

# Engaging People

with Digital Out-of-Home Media

Digital Out-of-Home Media Awareness & Attitude Study  
United States 2007



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“The OTX study confirms that digital signage has reached critical mass as a component of an advertiser’s media mix...And I think there’s more we can do with this medium every day.”

**Greg Smith**  
COO Neo@Ogilvy  
*A digital and direct media company  
of OgilvyOne Worldwide*

# INTRODUCTION

How effective is advertising on digital signs? Is digital out-of-home media a better way to engage people who are busy and difficult to reach? How does it fit in with other media? To find out, SeeSaw Networks commissioned OTX to undertake a research study. This report shares the results.

Today, people are out and about, living their busy lives. Almost every day we see a new article or blog post about how difficult it is for advertisers to reach these highly mobile and time-starved people with advertising in traditional media.

To better understand how digital out-of-home media can be used to reach mobile consumers, SeeSaw Networks commissioned OTX (Online Testing eXchange)—an independent, global consumer research and consulting firm—to research the role digital out-of-home media plays in today’s media landscape. The study was designed to gain deeper insight into how people engage with, and respond to, advertisements on

digital signage. This is the first study to compare consumers’ awareness and attitudes towards digital signage advertising with advertising on other media. The results provide compelling evidence on why digital out-of-home media is a critical element of today’s media experience.

The study shows that digital signage advertising engages people, has high awareness, and is a compelling media that advertisers can use to effectively reach people with their message. Using a methodology developed by SeeSaw called Life Pattern Marketing, advertisers can best leverage this media

by weaving messages throughout the daily routines of their target audience where people work, play, and socialize—using digital screens and billboards.

## Research objectives and sample

This study measures awareness, attention, impact, and attitudes toward advertising on digital signage and other media. Further, it explores various consumer segments to see how their life patterns intersect with digital signage touchpoints.

Online surveys were conducted in July 2007. Respondents were U.S. residents, both male and female, between the ages of 13 and 55. In total, 1,780 people were interviewed to generate a nationally representative sample of 900 adults aged 18 to 55. Additionally, the study was augmented with 200 respondents from each of the following specific life pattern segments:

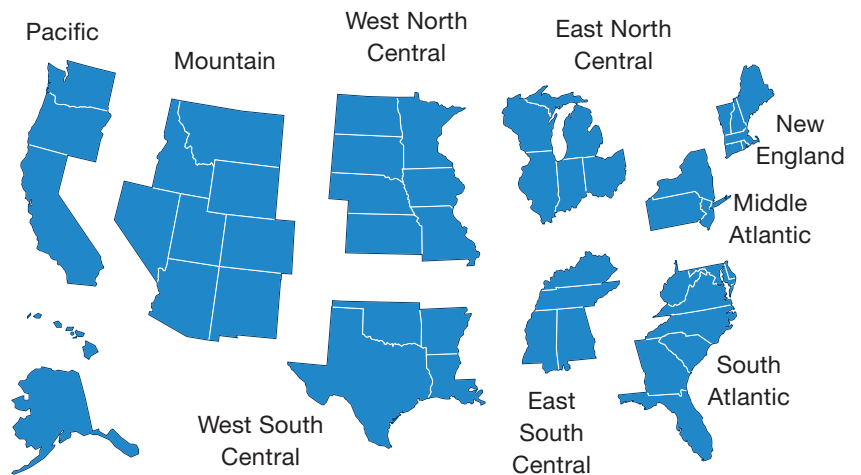
- **Affluents**
- **Alpha Moms**
- **Avid Movie Goers**
- **Business Professionals**
- **College Students**
- **Families On-the-Go**
- **Hispanic Families**
- **Mobile Millennials**
- **Nightlifers**
- **Older Affluents**
- **Teens**
- **Young Urban Professionals**

Digital out-of-home media is here, and its influence continues to widen.

## Stopping Power—the ability of an advertisement to grab and hold the attention of the target audience.

This report focuses on the findings from the adults segment. Participants answered questions about several types of media, including TV, magazine, radio, newspaper, billboard, Internet, mobile phone, and digital signage. For each of these types of media, researchers were able to measure the awareness, attention, impact levels, and consumer response to advertisements.

People were also asked where they had observed digital signage, and how they felt about the advertising being shown in these venues.



In the study, people were provided with this definition of digital signage:

**Digital signage is a type of media that displays videos or electronic images on LCD, plasma, or normal TV outside of the home. Usually the screens show advertising, product information, or special programs. This does NOT include screens that show ONLY text or full-length network or cable television programs.**

### Geographic Representation - Total Sample

Pacific	16%
Mountain	6%
West North Central	7%
West South Central	11%
East North Central	16%
East South Central	4%
Middle Atlantic	15%
South Atlantic	18%
New England	44%

The geographic distribution of the sample is approximate to the census.

# KEY FINDINGS

## Digital signage advertising has stopping power

Sixty-three percent of adults say that it catches their attention. This is the highest level reported across all media surveyed, including TV, the Internet, billboards, magazines, newspapers, radio, and mobile phone advertising.

## Digital signage is more positively rated than any other media

In addition to the fact that advertising on this media catches people's attention, people found it to be more unique, interesting, and entertaining than most media. Additionally, people reported that advertising on digital signage was less annoying than on nearly all other media.

## Awareness of digital signage advertising is high

Not surprisingly, television had the highest awareness rating of all media surveyed, but digital signage advertising was a close second. Sixty-two percent of adults say they have seen ads on digital signage over the

past 12 months, and the figure is even higher for young adults between 18 and 24, at 75%. This awareness level is similar to that for advertisements on billboards and in magazines and newspapers, and is better than awareness of advertising on mobile phones. Of all media surveyed, the Internet was highest in driving action.

## Digital signage advertising intercepts people throughout their daily routines

On average, the general population recalled having seen digital signage in six different types of locations during the past week. College-age people (18- to 24-year-olds) reported seeing it even more frequently in eight different types of locations in a week.

People rate advertising on digital signage more positively than other media across multiple measures.

- Attention grabbing (63%)
- Unique (58%)
- Interesting (53%)
- Entertaining (48%)
- Less annoying than other media (26%)

Forty-four percent of adults say they paid "some" or "a lot of" attention to digital signage advertising.

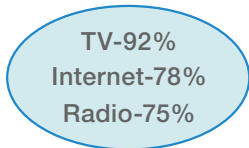
# DIGITAL SIGNAGE AWARENESS IS HIGH

In a media landscape where it is increasingly difficult for advertisers to deliver an effective brand message, people report that digital signage advertising cuts through the noise. Forty-four percent of adults said that they paid some or a lot of attention to digital signage advertising, which places this media ahead of billboards, Internet, and mobile phones, and on par with magazines, radio, and newspapers.

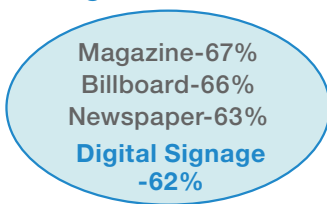
Awareness of digital signage advertising over the course of the past 12 months is on par with many more established, traditional media.

Percentage of people who have seen or heard ads on the media in the last 12 months

## Highest Awareness



## High Awareness



## Low Awareness



Over the past week, people reported seeing digital signage advertising in over forty different types of locations.

## Average number of different types of locations where digital signage is seen in a week:



**Total Adults**

**Age 18 to 24**

Base: Among those who have seen ads in the media in the past week

## People notice digital signage advertising in many locations

With digital signage, advertisers are able to reach people throughout their daily routines. When asked to say where they had seen digital signage advertising in the past week, people reported seeing it in a wide range of locations. In some locations, such as when riding in elevators or when waiting to see the dentist, people were part of a “captive” audience. In other instances, such as at airports and train stations, people were in transit, traveling from one place to another. Reports of seeing digital signage advertising in other locations—casinos, health clubs, golf courses—was indicative of the active lifestyles many people lead today.

### Captive and aware: waiting in veterinary clinics

Whether a pet lover or a busy mom, a person who is sitting in the waiting room at the veterinarian's office is a captive audience. A network of digital signs in waiting rooms of veterinary clinics is reaching pet lovers with educationally focused programming. Digital signage in this environment improves the waiting experience by showing content that instructs pet owners about pet care, informs visitors of other "while you are here" services, and includes advertisements. A visitor frequently spends more than 17 minutes\* waiting in the lobby, offering advertisers the opportunity to deliver high-impact impressions.



### Aware and on the go: stopping at the gas station

Digital signs at gas stations offer advertisers a highly targeted medium for entertaining and engaging people while they are refueling their vehicles. Digital signage on gas pumps delivers high-impact, measurable impressions to an audience who spends several minutes at each fuel fill up. Ads, news, and weather information run on 17" daylight-viewable LCD screens mounted on top of the gas pumps. Now, instead of watching the dollar count for their gas as they wait at the pump, people can now be engaged by short, focused, and relevant spots. Plus, gas station visit levels are consistent week after week, so people can see advertisements again and again.



### Attentive and socializing: spending time in restaurants and bars

As they sit with friends and wait for their food and drink to arrive, people in social environments like restaurants and bars are engaged by ads that run on music jukeboxes, fantasy sports kiosks, interactive gaming screens, or large plasma screens. This venue reaches an upscale audience of males and females between 21-34. While the majority of bar patrons fall into the middle-income range, there is also a skew among high-income earners, making this an efficient venue in targeting affluent consumers or business professionals. Kiosks with touch screens support interactive ads using Flash, as well as full-motion animation and video.



\*Source: emebaVet Sales Uplift Study, March 2008



### Engaged in the checkout line: digital signage advertising in grocery stores

To increase the dwell time within the store or to intercept people as they enter or exit, more and more grocery stores are installing digital signs and kiosks that provide relevant information or services, such as video-rental kiosks, to their customers. Grocery venues feature frequent traffic with a bias toward the female demographic between the ages of 25 and 44. These people are typically busy and short on time, but find themselves with a few precious idle moments while waiting in line at the checkout stands.

### Paying attention in and around school: reaching students on campus

What better way to reach the 18-24 young adult market than placing advertisements on digital signage in locations they visit every day? Digital screens are already in places on campus, such as student unions, recreation centers, dorm rooms, and bookstores, and off campus at gas stations, health clubs, bars, pubs, and clubs. College students confirm that digital signage is extremely effective at catching their attention. This largely unbranded audience is receptive to advertisements on digital signage today; given their shift away from traditional media, they are likely to remain that way throughout their lives.



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“It caught my attention and was something to watch while waiting for my doctor.”

*Survey respondent*

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# DIGITAL SIGNAGE ADVERTISING ENGAGES PEOPLE

Nowadays, when people are busier than ever, advertising is only effective if it engages people. It needs to have stopping power. That's the strength of digital signage advertising. Its messaging is direct and to the point: short and punchy, with real ability to grab and hold attention.

Digital signage ads can be placed where they will be seen by people on the go, whether it is while they pump gasoline in the morning, wait in line at the grocery store in the afternoon, or spend time with friends at a bar or restaurant in the evening.

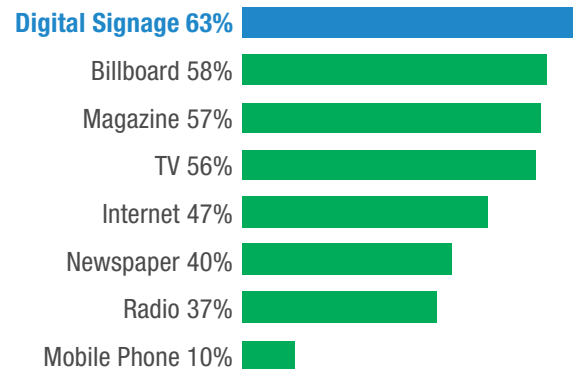
Digital signage offers advertisers the opportunity to intercept people in their daily work, play and social routines and then weave a relevant message through those patterns for a particular target audience. As people make purchases, wait for appointments, or

travel from one place to another, digital out-of-home media intercepts them.

