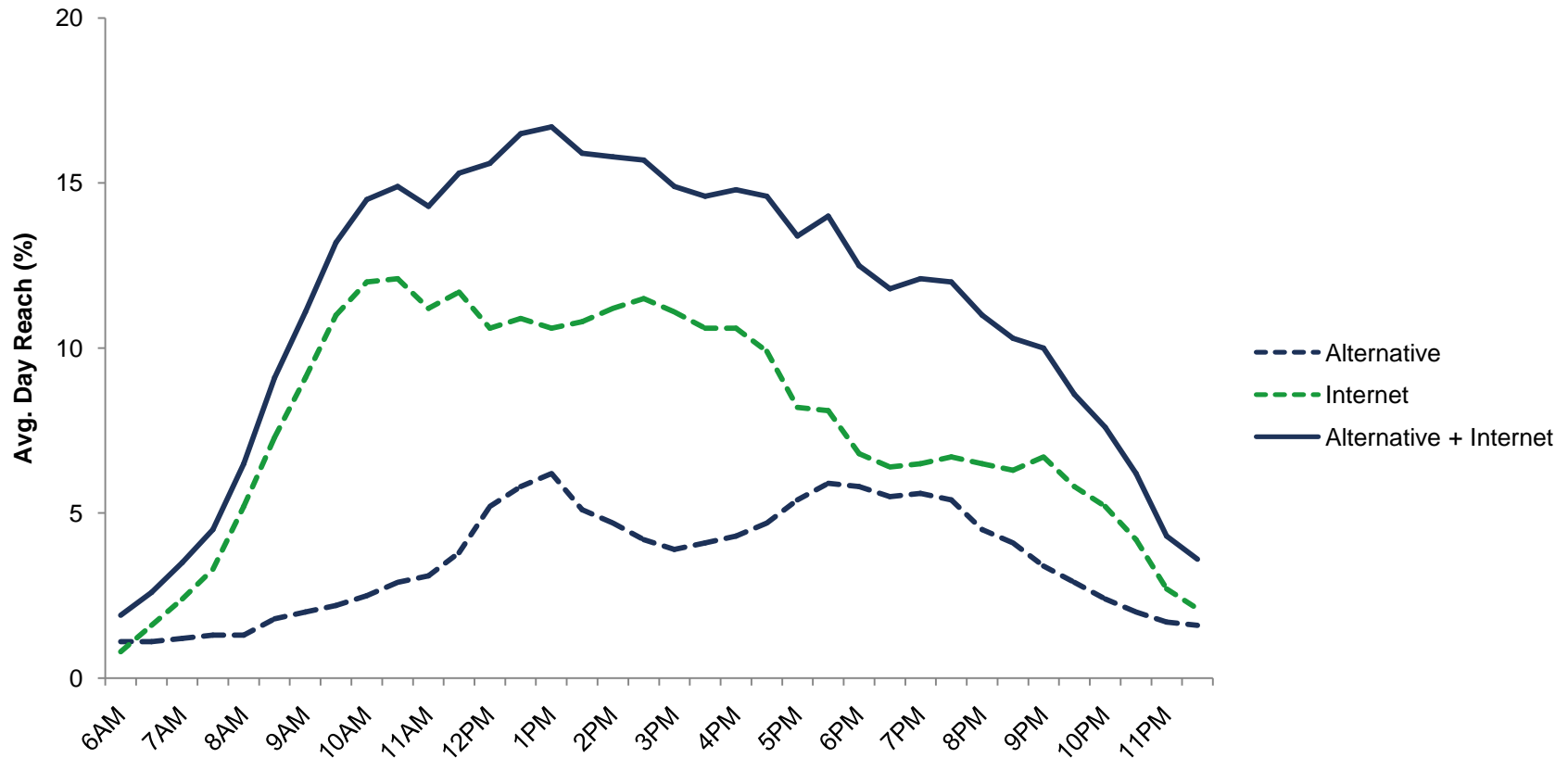


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# Alternative Adds 30% Reach To Internet

## Alternative + Internet

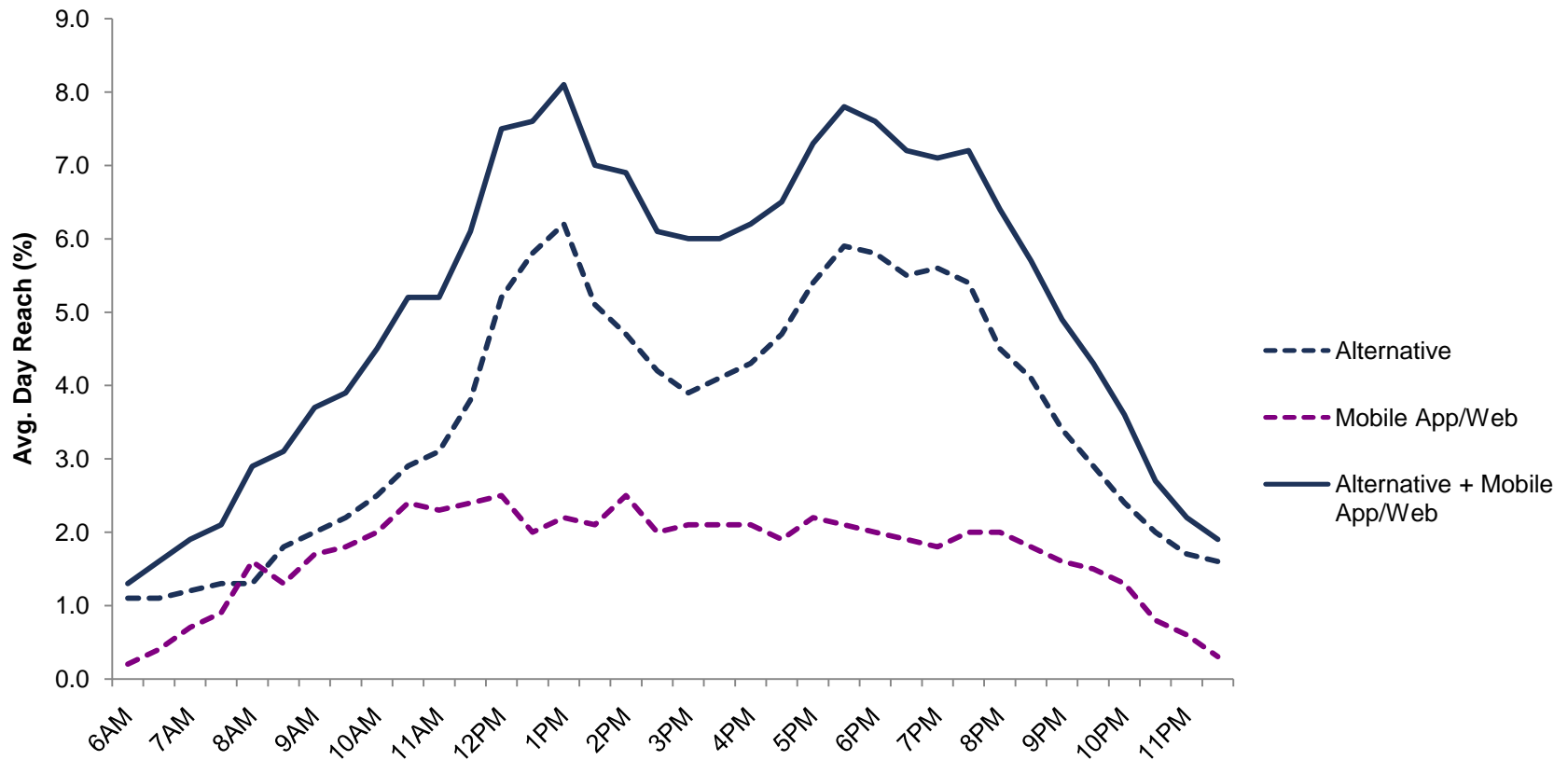


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# Alternative Supplements Flat Media Reach Throughout The Day

## Alternative + Mobile



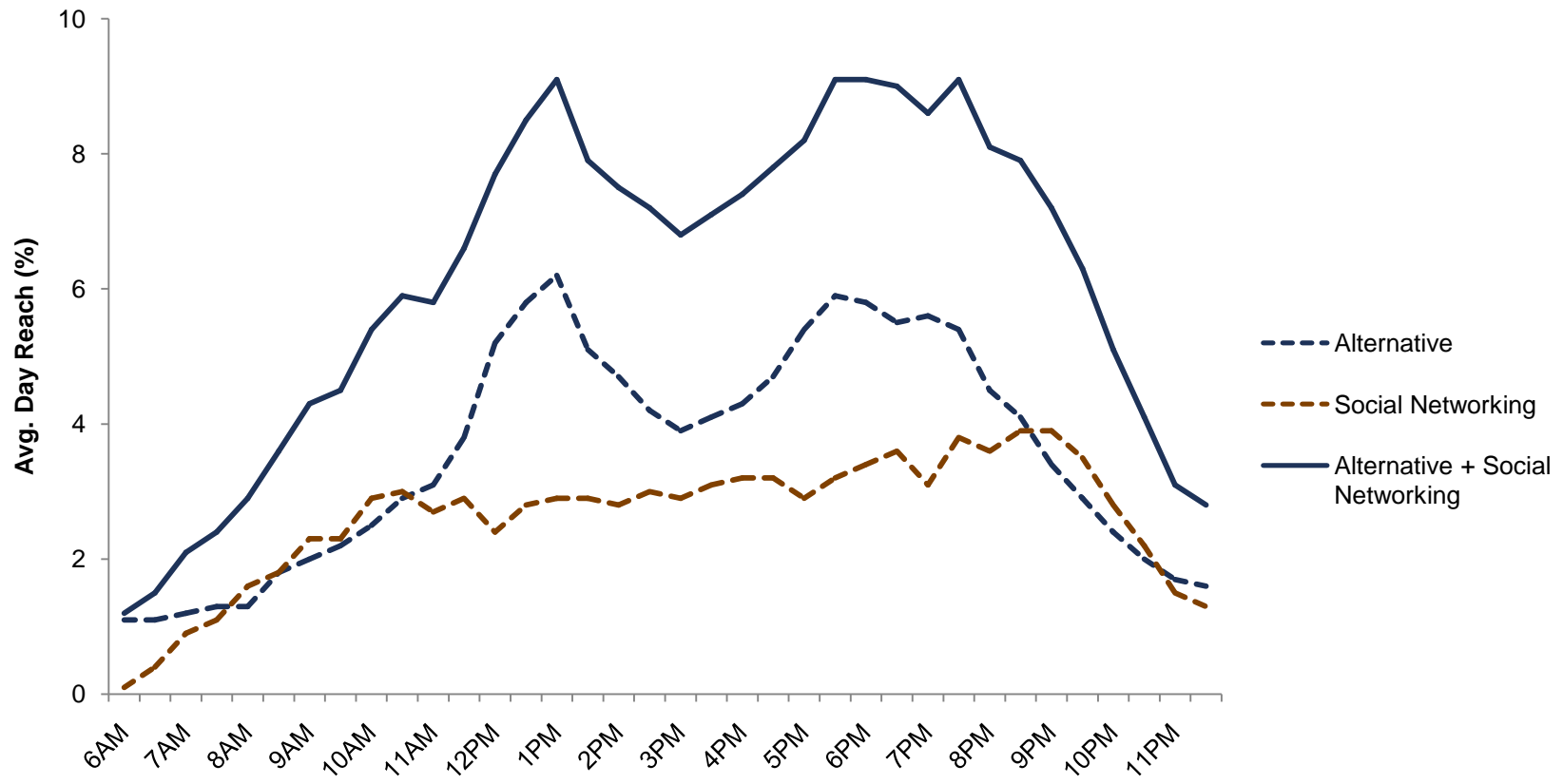
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# Alternative Supplements Flat Media Reach Throughout The Day

## Alternative + Social Networking

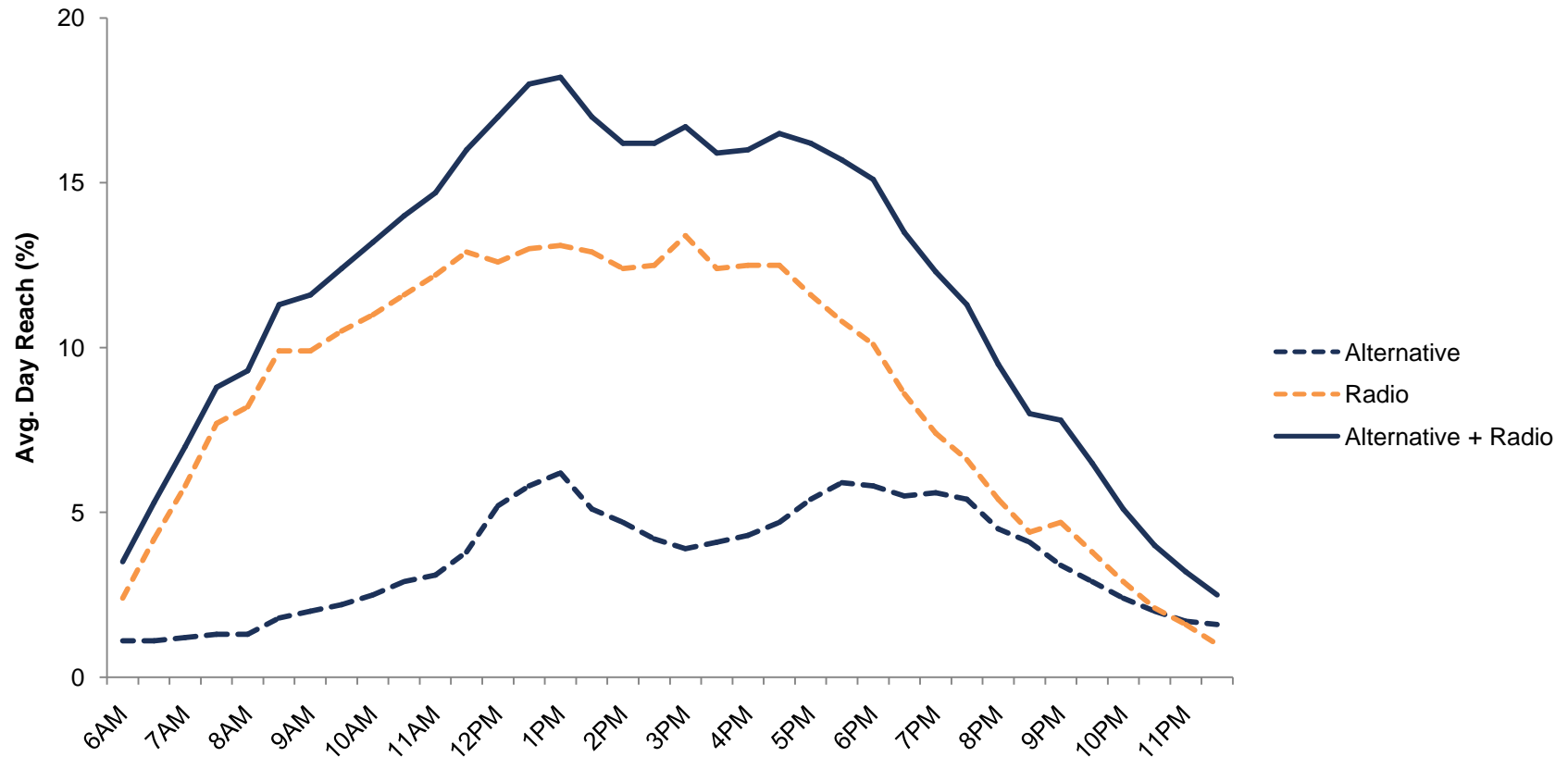


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# Alternative Adds 20% Reach To Radio

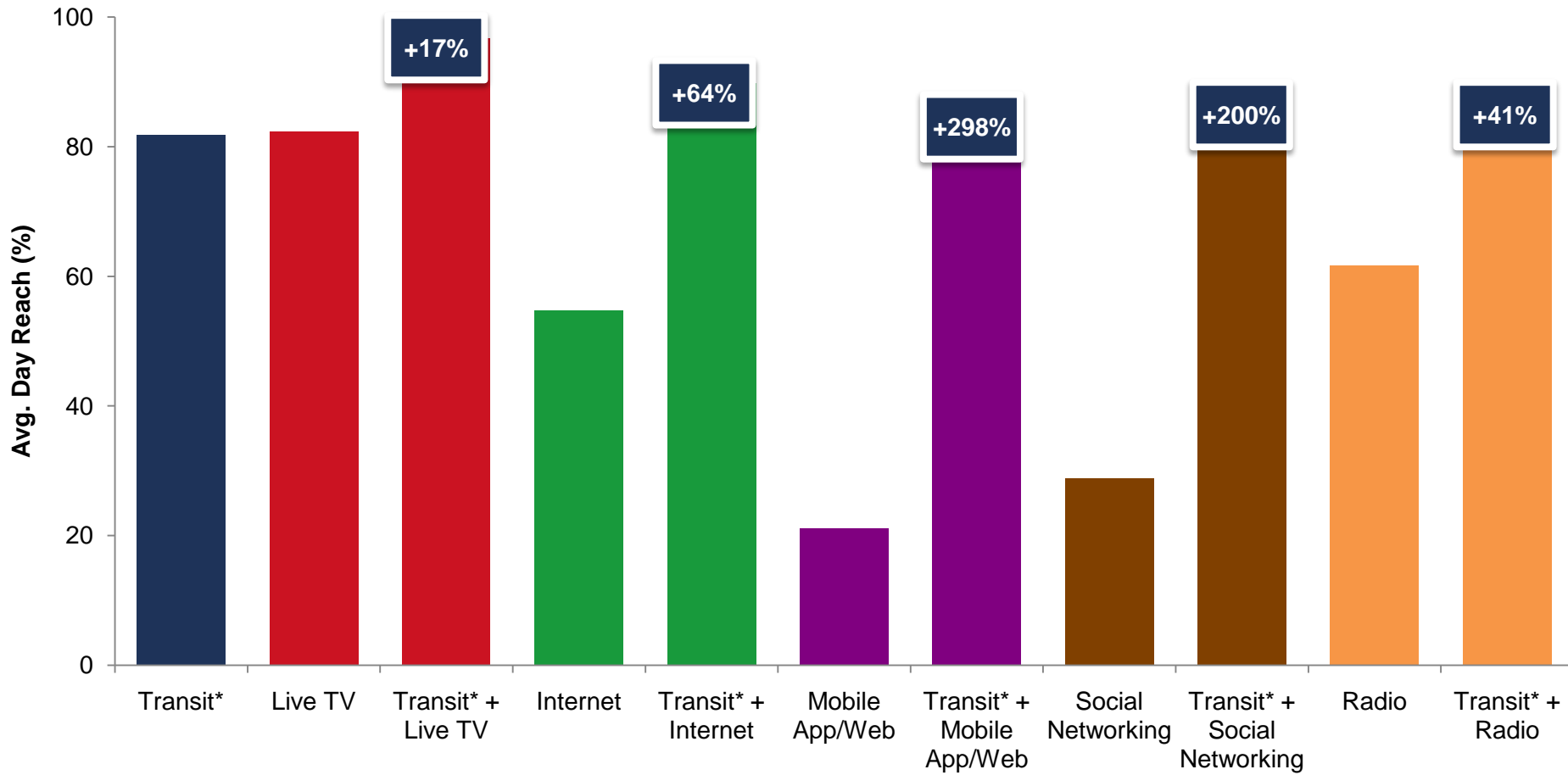
## Alternative + Radio



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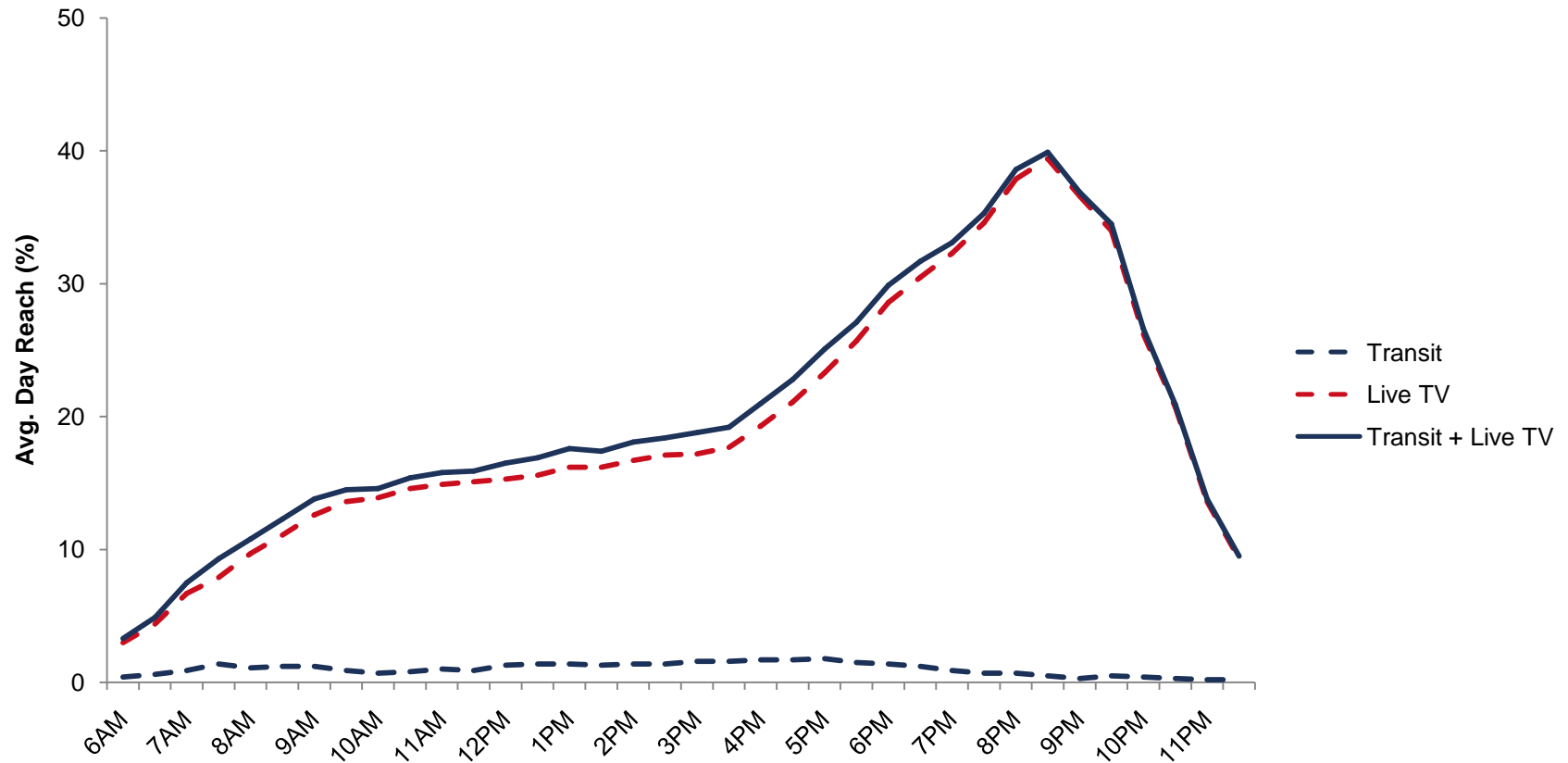


