



The National In-Car Study

The Power of Outdoor Advertising



How the In-Car Study Was Conducted

1,505 telephone interviews were conducted in July 2003

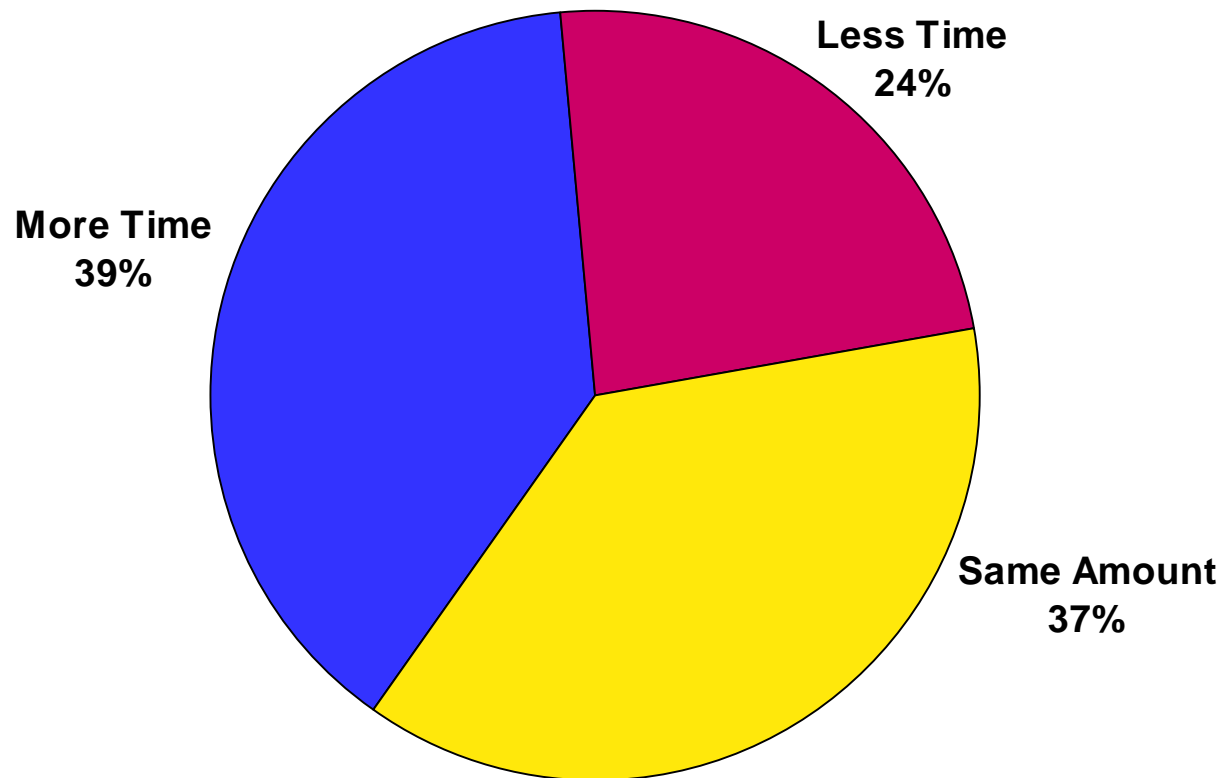
- National U.S. random sample
- 98.4% of the sample had driven or ridden as a passenger in non-public transportation vehicles (car/truck/van, etc.) in the last month

In-Car Trends



Americans Are Spending More Time In-Car

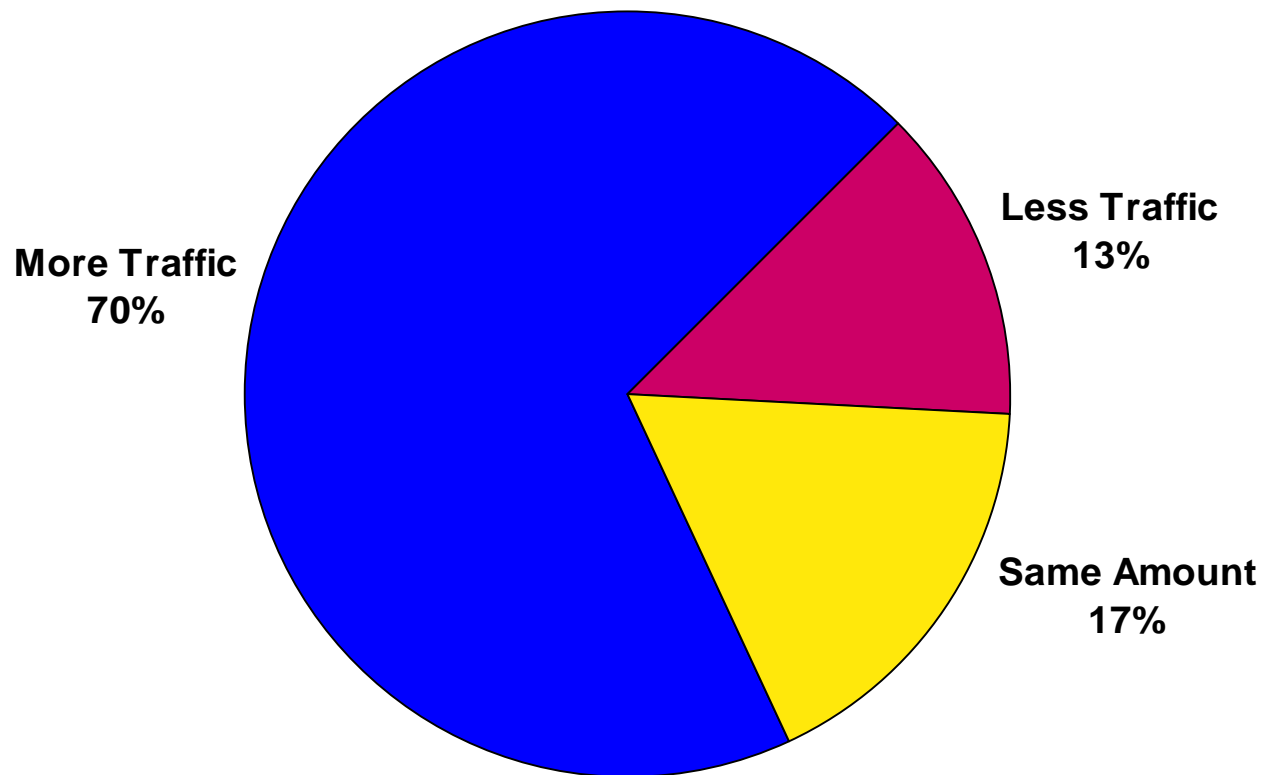
“In general, are you spending MORE or LESS time in cars than you were one year ago?”