## Advertisements on digital signage have stopping power

Digital signage advertising catches people's attention and provides a high-impact way of delivering an advertising message. People report that advertising on digital signage catches their attention better than any other media.

Percentage of people who report that advertising on the media catches their attention



Base: Among those who have seen ads in the media in the past 12 months

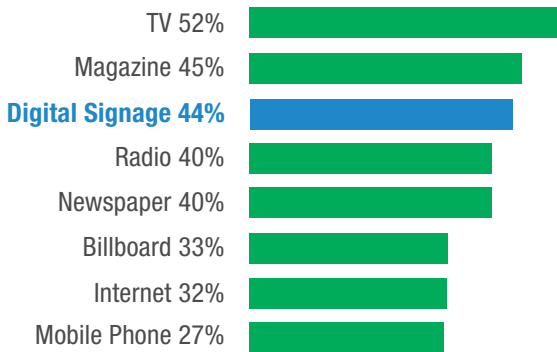
“It definitely caught my eye.”

*Survey respondent*

**People pay attention to digital signage advertising**

In a media landscape where it is increasingly difficult for advertisers to deliver an effective brand message, people report that digital signage advertising cuts through the noise. Forty-four percent of adults said that they paid some or a lot of attention to digital signage advertising, which places this media ahead of billboards, Internet, and mobile phones, and on par with magazines, radio, and newspapers.

Percentage of people who report that they pay “some” or “a lot of” attention to advertising on the media

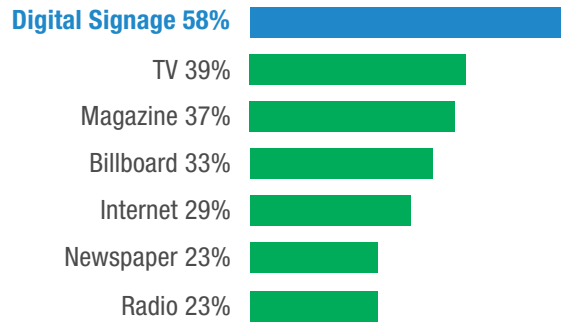


Base: Among those who have seen ads in the media in the past 12 months

**People find digital signage advertising to be unique**

Digital signage often appears in environments that provide content and advertising that is contextually relevant. This relevance, along with the dynamic and interactive opportunities of this media, offers a new experience for many consumers. Among those who have seen advertisements on different kinds of media over the past 12 months, people found digital signage advertising to be the most unique.

Percentage of people who report that advertising on the media is unique

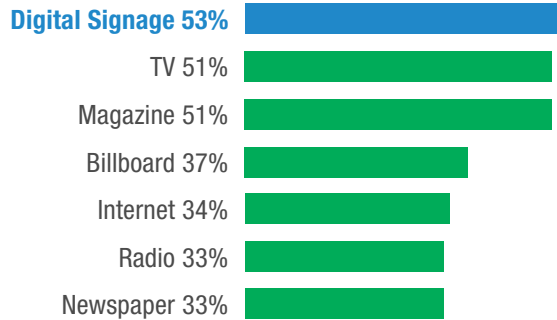


Base: Among those who have seen ads in the media in the past 12 months

**Advertisements on digital signage raise interest**

In these times of information overload, it’s not easy to pique the interest of an audience. Survey respondents who had seen advertisements over the past year found those on digital signage to be the most interesting.

Percentage of people who report that advertising on the media was interesting

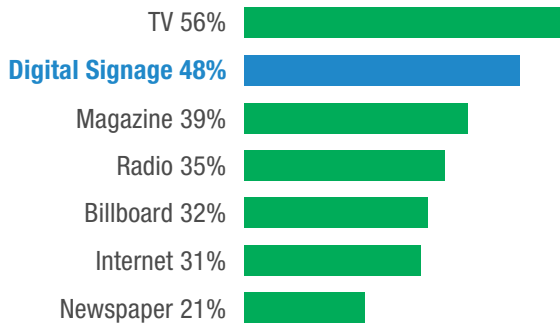


Base: Among those who have seen ads in the media in the past 12 months

**People are entertained by digital signage advertisements**

While advertising informs people about a product or service, it can also be entertaining and engaging. People say that digital signage rates nearly as high as TV in entertainment value.

Percentage of people who report that advertising on the media is entertaining

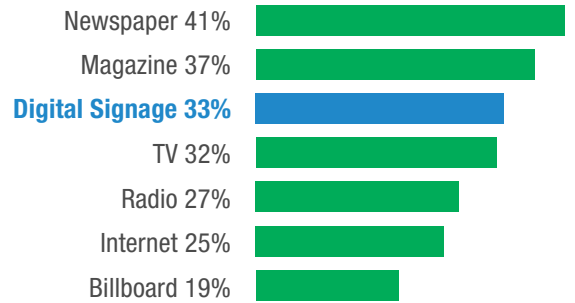


Base: Among those that have seen ads in the media in the past 12 months

**People find advertisements on digital signage to be credible**

It's an optimal situation when people are entertained and interested in advertisements, but also find them to be believable. When asked if they find advertising on digital signage to be credible, many reported it to be a credible source of information.

Percentage of people who report that advertising on the media is credible

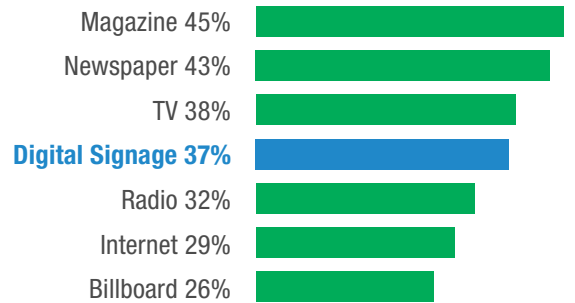


Base: Among those who have seen ads in the media in the past 12 months

**People find advertisements on digital signage to be relevant**

Relevance is how closely an advertisement matches the interests of the target audience. The more relevant the advertisement, the more likely it is to register with, and engage, people who see it.

Percentage of people who report that advertising on the media is relevant



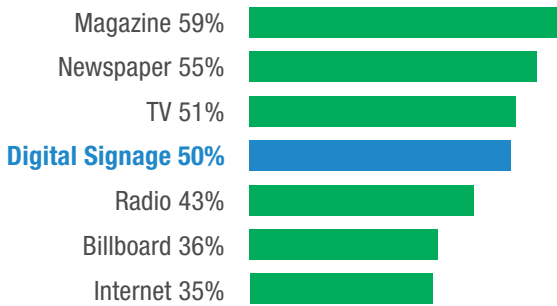
Base: Among those who have seen ads in the media in the past 12 months

**People find advertisements on digital signage to be informative**

While all advertising seeks to increase demand for a product or service, informative advertising provides people with information that influences their decisions.

It's clear from the survey that general adults pay attention to digital out-of-home media and find it to be unique, credible, and interesting. The survey results also indicate that young adults have a strong response to this media, and that advertisers can use it to reach both general and young adult audiences.

Percentage of people who report that advertising on the media is informative

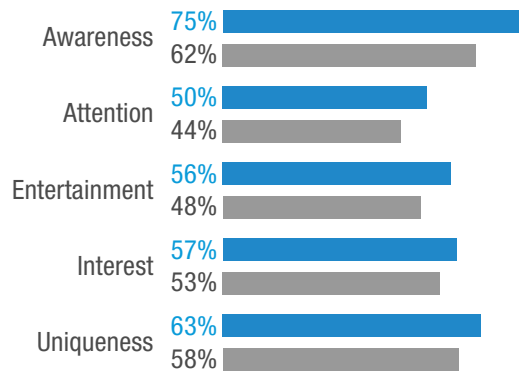


Base: Among those who have seen ads in the media in the past 12 months

**A great way to connect with young people**

The survey confirms that digital out-of-home media is particularly effective at reaching people aged 18 to 34 years old, and here's why. Always on the go, and out of home more than in, this audience spends less time with traditional media. When they head to school or work, go out shopping, or go out with friends, digital out-of-home media is proving to be an effective way to intercept and engage them.

Comparison of measures between general adults vs. 18-24 year-olds (general adults percentages shown in gray)



Base: Among those who have seen ads in the media in the past week

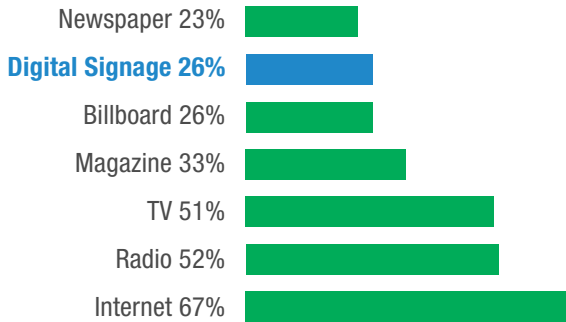
“It caught my attention because it’s right there in front of you.”

*Survey respondent*

# ACCEPTANCE OF DIGITAL SIGNAGE ADVERTISING

People report that they find digital signage advertising unique, entertaining, and attention getting. They also find it less annoying than nearly all other media. In a world where people are shaping their own media experiences, acceptance is a critical component of effective media.

When comparing digital signage with other media, only newspapers were found to be less annoying



Base: Among those who have seen ads in the media in the past 12 months

## A better experience during dwell times

So many daily activities involve waiting, and digital signage advertisements provide people with something relevant to watch while they are on the go: a very effective way to deliver a targeted message alongside programming of interest to the audience.

Respondents' state of mind when they notice digital signage

Location	State of Mind	Responded Yes
Gas Station	Bored	42%
Medical Office	Likely to pay attention to ads	63%
Hotel	Relaxing	52%
Bank	Likely to pay attention to ads	40%
Stadium/Arena	Relaxing	60%
Airport	Bored	44%

From the gas station to the medical office to the airport to the hotel, digital signage advertisements are being seen as a welcome addition to daily life. No matter what a person is doing—whether they are relaxing, waiting in line, socializing with friends, browsing for a product or service, or simply out and about—they notice digital signage advertising. Given that the customer experience in many digital out-of-home media environments involves dwell time, the mood state of consumers creates a favorable opportunity to deliver a brand message.

“It catches your eye immediately.  
Makes you pay attention.”

*Survey respondent*

### Programs of interest vary by location

With digital out-of-home media, advertisers have an opportunity to present advertisements alongside informative content.

We asked people who had seen digital signage at specific locations to identify what types of programming they would be interested in seeing there. Responses varied by the digital signage location—for example, 55% of those who had seen digital signage in stadiums were interested in seeing sports information, and 58% of those who had seen the signage in a doctor’s or dentist’s office were interested in seeing health information.

Weather information and news are the popular programs for most of the digital signage venues, creating an opportunity to include advertising with these programs.

#### Responses from people who saw digital signage advertising

**GAS STATION:** “It caught my attention because it’s right there in front of you.”

**STADIUM:** “Sometimes we would watch the signage to see what was coming up.”

**WAITING ROOM:** “Great! Something to do besides reading magazines.”

**STREET/HIGHWAY:** “As it is something new to me, it caught my attention.”

**BANK:** “Had to read it because it was bright red.”

**SPORTS RETAIL STORE:** “Looking for specials or something unique.”

### Responses vary by environment

When people were asked what programs they would be interested in seeing on digital signage, their responses varied based on the environment. The table below shows the highest responses for each of these specific locations.