# Adding Transit To Other Media Increases Reach



# Adding Transit To Live TV Increases Exposure

## Transit + Live TV

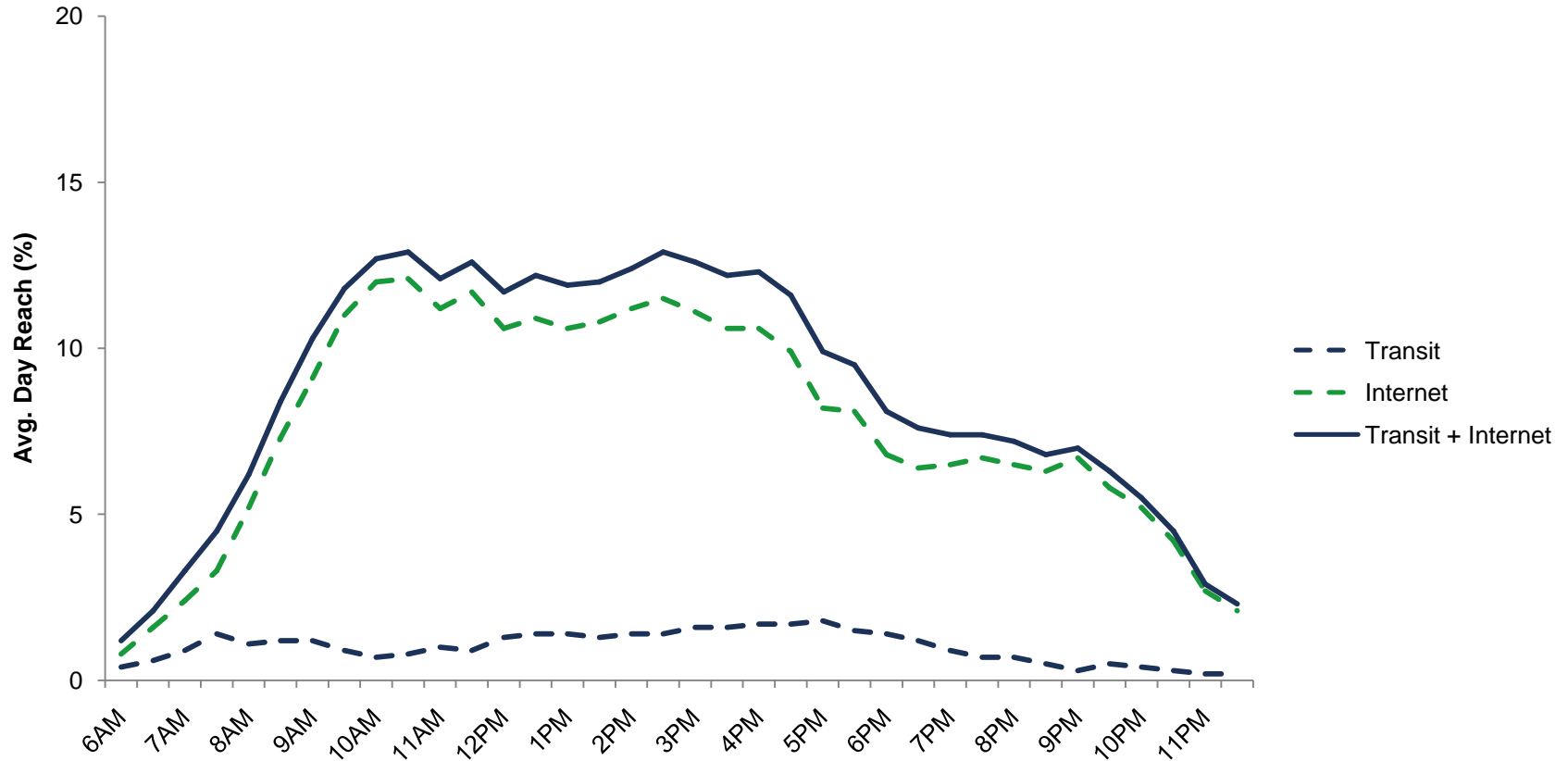


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# Adding Transit To Internet Increases Exposure

## Transit + Internet

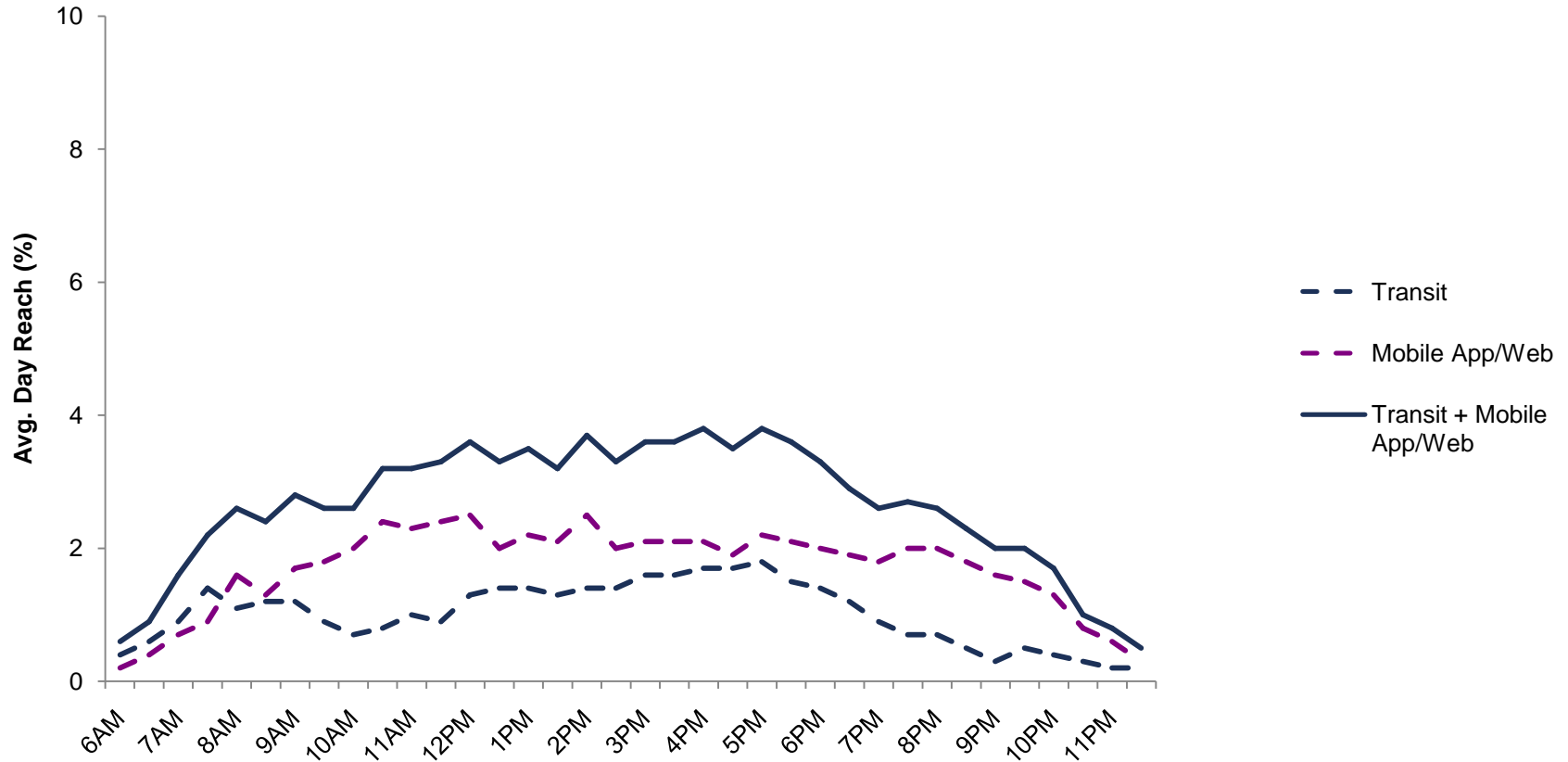


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# Transit Adds Almost 300% Reach To Mobile App/Web

## Transit + Mobile App/Web

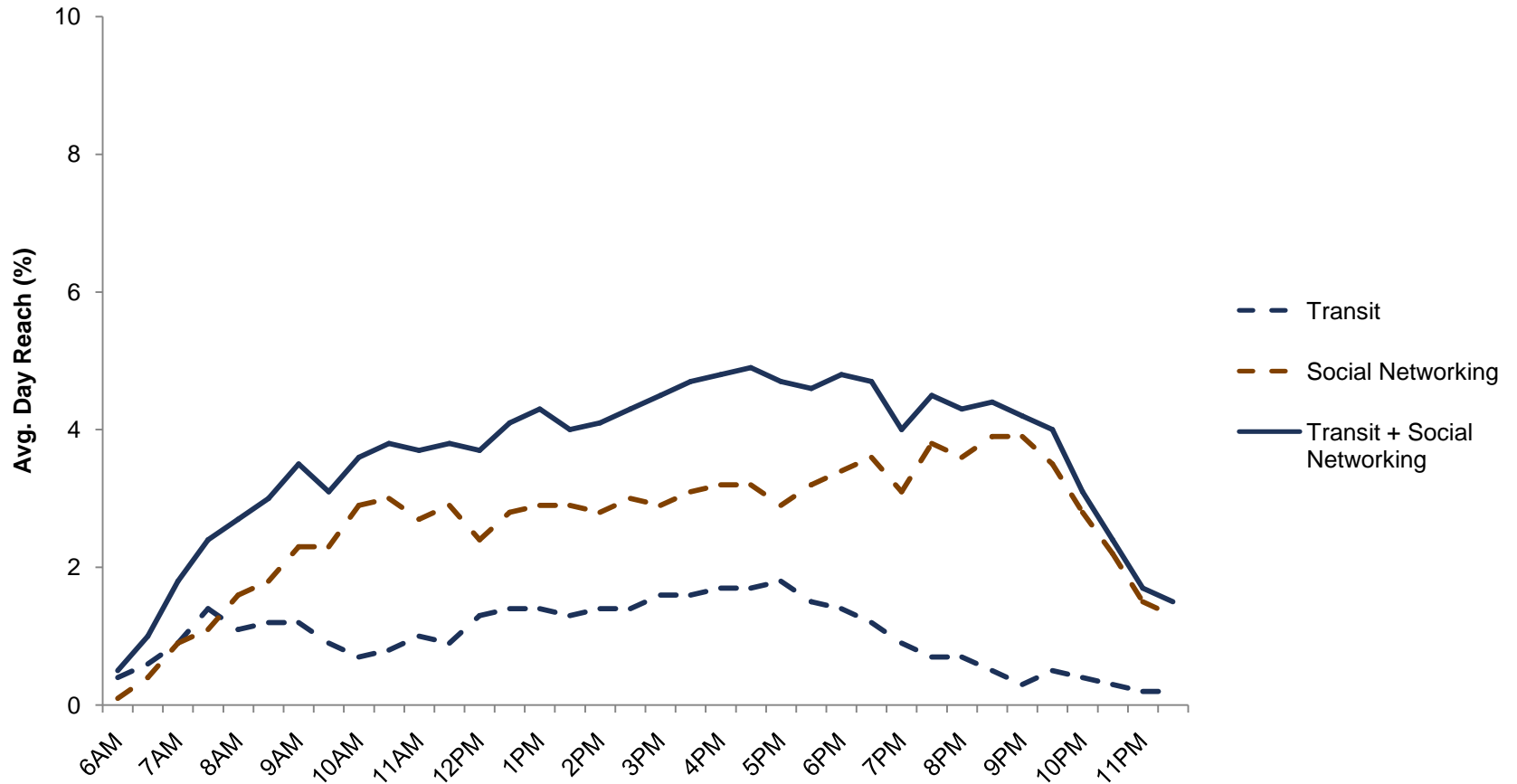


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# Transit Adds 200% Reach To Social Networking

## Transit + Social Networking

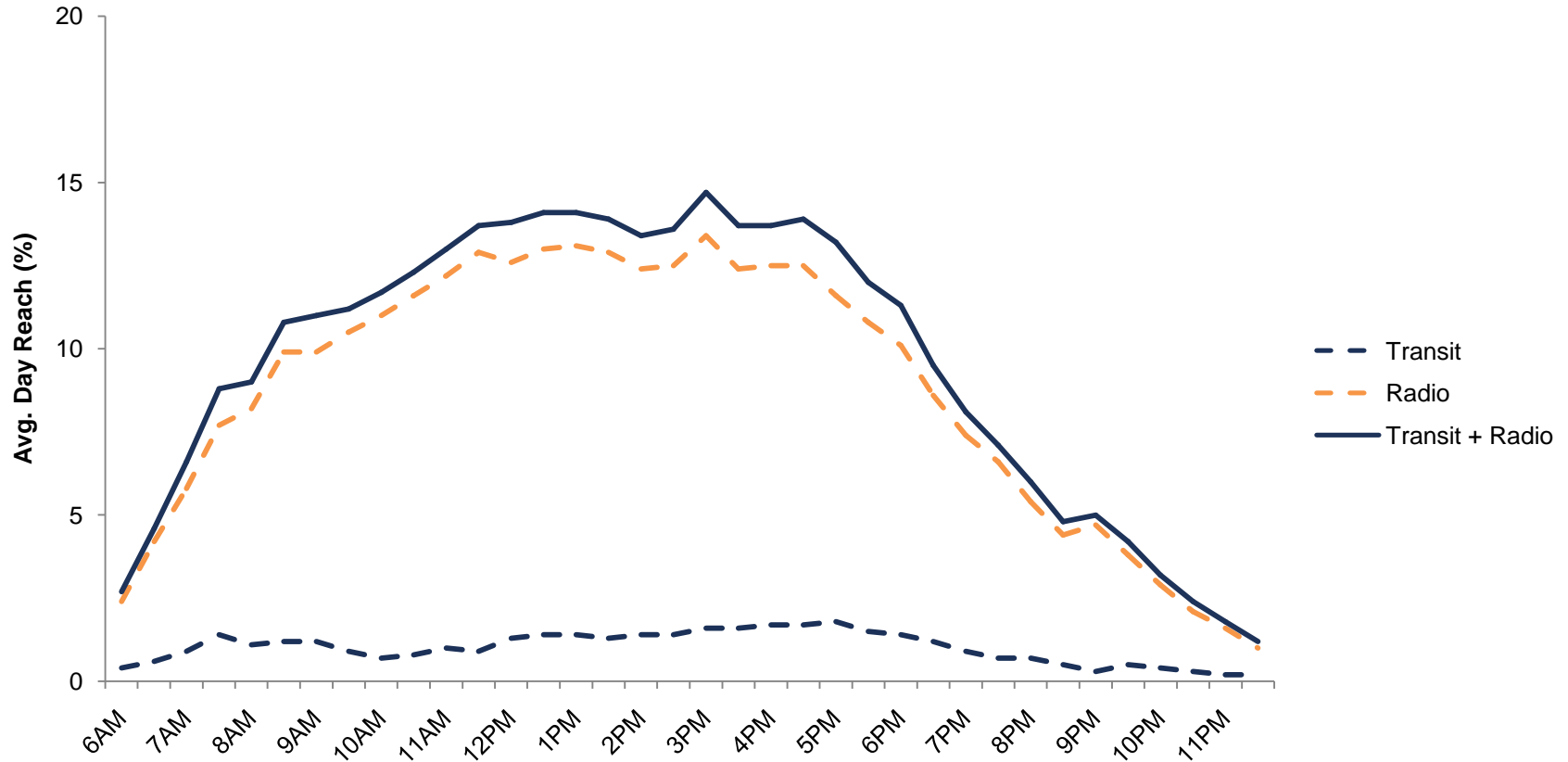


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# Adding Transit To Radio Increases Exposure

## Transit + Radio

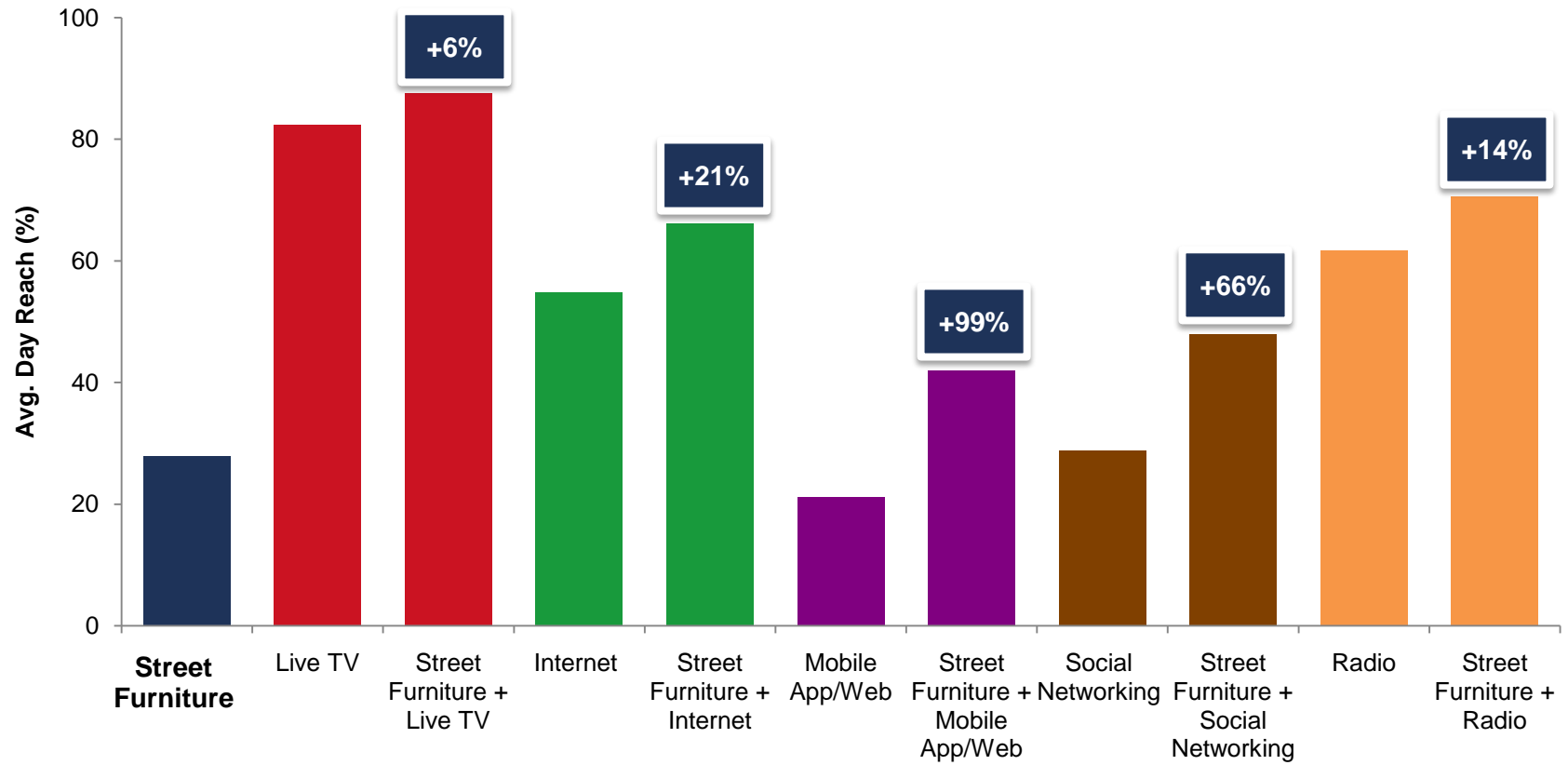


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# Adding Street Furniture To Other Media Can Potentially Increase Reach By Almost 100%



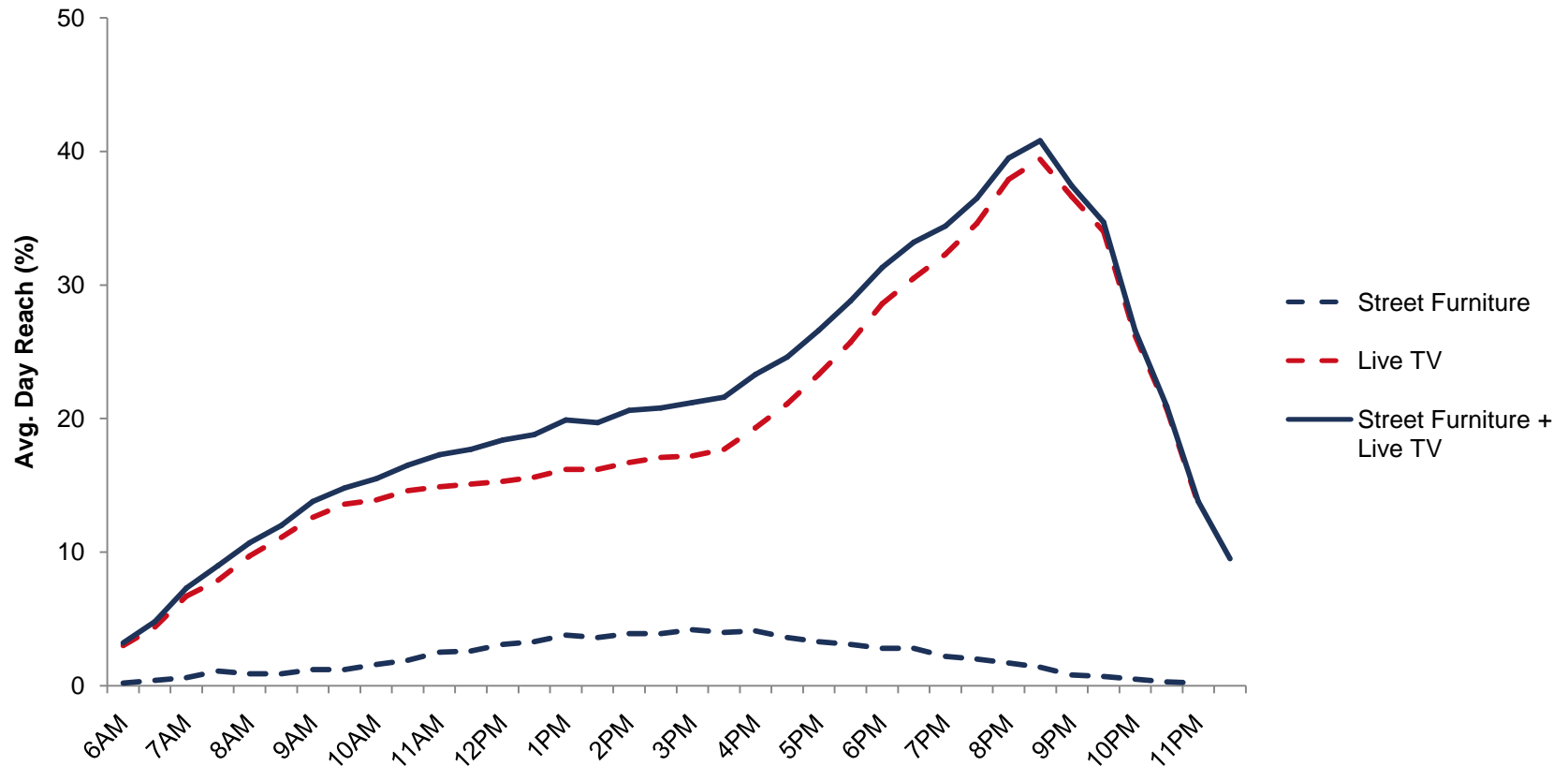
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Reported time: 6AM-12AM