Base: Driven/Ridden In a Car in Last Month

Traffic Is Getting Worse

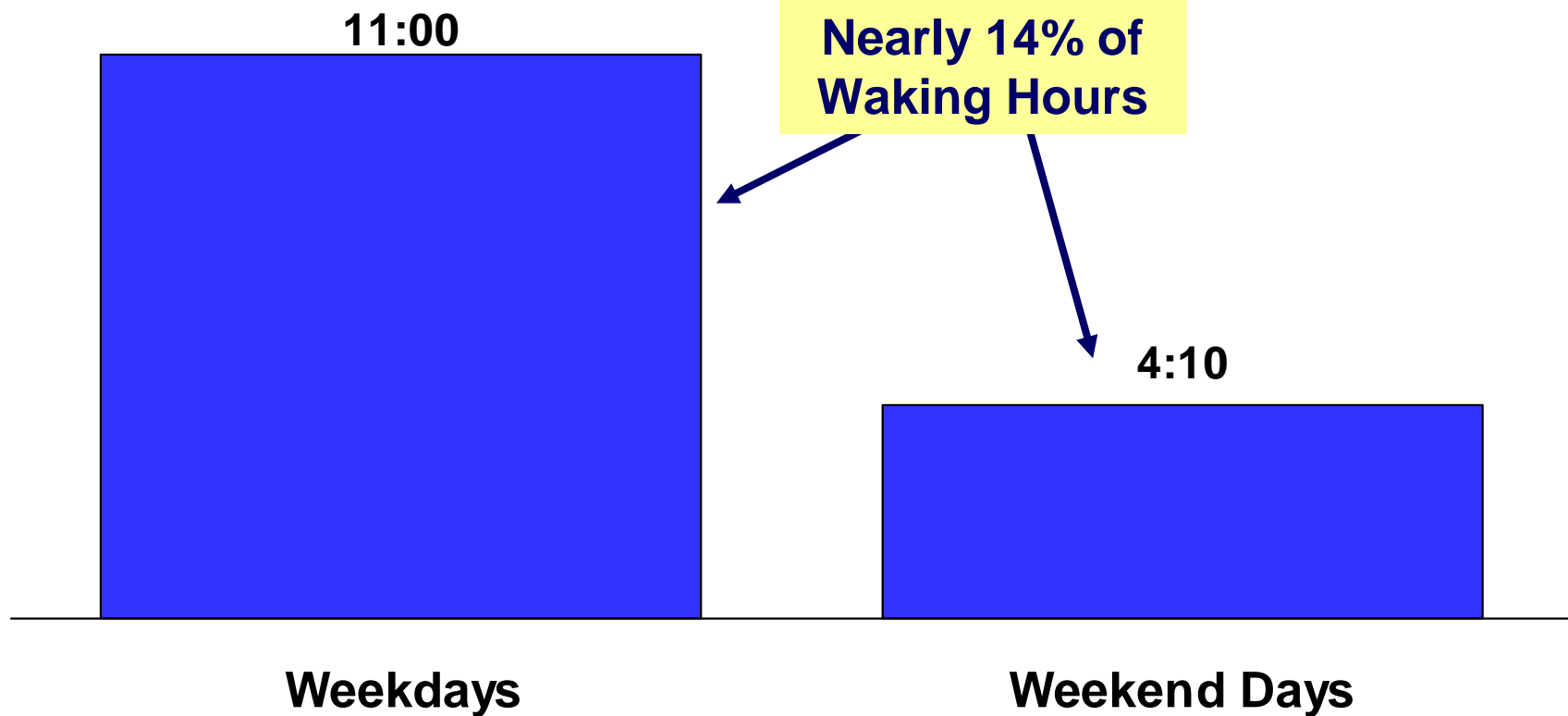
“Would you say you personally are encountering **MORE TRAFFIC** or **LESS TRAFFIC** than you were one year ago?”



Base: Driven/Ridden In a Car in Last Month

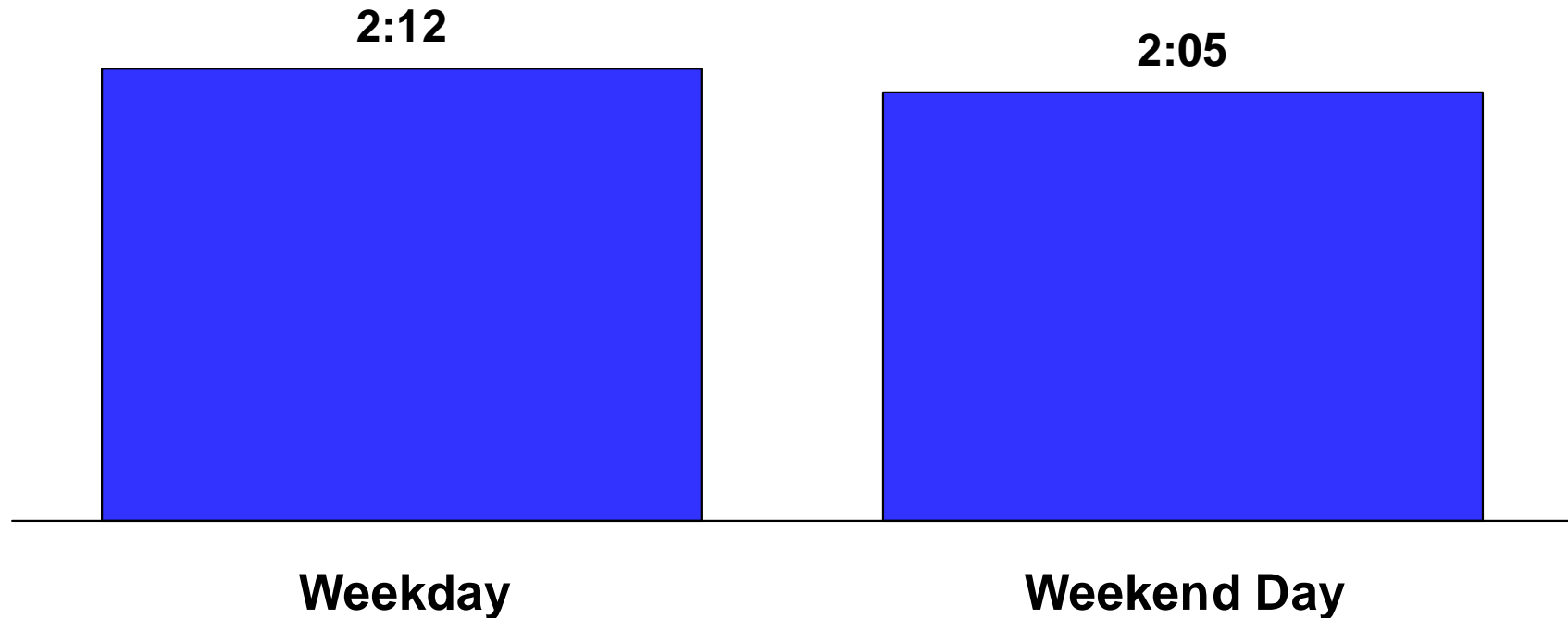
On Average, People Spend More Than 15 Hours Per Week In-Car

Total Time Spent In-Car (as Driver or Passenger) During...
(Hours: Minutes)