Location	Programs of Interest	Extremely and Very Interested
Gas Station	Weather	49%
	News	43%
	Sales and discounts	39%
Medical Offices	Health Info	58%
	News	52%
	Weather	45%
	Network TV	45%
Auto Retail Store	Music videos	36%
	Sales and discounts	36%
	Local info and events	31%
Sports Retail Store	Sports info	58%
	Sales and discounts	56%
	Product and service info	50%
Airport	Weather	59%
	News	52%
	Quiz and trivia	43%
Bank	Weather	46%
	News	43%
	Local info and events	41%
Hotel	Weather	61%
	Local info and events	57%
	Special events	53%
	News	52%
Stadium/Arena	Sports info	55%
	Weather	47%
	Quiz and trivia	39%
Streets/Highways	Weather	50%
	Local info and event	44%
	Special events	40%

# DIGITAL SIGNAGE ADVERTISING DRIVES ACTION

Digital signage advertising is effective in driving action. Whether people purchase or use a product or service, look for more information, visit a store, go to a website, or recommend a product or service to a friend or family member, digital signage advertising has impact.

Respondents in all age bands in the study reported taking action after seeing advertisements on digital signage. The percentage of people taking action varies by age range.

## Young people score highest in taking action

Among all respondents in the survey, young people who had seen digital signage in the past week were most likely to take action as a result.

## Percentage of people who reported taking an action as a result of seeing ads on digital signage

Total adults (gray) compared to 18- to 24-year-olds (blue)

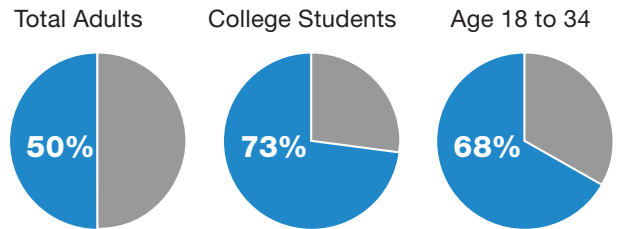


Base: Among those who have seen ads in the media in the past week

## People use cell phones to text message

Nearly eight out of nine respondents say that they use cell phones on a regular basis, and among young adults, text messaging is favored over email and phone calls.

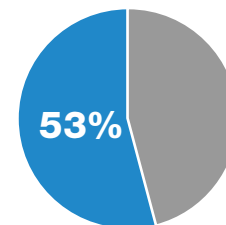
## Percent of cell phone users who report using text messaging



Base: Among people who have active cell phones

## Interactive opportunities

Over 50% of text-savvy respondents were interested in sending a text message in response to advertising on digital signage.



Percentage of total adults likely to text a response to a compelling offer seen on digital signage

Base: Among those who use their cell phones for text messaging

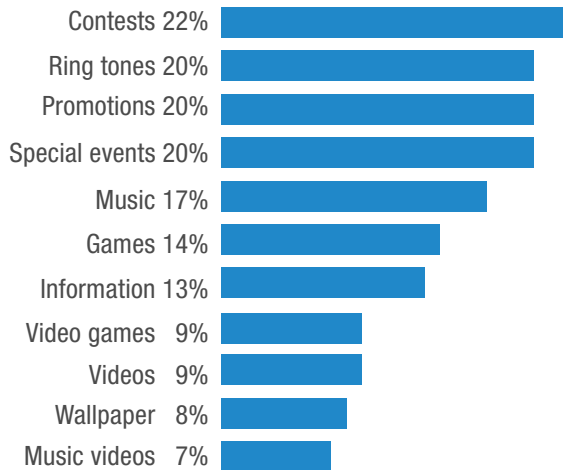
Consumers notice advertisements on digital signage, and then use the Internet to act on what they saw.

“The digital sign showed places I could go and visit.”

*Survey respondent*

Topping the list of advertisements they said they would respond to were messages about contests, promotional offers, and invitations to special events.

Offers that cell phone users said they respond to



Base: Those who text message with their cell phones

**Online purchasing**

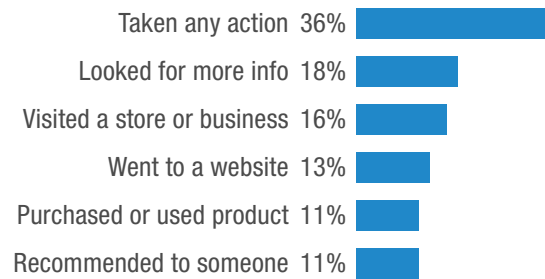
Not only do consumers notice advertisements on digital signage, but they also go home and use another form of interactive digital media, the Internet, to act on what they saw.

Sixty percent of the adults surveyed spent more than 20 hours a week online, and 84% spent more than 10 hours. Thirty percent of the study's adults said they make an online purchase more than once a month.

Online Purchase Frequency - Total Adults

Weekly or more often	8%
A few times a month	22%
About once a month	24%
About once every three months	19%
About once every six months	9%
About once a year or less often	12%
Never	7%

Actions taken among total adults as a result of seeing advertising on digital signal.



Base: Those who have seen digital signage in the last week

# REACHING PEOPLE THROUGH LIFE PATTERNS

SeeSaw Networks developed a methodology for advertisers and agencies that enables them to intercept people with a brand message in the places where they work, play, and socialize. The methodology, called Life Pattern Marketing, maps a person's daily routines and weaves advertising into the person's life at the places where they spend time. This framework addresses the problem of connecting with mobile people whose media-consumption habits make them especially difficult to reach through traditional media.

"Life Pattern Marketing can be the primary way a brand reaches people or a powerful companion to traditional media strategies," says Peter Georgescu, chairman emeritus of Young & Rubicam and author of the book *The Source of Success*. "SeeSaw's approach to Life Pattern Marketing opens new doors for advertisers who are facing challenges in reaching their highly mobile target audience."

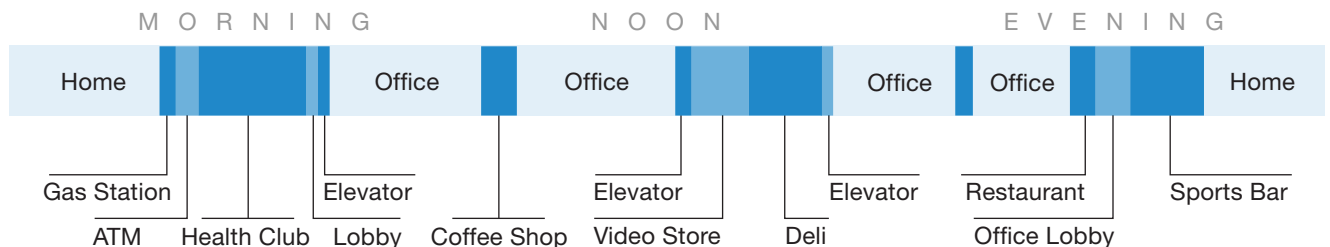
With Life Pattern Marketing, advertisers place brand messages with relevant content in the most desirable places and at the most desirable times, aligning their brands with difficult-to-reach, highly mobile people.

Blending relevant ads into daily routines when and where people are approachable helps advertisers more effectively engage audiences with their message.

The first step of this methodology requires media planners and advertisers to map the work, play, and social routines of a target audience. The next step is to evaluate the advertising opportunities within the target audience's routines and then weave an advertising campaign through these life patterns. Finally, the advertiser tailors the advertising schedule over time to reach the appropriate repetition or frequency and customizes the ad creative across venues to attain the most effective treatment for that particular environment.

In order to understand the impact of digital signage advertising for different life patterns, SeeSaw augmented the general study with research on individual life patterns. The goal was to provide additional insight on factors such as interests, activities, awareness of digital signage and other media, and behavior for specific groups of people. The following life pattern profiles share the results of this part of the research.

## Digital signage reaches people throughout their daily routines





Life Pattern Profile

# AFFLUENTS

**Who are Affluents?**

With a household income over \$100,000, Affluents are people who have money to engage in high-end activities: traveling, taking cruises, staying at nice hotels, and visiting exotic locales.

Affluents follow fashion trends. During the last year, they are likely to have purchased luxury jewelry, and to have bought other fashionable products and services.

**How Affluents spend time**

Affluents are active and involved in many activities. They enjoy watching movies, taking vacations, and attending family-oriented events. In the past month, 77% say that they went to a bar or restaurant with family, friends or colleagues once or more and in the past year, half say they took a road trip as a vacation. Affluents also spend time at sporting events and music concerts.

**Awareness 63%**

*(last 12 months; general adults 62%).* Awareness of digital signage by Affluents is comparable to that of general adults. They find advertising on digital signage more unique than advertising on all other media, and more eye-catching and interesting than advertising in magazines and newspapers, and on the Internet and the radio.

During their travels, Affluents are aware of digital signage at airports, stadiums and arenas, ATMs, and elevators, and report seeing it in six or seven different types of locations in the past week.

**Attention Level 48%**

*(last 12 months; general adults 44%).* There are many opportunities to engage Affluents with digital signage advertising. Over the past year—compared with total respondents—Affluents report attending sporting and music events, taking a road trip or an exotic trip



Ways that Affluents spent time in the past year

Activity performed in the past year	Affluents	Total Adults
Attended a sporting event	49%	39%
Took a road trip as a vacation	50%	37%
Attended a music concert	42%	32%
Stayed at a 4-star or 5-star hotel	45%	23%
Purchased an automobile	24%	20%
Attended family-oriented event	18%	17%
<b>Performed once a month or more</b>		
Went to a bar or restaurant	77%	64%
Rented a video	47%	46%
Attended a movie	43%	42%
Purchased music at a music store	17%	20%

Base: Total respondents

“I enjoy purchasing fashionable products and services.”

Survey respondent

Attitudes towards advertising media: Affluents

	Digital Signage	Billboard	Magazine	TV	Internet	Newspaper	Radio
Catches my attention	60%	60%	48%	43%	37%	35%	34%
Unique	54%	29%	25%	30%	18%	17%	15%
Interesting	49%	31%	36%	39%	25%	28%	31%
Entertaining	44%	33%	27%	47%	22%	20%	31%
Informative	42%	28%	51%	43%	26%	56%	38%
Credible	20%	20%	30%	23%	15%	43%	23%
Relevant	34%	21%	38%	27%	24%	43%	24%
Annoying	23%	24%	24%	44%	74%	14%	54%

Base: Among those that have seen ads in the media in the past 12 months

abroad, staying at a four- or five-star hotel, and purchasing luxury jewelry.

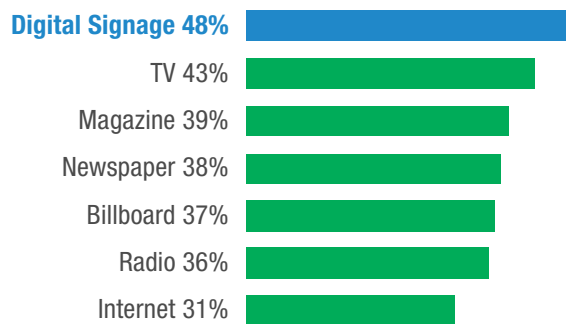
Action 34%

(last week; general adults 36%). When asked if they had taken any action after seeing advertisements on digital signage, 34% of Affluents said they had taken action.

Text Messaging 42%

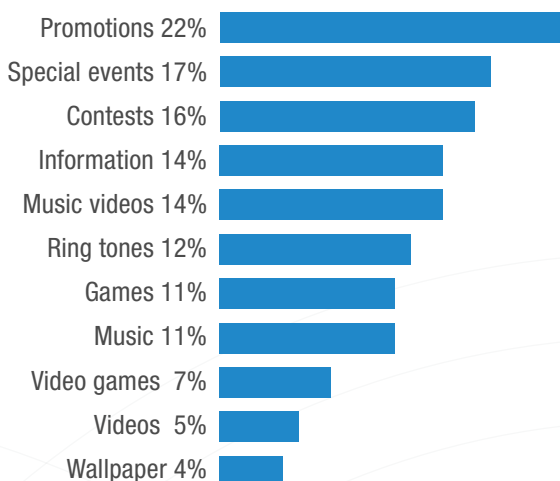
(last week; general adults 50%). About 91% of Affluents have activated cell phones, and use them mostly for work. Those who use cell phones for text messaging say that they are interested in receiving contests (22% vs. 16% of general adults), ring tones (20% vs. 12%), and music (17% vs. 11%) via text messaging.