# Adding Street Furniture To Live TV Increases Exposure

## Street Furniture + Live TV

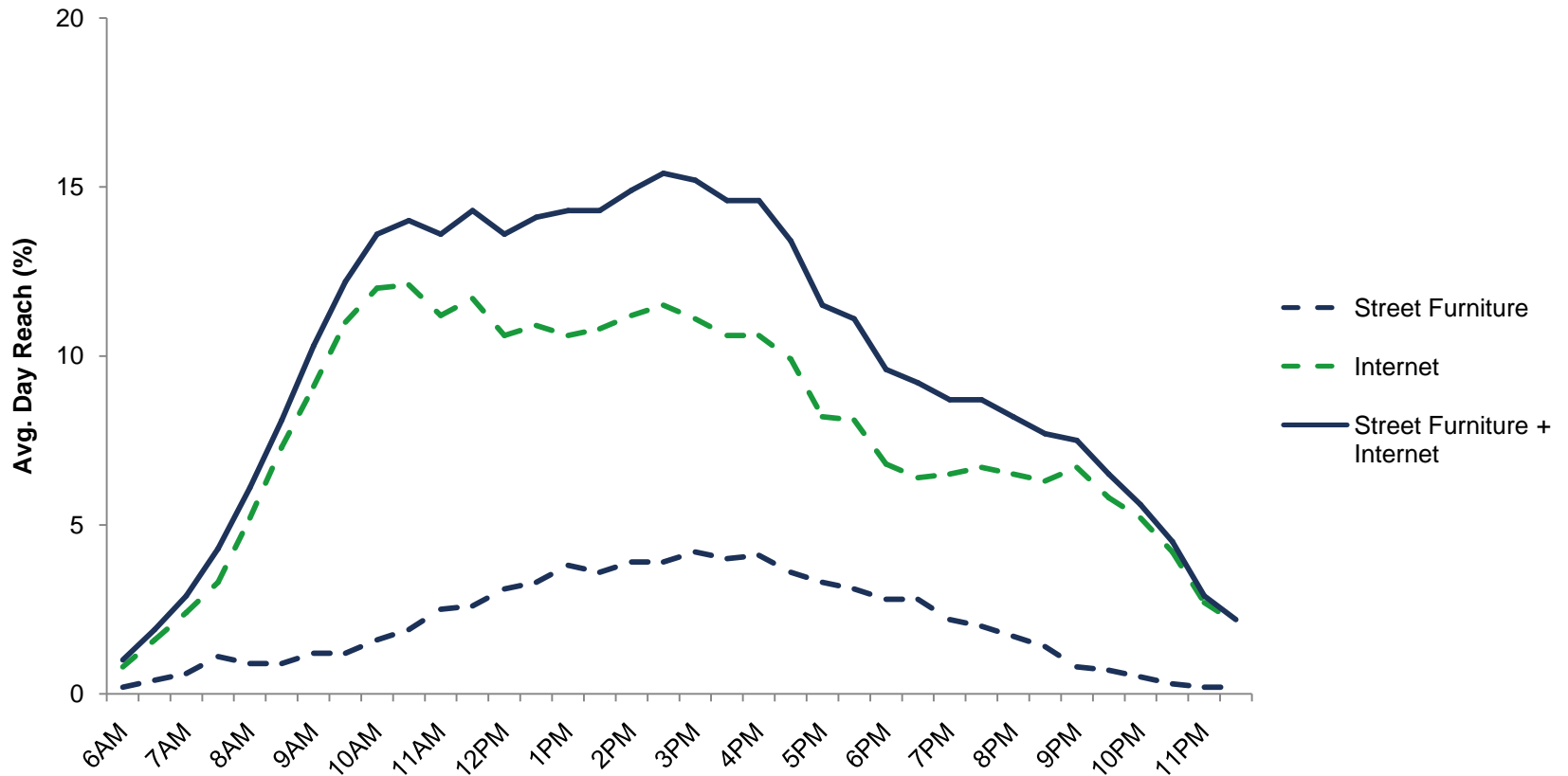


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# Street Furniture Adds Over 20% Reach To Internet

## Street Furniture + Internet

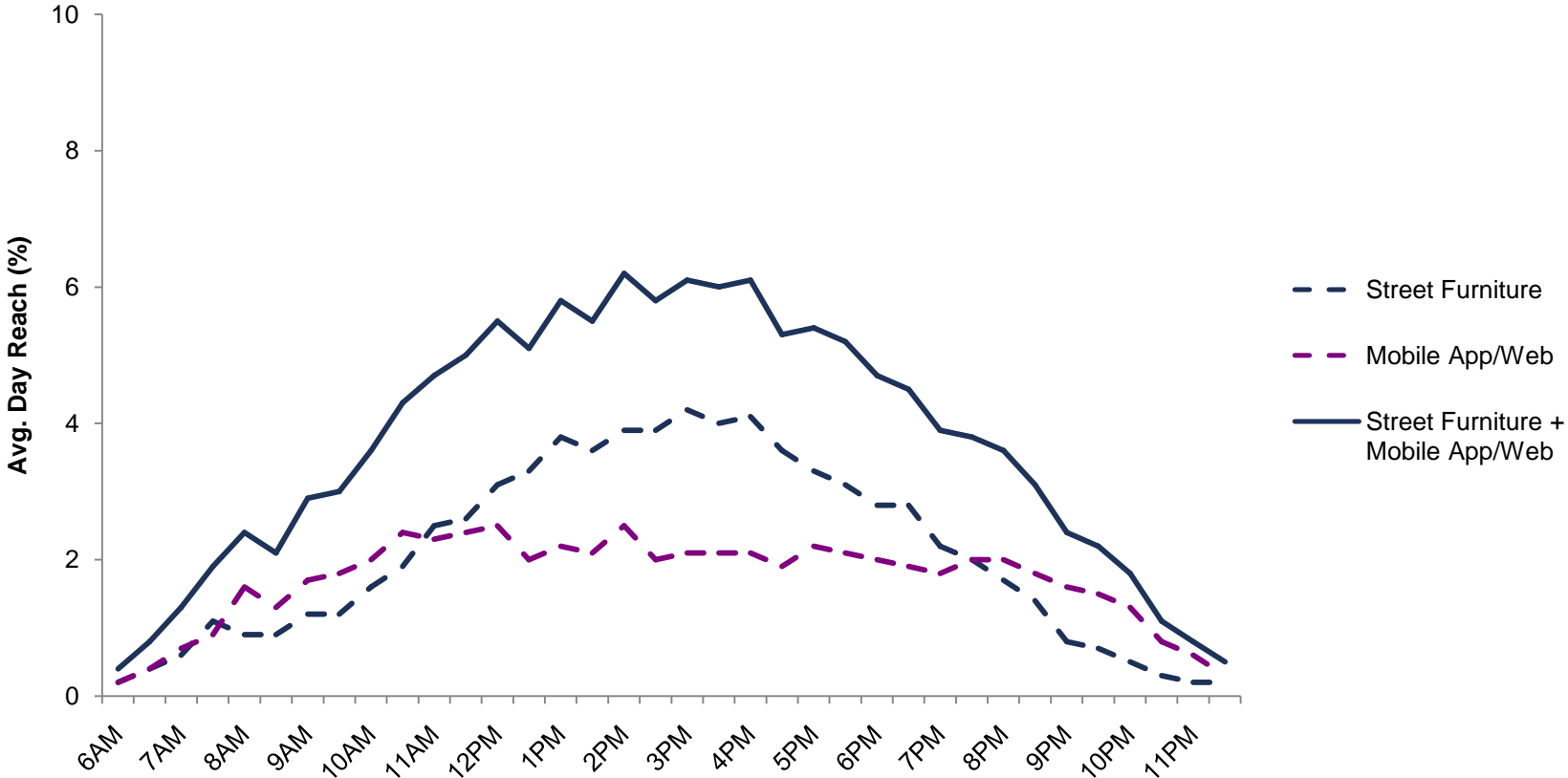


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# Street Furniture Almost Doubles the Reach To Internet

## Street Furniture + Mobile App/Web

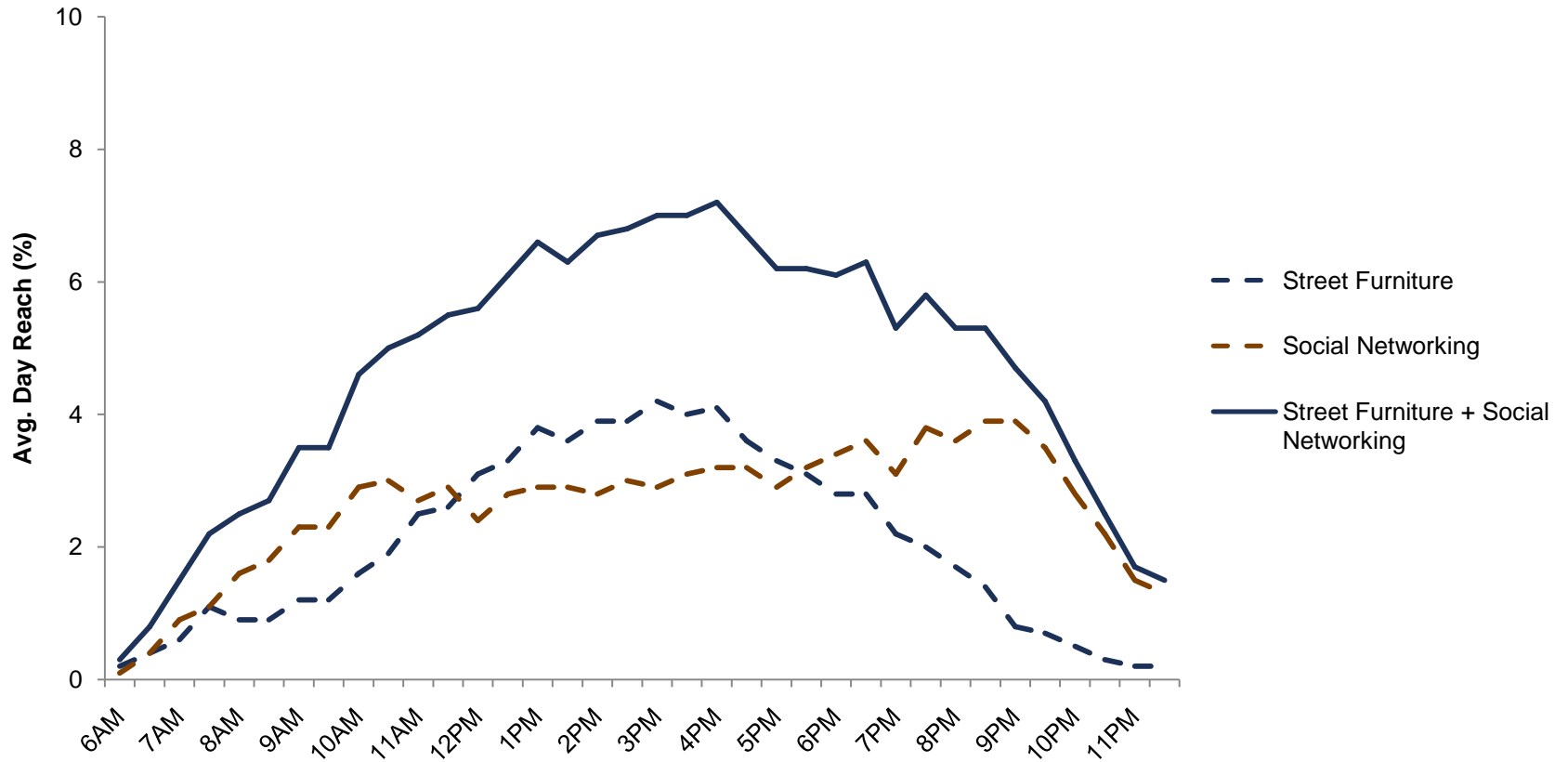


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# Street Furniture Compliments Social Networking Reach

## Street Furniture + Social Networking

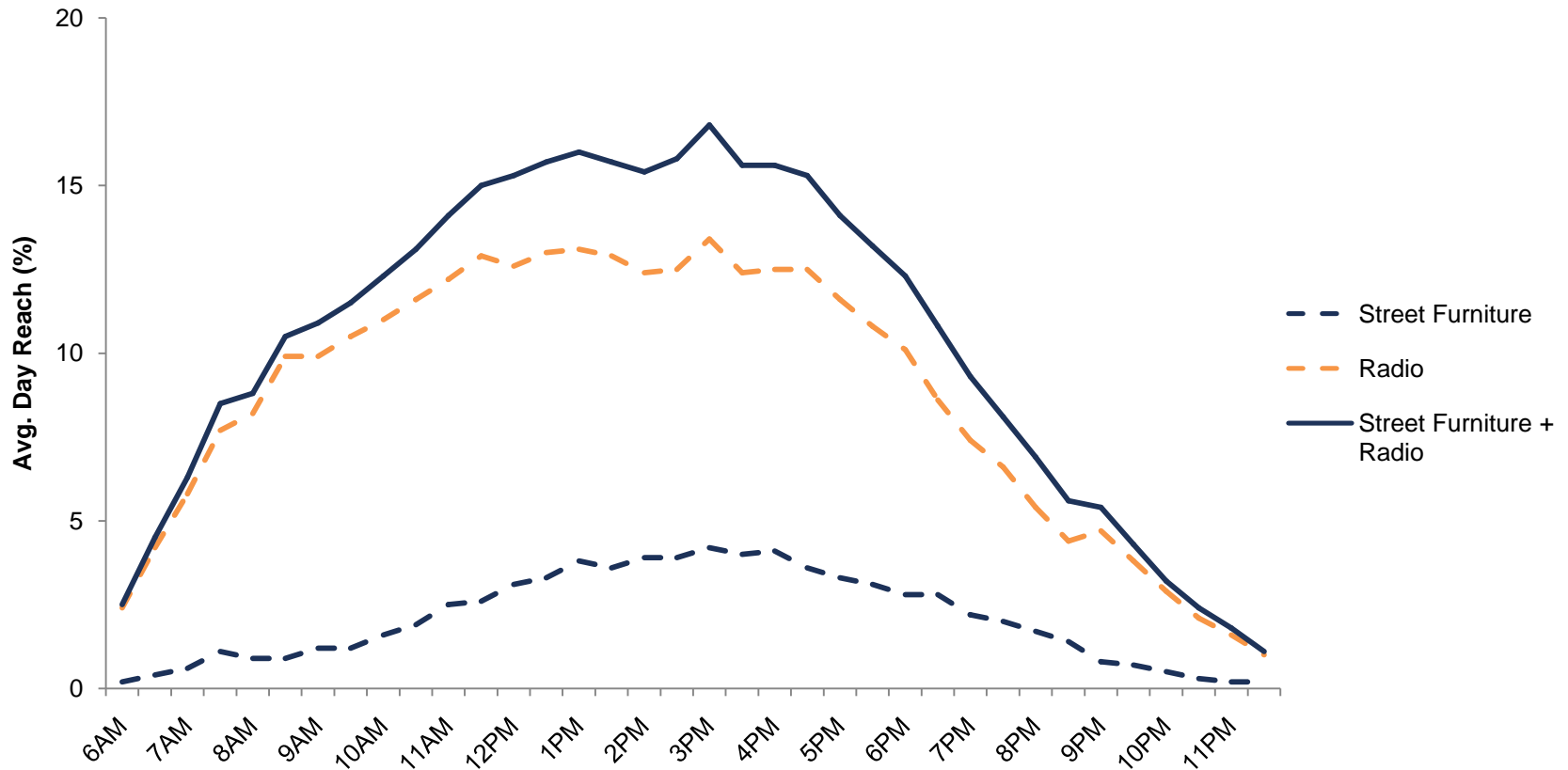


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# Street Furniture Adds Over 15% Reach To Radio

## Street Furniture + Radio



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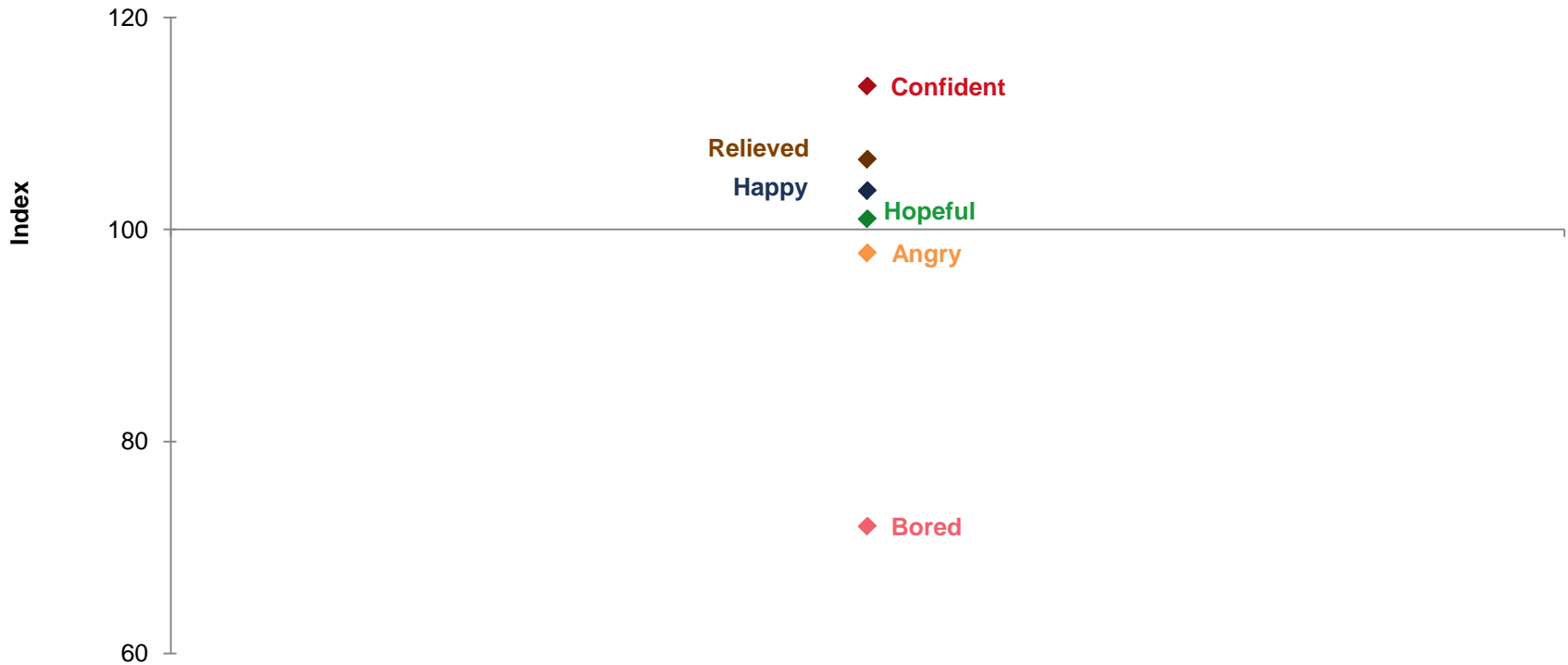


# Consumers Experience OOH Media In Very Positive Mindsets



# Emotional Index Of OOH Audiences To Live TV

% of OOH Audience Index to TV



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Reported time: 6AM-12AM





# Emotional Index Of OOH Audiences To Radio

% of OOH Audience Index to Radio

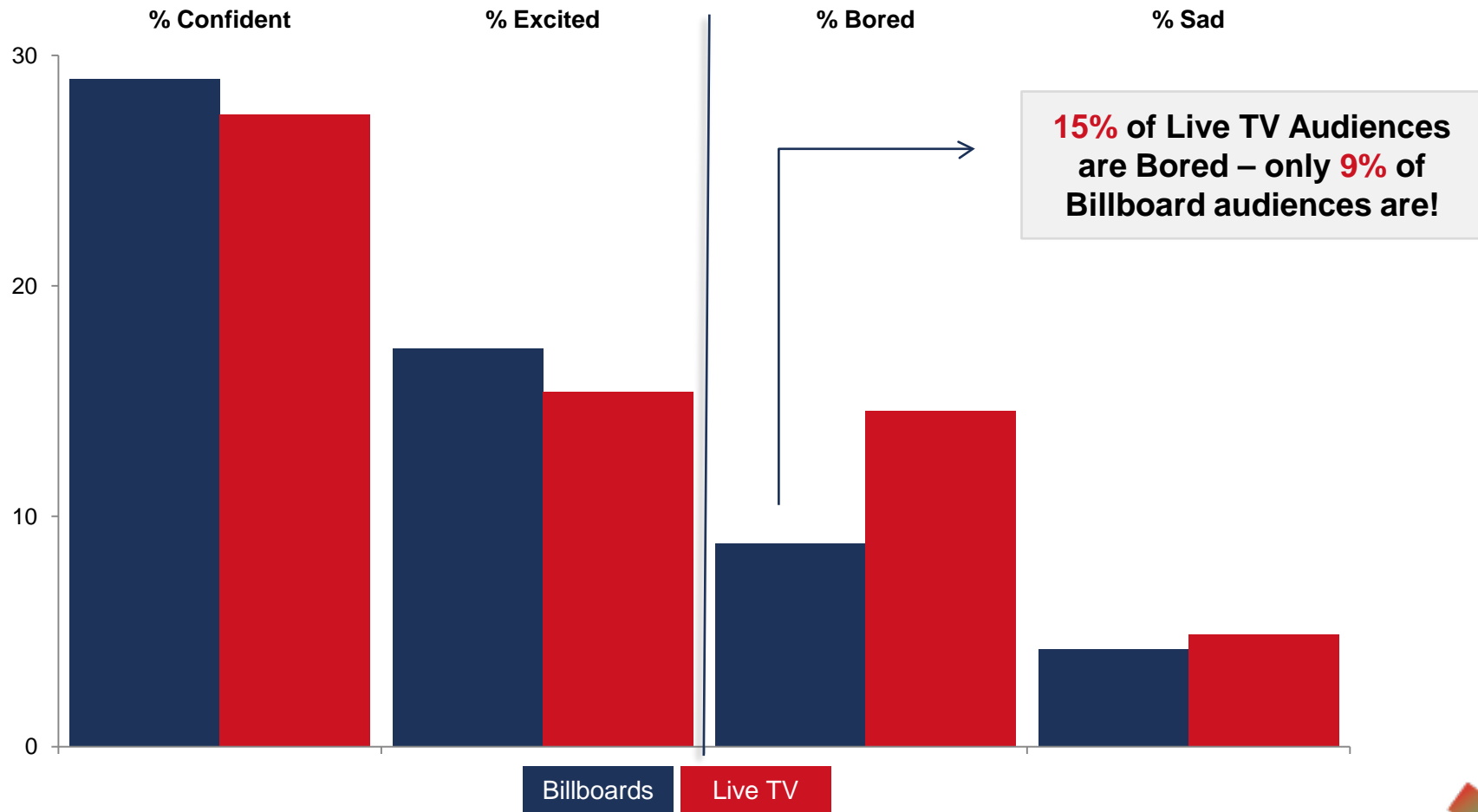


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Reported time: 6AM-12AM



# A Higher Percentage Of Billboard Audiences Feel Positive Compared To Live TV Audiences



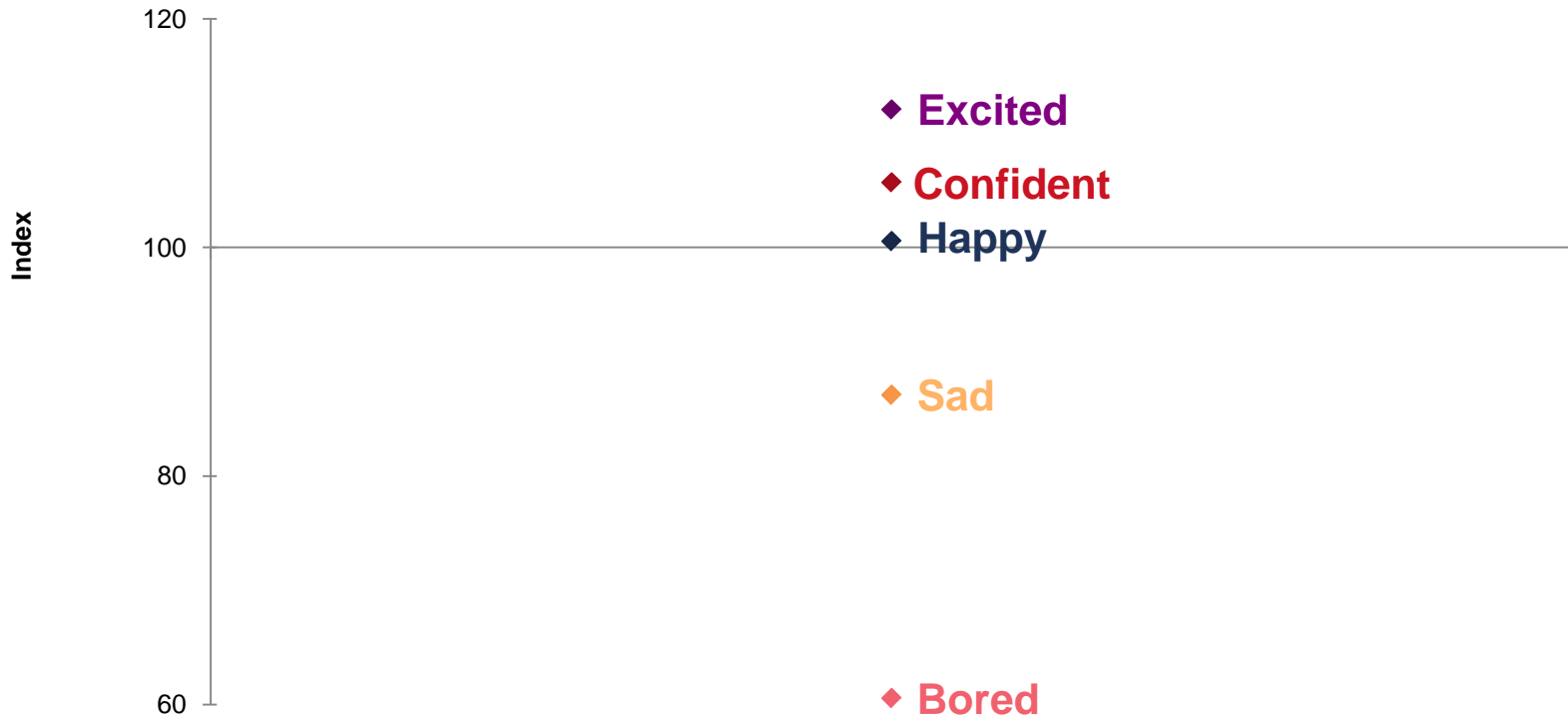
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Reported time: 6AM-12AM