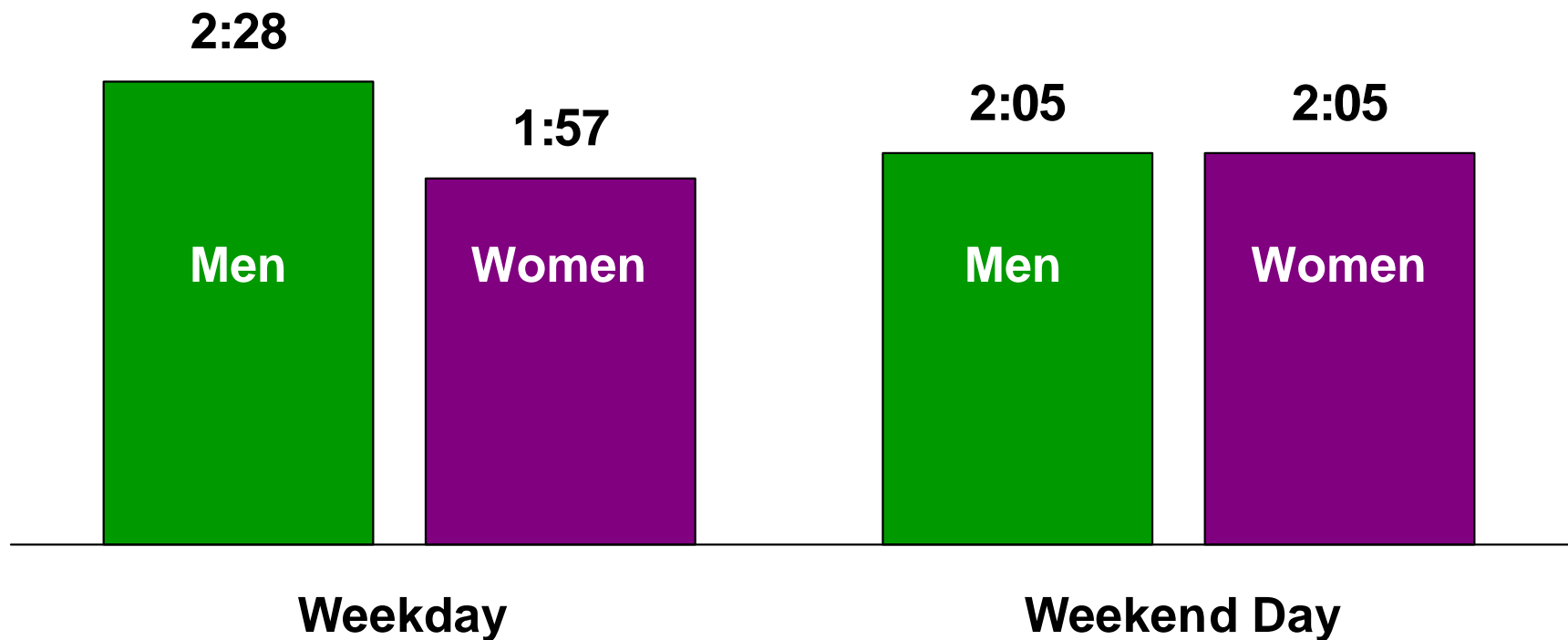
Nearly as Much Time Spent In-Car on Weekends as Weekdays

Time Spent In-Car (as Driver or Passenger) Per...
(Hours: Minutes)



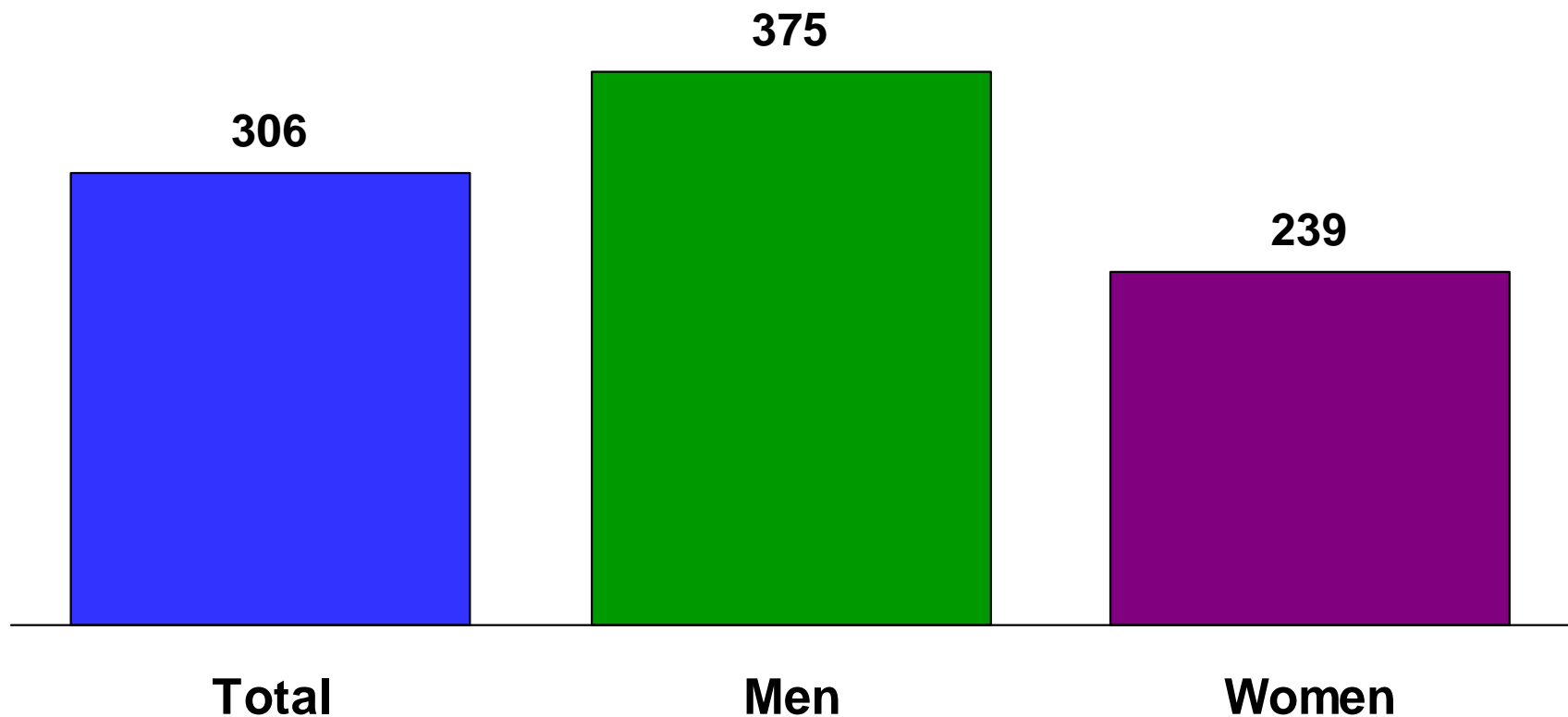
Men Report More Time In-Car Than Women During Weekdays

Time Spent In-Car (as Driver or Passenger) Per...
(Hours: Minutes)



People Cover Plenty of Ground In-Car

Miles Traveled In-Car (as Driver or Passenger) in Last Seven Days



Base: Driven/Ridden In a Car in Last Month



Who Is the Heavy In-Car Consumer?