Percentage of Affluents who report that they pay attention to advertising on the following media



Base: Among those that have seen ads in the media in the past 12 months

Offers that Affluents said they respond to with text messaging



Base: Those who text message with their cell phones

## Life Pattern Profile

# ALPHA MOMS

### Who are Alpha Moms?

Alpha Moms are females between the ages of 35 and 54, and are parents or legal guardians of children. These moms have purchasing power, with an annual household income of \$90,000 or more.

Alpha Moms are the primary shoppers for their families (91% buy all or almost all of their household groceries). Given their incredibly busy lifestyle, reaching them while they are out and about is an important way to effectively communicate with them

### How Alpha Moms spend time

When asked about how they spend time, Alpha Moms reported a wide range of activities performed in the past 12 months. Alpha Moms attend sporting events, family-oriented events, and music concerts. While they go to bars and restaurants, and rent and go out to movies, they are on levels generally on par with the general population.

### Awareness 68%

(last 12 months; general adults 62%). Alpha Moms are more likely than general adults to have seen digital signage. On average, Alpha Moms who are aware of the media have seen digital signage advertising in five and six different types of locations within the past week.

### Attention Level 49%

(last 12 months; general adults 44%). Alpha Moms are more engaged with digital signage advertising than other life pattern segments; they report finding advertising on digital signage to be more unique and attention getting than other traditional advertising media vehicles. Alpha Moms see digital signage advertising at malls, grocery stores, airports, banks, hotels, medical offices, and hair salons, to name a few.

### Action 36%

(last week; general adults 36%). When asked if they had taken any action after seeing advertisements on digital signage, 36% of Alpha Moms said they had taken action.



Ways that Alpha Moms spent time in the past year

Activity performed in the past year	Alpha Moms	Total Adults
Attended a sporting event	51%	39%
Took a road trip as a vacation	48%	37%
Attended a music concert	37%	32%
Stayed at a 4-star or 5-star hotel	46%	23%
Purchased an automobile	31%	20%
Attended family-oriented event	18%	17%
<b>Performed once a month or more</b>		
Went to a bar or restaurant	65%	64%
Rented a video	46%	46%
Attended a movie	42%	42%
Purchased music at a music store	13%	20%

Base: Total respondents

“I consider the needs of my family first when making daily decisions.”

Survey respondent

Attitudes towards advertising media: Alpha Moms

	Digital Signage	Billboard	Magazine	TV	Internet	Newspaper	Radio
Catches my attention	68%	62%	55%	57%	43%	41%	34%
Unique	60%	33%	27%	40%	25%	15%	20%
Interesting	53%	44%	52%	48%	25%	24%	30%
Entertaining	51%	40%	32%	63%	26%	15%	28%
Informative	54%	48%	67%	54%	36%	63%	43%
Credible	33%	26%	42%	28%	17%	48%	25%
Relevant	43%	29%	50%	38%	26%	48%	37%
Annoying	21%	26%	26%	62%	69%	17%	50%

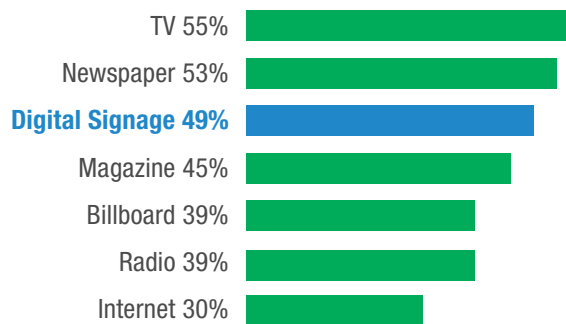
Base: Among those that have seen ads in the media in the past 12 months

Text Messaging 47%

(last week; general adults 50%). About 95% of Alpha Moms have activated cell phones that are primarily used for personal phone calls. Their use of text messaging is slightly lower (47%) than general adults

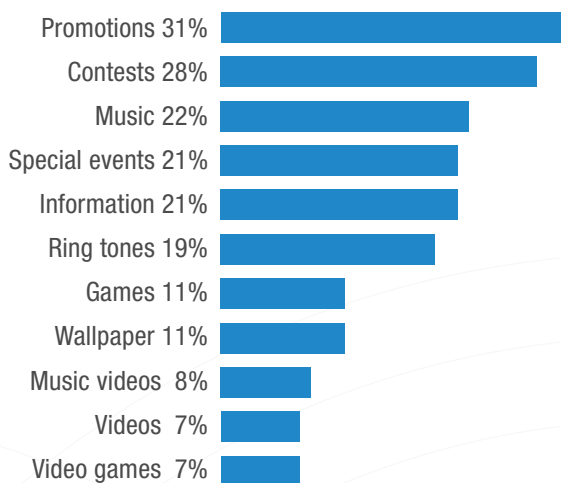
(50%). Those who use cell phones for text messaging say that they are interested in receiving promotional offers (31% vs. 20% of general adults), and requests for information (21% vs. 13%) via text messaging.

Percentage of Alpha Moms who report that they pay attention to advertising on the following media



Base: Among those that have seen ads in the media in the past 12 months

Offers that Alpha Moms said they respond to with text messaging



Base: Those who text message with their cell phones

## Life Pattern Profile

# AVID MOVIEGOERS

### Who is an Avid Moviegoer?

Avid Moviegoers are 18- to 55-year-olds who attend movies more than once a month and enjoy all film genres. They are image-conscious people who like to socialize, choosing public activities and events away from the home more than do general adults.

In keeping with their identifying label, people in this life pattern go to movie theatres, and rent movies to watch at home, more than any other group. But they also participate in other activities, and report attending sporting events and music concerts more than general adults over the past year.

### How Avid Moviegoers spend time

Avid Moviegoers have active lives that include traveling, attending sporting events and concerts, and going to bars and restaurants. Over the past year, they were more likely than general adults to have done nearly all of the activities listed in the survey.

### Awareness 74%\*

(last 12 months; general adults 62%). Avid Moviegoers report a significantly higher rate of having seen digital signage advertising within the past year, compared with the rate for general adults.

On average, Avid Moviegoers who said they were aware of digital signage within the past week saw it in seven or eight different types of locations. Avid Moviegoers also find digital advertising more interesting, informative, and entertaining than advertising on a billboard, the Internet, a newspaper, or the radio.

### Attention Level 58%\*

(last 12 months; general adults 44%). Avid Moviegoers have a significant level of engagement with digital signage advertising. In fact, 14% more of them say that they pay some, or a lot of, attention to digital signage advertising than do general adults. Venues where they see digital signage include: malls, along highways,



Ways that Avid Moviegoers spent time in the past year

Activity performed in the past year	Avid Moviegoers	Total Adults
Attended a sporting event	53%	39%
Took a road trip as a vacation	49%	37%
Attended a music concert	45%	32%
Stayed at a 4-star or 5-star hotel	33%	23%
Purchased an automobile	21%	20%
Attended family-oriented event	28%	17%
<b>Performed once a month or more</b>		
Went to a bar or restaurant	84%	64%
Rented a video	74%	46%
Attended a movie	100%	42%
Purchased music at a music store	44%	20%

Base: Total respondents

“I like learning new things and expanding knowledge.”

Survey respondent

Attitudes towards advertising media: Avid Moviegoers

	Digital Signage	Billboard	Magazine	TV	Internet	Newspaper	Radio
Catches my attention	69%*	66%	66%	63%	57%	39%	44%
Unique	67%*	42%	55%	44%	42%	29%	30%
Interesting	61%*	41%	58%	54%	40%	37%	41%
Entertaining	51%*	40%	32%	63%	26%	15%	28%
Informative	59%*	47%	63%	58%	39%	46%	44%
Credible	43%*	38%	49%	43%	28%	40%	30%
Relevant	43%*	29%	50%	38%	26%	48%	37%
Annoying	29%	24%	32%	49%	63%	21%	53%

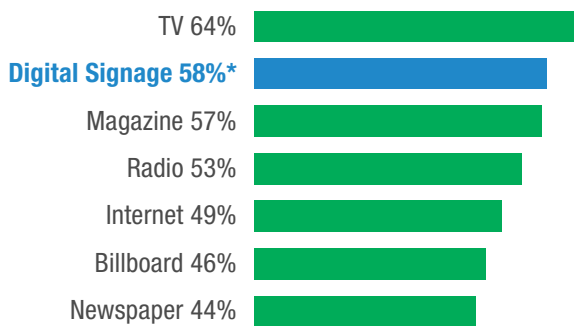
Base: Among those that have seen ads in the media in the past 12 months

streets, airports, retail entertainment venues, convenience stores, and more.

Action 51%\*

(last week; general adults 36%). When asked if they had taken any action after seeing advertisements on digital signage, 51% of Avid Moviegoers said they had taken action.

Percentage of Avid Moviegoers who report that they pay attention to advertising on the following media

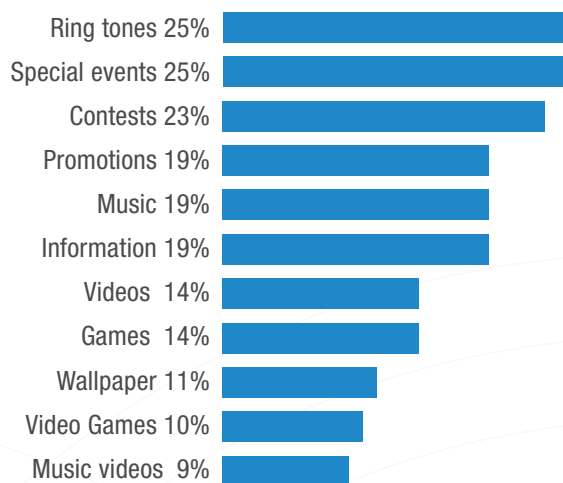


Base: Among those that have seen ads in the media in the past 12 months

Text Messaging 66%

(last week; general adults 50%). About 87% of Avid Moviegoers have activated cell phones that they use for personal calls, text messaging, and browsing the Internet. Those who use cell phones for text messaging say that they are interested in special events (25% vs. 20% of general adults) and contests (23% vs. 22% of general adults).

Offers that Avid Moviegoers said they respond to with text messaging



Base: Those who text message with their cell phones

\*Percentage has statistical significance at a 90 percent confidence level.

## Life Pattern Profile

# BUSINESS PROFESSIONALS

### Who are Business Professionals?

Business Professionals are between 25 and 55 years old. At work, they are business decision makers or professionals. They spend many hours each day at work, but also find time to relax with friends and family in bars and restaurants. Their lives are busy and they are active and mobile. Not surprisingly, they are more likely than the general population to be college graduates or to have a graduate degree.

### How Business Professionals spend time

Business Professionals consider themselves to be leaders and say that they like doing volunteer work in their communities. Because of their active lifestyles, they are often on the road and mobile, relying on technology to keep them informed. Business Professionals enjoy a wide range of activities including sporting events, music concerts, and staying at luxury hotels. In the past month, 73% said they visited a bar or restaurant, 51% attended a movie and 20% purchased music at a music store.

### Awareness 71%\*

(last 12 months; general adults 62%). Business Professionals are more aware than general adults of advertising on digital signage. On average, Business Professionals who are aware of the media have seen digital signage advertising in six to seven different types of locations within the past week.

### Attention Level 43%

(last 12 months; general adults 44%). Of significance, Business Professionals have very active lifestyles when they are not in the office or traveling on business, and participate more than general adults in most of the activities they were asked about in this study.

When not working, they go to sporting events, concerts, movies, bars, and restaurants, giving advertisers many opportunities to engage them with digital out-of-home media. Business Professionals find digital signage to be more unique and interesting than traditional media, such as billboards, newspapers, radio, and the Internet.