# Emotional Index Of Billboard Audiences To Live TV

% of Billboard Audience Index to TV

Index To Live TV

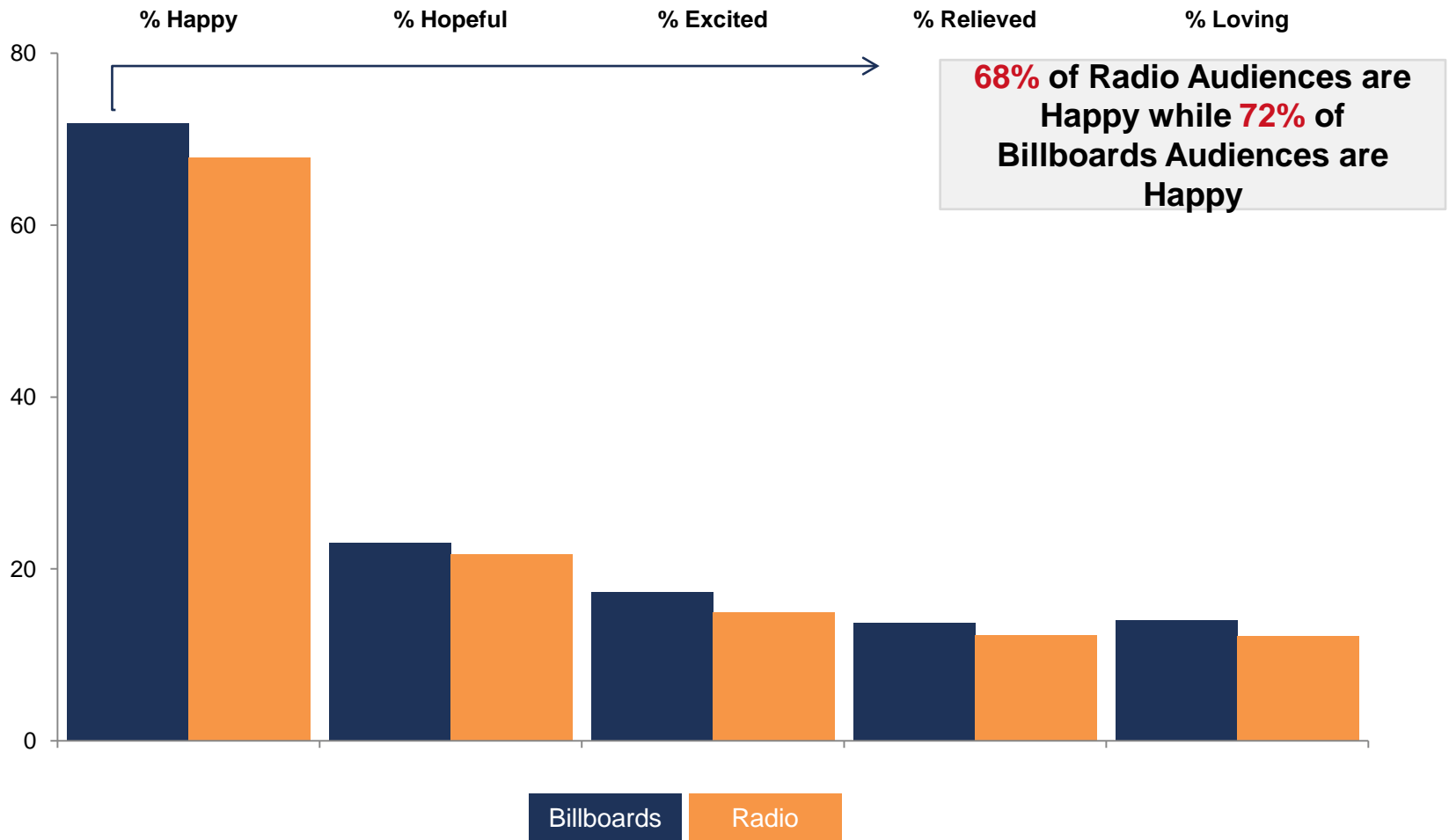


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Reported time: 6AM-12AM



# Billboards Have Higher Percentage Of Its Audience Feeling Happy Than Radio

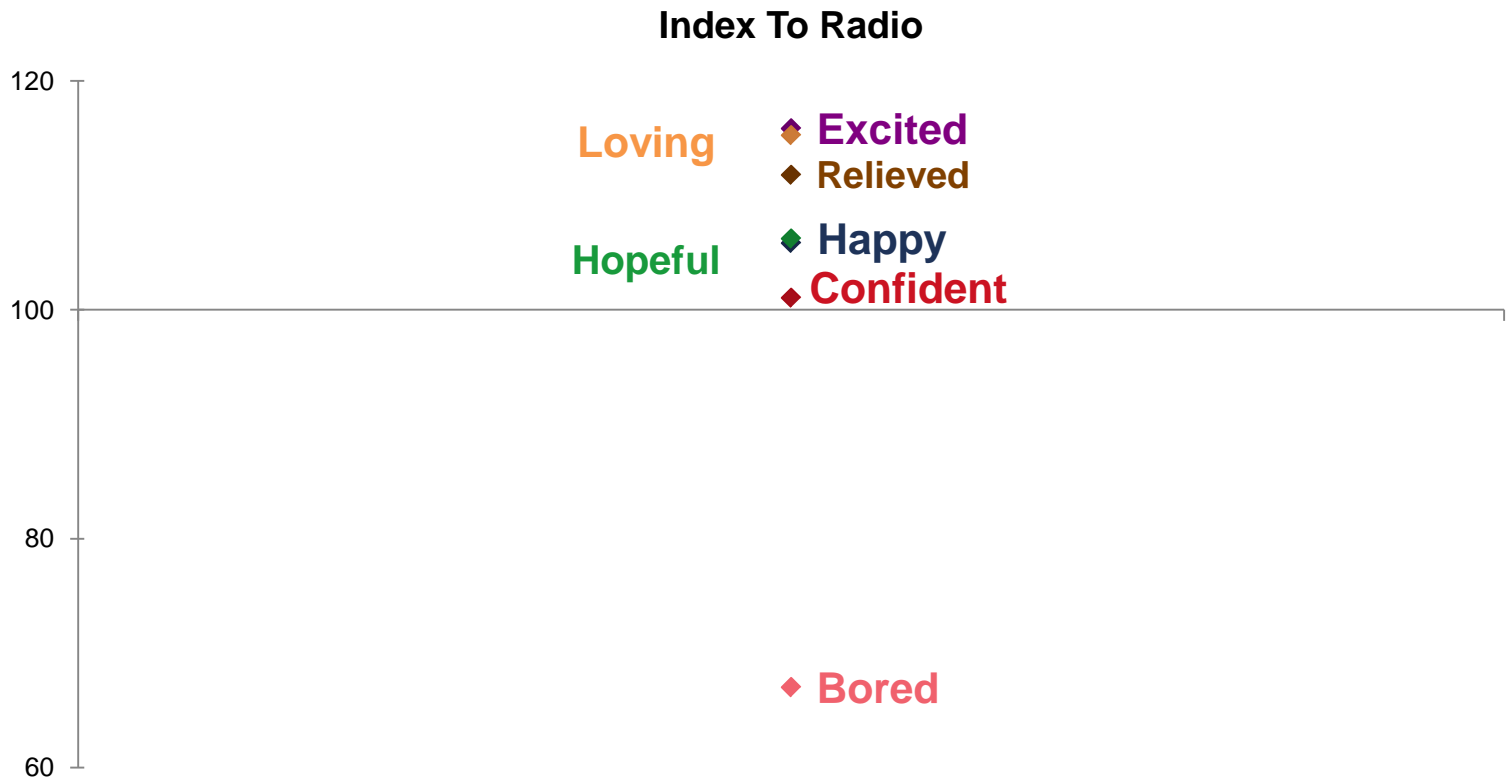


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Reported time: 6AM-12AM



# Emotional Index Of Billboard Audiences To Radio

% of Billboard Audience Index to Radio

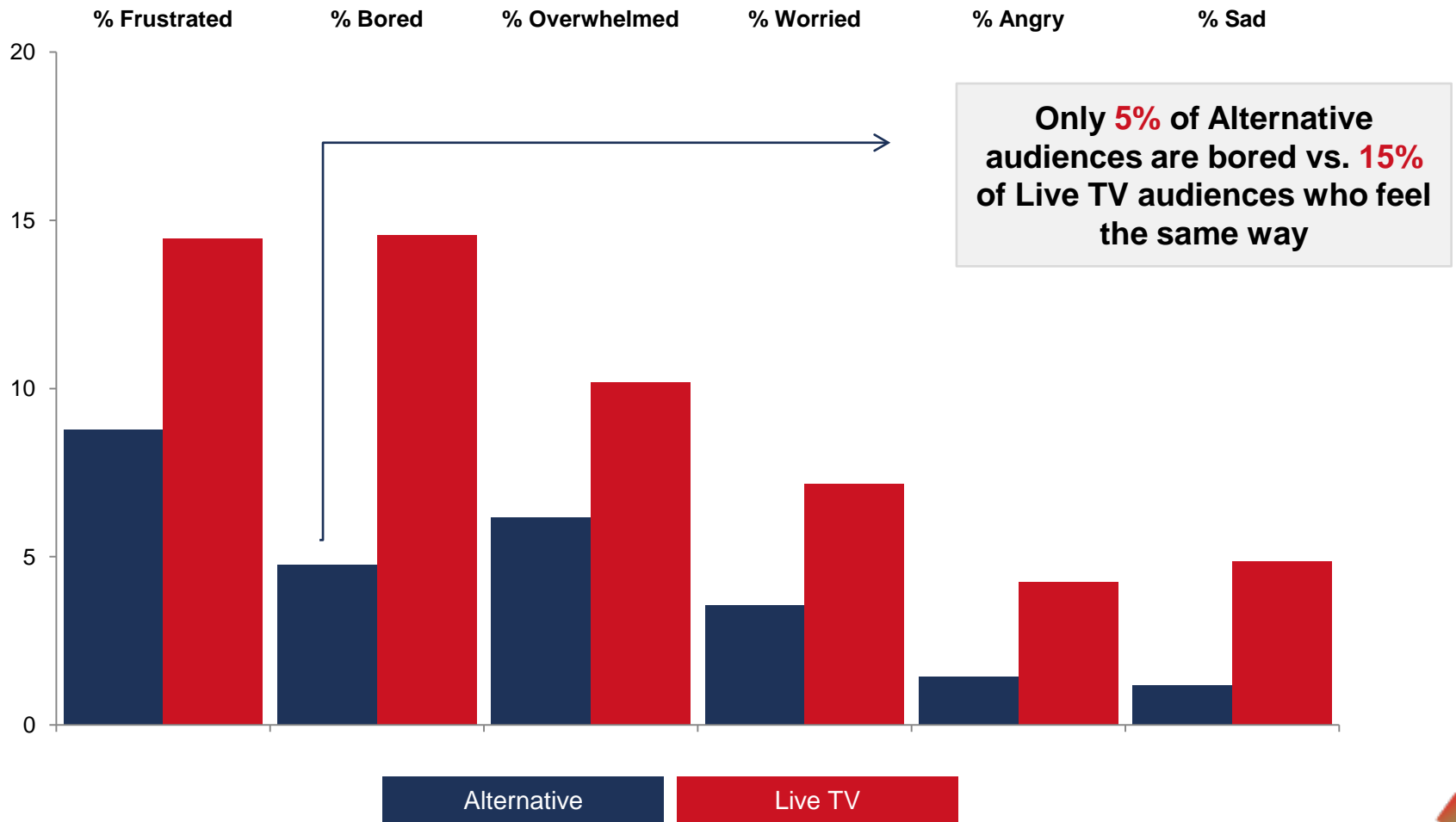


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Reported time: 6AM-12AM



# 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

Alternative Live TV

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Reported time: 6AM-12AM



# Emotional Index Of Alternative Audiences To Live TV

% of Alternative Audience Index to TV

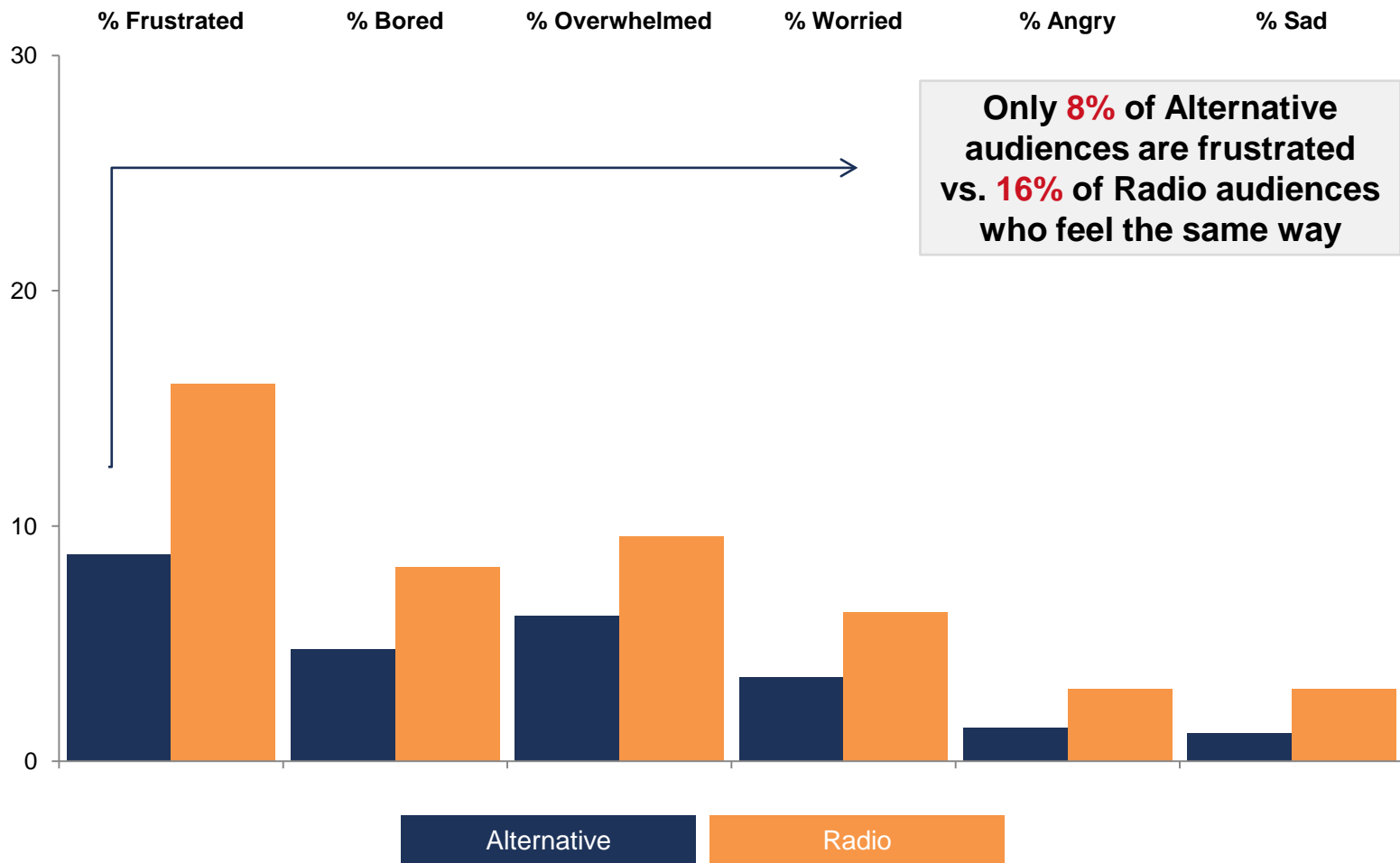


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Reported time: 6AM-12AM