“Mega-milers”

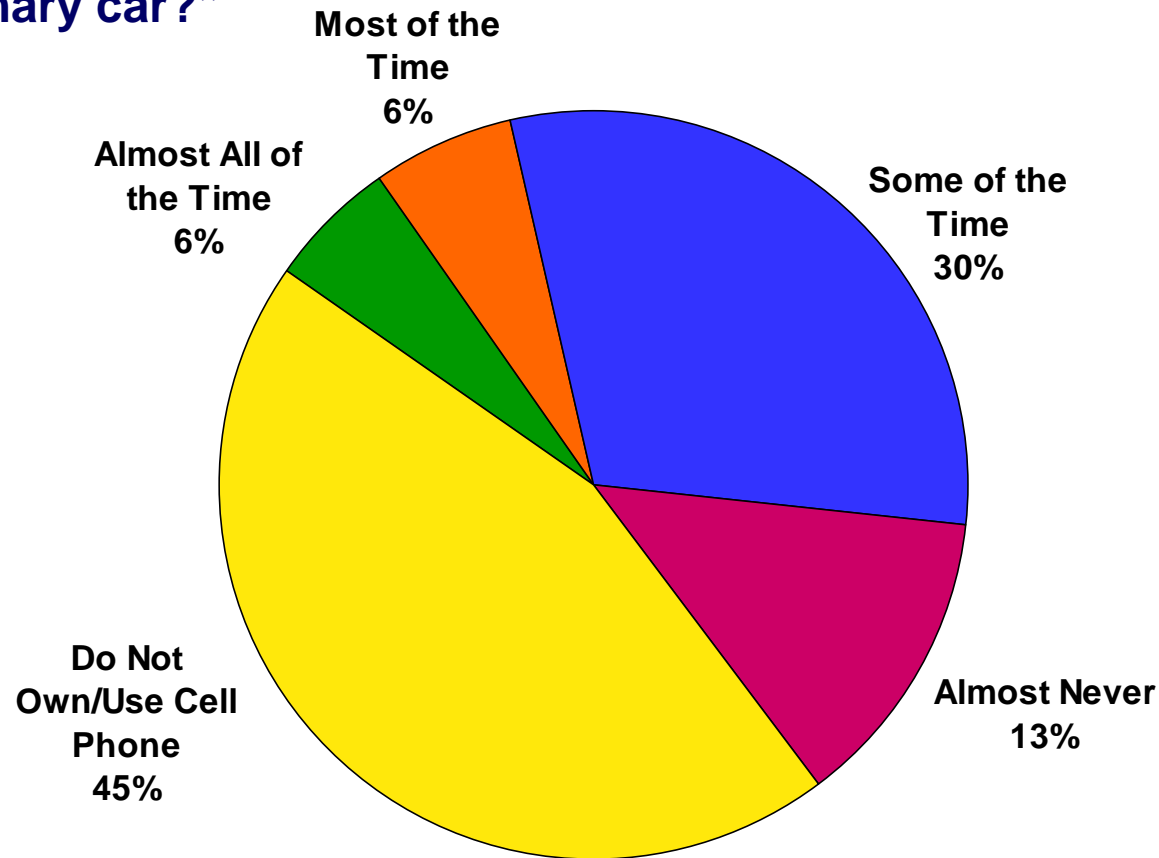
Category	Index
\$100K+ HH Income	142
Male	131
Age 35-54	131
Four-Year Degree or Higher Education	112
TV Time Spent Viewing	92

Base: Drive/Ride in Car More than 260 Miles Per Week



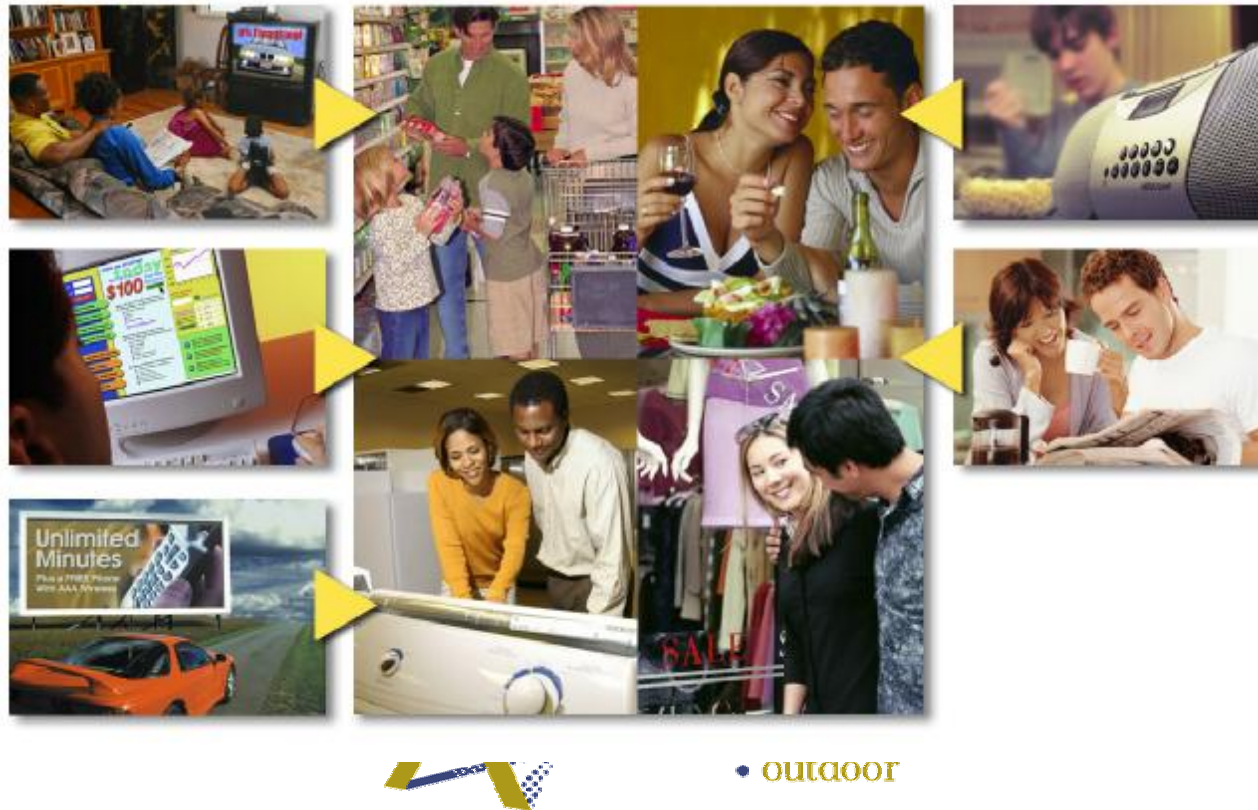
Only a Small Fraction Regularly Use Cell Phone While In-Car

“How often do you use a cell phone while driving or riding as a passenger in your primary car?”