Ways that Business Professionals spent time in the past year

Activity performed in the past year	Business Pros	Total Adults
Attended a sporting event	48%	39%
Took a road trip as a vacation	48%	37%
Attended a music concert	42%	32%
Stayed at a 4-star or 5-star hotel	33%	23%
Purchased an automobile	23%	20%
Purchased luxury jewelry	16%	12%
<b>Performed once a month or more</b>		
Went to a bar or restaurant	73%	64%
Rented a video	45%	46%
Attended a movie	51%	42%
Purchased music at a music store	20%	20%

Base: Total respondents

“I consider myself to be a leader.”

Survey respondent

Attitudes towards advertising media: Business Professionals

	Digital Signage	Billboard	Magazine	TV	Internet	Newspaper	Radio
Catches my attention	67%	60%	57%	53%	40%	35%	42%
Unique	60%	36%	31%	42%	27%	16%	32%
Interesting	55%	38%	44%	50%	27%	29%	43%
Entertaining	48%	35%	36%	56%	23%	15%	38%
Informative	50%	38%	59%	53%	30%	55%	44%
Credible	32%	24%	38%	31%	15%	45%	32%
Relevant	40%	23%	45%	39%	28%	46%	36%
Annoying	32%*	23%	31%	54%	73%	15%	50%

Base: Among those that have seen ads in the media in the past 12 months

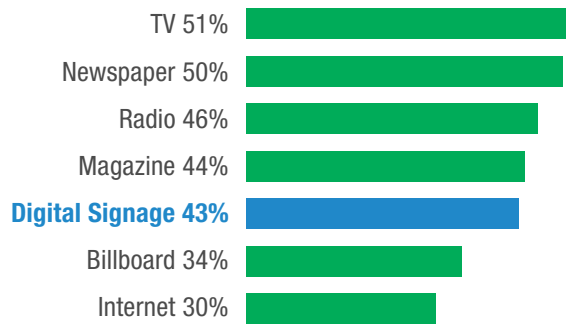
Action 30%

(last week; general adults 36%). When asked if they had taken action after seeing advertisements on digital signage, 30% of Business Professionals said they had taken action.

Text Messaging 53%

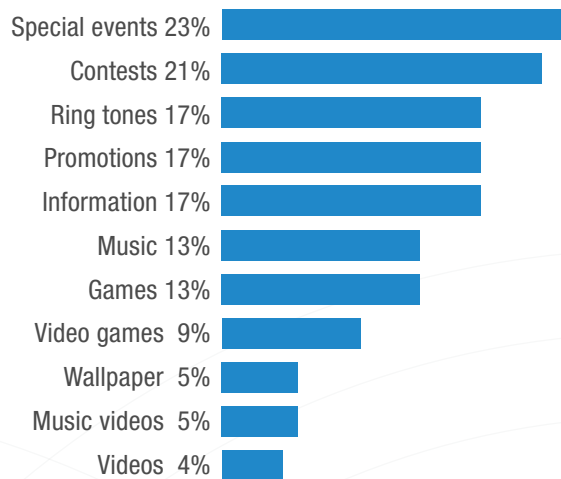
(last week; general adults 50%). About 92% of Business Professionals have activated cell phones that are primarily used for work. Those who use cell phones for text messaging say that they are interested in receiving invitations to special events (23% vs. 20% of general adults), and requests for information (17% vs. 13%).

Percentage of Business Professionals who report that they pay attention to advertising on the following media



Base: Among those that have seen ads in the media in the past 12 months

Offers that Business Professionals said they respond to with text messaging



Base: Those who text message with their cell phones

\*Percentage has statistical significance at a 90 percent confidence level.

## Life Pattern Profile

# COLLEGE STUDENTS

### Who are College Students?

College Students are 18- to 34-year-olds who attend junior college, college, university, or graduate school. This group has purchasing power: they are more likely than general adults to have taken an exotic vacation and to have stayed in nice hotels, possibly during spring or summer breaks from classes.

Outside of school, nearly half (48%) of College Students attended sporting events and concerts in the last year. In addition to purchasing music at retail spots, going to a bar or restaurant with family and friends is a regular activity, with 78% saying they participated once a month or more often.

### How College Students spend time

A very socially active group, College Students fill their extra time with renting videos or attending movies. They also participate in many other activities during the year.

### Awareness 75%\*

(last 12 months; general adults 62%). College Students are exceptionally aware of digital signage advertisements, which intercept them in many different locales besides those that are on campus.

Given their on-the-go life pattern, these students see digital signage at malls, airports, banks, grocery stores, stadiums/arenas, bars/restaurants/sports bars, gas stations, bookstores, and entertainment stores. On average, College Students who are aware of digital signage advertising have seen it in five or six different types of locations.

### Attention Level 51%\*

(last 12 months; general adults 44%). College Students are both more aware and even more engaged than general adults with digital signage advertising. They also find it more unique and interesting than traditional advertising media.



Ways that College Students spent time in the past year

Activity performed in the past year	College students	Total Adults
Attended a sporting event	48%	39%
Took a road trip as a vacation	41%	37%
Attended a music concert	43%	32%
Stayed at a 4-star or 5-star hotel	31%	23%
Purchased an automobile	17%	20%
Attended family-oriented event	21%	17%
<b>Performed once a month or more</b>		
Went to a bar or restaurant	78%	64%
Rented a video	64%	46%
Attended a movie	67%	42%
Purchased music at a music store	33%	20%

Base: Total respondents

“I spend many hours at school or with organizations.”

Survey respondent

Attitudes towards advertising media: College Students

	Digital Signage	Billboard	Magazine	TV	Internet	Newspaper	Radio
Catches my attention	65%	72%	63%	70%	47%	37%	40%
Unique	60%	42%	52%	48%	36%	22%	25%
Interesting	57%	42%	60%	62%	39%	29%	35%
Entertaining	55%*	38%	47%	71%	39%	18%	49%
Informative	53%	44%	58%	57%	34%	63%	50%
Credible	41%*	33%	46%	40%	21%	47%	35%
Relevant	39%	30%	53%	50%	34%	48%	32%
Annoying	23%	26%	28%	51%	72%	22%	63%

Base: Among those that have seen ads in the media in the past 12 months

When College Students who have seen digital signage advertising over the past year were asked about it, more than half said that they pay some or a lot of attention to this media.

**Action 49%\***

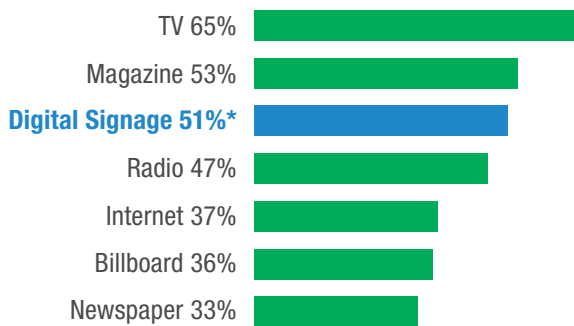
(last week; general adults 36%). When asked if they had taken any action after seeing advertisements

on digital signage, 49% of College Students said they had taken action.

**Text Messaging 73%**

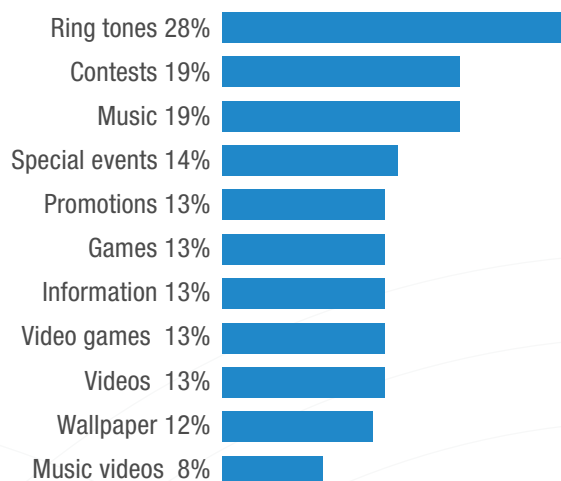
(last week; general adults 50%). Almost all College Students have activated cell phones. Those who use cell phones for text messaging say that they are interested in receiving ring tones (28% vs. 20% of general adults), and videos (13% vs. 9%) via text messaging.

Percentage of College Students who report that they pay attention to advertising on the following media



Base: Among those that have seen ads in the media in the past 12 months

Offers that College Students said they respond to with text messaging



Base: Those who text message with their cell phones

\*Percentage has statistical significance at a 90 percent confidence level.

Life Pattern Profile

# FAMILIES ON-THE-GO

**Who are Families On-the-Go?**

Families On-the-Go have at least one parent or legal guardian and have one or more children in the household. This group's daily decisions revolve around the family. Top leisurely activities included attending a sporting event, taking a road trip, and attending a music concert.

While these families have active lives, their level of participation in activities is similar to those of general adults. However, 29% have purchased an automobile in the past year, compared with 20% of general adults.

**How Families On-the-Go spend time**

Activities for people in this profile revolve around the whole family. Once a month or more, they go to a bar or restaurant with family or friends or colleagues (64%) and rent a video (48%). The most popular special activities in the last year were attending a sporting

event, taking a vacation road trip, and attending a music concert.

**Awareness 66%**

(last 12 months; general adults 62%). Families On-the-Go are slightly more likely than general adults to have seen digital signage advertising. They find advertising on this media to be more unique and entertaining than on other more traditional media. On average, Families On-the-Go who are aware of seeing digital signage advertising within the past week have seen it in five or six different types of locations.

**Attention Level 47%**

(last 12 months; general adults 44%). Families On-the-Go are engaged with digital signage advertising at levels similar to those of general adults. These families see digital signage at malls, grocery stores, gas stations, along highways, at convenience stores, and at entertainment retail stores.



Ways that Families On-the-Go spent time in the past year

Activity performed in the past year	Families On-the-Go	Total Adults
Attended a sporting event	38%	39%
Took a road trip as a vacation	48%	37%
Attended a music concert	39%	37%
Stayed at a 4-star or 5-star hotel	24%	23%
Purchased an automobile	29%	20%
Attended family-oriented event	20%	17%
<b>Performed once a month or more</b>		
Went to a bar or restaurant	64%	64%
Rented a video	48%	46%
Attended a movie	38%	42%
Purchased music at a music store	22%	20%

Base: Total respondents

“I am always trying to save money.”

Survey respondent

Attitudes towards advertising media: Families On-the-Go

	Digital Signage	Billboard	Magazine	TV	Internet	Newspaper	Radio
Catches my attention	62%	53%	59%	59%	49%	35%	45%
Unique	60%	60%	36%	46%	33%	22%	33%
Interesting	53%	42%	51%	53%	33%	29%	45%
Entertaining	51%	38%	39%	58%	29%	18%	39%
Informative	53%	39%	62%	53%	40%	51%	52%
Credible	35%	31%	37%	34%	20%	41%	35%
Relevant	38%	32%	54%	33%	34%	41%	42%
Annoying	29%	28%	28%	57%	71%	24%	49%

Base: Among those that have seen ads in the media in the past 12 months

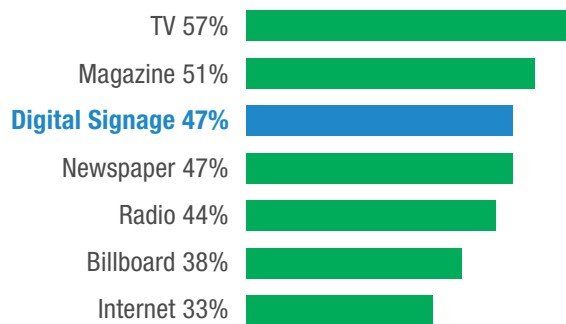
Action 32%

(last 12 months; general adults 36%). When asked if they had taken any action after seeing advertisements on digital signage, 32% of Families On-the-Go said they had taken action.