# 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

Alternative Radio

A18-64

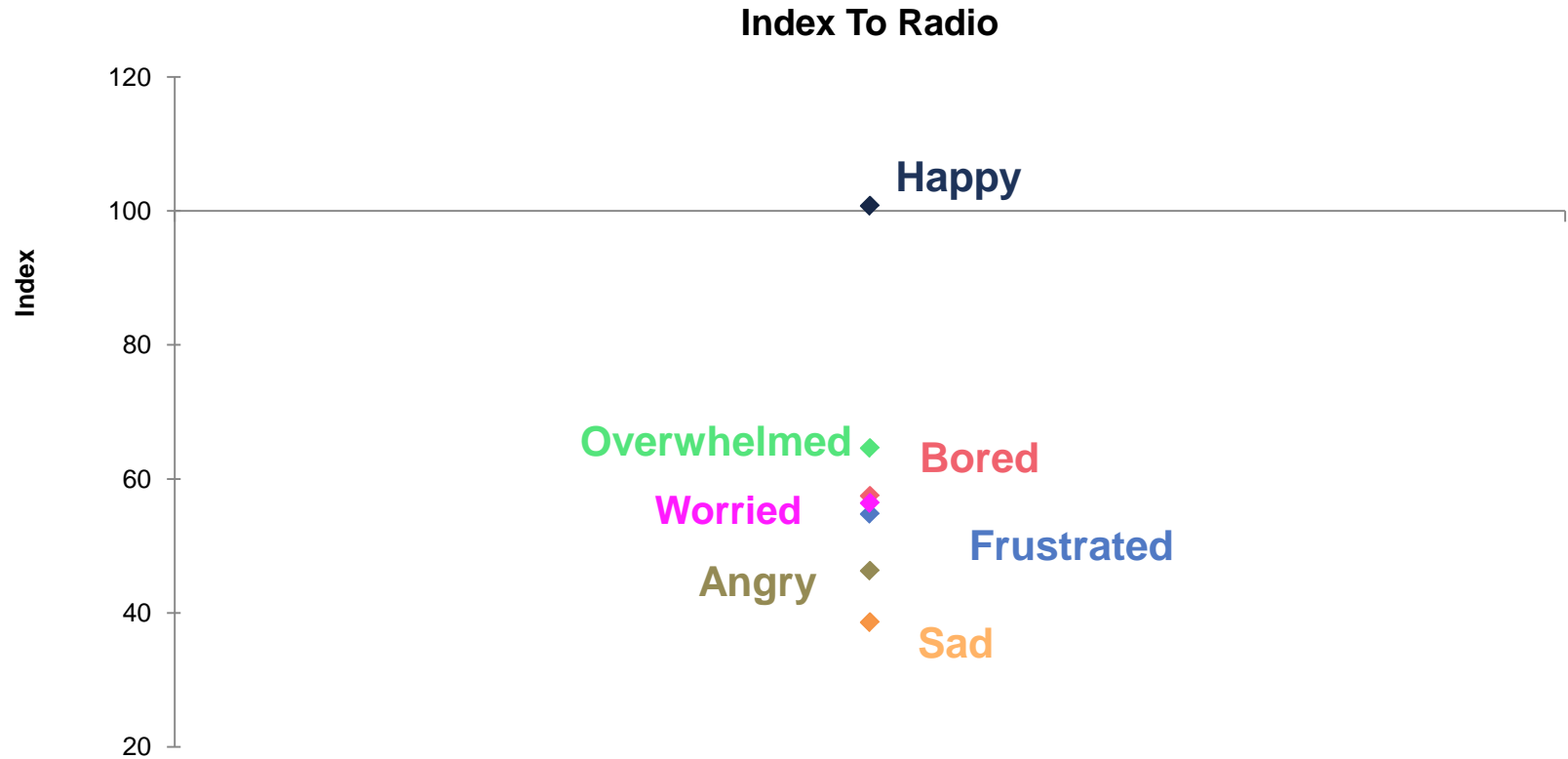
Reported time: 6AM-12AM





# Emotional Index Of Alternative Audiences To Radio

% of Alternative Audience Index to Radio

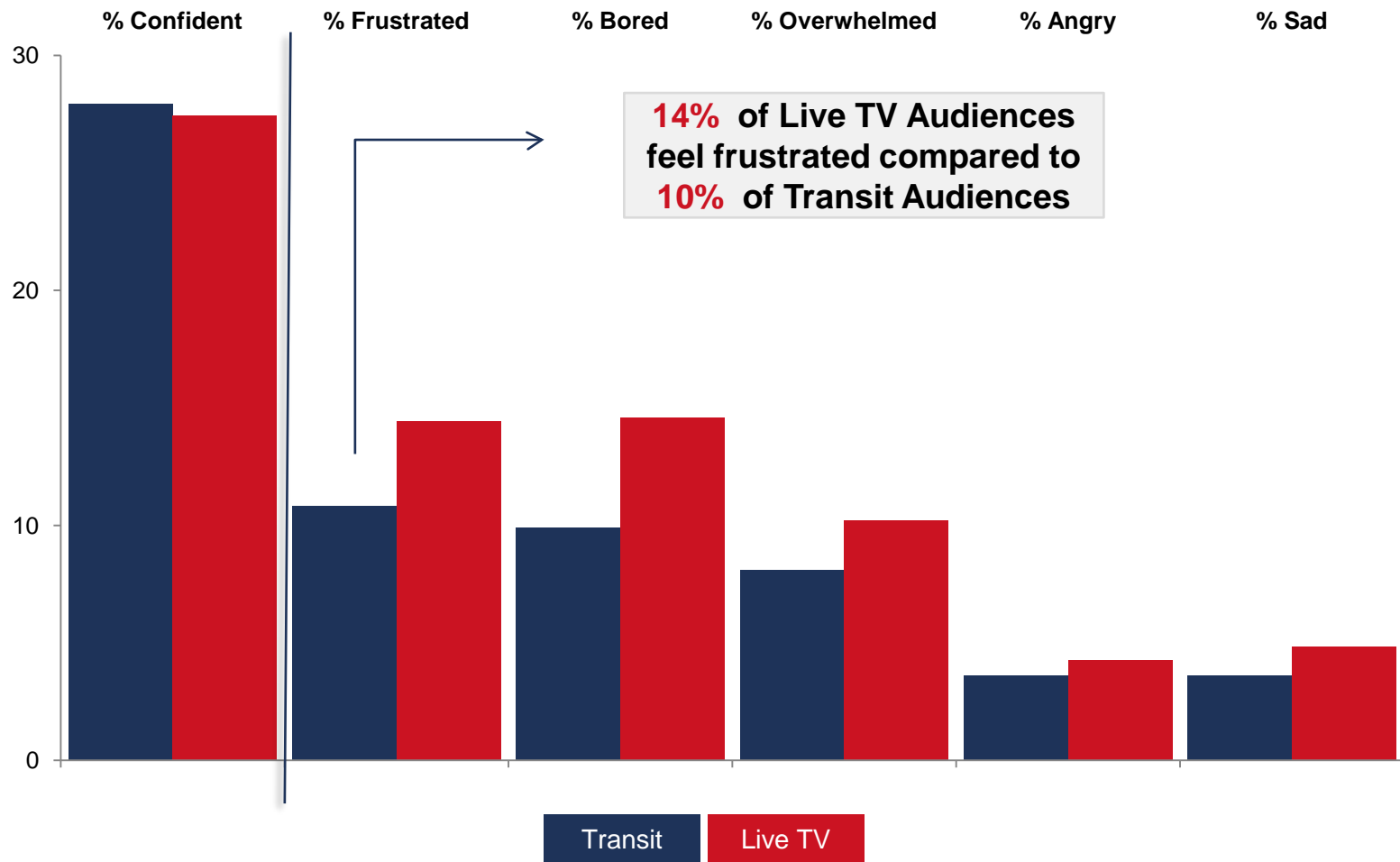


A18-64

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

Transit

Live TV

A18-64

Reported time: 6AM-12AM



# Emotional Index Of Transit Audiences To Live TV

% of Transit Audience Index to TV

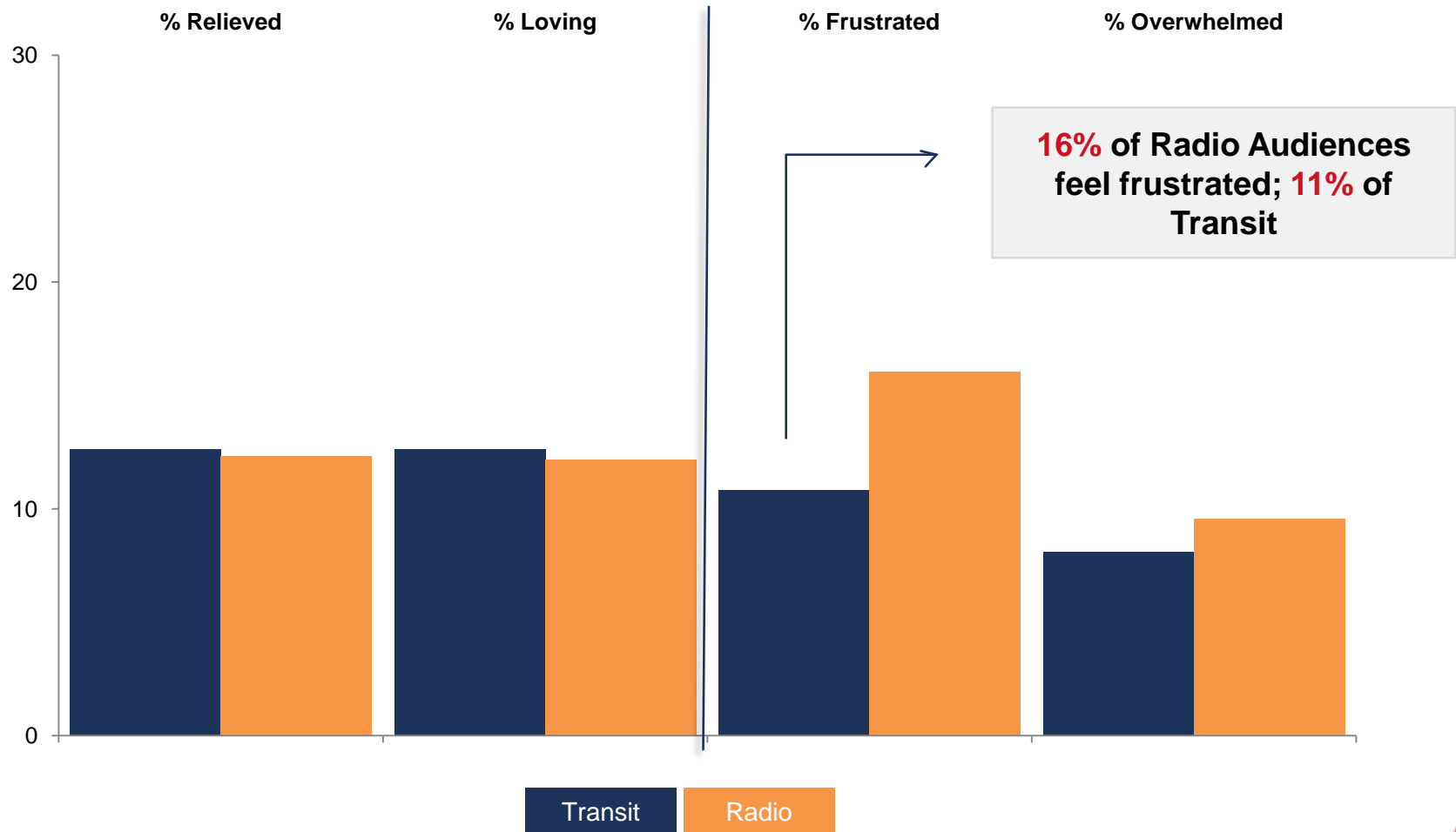


A18-64

Reported time: 6AM-12AM



# Fewer Transit Audiences Are Frustrated And Bored Than Radio Audiences

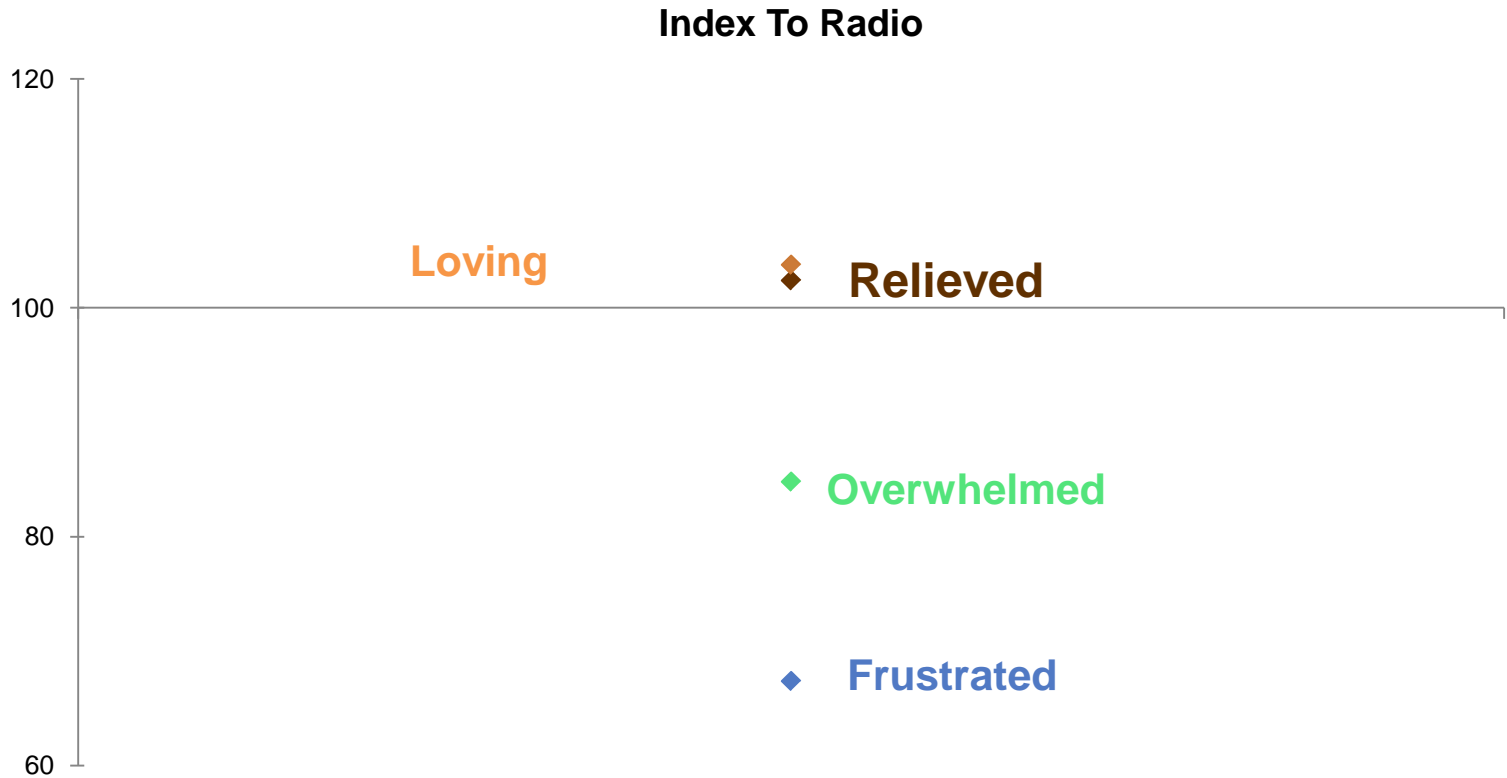


A18-64  
Reported time: 6AM-12AM



# Emotional Index Of Transit Audiences To Radio

% of Transit Audience Index to Radio

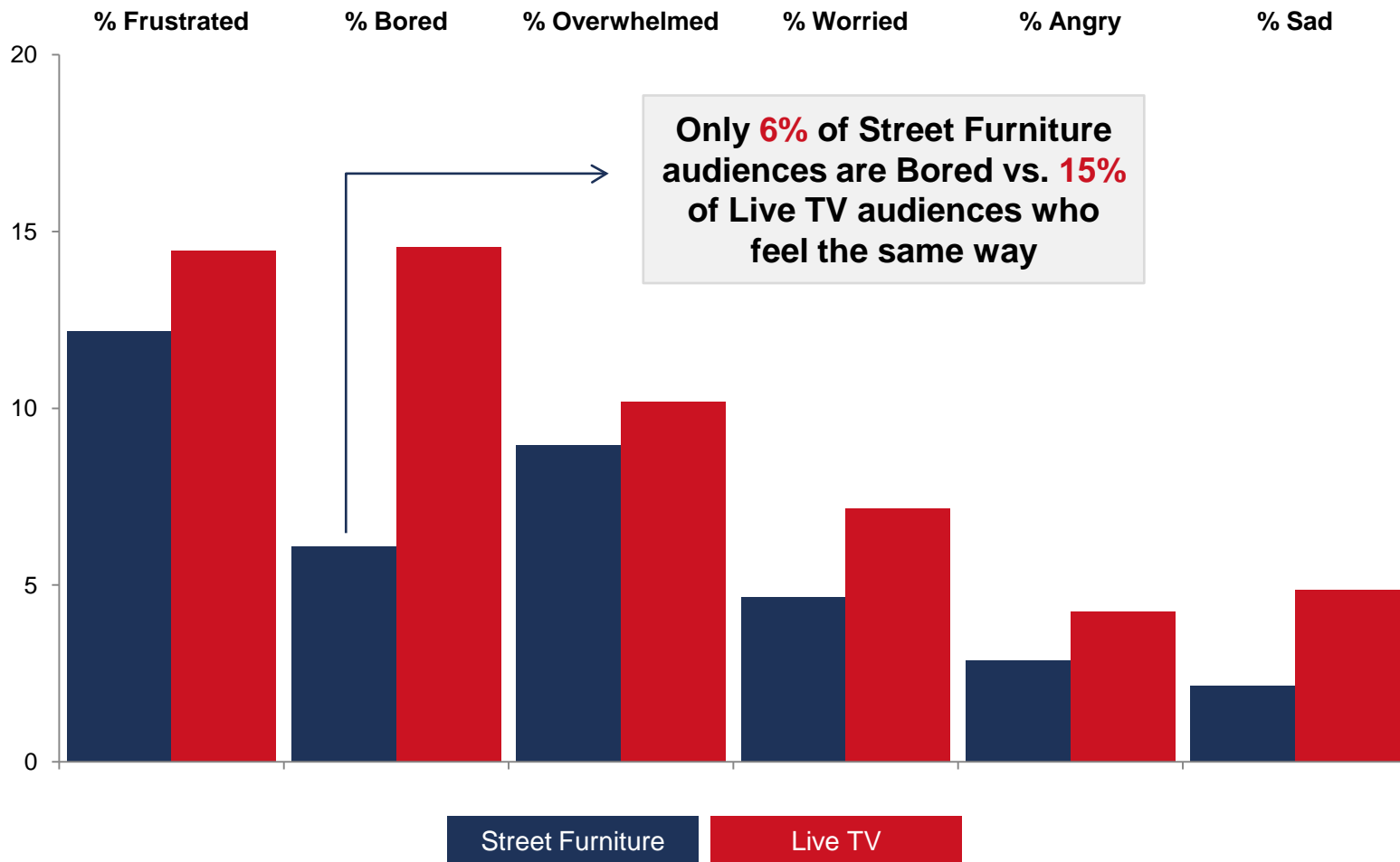


A18-64

Reported time: 6AM-12AM



# Street Furniture Audiences Are Far Less Bored Than Live TV Audiences



A18-64