Base: Driven/Ridden In a Car in Last Month

In-Car Buying Decisions



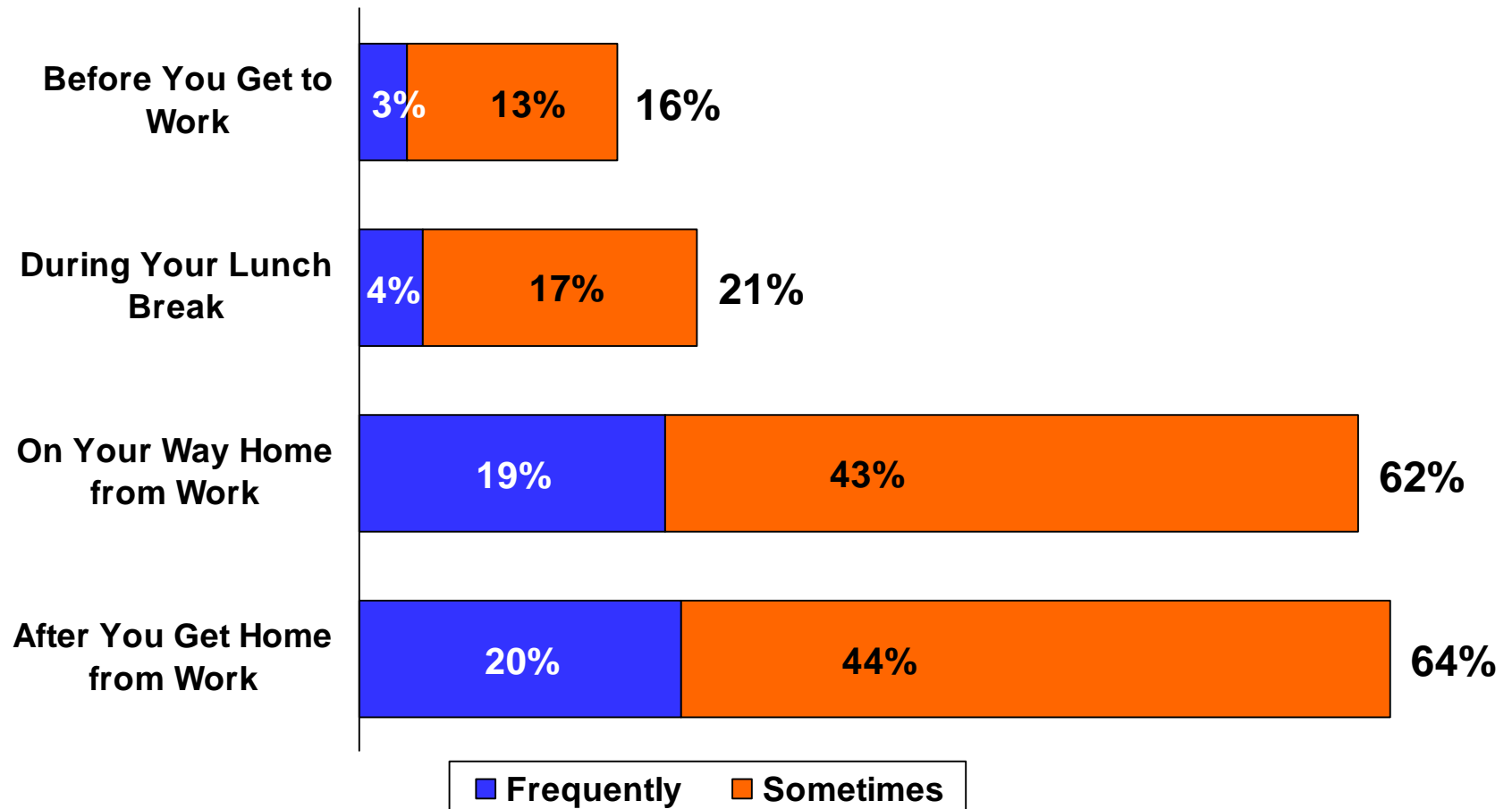
Exploring the Power of Recency for In-Car Advertising

- **Recency** planning starts with the idea that *when* is the critical variable rather than *how many*—in other words, advertising effects can also be controlled by *when* the message is received.

How Important Is It to Reach a Consumer in the Car?

Targeting Consumers Close to Purchase? The Real Value Is in the afternoon

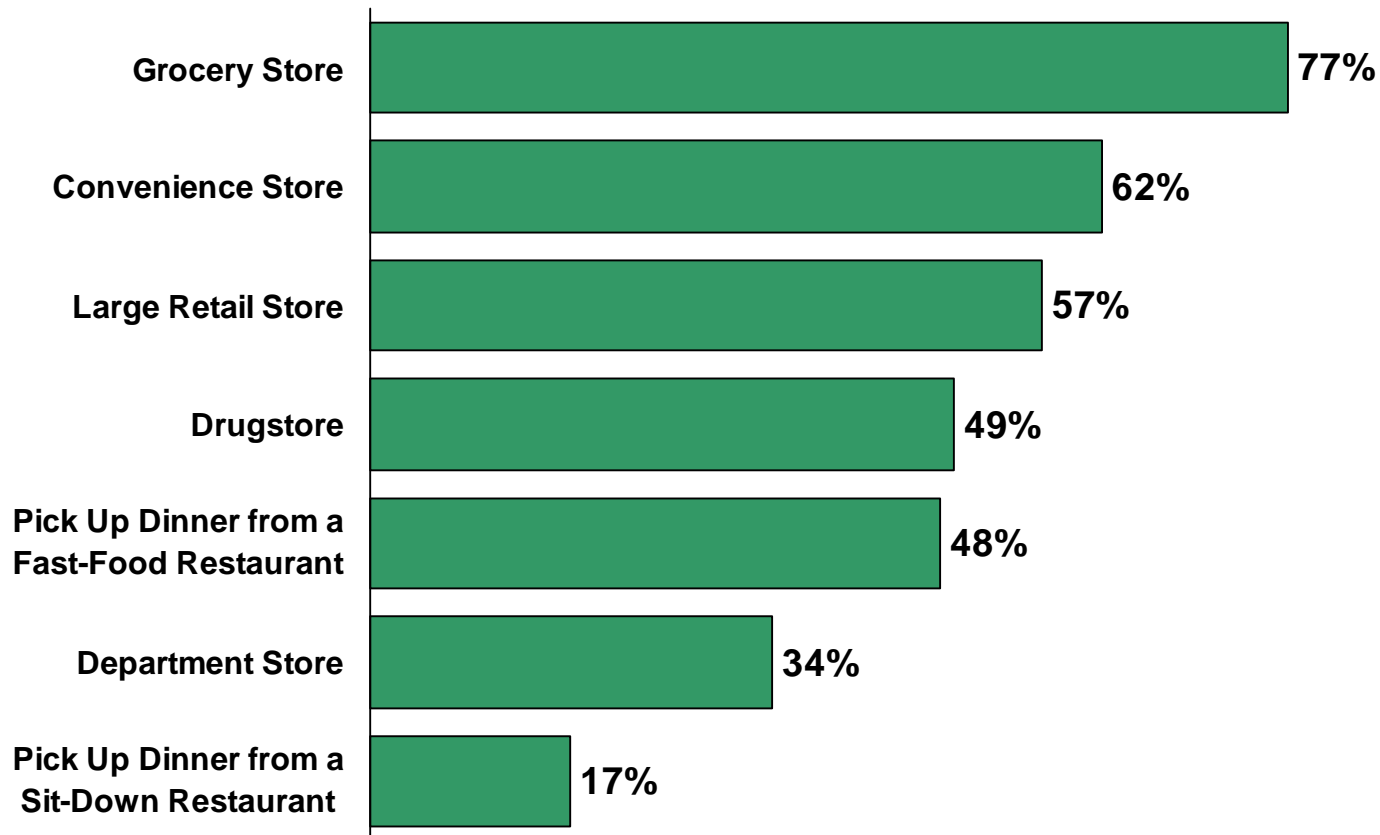
“In the course of a typical workweek, how often do you shop...?”