Text Messaging 39%

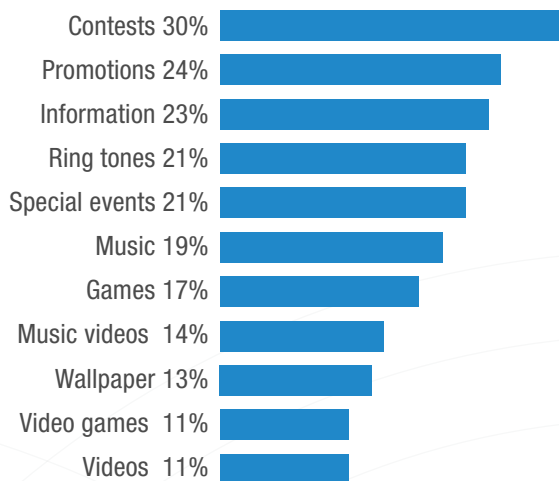
(last week; general adults 50%). Compared with general adults, a smaller percentage of Families On-the-Go use cell phones for text messaging. Those who do text messaging say that they are interested in receiving requests for information (23% vs. 13% of general adults), and music videos (14% vs. 7%) via text messaging.

Percentage of Families On-the-Go who report that they pay attention to advertising on the following media



Base: Among those that have seen ads in the media in the past 12 months

Offers that Families On-the-Go said they respond to with text messaging



Base: Those who text message with their cell phones

\*Percentage has statistical significance at a 90 percent confidence level.

## Life Pattern Profile

# HISPANIC FAMILIES

### Who are Hispanic Families?

Hispanic Families include a parent or legal guardian and have at least one child in the household. Thirty-seven percent say they always try to set an example for other family members, and most of the daily decisions revolve around the family.

Members of Hispanic Families report that they enjoy purchasing fashionable products and services and say that keeping up with the latest technology is also important.

### How Hispanic Families spend time

Hispanic Families like movies. People in this profile frequently attend movies (52%) and rent a video from a store or kiosk (52%). Their favorite movie genres are comedy, action, and family movies. Their frequency of going out to a bar with family or friends is lower than for general adults: 57% vs. 64%.

### Awareness 72%\*

(last 12 months; general adults 62%). Hispanic Families are significantly more likely than general adults to have seen digital signage in the past 12 months. On average, Hispanic Families who are aware of this media within the past week have seen digital signage advertising in five to six different types of locations.

### Attention Level 51%

(last 12 months; general adults 44%). In the past year, Hispanic Families say that they have seen digital signage when they visit malls, grocery stores, video rental stores, and medical offices.

They find advertising on digital signage more unique than advertising on all other media, and they also find it more entertaining and interesting than advertising than on billboards, the Internet, in newspapers, and on the radio.



Ways that Hispanic Families spent time in the past year

Activity performed in the past year	Hispanic Families	Total Adults
Attended a sporting event	33%	39%
Took a road trip as a vacation	35%	37%
Attended a music concert	23%	32%
Stayed at a 4-star or 5-star hotel	27%	23%
Purchased an automobile	20%	20%
Attended family-oriented event	17%	17%
<b>Performed once a month or more</b>		
Went to a bar or restaurant	57%	64%
Rented a video	59%	46%
Attended a movie	52%	42%
Purchased music at a music store	23%	20%

Base: Total respondents

“The well-being of my local community is important to me.”

Survey respondent

Attitudes towards advertising media: Hispanic Families

	Digital Signage	Billboard	Magazine	TV	Internet	Newspaper	Radio
Catches my attention	63%	53%	63%	53%	54%	51%	47%
Unique	62%	37%	47%	46%	37%	28%	26%
Interesting	56%	41%	59%	56%	42%	40%	39%
Entertaining	59%*	32%	54%	60%	41%	28%	42%
Informative	58%*	38%	69%	56%	49%	61%	56%
Credible	40%	25%	50%	46%	34%	47%	30%
Relevant	45%*	33%	50%	46%	39%	47%	38%
Annoying	26%	22%	24%	43%	61%	22%	42%

Base: Among those that have seen ads in the media in the past 12 months

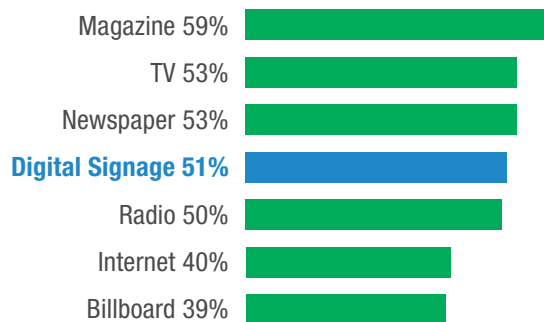
Action 45%

(last week; general adults 36%). When asked if they had taken any action after seeing advertisements on digital signage, 45% of Hispanic Families said they had taken action.

Text Messaging 52%

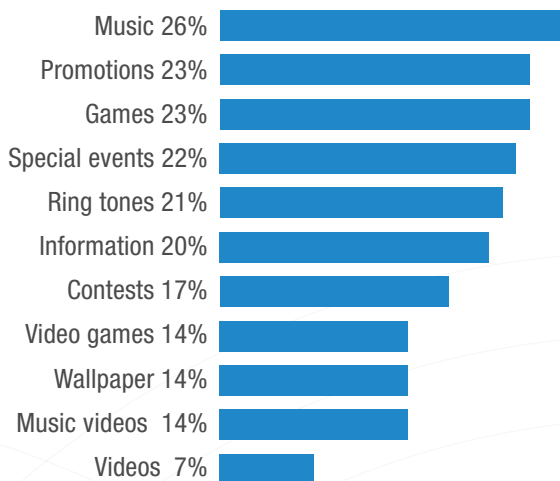
(last week; general adults 50%). About 92% of Hispanic Families have activated cell phones. Those who use cell phones for text messaging say that they are interested in receiving music (26% vs. 17% of general adults), games (23% vs. 14%), and music videos (14% vs. 7%) via text messaging.

Percentage of Hispanic Families who report that they pay attention to advertising on the following media



Base: Among those that have seen ads in the media in the past 12 months

Offers that Hispanic Families said they respond to with text messaging



Base: Those who text message with their cell phones

\*Percentage has statistical significance at a 90 percent confidence level.

## Life Pattern Profile

# MOBILE MILLENNIALS

### Who is a Mobile Millennial?

Mobile Millennials are 18- to 34-year-olds with purchasing power.

Very similar to College Students, Mobile Millennials exhibit more favorable ratings across virtually all awareness and attitude measures versus general adults. Combining their mobile, more tech-savvy life style with the favorable impact of advertising on digital signage makes digital out-of-home media an ideal communication vehicle for reaching them, especially when combined with an interactive component.

### How Mobile Millennials spend time

When asked about how they spend time, Mobile Millennials reported a wide range of activities performed in the past 12 months. They spend time on college and university campuses and go to shopping malls, airports, grocery stores, conveniences stores, stadiums/arenas, hotels, bookstores, health clubs, and entertainment stores.

### Awareness 75%\*

(last 12 months; general adults 62%). On average, Mobile Millennials who are aware of the media have seen digital signage advertising in six to seven different types of locations within the past week.

They are much more aware than general adults of advertising on digital signage.

### Attention Level 50%\*

(last 12 months; general adults 44%). The life pattern of Mobile Millennials provides many instances where these people can be intercepted by advertising on digital signage.

With their on-the-go lifestyle, they are out and about, attending sporting events and going to bars and restaurants with family and friends. They find digital signage to be more unique and interesting than traditional media, such as billboards, newspapers, radio, and new media such as the Internet.



Ways that Mobile Millennials spent time in the past year

Activity performed in the past year	Mobile Millennials	Total Adults
Attended a sporting event	46%	39%
Took a road trip as a vacation	43%	37%
Attended a music concert	40%	32%
Stayed at a 4-star or 5-star hotel	24%	23%
Purchased an automobile	19%	20%
Attended an event at a stadium	19%	17%
<b>Performed once a month or more</b>		
Went to a bar or restaurant	80%	64%
Rented a video	50%	46%
Attended a movie	59%	42%
Purchased music at a music store	27%	20%

Base: Total respondents

“I like a lot of excitement  
in my life.”

Survey respondent

Attitudes towards advertising media: Mobile Millennials

	Digital Signage	Billboard	Magazine	TV	Internet	Newspaper	Radio
Catches my attention	63%	67%	60%	64%	49%	37%	37%
Unique	63%	41%	45%	42%	40%	32%	23%
Interesting	57%	44%	56%	51%	33%	34%	27%
Entertaining	56%*	34%	44%	62%	35%	21%	37%
Informative	53%	44%	55%	50%	31%	63%	48%
Credible	38%	38%	41%	32%	22%	44%	25%
Relevant	36%	29%	52%	42%	33%	45%	31%
Annoying	29%	24%	28%	54%	72%	30%	63%

Base: Among those that have seen ads in the media in the past 12 months

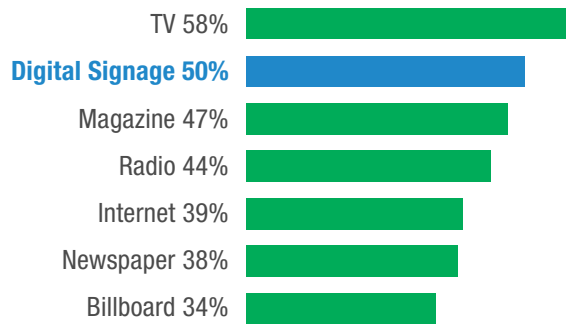
Action 43%

(last week; general adults 36%). When asked if they had taken any action after seeing advertisements on digital signage, 43% of Mobile Millennials said they had taken action.

Text Messaging 68%

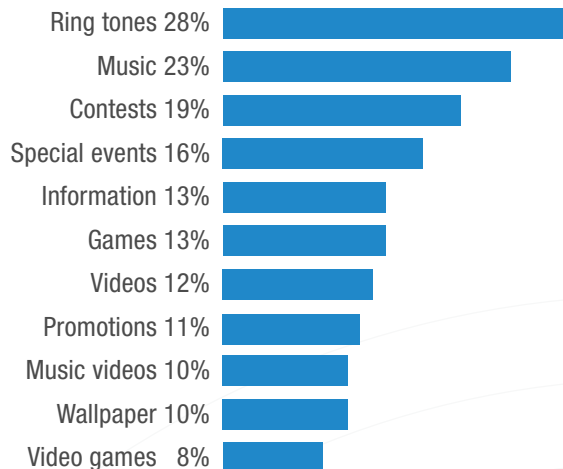
(last week; general adults 50%). Almost all Mobile Millennials have activated cell phones. Those who use cell phones for text messaging say that they are interested in receiving ring tones (28% vs. 20% of general adults), and music (23% vs. 17%) via text messaging.

Percentage of Mobile Millennials who report that they pay attention to advertising on the following media



Base: Among those that have seen ads in the media in the past 12 months

Offers that Mobile Millennials said they respond to with text messaging



Base: Those who text message with their cell phones

\*Percentage has statistical significance at a 90 percent confidence level.

## Life Pattern Profile

# NIGHTLIFERS

### What is a Nightlifer?

Nightlifers are people who like to go out and have a good time with friends. They tend to be early adopters of new trends and like the challenge of doing new things. Nightlifers often frequent bars and restaurants and in the past year, 42% have gone to a concert. But Nightlifers do more than just socialize; they are politically minded and involved with their communities.

### How Nightlifers spend time

When asked about how they spend time, Nightlifers reported participating in multiple activities over the past 12 months. In addition to the time they spend socializing at bars and restaurants, they also visit malls, airports, banks, casinos, bookstores and college campuses, and 59% have reported seeing a movie at least one time in the past month.

### Awareness 70%\*

(last 12 months; general adults 62%). On average, Nightlifers who are aware of the media have seen

digital signage advertising in six to seven different types of locations within the past week. They are much more aware than general adults of advertising on digital signage.