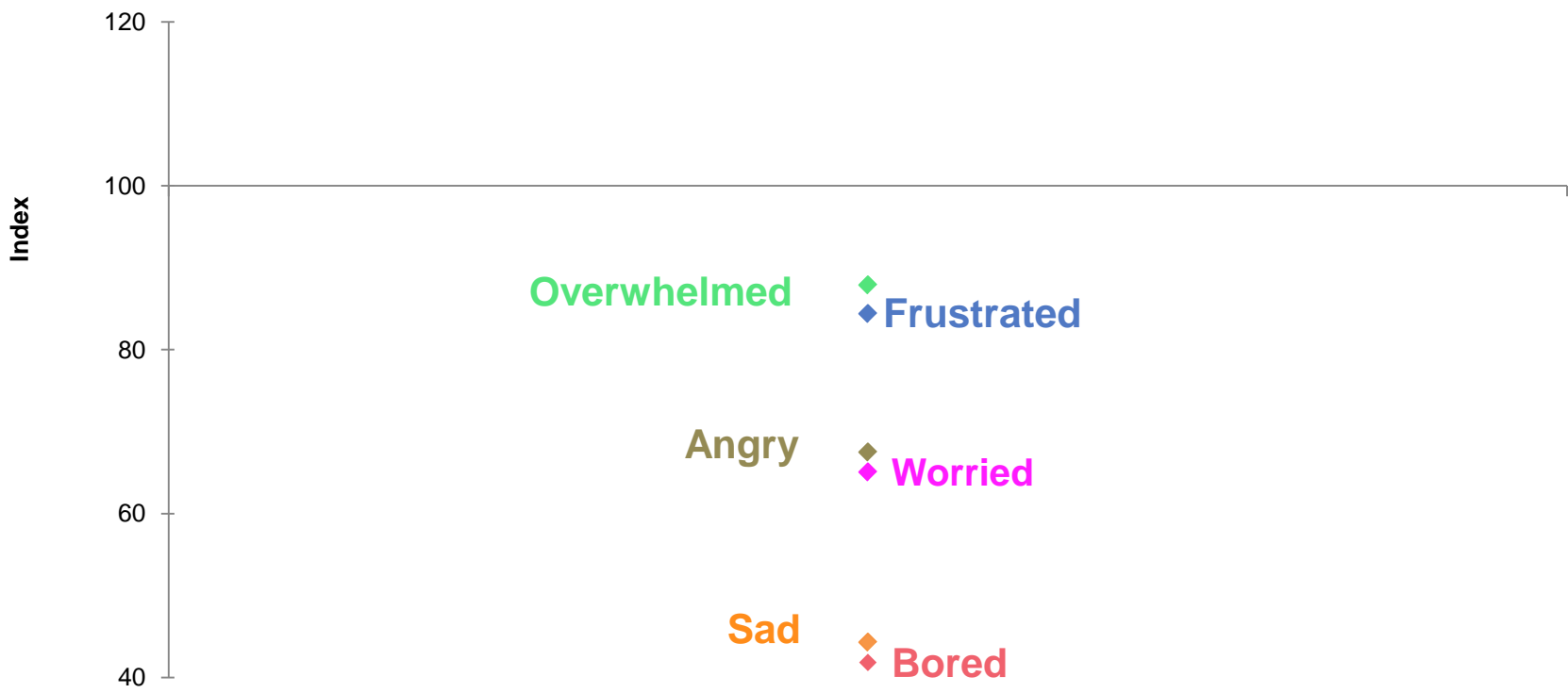
Reported time: 6AM-12AM



# Emotional Index Of Street Furniture Audiences To Live TV

% of Street Furniture Audience Index to TV

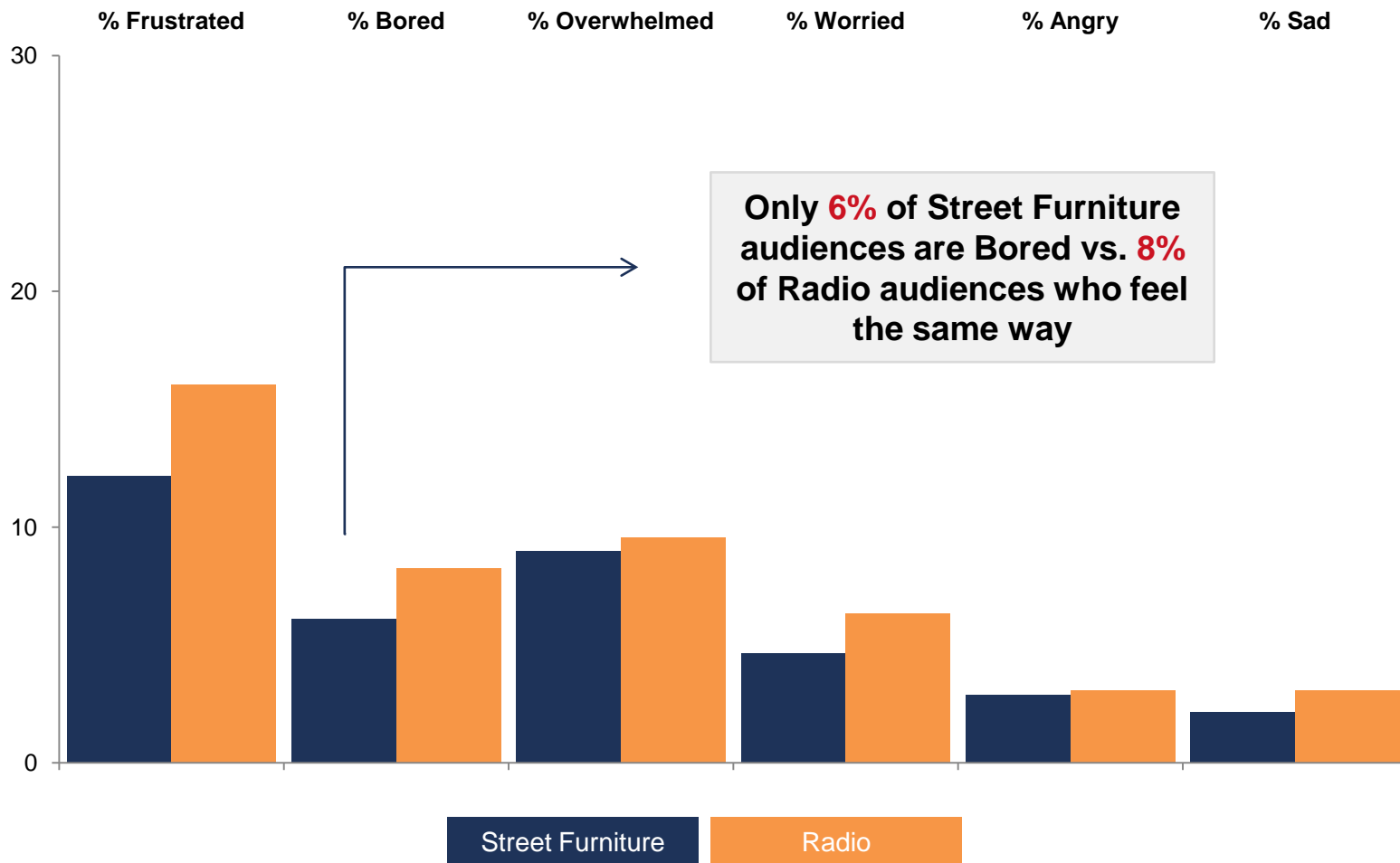
Index To Live TV



A18-64  
Reported time: 6AM-12AM



# Street Furniture Audiences Are Far Less Bored Than Radio Audiences



A18-64

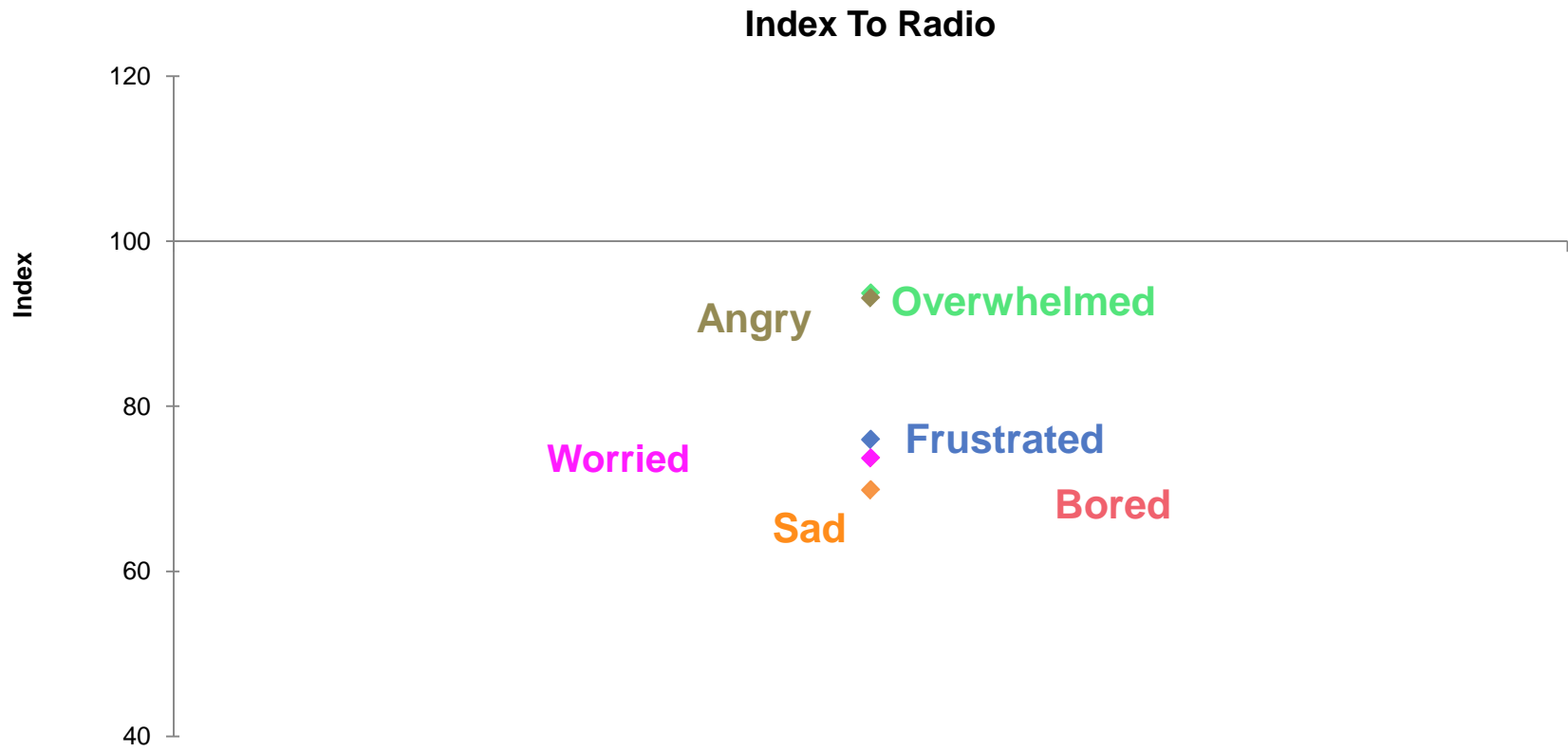
Reported time: 6AM-12AM





# Emotional Index Of Street Furniture Audiences To Radio

% of Street Furniture Audience Index to Radio

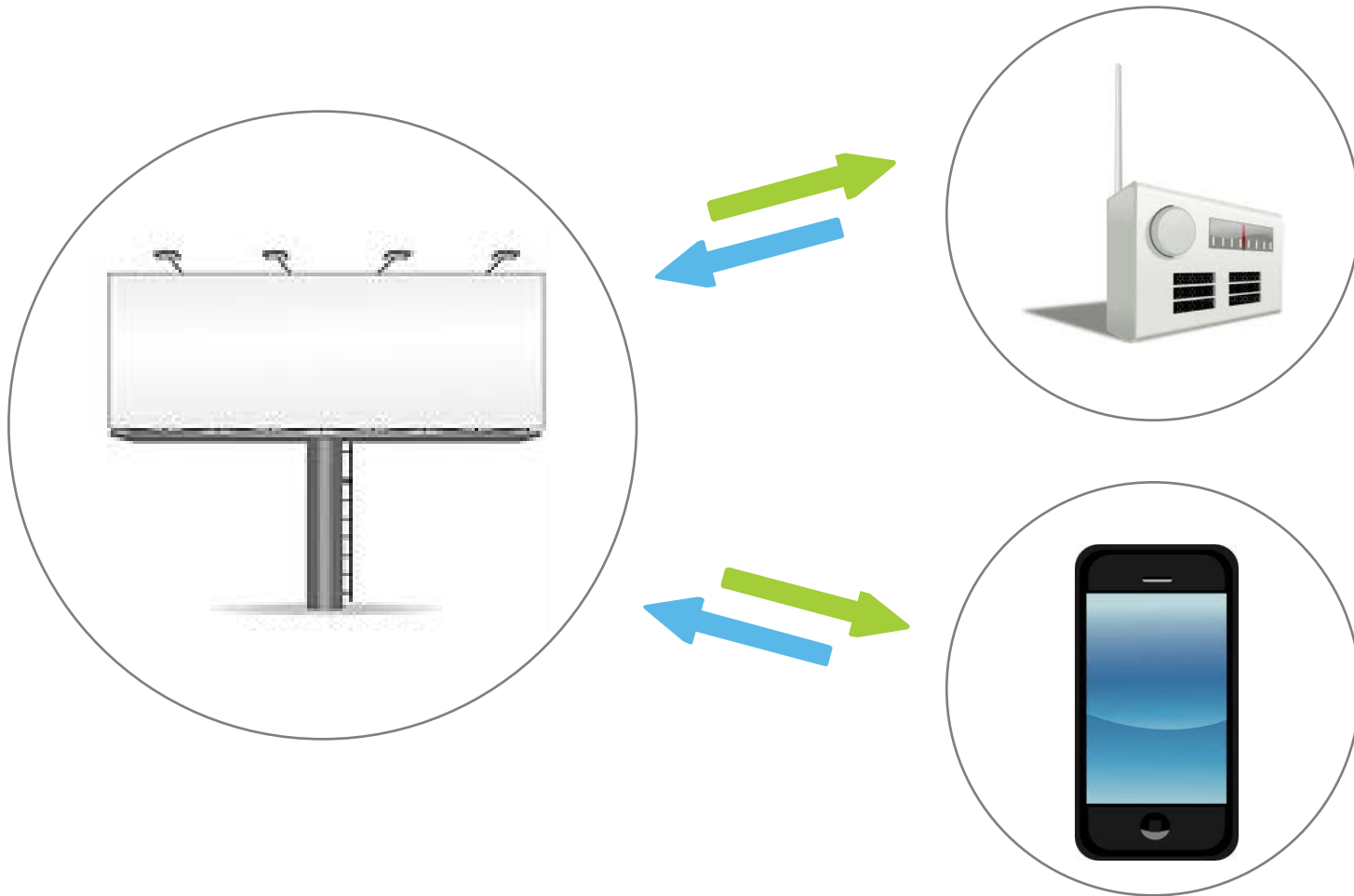


A18-64

Reported time: 6AM-12AM

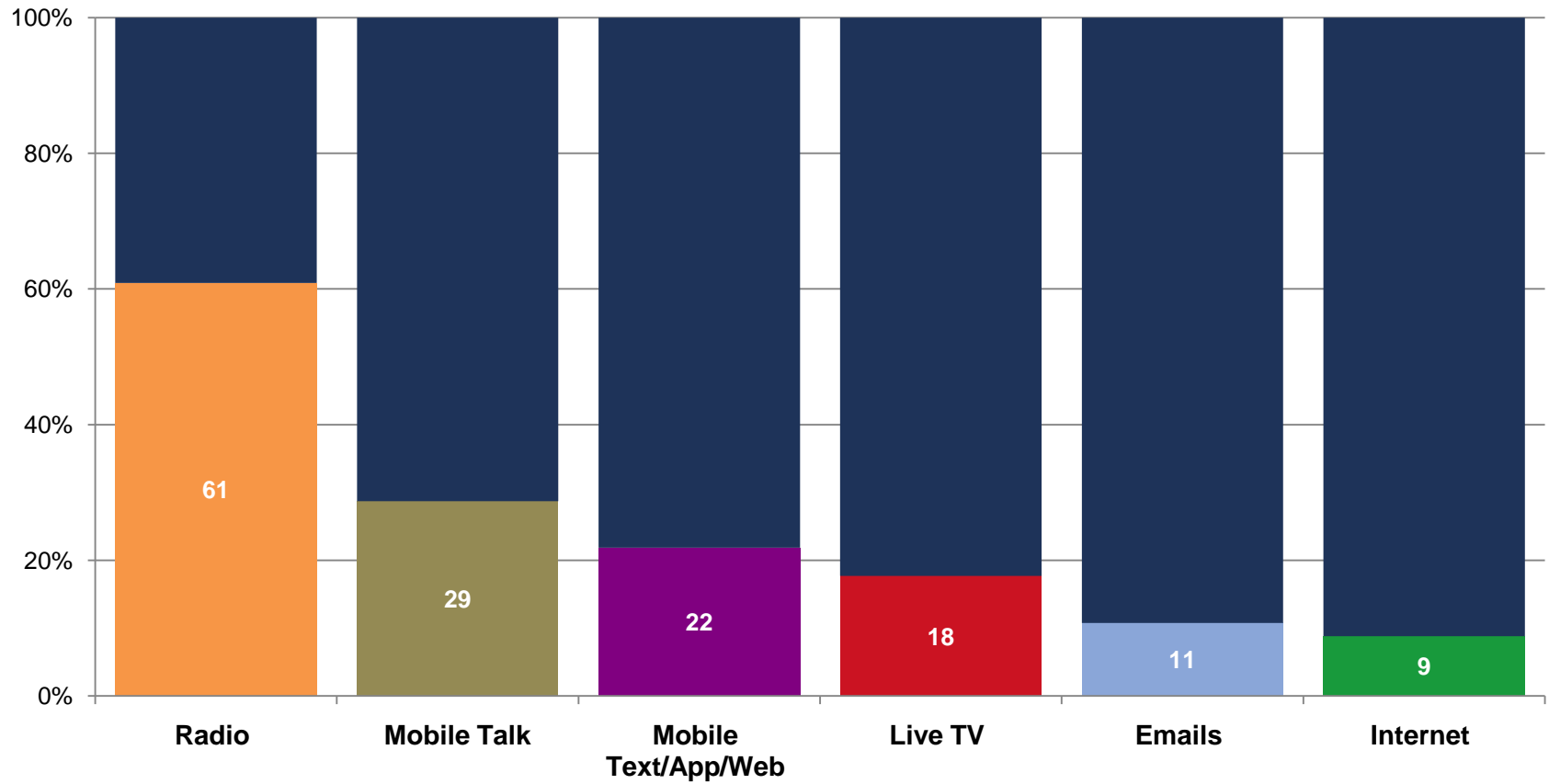


# OOH Offers Strategic Cross-Platform And Promotional Opportunity With Other Media Within The Same Half-hour



# OOH Media Are Strategic Additions To Radio And Mobile To Complement Messaging

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



A18-64

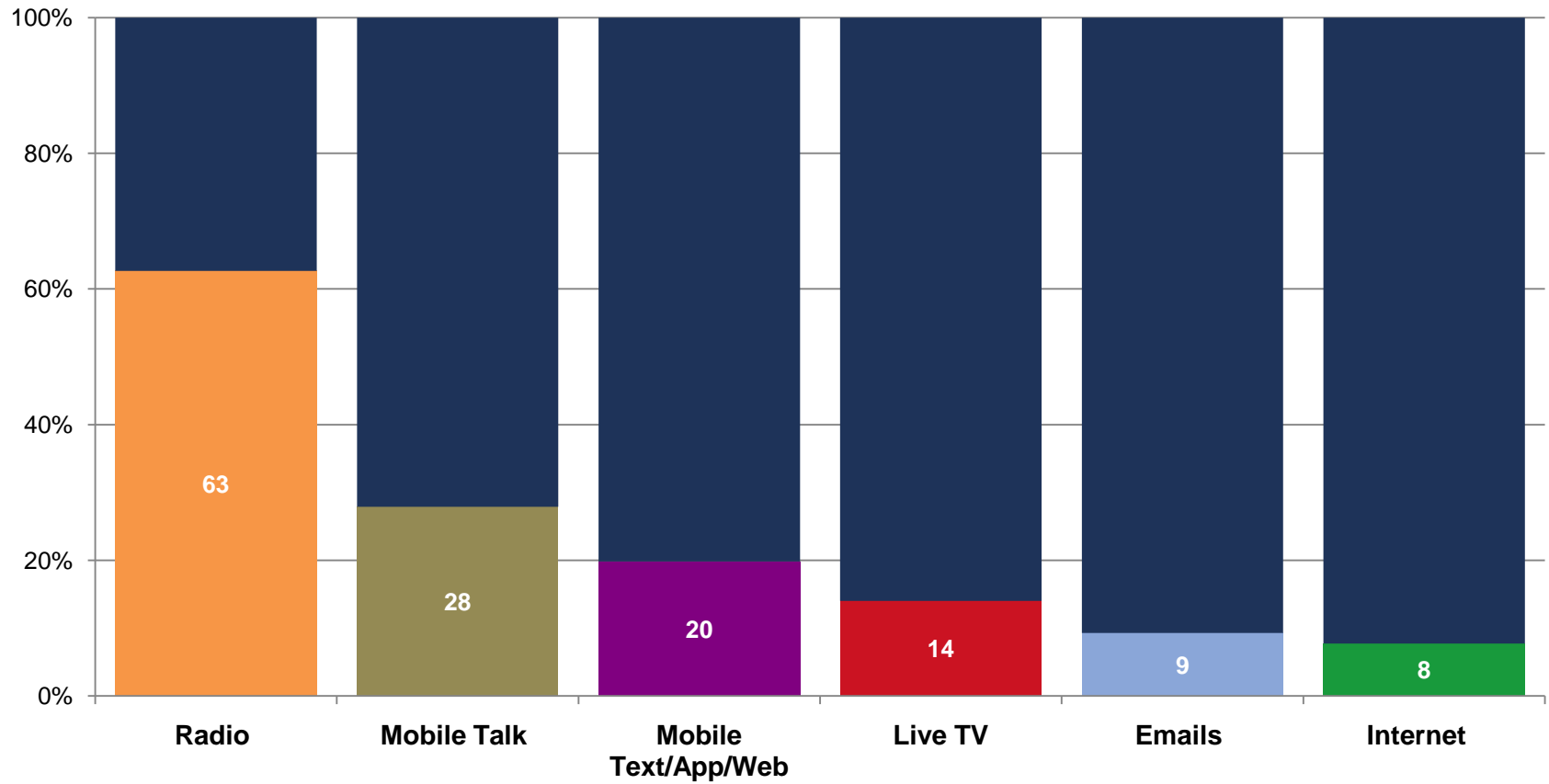
Reported time: 6AM-12AM

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