Base: Work Full/Part Time

Workers Make Many Stops on the Commute Home

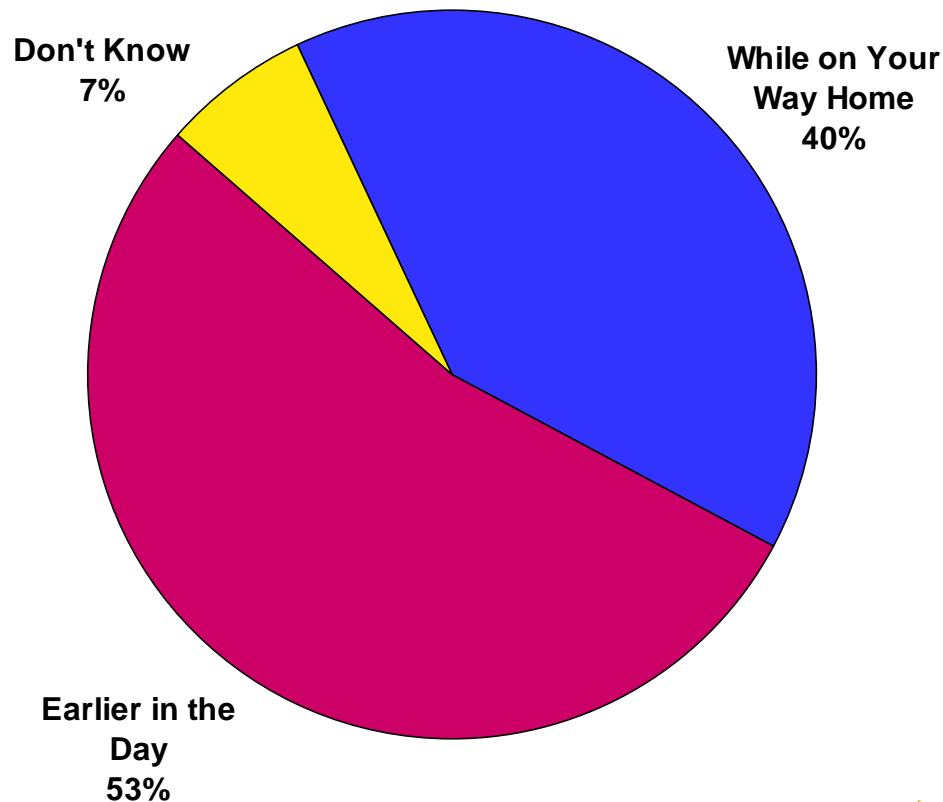
“In the last month, have you stopped on your way home from work to go to...?”



Base: Work Full/Part Time

Two Out of Five Consumers Don't Make the Decision to Shop Until the Last Minute

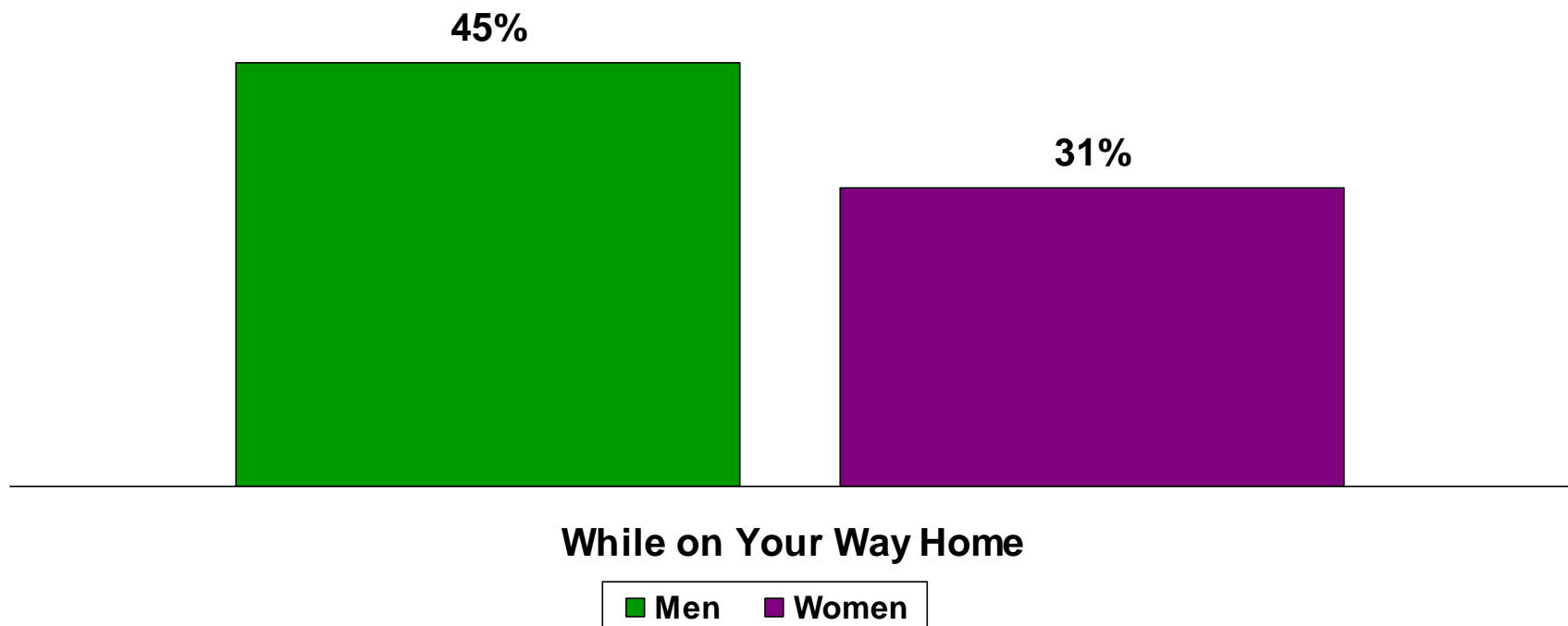
“In general, when do you usually make the decision to stop at a store on your way home from work?”



Base: Work Full/Part Time

Men Are More Likely to Be Last-Minute Shoppers

“In general, when do you usually make the decision to shop at a store on your way home from work?”