### Attention Level 49%\*

(last 12 months; general adults 44%). The life pattern of Nightlifers provides many instances where these people can be intercepted by advertising on digital signage.

Nightlifers are social by nature and they attend bars or nightclubs weekly, often visiting multiple locations within a single evening. They have dinner in sit-down or quick-serve restaurants at least twice per week, and they have regular lunches with friends, coworkers or clients. They find digital signage advertising to be more unique, interesting and entertaining than traditional media.



Ways that Nightlifers spent time in the past year

Activity performed in the past year	Nightlifers	Total Adults
Attended a sporting event	49%	39%
Took a road trip as a vacation	47%	37%
Attended a music concert	42%	32%
Stayed at a 4-star or 5-star hotel	30%	23%
Purchased an automobile	21%	20%
Attended an event at a stadium	23%	17%
<b>Performed once a month or more</b>		
Went to a bar or restaurant	100%	64%
Rented a video	56%	46%
Attended a movie	59%	42%
Purchased music at a music store	27%	20%

Base: Total respondents

“I frequently socialize with friends.”

Survey respondent

Attitudes towards advertising media: Nightlifers

	Digital Signage	Billboard	Magazine	TV	Internet	Newspaper	Radio
Catches my attention	65%	59%	13%	61%	47%	37%	38%
Unique	59%	34%	12%	41%	31%	22%	21%
Interesting	54%	41%	12%	51%	31%	30%	32%
Entertaining	49%	36%	9%	59%	33%	18%	36%
Informative	51%	38%	15%	52%	32%	55%	45%
Credible	34%	26%	9%	33%	18%	41%	31%
Relevant	40%	27%	10%	43%	28%	42%	31%
Annoying	27%	27%	10%	54%	72%	21%	54%

Base: Among those that have seen ads in the media in the past 12 months

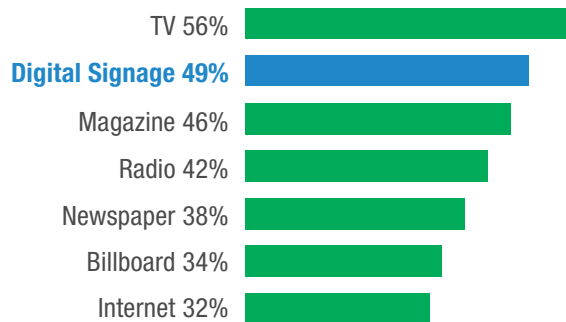
Action 43%

(last week; general adults 36%). When asked if they had taken action after seeing advertisements on digital signage, 43% of Nightlifers said they had taken action.

Text Messaging 62%

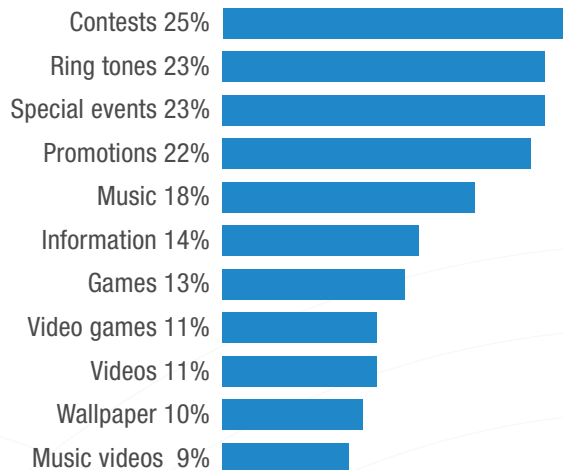
(last week; general adults 50%). Many Nightlifers have activated cell phones. Those who use cell phones for text messaging say that they are interested in responding to contests (25% vs. 22% of general adults), and receiving invitations to special events (23% vs. 20%) via text messaging.

Percentage of Nightlifers who report that they pay attention to advertising on the following media



Base: Among those that have seen ads in the media in the past 12 months

Offers that Nightlifers said they respond to with text messaging



Base: Those who text message with their cell phones

\*Percentage has statistical significance at a 90 percent confidence level.

## Life Pattern Profile

# OLDER AFFLUENTS

### Who are Older Affluents?

Older Affluents are 35- to 55-year-olds with a household income of \$100,000 or more. They have strong purchasing power, enjoying travel and staying at expensive hotels. They are very connected to family and consider the needs of family first when making daily decisions.

Compared with general adults, Older Affluents are more likely to have purchased an automobile in the past year (28% vs. 20% of general adults). When they travel, they often stay at four- or five-star hotels, and are more likely than general adults to have taken a road trip as a vacation over the past year (52% vs. 37% of general adults).

### How Older Affluents spend time

In addition to traveling, Older Affluents report taking part in a wide variety of activities over the past year. Once a month or more often, 74% of them go to bars or restaurants, compared with 64% of general

adults. They read magazines that cover topics such as business and finance, and health and fitness. They enjoy listening to jazz music and watching sitcoms and drama on TV.

### Awareness 65%

(last 12 months; general adults 62%). Older Affluents are as aware as general adults of digital signage advertising. They report seeing digital signage in malls, grocery stores, along streets and highways, and at airports.

Older Affluents who are aware of this media within the past week have seen digital signage advertising in five or six different types of locations, on average.

### Attention Level 44%

(last 12 months; general adults 44%). Older Affluents find advertising on digital signage more unique than advertising on all other media; they say that it is also more eye-catching and entertaining than advertising in magazines, the Internet, newspapers, and radio.



Ways that Older Affluents spent time in the past year

Activity performed in the past year	Older Affluents	Total Adults
Attended a sporting event	48%	39%
Took a road trip as a vacation	52%	37%
Attended a music concert	44%	32%
Stayed at a 4-star or 5-star hotel	46%	23%
Purchased an automobile	28%	20%
Attended an event at a stadium	21%	17%
<b>Performed once a month or more</b>		
Went to a bar or restaurant	74%	64%
Rented a video	48%	46%
Attended a movie	42%	42%
Purchased music at a music store	15%	20%

Base: Total respondents

“I like to travel.”

Survey respondent

Attitudes towards advertising media: Older Affluents

	Digital Signage	Billboard	Magazine	TV	Internet	Newspaper	Radio
Catches my attention	61%	56%	50%	40%	32%	32%	32%
Unique	56%	28%	23%	29%	18%	14%	13%
Interesting	48%	32%	38%	42%	22%	25%	31%
Entertaining	42%	29%	22%	48%	18%	15%	30%
Informative	42%	28%	55%	45%	24%	56%	38%
Credible	19%	19%	29%	22%	14%	44%	23%
Relevant	32%	18%	35%	29%	20%	40%	26%
Annoying	21%	22%	21%	49%	74%	14%	54%

Base: Among those that have seen ads in the media in the past 12 months

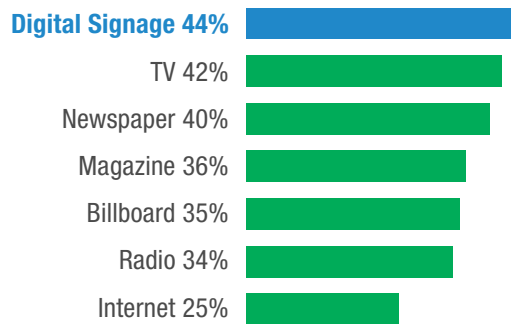
Action 26%

(last week; general adults 36%). When asked if they had taken any action after seeing advertisements on digital signage, 26% of Older Affluents said they had taken action.

Text Messaging 42%

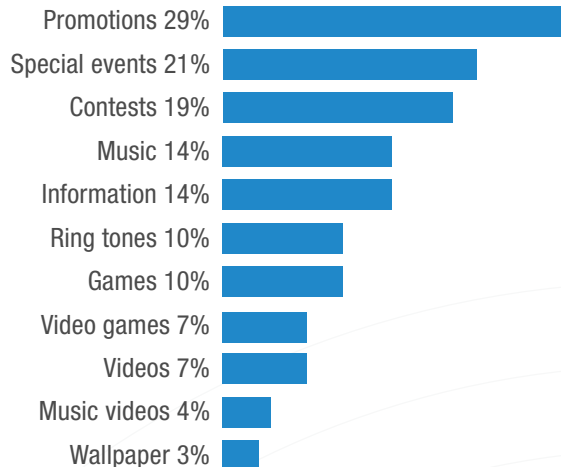
(last week; general adults 50%). About 91% of Older Affluents reported having activated cell phones. Those who use cell phones for text messaging say that they are interested in receiving promotional offers (29% vs. 20% of general adults) via text messaging.

Percentage of Older Affluents who report that they pay attention to advertising on the following media



Base: Among those that have seen ads in the media in the past 12 months

Offers that Older Affluents said they respond to with text messaging



Base: Those who text message with their cell phones

## Life Pattern Profile

# TEENS

### Who are Teens?

Teens are young people between the ages of 13- and 17-years-old. They comprise a very social, image-conscious group. A quarter of them (26% vs. 9% of general adults) say that they would pay more for a product that is consistent with the image they want to convey.

Teens seek fun and excitement in their lives. Many say that they like to go out to events like plays and music concerts (45% vs. 23% of general adults). Teens have higher awareness of advertising on digital signage and are also more likely than adults to take action as a result of seeing advertising on digital signage.

### How Teens spend time

Teens enjoy purchasing music at retail stores with favorite music genres of hip hop, rap, and R&B. Discretionary time is also filled with attending movies and other activities.

### Awareness 70%\*

*(last 12 months; general adults 62%).* Teens are much more likely than general adults to have seen digital signage in the past 12 months (70% vs. 62% of general adults), and say that they find digital signage advertising to be more unique and interesting than advertising on other traditional media. On average, Teens who are aware of this media within the past week have seen digital signage advertising in about seven different types of locations.

### Attention Level 39%

*(last 12 months; general adults 44%).* Teens have active life patterns, presenting many opportunities for advertisers to reach them with digital out-of-home media. They report a slightly lower rate than general adults of engagement with digital signage advertisements. But they do see digital signage advertisements in a wide range of locations, including malls, retail entertainment stores, transit locations, bookstores, newsstands, DMVs, hair salons, and barbershops.



Ways that Teens spent time in the past year

Activity performed in the past year	Teens	Total Adults
Attended a sporting event	42%	39%
Took a road trip as a vacation	29%	37%
Attended a music concert	36%	32%
Stayed at a 4-star or 5-star hotel	29%	23%
Purchased an automobile	12%	20%
Attended an event at a stadium	19%	17%
<b>Performed once a month or more</b>		
Went to a bar or restaurant	60%	64%
Rented a video	53%	46%
Attended a movie	62%	42%
Purchased music at a music store	38%	20%

Base: Total respondents

“Having fun is the whole point of life.”

Survey respondent

Attitudes towards advertising media: Teens

	Digital Signage	Billboard	Magazine	TV	Internet	Newspaper	Radio
Catches my attention	54%	68%	53%	55%	56%	31%	52%
Unique	51%	44%	44%	49%	44%	26%	41%
Interesting	51%	46%	49%	53%	54%	31%	36%
Entertaining	47%	37%	52%	58%	50%	23%	39%
Informative	46%	38%	46%	49%	43%	54%	48%
Credible	39%	30%	34%	41%	26%	50%	33%
Relevant	36%	38%	38%	44%	37%	41%	36%
Annoying	29%	37%	33%	59%	63%	37%	52%

Base: Among those that have seen ads in the media in the past 12 months

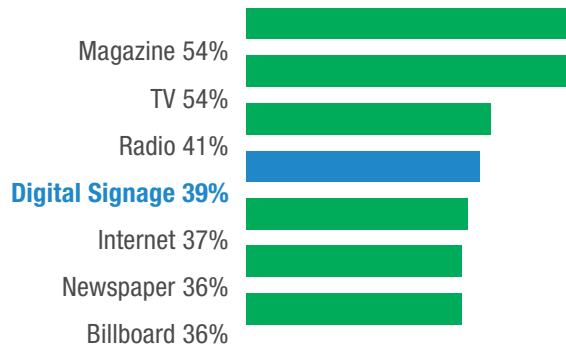
Action 55%\*

(last week; general adults 36%). When asked if they had taken any action after seeing advertisements on digital signage, 55% of Teens said they had taken action.