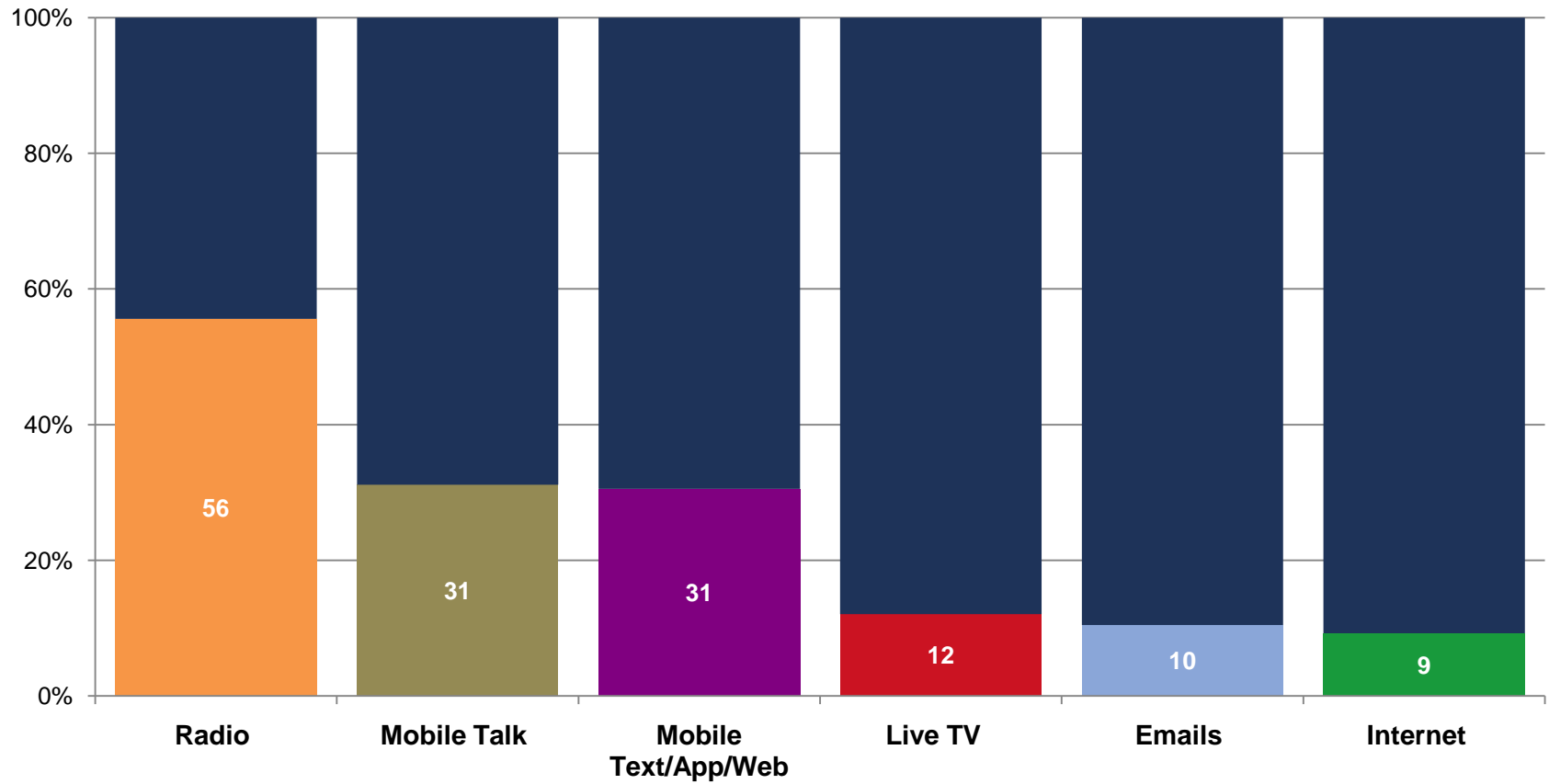
A18-64  
Reported time: 6AM-12AM

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



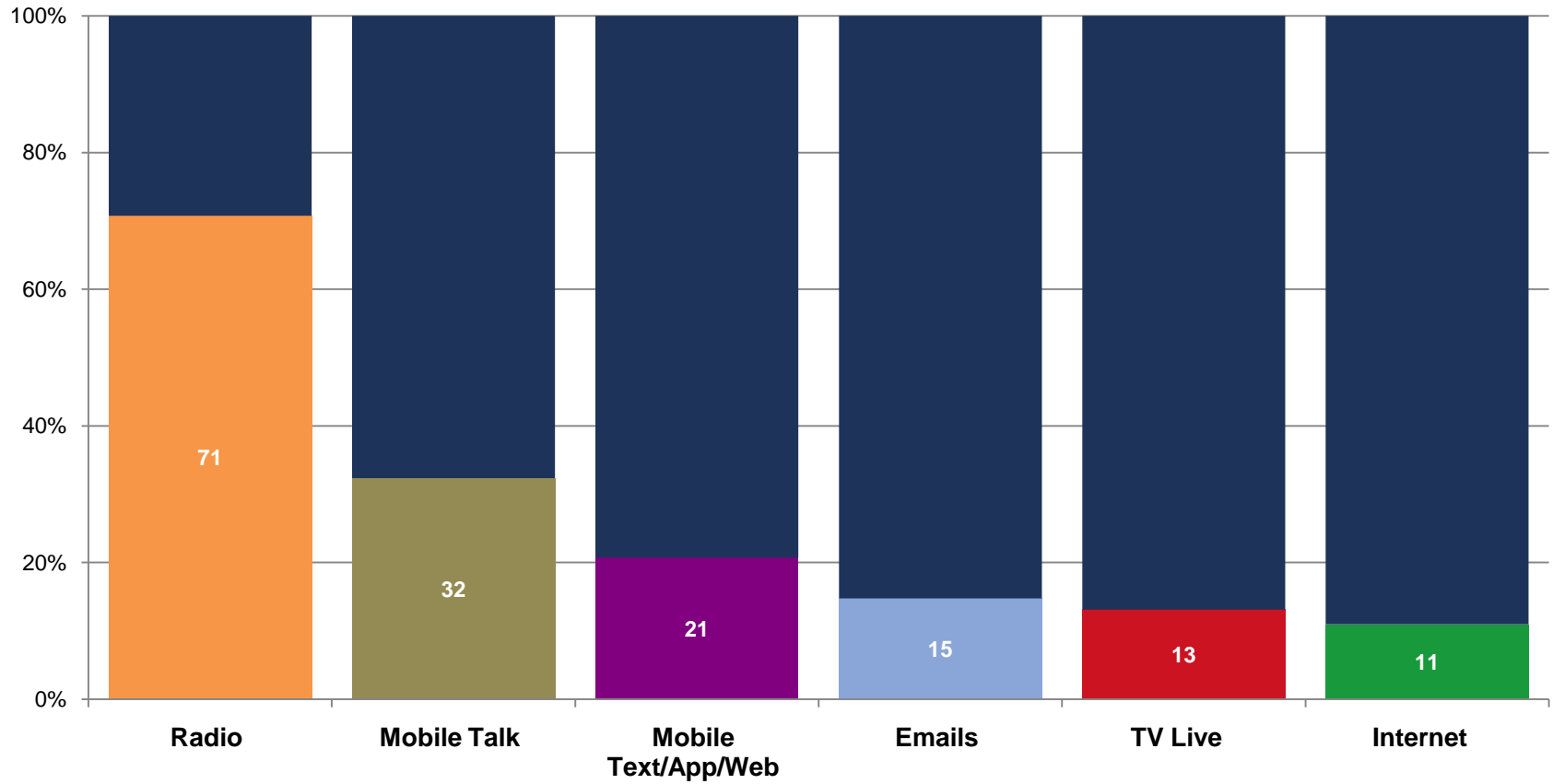
A18-34  
Reported time: 6AM-12AM

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+

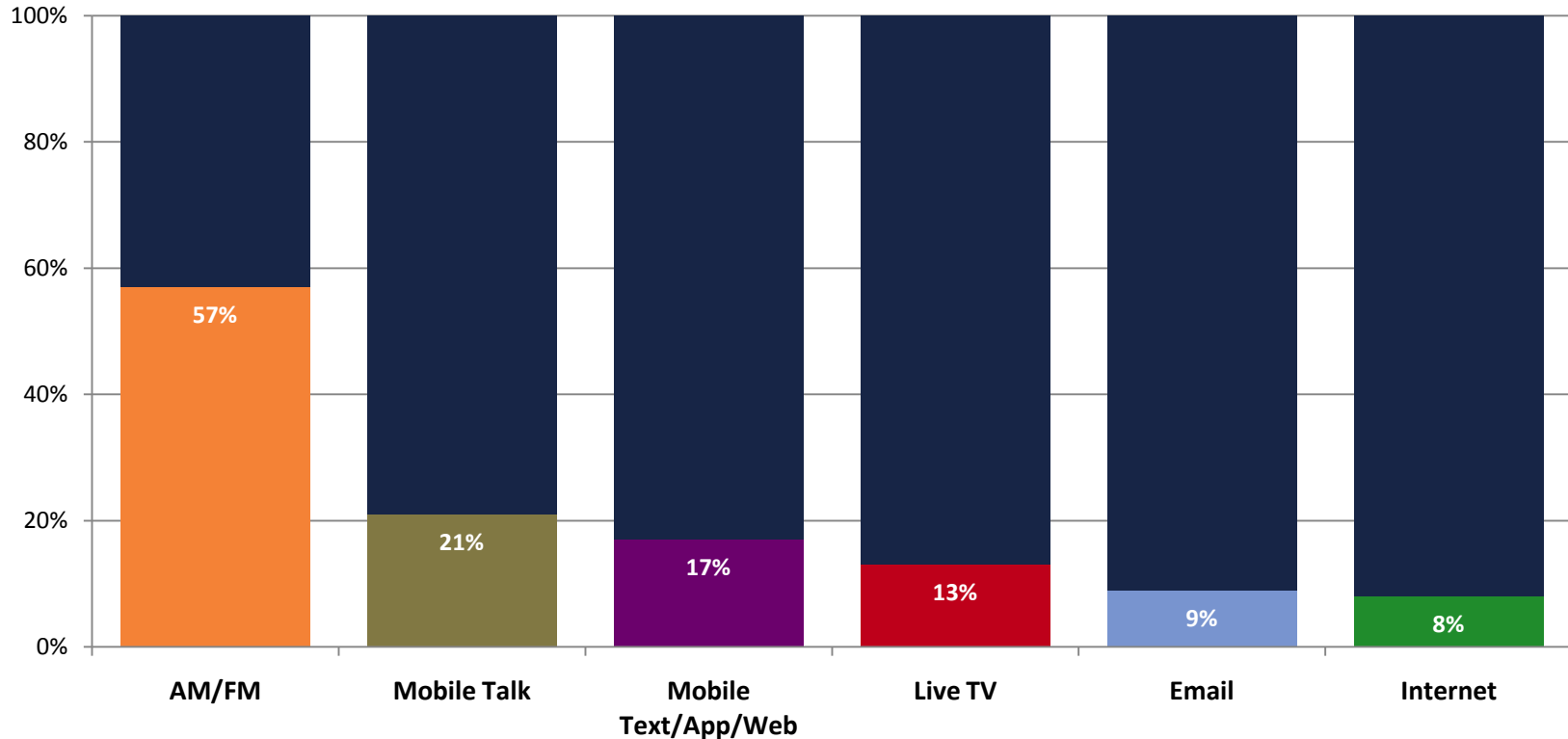


HHI\$75K+  
Reported time: 6AM-12AM



# Billboards Are Strategic Additions To Radio And Mobile To Complement Messaging

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



W18-64

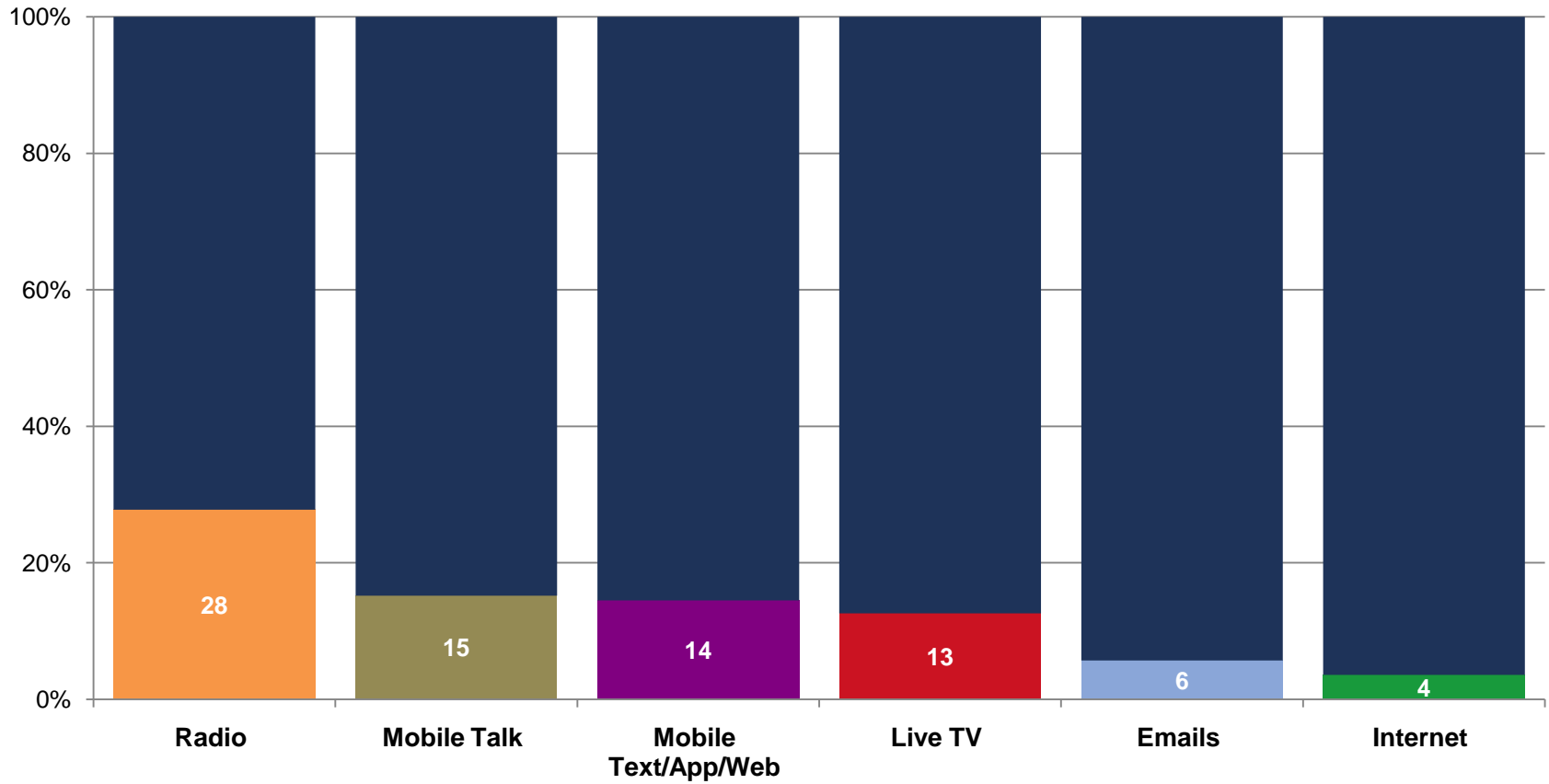
Reported time: 6AM-12AM

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



A18-64

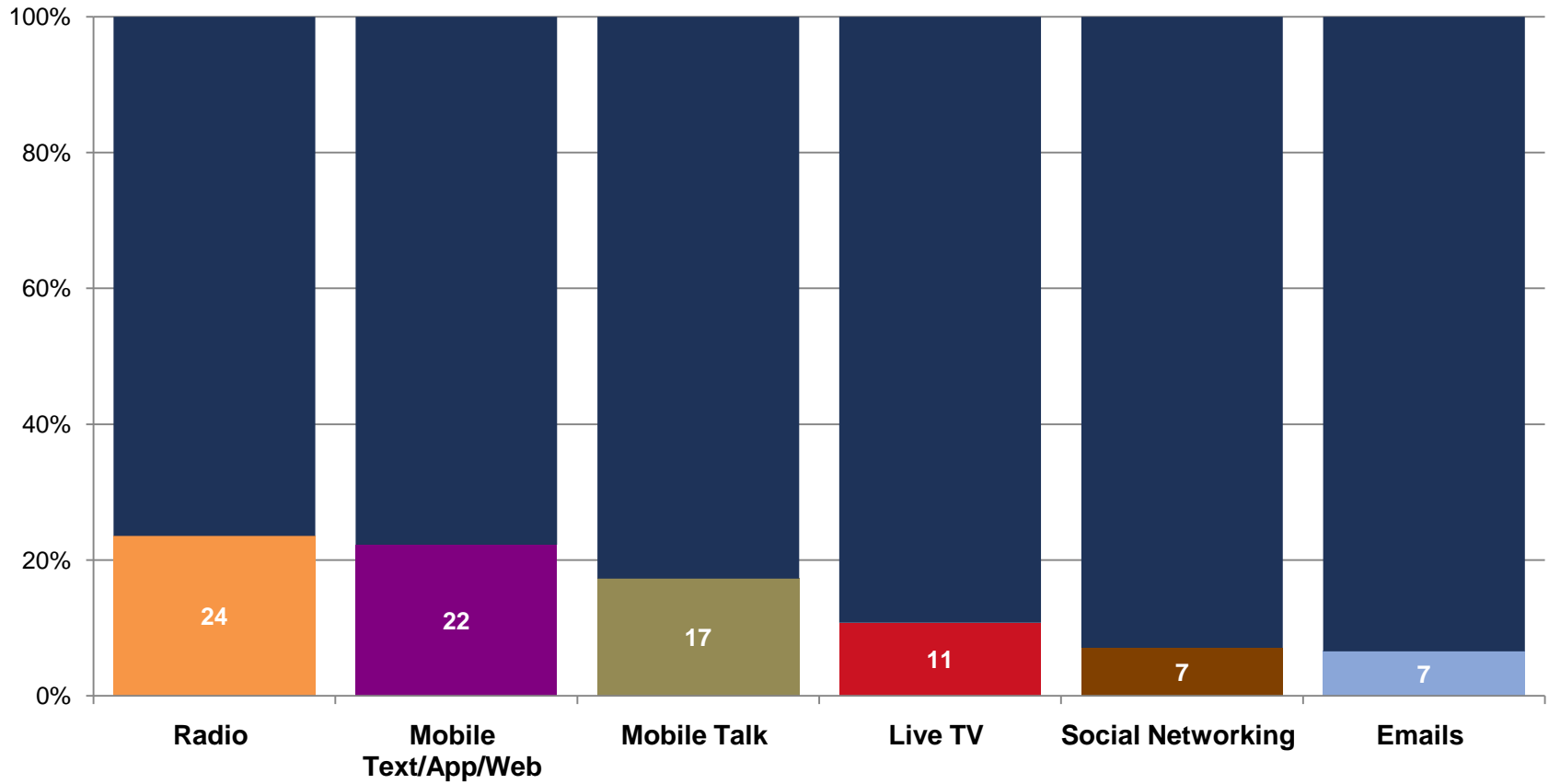
Reported time: 6AM-12AM





# 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



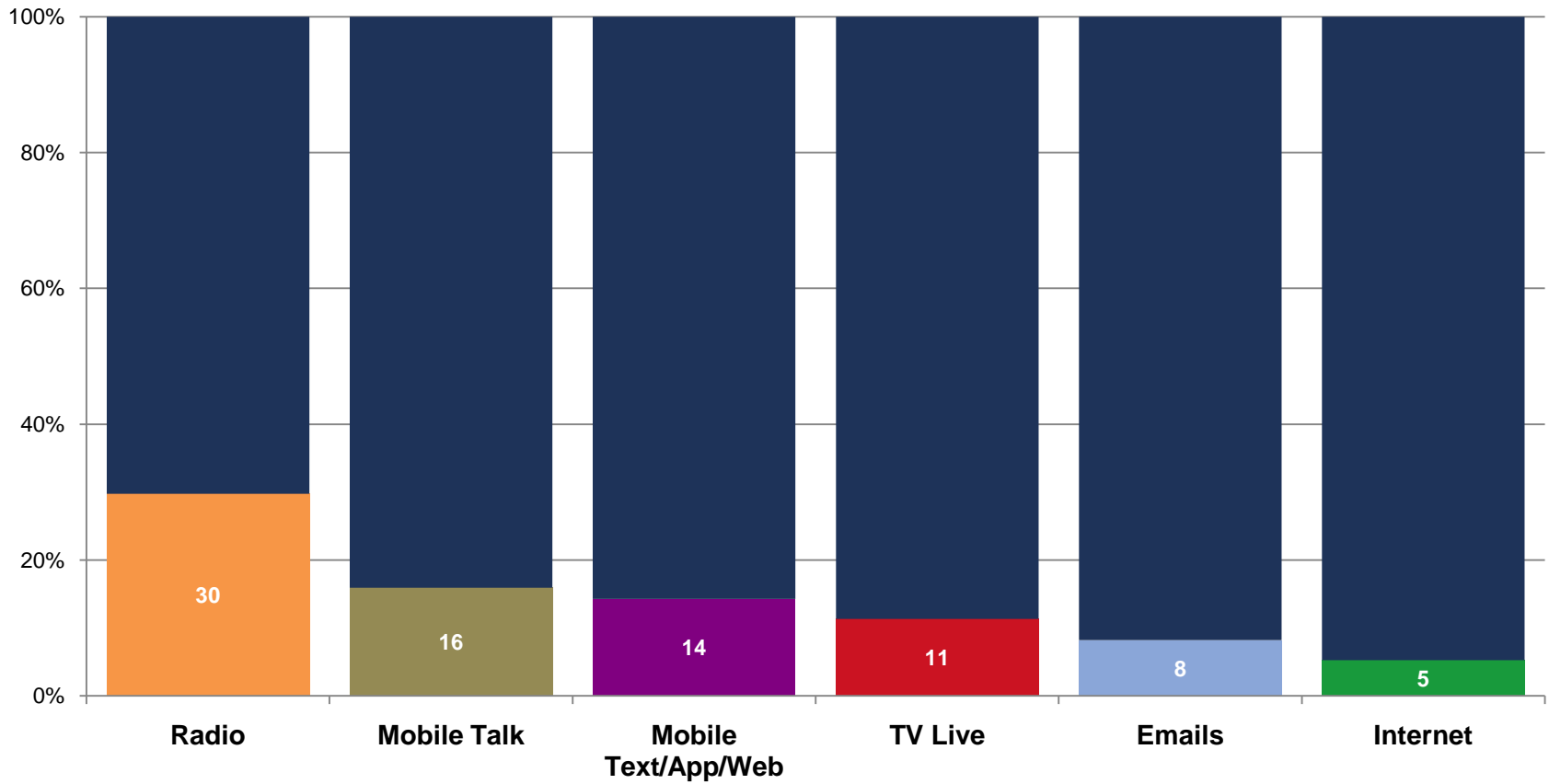
A18-34

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+



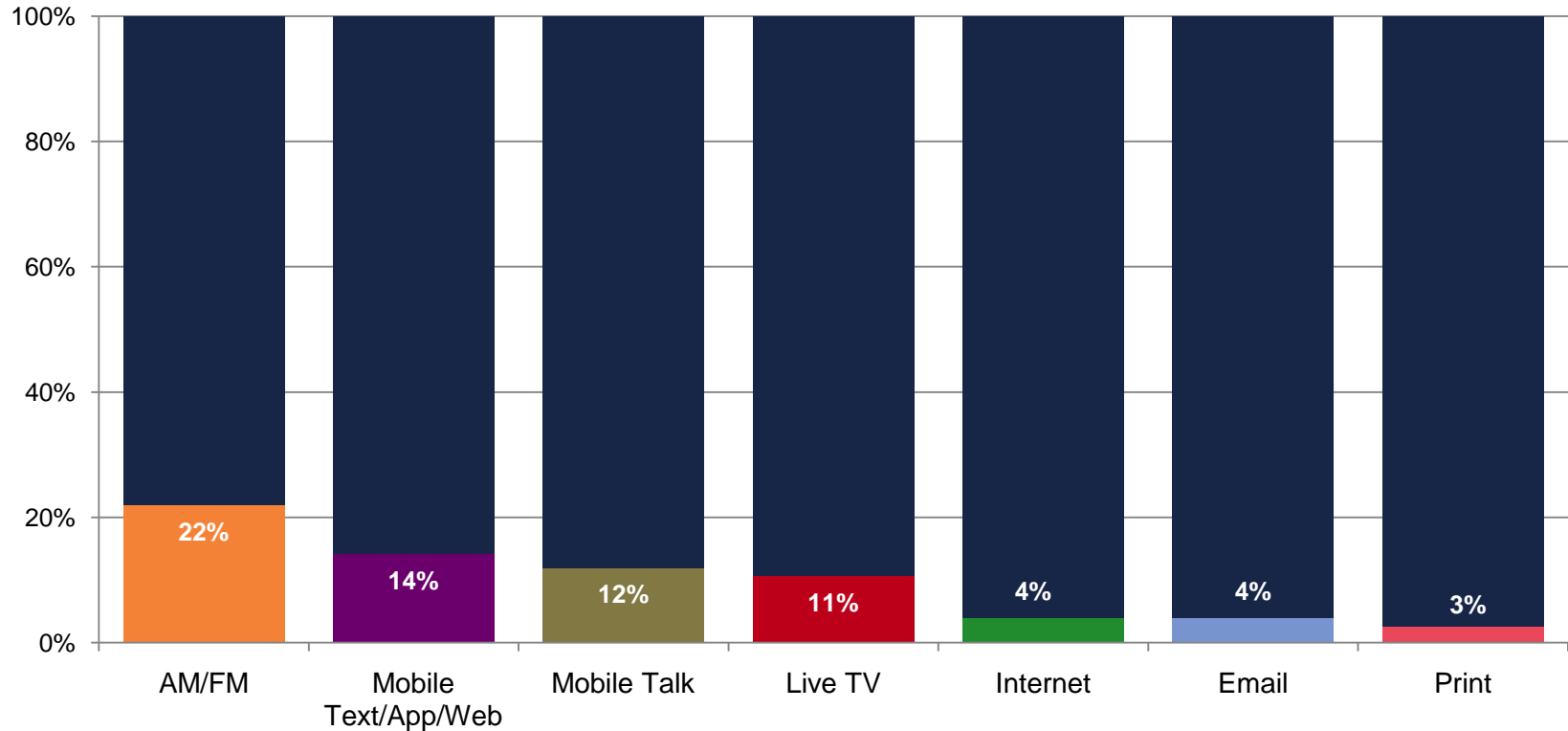
HHI\$75K+

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