Base: Work Full/Part Time

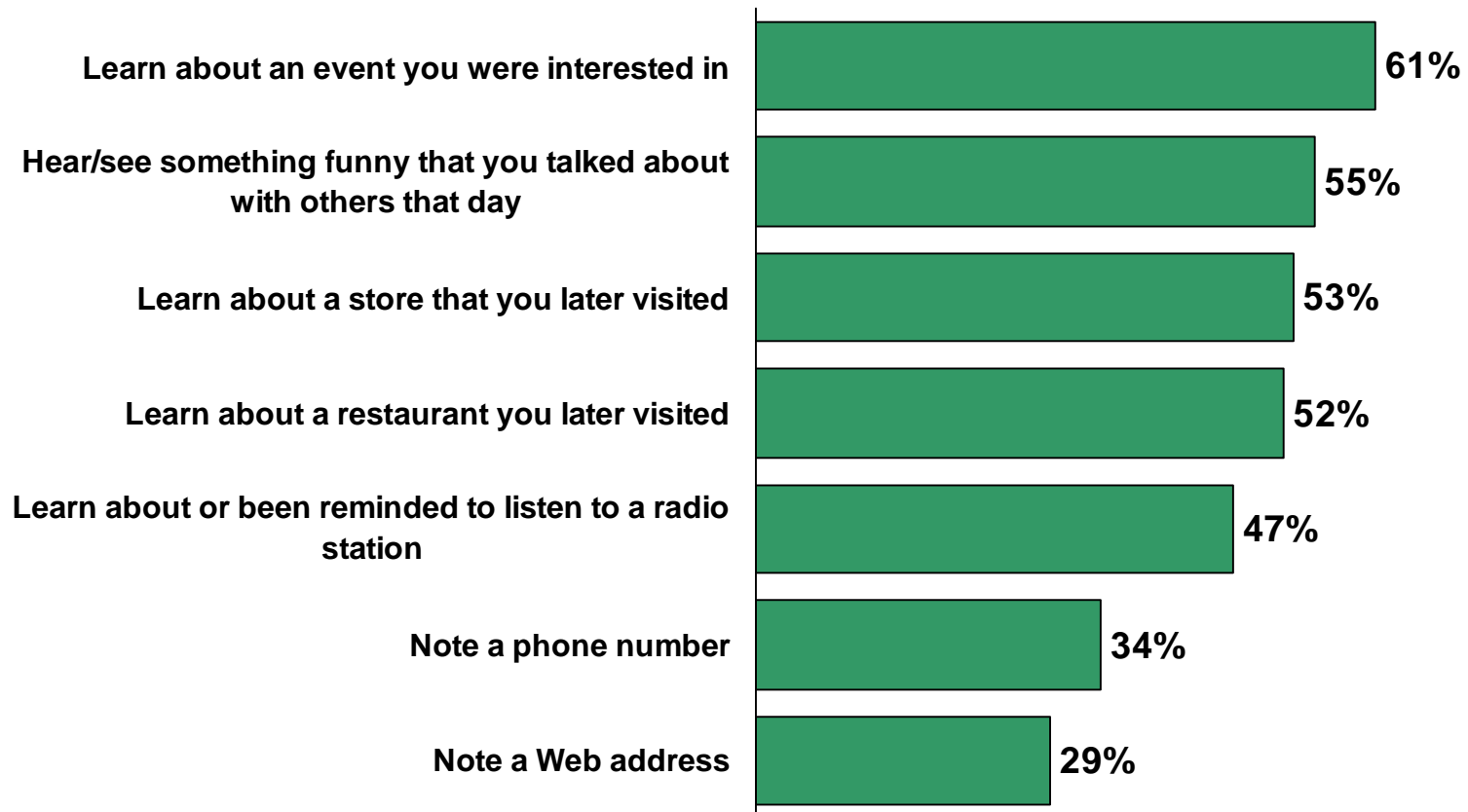


In-Car Study Shows Outdoor Gets Results



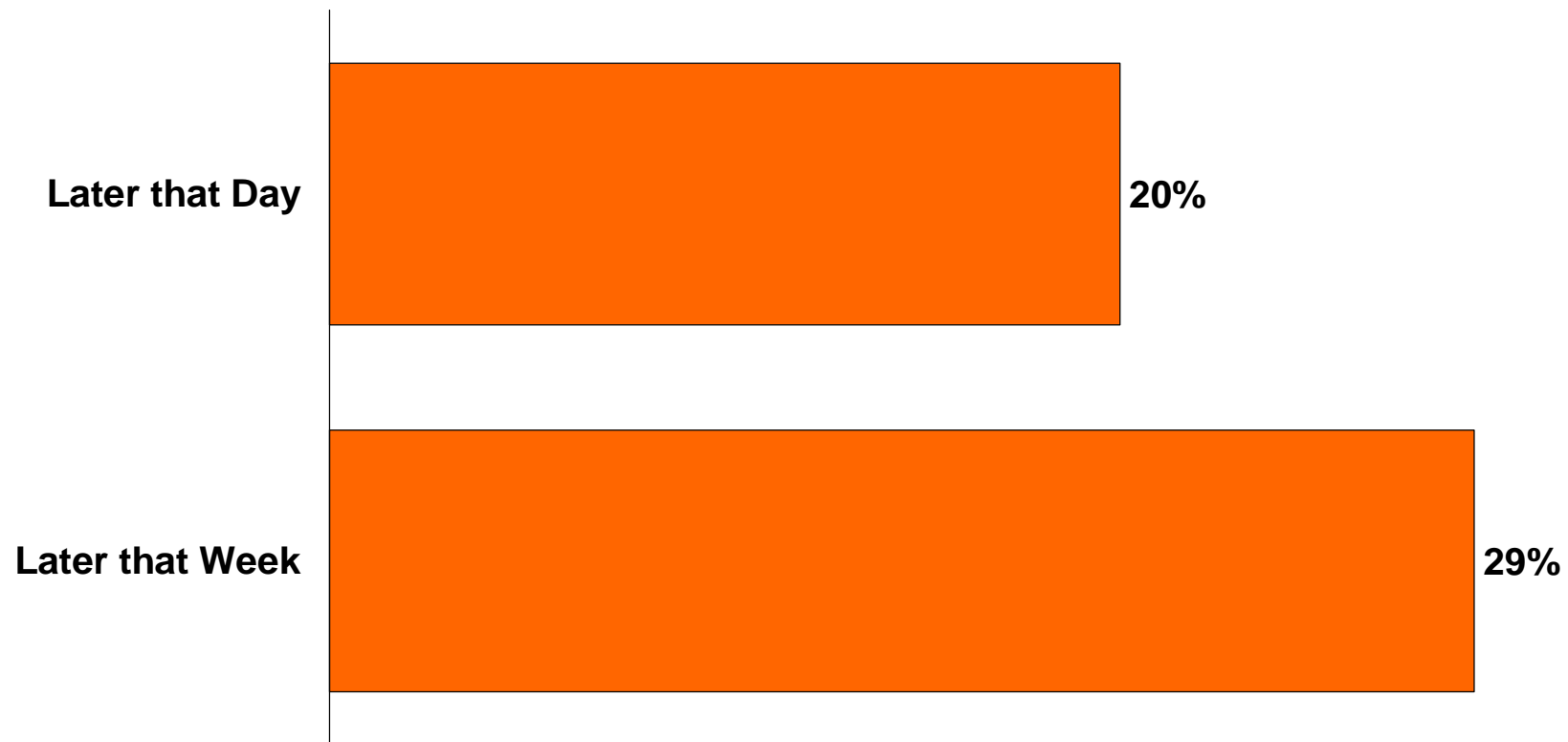
Outdoor Gets Results

“Have you ever seen a billboard that caused you to...?”



Outdoor Can Deliver Immediate Results for an Advertiser

“Have you ever noticed a billboard advertising a sale or special offer that motivated you to visit a certain store...?”