Text Messaging 65%

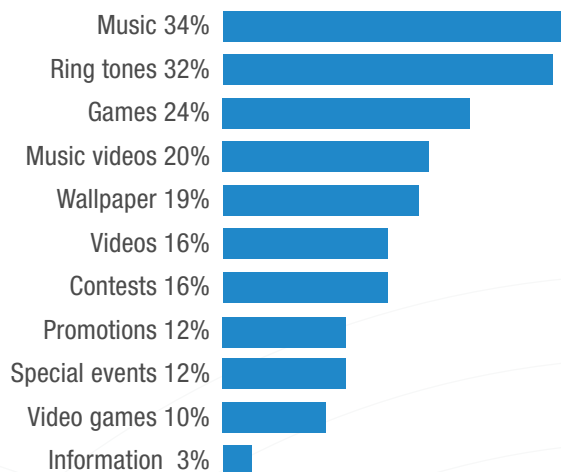
(last week; general adults 50%). Only 70% of Teens reported having activated cell phones. Those who use cell phones for text messaging say that they are interested in receiving ring tones (32% vs. 20% of general adults), music (34% vs. 17%), music videos (20% vs. 7%), and videos (16% vs. 9%) via text messaging.

Percentage of Teens who report that they pay attention to advertising on the following media



Base: Among those that have seen ads in the media in the past 12 months

Offers that Teens said they respond to with text messaging



Base: Those who text message with their cell phones

\*Percentage has statistical significance at a 90 percent confidence level.

Life Pattern Profile

# YOUNG URBAN PROFESSIONALS

**Who are Young Urban Professionals?**

Young Urban Professionals are between the ages of 25 and 34. While still early in their careers, many already have influential positions at work, and are business decision-makers (directors, department heads), business professionals (managers, supervisors), or other professional specialists (doctors, physicians, attorneys, engineers, technicians).

They like the challenge of doing something they have never done before and consider themselves to be leaders. Sporting events and travel are at the top of their activities list, with attendance at music concerts close behind.

**How Young Urban Professionals spend time**

A group with an active lifestyle, Young Urban Professionals participate more than general adults in nearly all of the activities about which they were asked. They travel, go to sporting events and concerts, go to movies, and go to bars and restaurants, and frequently

socialize with friends. This group likes the challenge of doing something they have never done before (37% vs. 22% of general adults) and likes lots of excitement in their lives (23% vs. 15% of general adults).

**Awareness 76%\***

(last 12 months; general adults 62%). Young Urban Professionals are much more likely than general adults to have seen digital signage. On average, Young Urban Professionals who are aware of this media within the past week have seen digital signage advertising in six to seven different types of locations.

**Attention Level 59%\***

(last 12 months; general adults 44%). Young Urban Professionals see digital signage at the places they frequent: malls, grocery stores, along highways and streets, airports, convenience stores, health clubs, airports, and barbershops. They pay more attention than general adults to digital signage advertising. They find advertising on digital signage more unique than



Ways that Young Urban Professionals spent time in the past year

Activity performed in the past year	Young Urban Pros	Total Adults
Attended a sporting event	48%	39%
Took a road trip as a vacation	44%	37%
Attended a music concert	38%	32%
Stayed at a 4-star or 5-star hotel	37%	23%
Purchased an automobile	27%	20%
Attended an event at a stadium	20%	17%
<b>Performed once a month or more</b>		
Went to a bar or restaurant	78%	64%
Rented a video	59%	46%
Attended a movie	56%	42%
Purchased music at a music store	31%	20%

Base: Total respondents

“I like learning new things and expanding my knowledge.”

Survey respondent

Attitudes towards advertising media: Young Urban Professionals

	Digital Signage	Billboard	Magazine	TV	Internet	Newspaper	Radio
Catches my attention	65%	69%	62%	61%	48%	48%	45%
Unique	61%	41%	36%	43%	30%	33%	30%
Interesting	52%	45%	62%	61%	36%	42%	40%
Entertaining	55%	37%	52%	58%	50%	23%	39%
Informative	52%	45%	62%	53%	44%	60%	52%
Credible	42%*	26%	48%	40%	27%	46%	22%
Relevant	44%	33%	57%	47%	34%	50%	37%
Annoying	31%	31%	34%	54%	67%	29%	48%

Base: Among those that have seen ads in the media in the past 12 months

advertising on other media and less annoying than advertising on TV, the Internet, and radio.

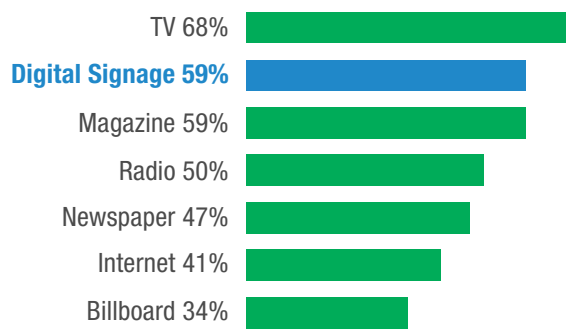
**Action 41%**

(last week; general adults 36%). When asked if they had taken any action after seeing advertisements on digital signage, 41% of Young Urban Professionals said they had taken action.

**Text Messaging 73%**

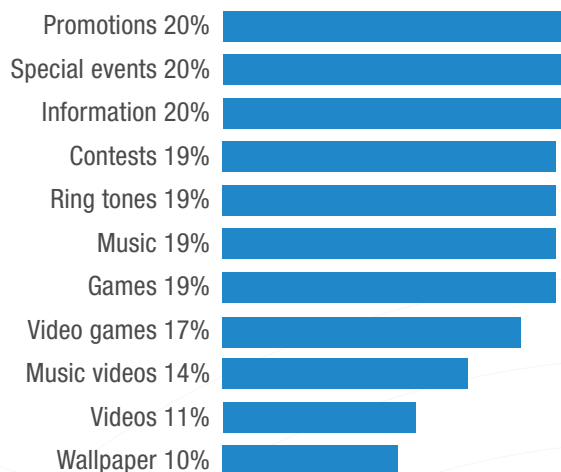
(last week; general adults 50%). A large number (93%) of Young Urban Professionals have activated cell phones. Those who use cell phones for text messaging say that they are interested in receiving music videos (14% vs. 7% of general adults), requests for information (20% vs. 13%), and video games (17% vs. 9%) via text messaging.

Percentage of Young Urban Professionals who report that they pay attention to advertising on the following media



Base: Among those that have seen ads in the media in the past 12 months

Offers that Young Urban Professionals said they respond to with text messaging



Base: Those who text message with their cell phones

\*Percentage has statistical significance at a 90 percent confidence level.

# THE ARRIVAL OF DIGITAL SIGNAGE AS PART OF THE MEDIA LANDSCAPE

Americans are spending more and more of their time away from home. Nearly everywhere they go during their daily lives, there are opportunities where digital out-of-home advertising intercepts and engages them. Digital signage is everywhere people are—in places such as bars and restaurants, retail stores, elevators, gas stations, and college campuses, to name a few—and people report that the advertising shown on it is exceptionally effective at engaging them.

“In today’s media landscape, advertisers are challenged with efficiently and effectively reaching people with their brand message,” says Peter Bowen, chief executive officer of SeeSaw Networks. “Combining digital out-of-home with traditional media is an excellent way to leverage this media’s unique ability to intercept people who are increasingly on the go and weave a brand’s message into their daily routines—at SeeSaw we call this Life Pattern Marketing.”

The ubiquity of digital out-of-home media allows for precisely targeted advertising campaigns that engage people based on their life patterns. Whether an advertiser is trying to reach an Alpha Mom or a Mobile Millennial, digital out-of-home media reaches and engages people throughout their daily routines.

The high awareness, stopping power, engagement, likeability, and ubiquity of digital signage advertising makes digital out-of-home a must-have for today’s media mix

## **Learn more about digital out-of-home media**

We hope you found this report to be of interest. To learn more:

call **+1 877 SEESAW8**

email **research@seesawnetworks.com**

or visit **www.seesawnetworks.com**

## **Learn more about Life Pattern Marketing**

Advertisers and media planners interested in learning more about SeeSaw’s Life Pattern Marketing methodology can download a free white paper at [www.seesawnetworks.com/services/whitepapers/life-pattern-marketing/](http://www.seesawnetworks.com/services/whitepapers/life-pattern-marketing/)

“Combining digital out-of-home media with traditional media is an excellent way to leverage this media’s unique ability to intercept people who are increasingly on the go.”

*Peter Bowen*  
**CEO**  
*SeeSaw Networks*

# LIFE PATTERN MARKETING WORKSHOP

If you're wondering how to reach people on the go, schedule a Life Pattern Marketing workshop. In this interactive session, consultants from SeeSaw Networks will collaborate with you as you discover how Life Pattern Marketing intercepts people in their work, play, and social routines.

SeeSaw Network's Life Pattern Marketing Workshop will show you a new process to refine your advertising strategies. During this workshop, you will:

- Gain a deeper understanding of the reach and effectiveness of digital out-of-home media.
- Learn a methodology to effectively leverage digital out-of-home media.
- Apply techniques for segmenting audiences based on their behavior.
- Evaluate where and when to place your media for maximum effect.
- Leverage your assets to create high impact creative for digital out-of-home media.

## Why do you need to analyze life patterns?

Whether you're an advertiser or a media planner, you need to know about life pattern analysis. No other method is as effective in allowing you to visualize your target audience and their daily routines.

## Where are they likely to be at any point throughout the day?

Life pattern analysis delivers a clear picture of "a day in the life" of your target audience. Whether they are at home, at work, at play, or socializing, you'll know where they are and what they're likely to be doing. Using this information, you can precisely pinpoint the optimal placement of the digital out-of-home media to intercept your audience as they are out and about.

Once you've completed a life pattern analysis, you can use the information you've gathered to develop a media plan—using digital out-of-home media—that improves the efficacy and reach of your marketing spend for this audience. You do this by mapping the media on screens in venues—health clubs, gas stations, bars, restaurants, retail stores, and universities—across the country, to the life patterns of your target audiences.

If you are an advertiser or media professional looking to leverage the power of digital out-of-home media, don't miss out on the opportunity to learn more in this free workshop.

call **+1 877 SEESAW8**

or visit **[www.seesawnetworks.com](http://www.seesawnetworks.com)**



## About OTX

OTX (Online Testing eXchange) is a global consumer research and consulting firm that has established itself as a leading provider of online-based research. The company specializes in providing innovative, cutting-edge online technology, products and analysis to the marketing, entertainment, and advertising communities. OTX has developed the most innovative products available for online research today—products that work to uncover deeper and more profound consumer insight. Today the company is one of the fastest growing research companies in the United States and has offices in Los Angeles, New York, Cincinnati, Miami, Chicago and London, with strategic partners in Japan, Australia, Russia and China.

## About SeeSaw Networks

SeeSaw is the most extensive network of digital out-of-home media with tens of thousands of locations nationally and growing. Through its network of affiliates, SeeSaw currently delivers more weekly gross impressions more than primetime TV spots and at a fraction of the cost. SeeSaw operates SeeSawAds.com, a media service that enables agencies to easily plan, buy and measure digital signage. On SeeSawAds.com agencies customize campaigns across different venues, markets, and demographics with unprecedented precision. With SeeSaw, advertisers can intercept people in their life patterns during their work, play, and social routines.

SeeSaw Networks is headquartered in San Francisco and has offices in New York and Chicago.

For more information on SeeSaw Networks, please visit: [www.seesawnetworks.com](http://www.seesawnetworks.com).

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