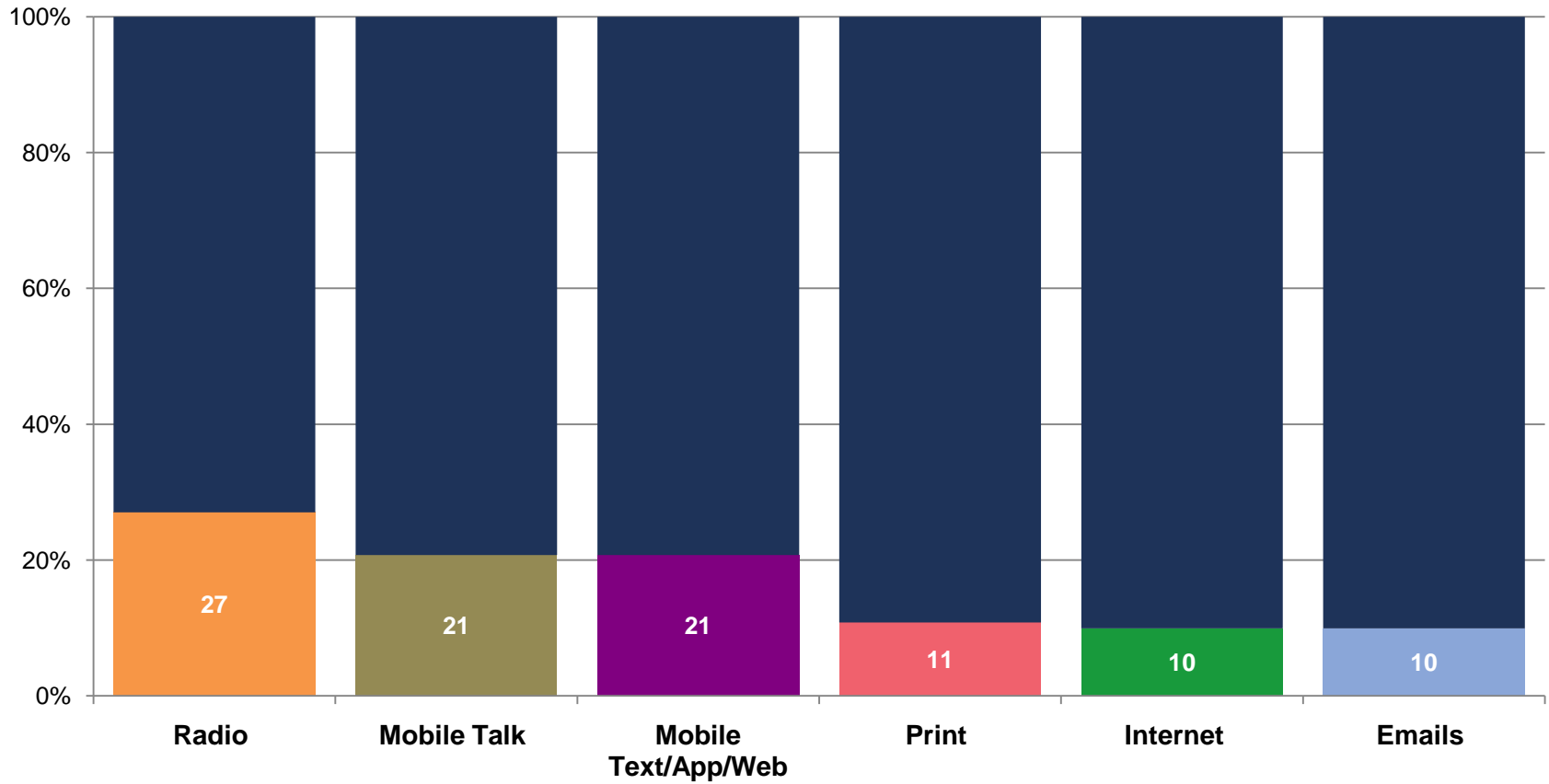
W18-64

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



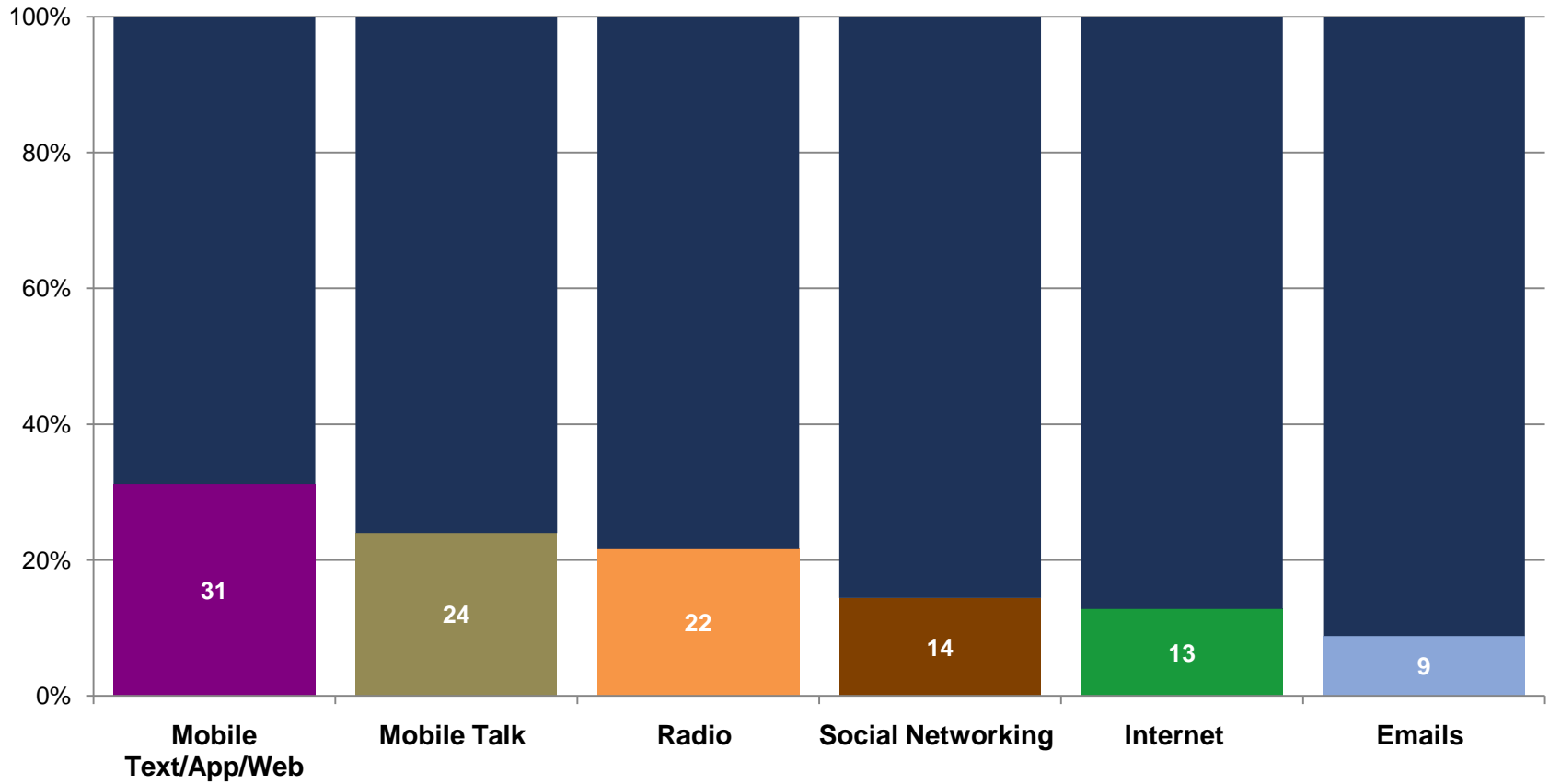
A18-64

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



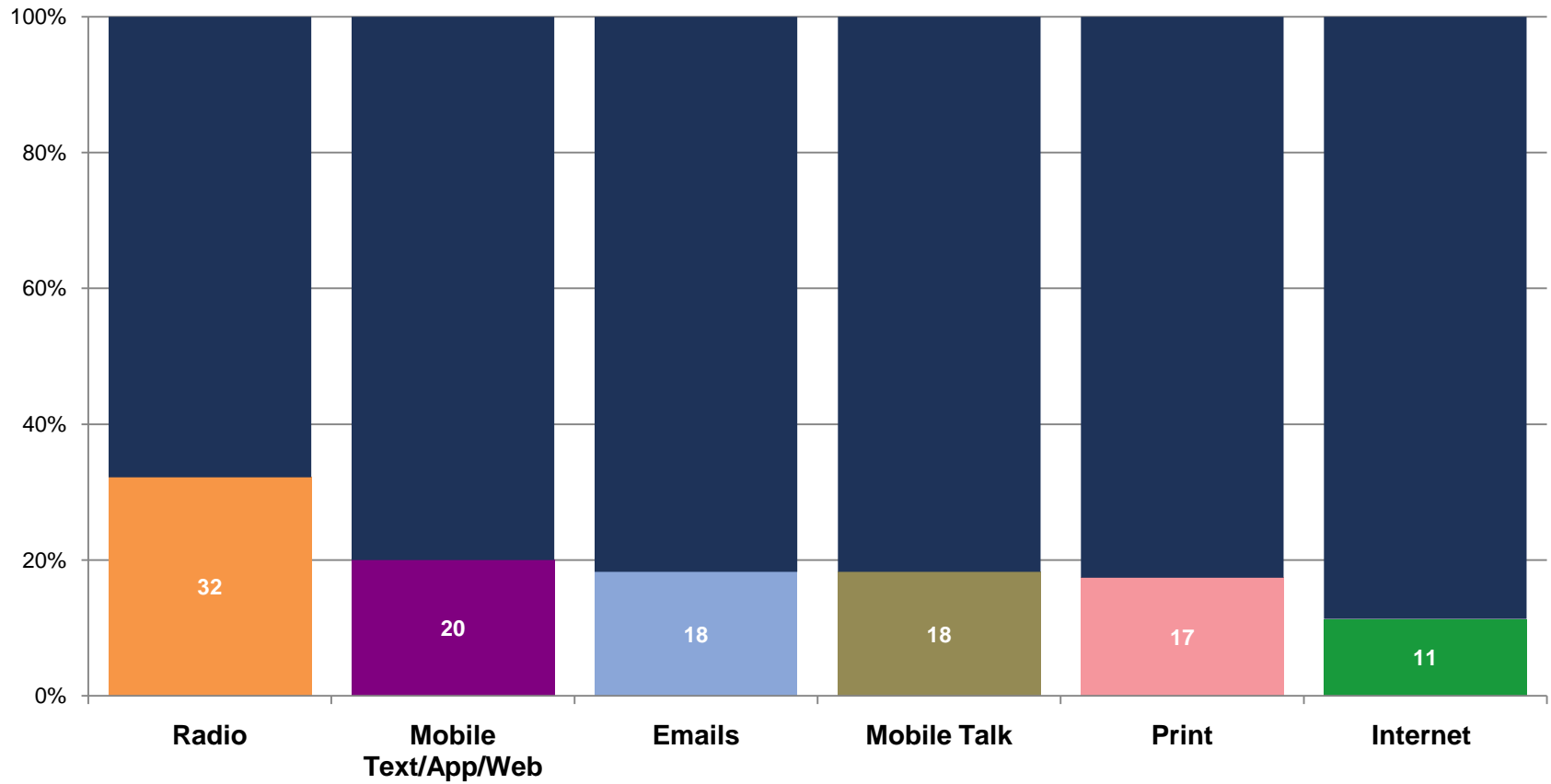
A18-34

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+

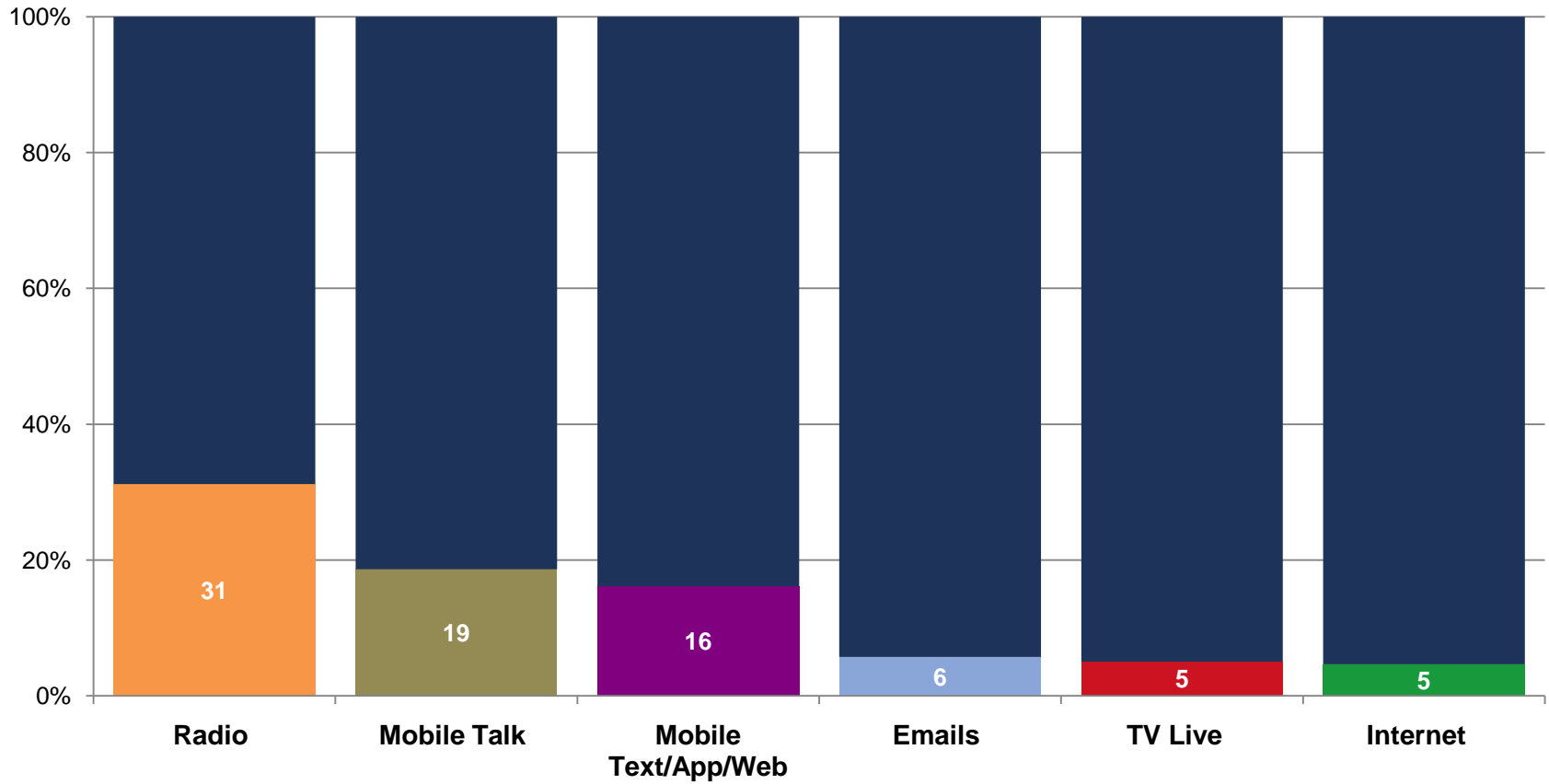


HHI\$75K+  
Reported time: 6AM-12AM



# 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



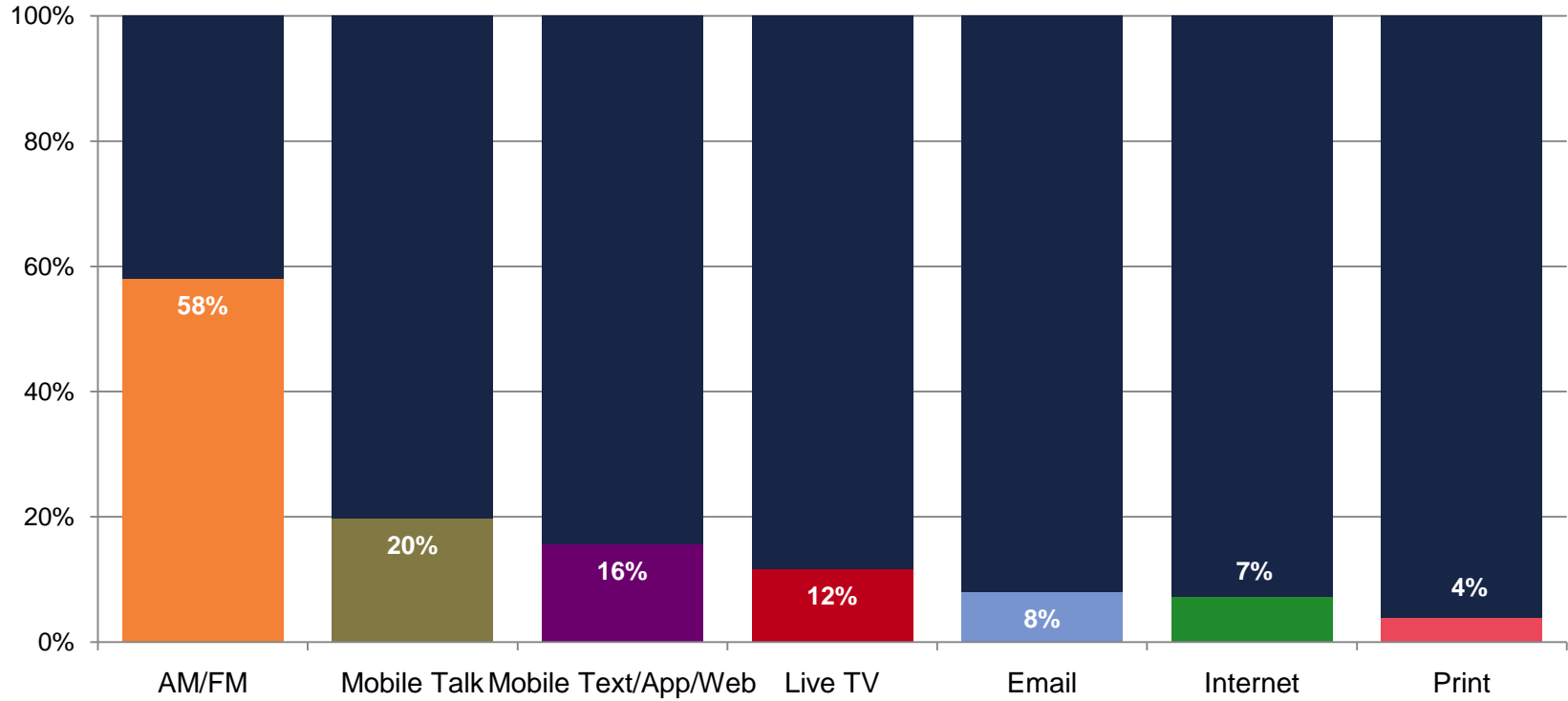
A18-64

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



W18-64

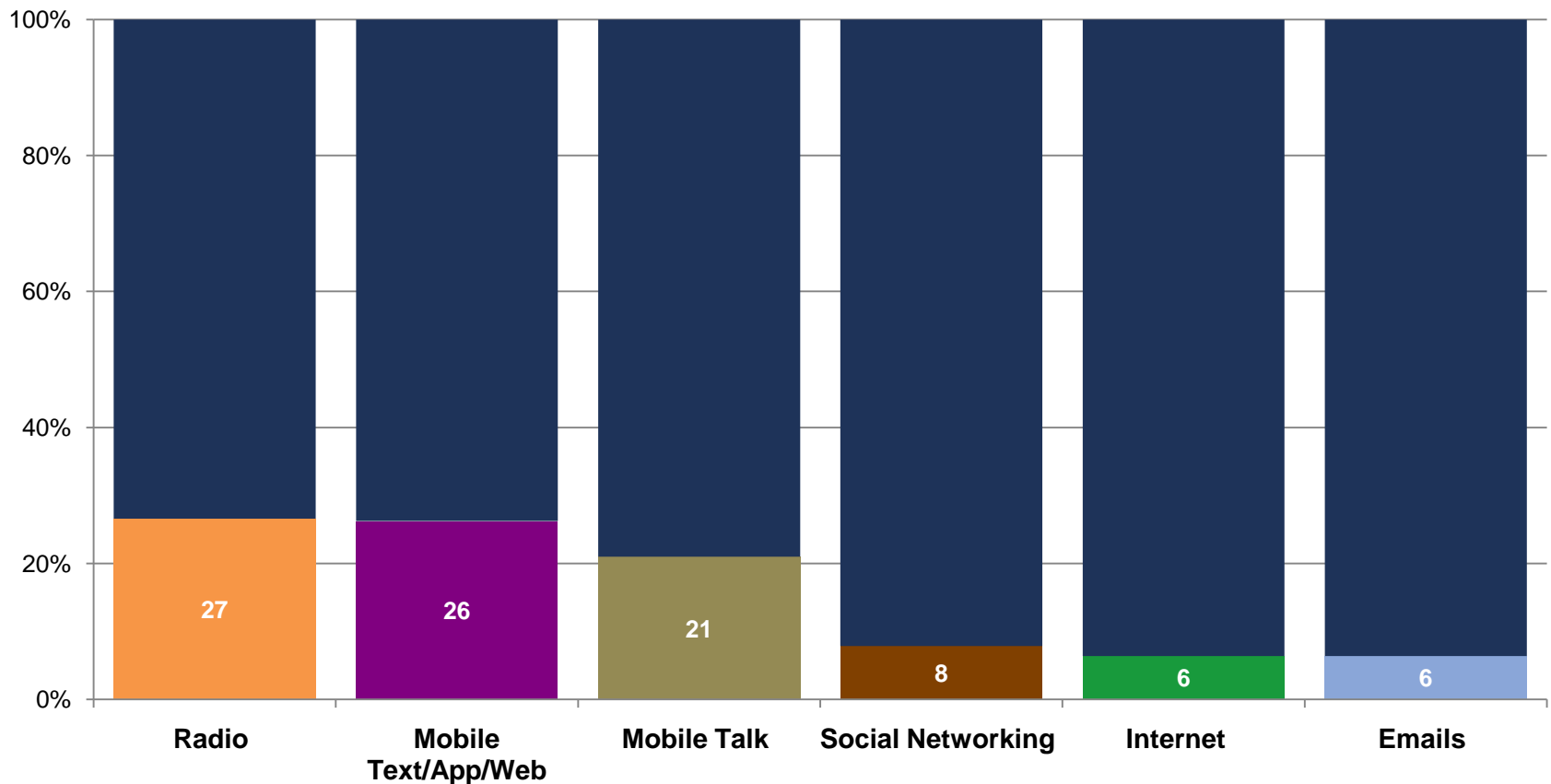
Reported time: 6AM-12AM





# 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



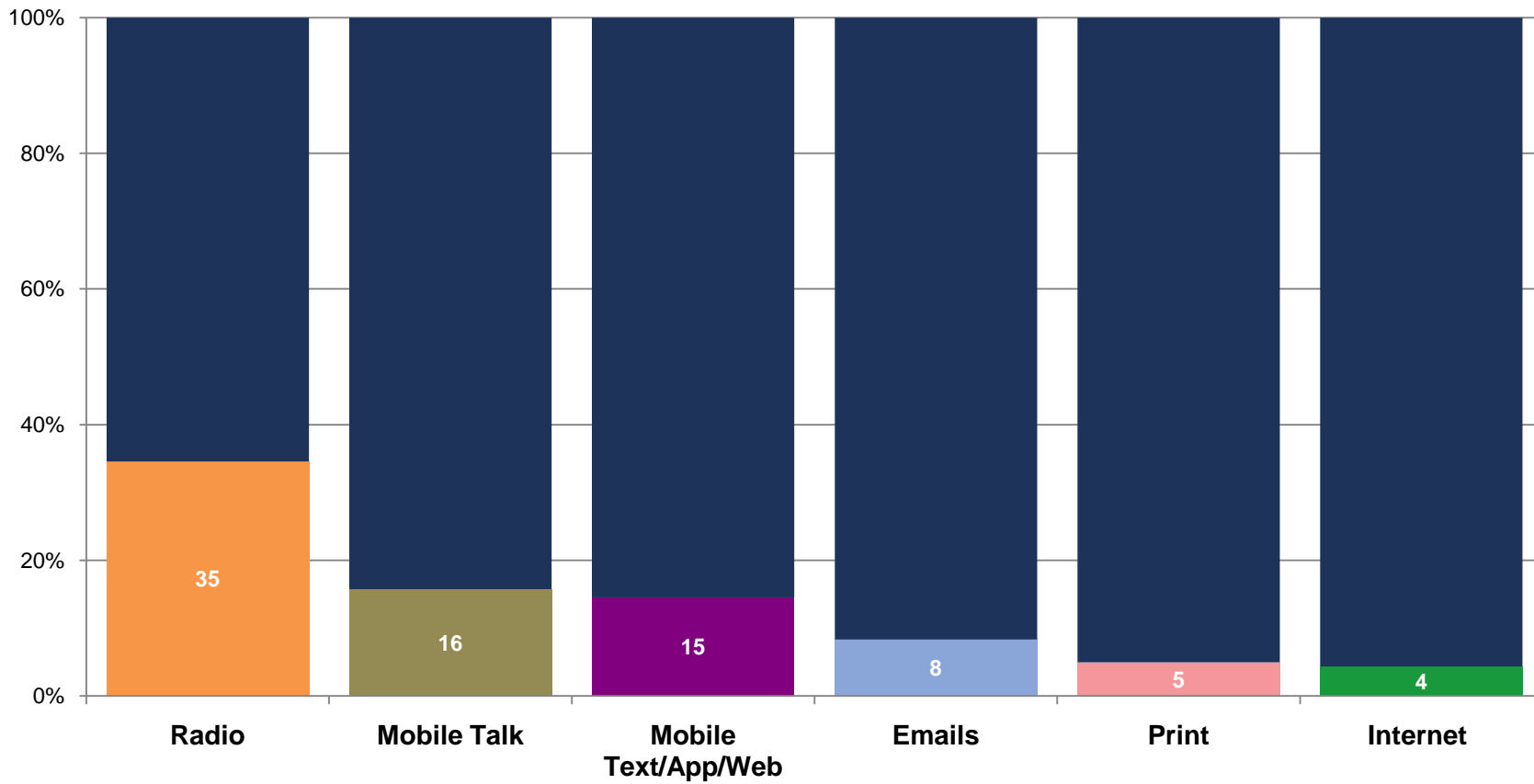
A18-34

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+

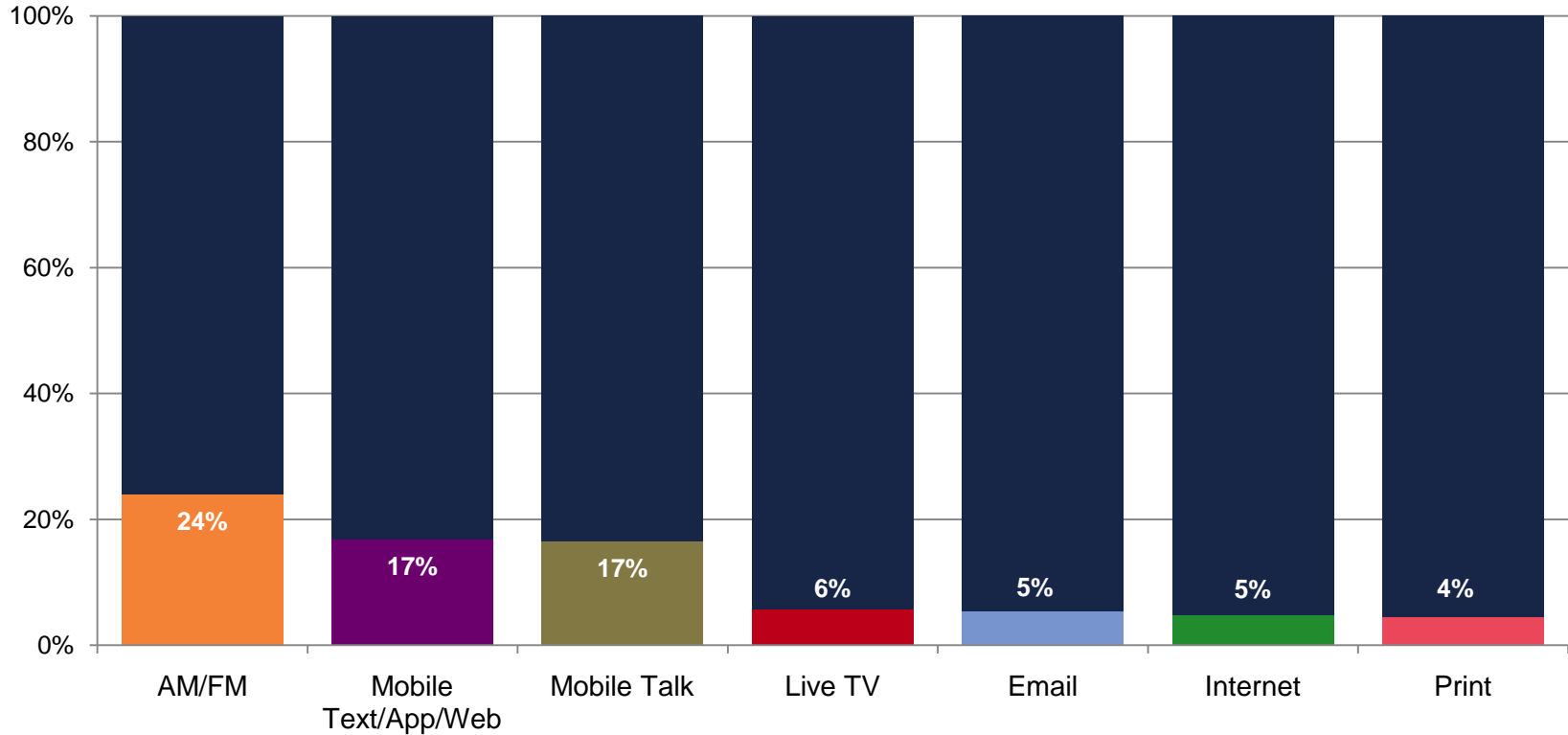


HHI\$75K+  
Reported time: 6AM-12AM



# 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



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