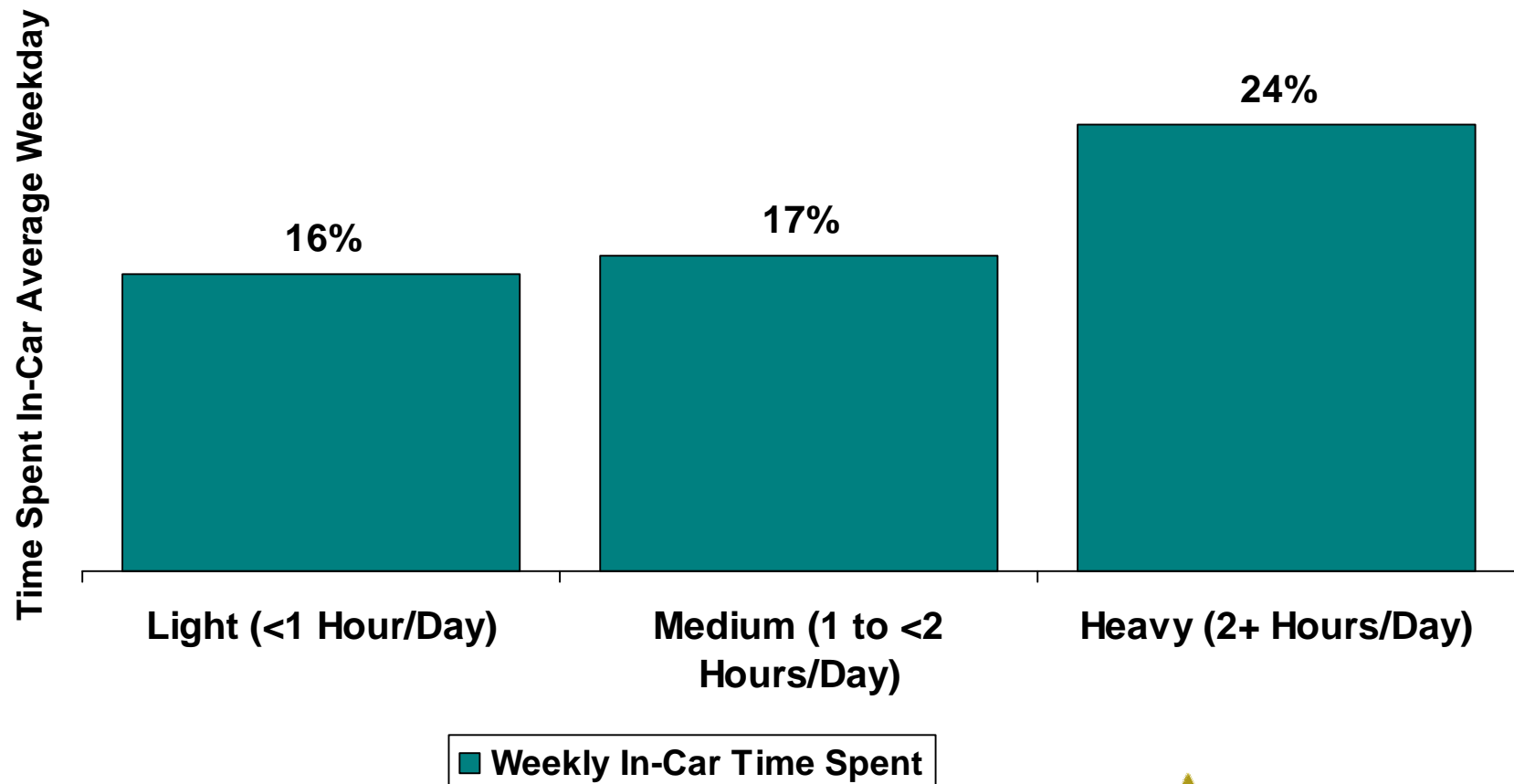
% Saying "Yes"

Base: Total Population 12+



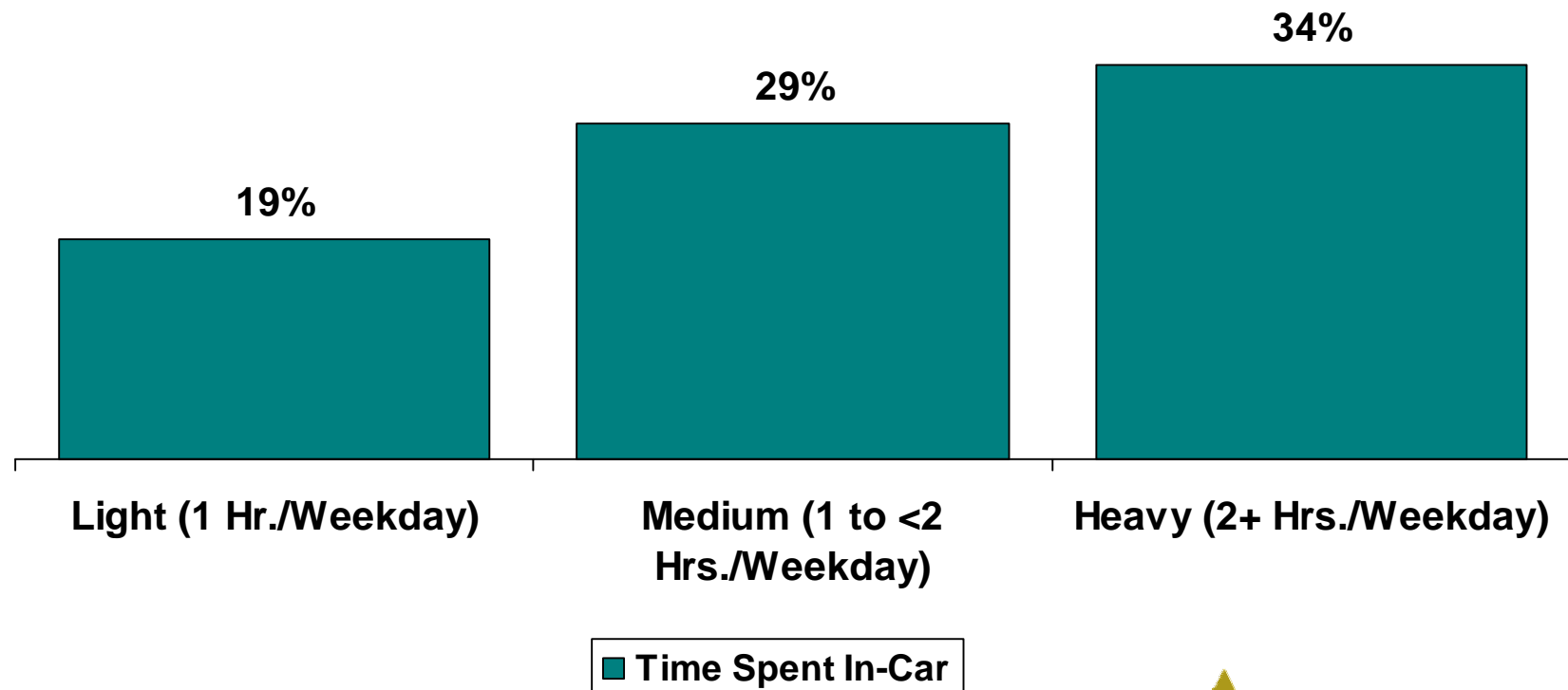
Time Spent In-Car Creates More Outdoor Advertising Results

% Visiting a Store Later That Day After Seeing Sale/Special Offer Advertised on Billboard



Outdoor Advertising Impact Grows with In-Car Exposure

% Noticing a Billboard That Motivated a Visit to a Store Later That Week





Key Findings

- 15 hours a week in car means high Outdoor advertising exposure
- Outdoor can impact shopping that occurs on the way home from work
- Outdoor gets results – consumers report billboards prompts them to visit stores



The National In-Car Study

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