Outdoor Advertising Research Study

October 2012
OBJECTIVE

• To measure perception of “effectiveness” of various non traditional advertising media by the Puerto Rican consumer.

• Effectiveness in light of:
  ✓ Exposure
  ✓ Frequency
  ✓ Impact:
    • Informative
    • Entertaining
    • Brand recall
    • Relevance
• Sample:
  – 600 households
  – Person to person interviews, Islandwide
  – Among adults heads of households, 18 to 64 years of age

• Interviews took place during August and September 2012

• Questionnaire developed as a joint effort between OAAPR and TMC

• Analysis: by specific media
SAMPLE PROFILE

GENDER:
- MALE: 46
- FEMALE: 54

AGE:
- 18 - 24: 16
- 25 - 34: 23
- 35 - 49: 33
- 50 - 64: 29

FAMILY INCOME:
- LESS THAN $10K: 19
- $10K - $20K: 30
- $20K - $30K: 22
- $30K+: 29

GEOGRAPHICAL AREA:
- METRO: 34
- EAST: 17
- NORTH: 17
- SOUTH: 16
- WEST: 17
While Consumers Are Away From Home, They’re Doing Things That Are Critical To Marketers!

- They’re **Using Media and Being Reached by Many Messages**
- They’re **Socializing and Influencing other People**
- They’re **Shopping and Making Purchasing Decisions**
OOH rules the day
On average people spend 85% of their time Out of Home.

BASE: 18-64
REPORTED TIME: 6:00AM - 5:00PM
AWAY FROM HOME

BY TIME OF THE DAY

PEAK TIME FOR “AWAY FROM HOME”
6am to 8pm.

BASE: 18-64
OUT OF HOME HABITS...

Average time spent driving:

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<tr>
<td>WEEKENDS</td>
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</table>

91% OWN AN AUTOMOBILE

Usage priorities:

- PERSONAL ERRANDS / SHOPPING: 88
- DRIVES / GO OUT WITH FAMILY: 82
- DRIVE TO WORK: 75
- DRIVE CHILDREN TO SCHOOL: 47
- OUT WITH FRIENDS / SOCIALIZING: 40
Media Habits have Changed!
91% LISTEN TO THE RADIO ON A REGULAR BASIS

Compared to 1 year ago, you listen to radio:

- MORE: 28
- SAME: 50
- LESS: 22

Average – 1.3 hours per day
Compared to 1 year ago, you read newspapers:

- More: 18
- Same: 56
- Less: 26

64% read newspapers and/or magazines.
Subscribed to paid TV service

YES 68

Watch TV on a regular basis

98

Compared to 1 year ago, you watch TV:

MORE 18
SAME 54
LESS 28

WEEKDAYS AVERAGE: 1.8 HOURS PER DAY
WEEKENDS AVERAGE: 3.8 HOURS PER DAY
USE & ACCESS TO INTERNET

Have Internet access

YES  71
NO   29

Compared to 1 year ago, you use the Internet...

MORE   57
SAME   32
LESS   11

Use the Internet on a regular basis

YES  94
NO   6

INTERNET ACCESS  %
At home        74
At school/Work  25
Mobile Phone   72
Tablets        7

Average Access Hrs./day: 2.1
MEDIA USAGE SUMMARY

Compared to 1 Year Ago

RADIO

TELEVISION

NEWSPAPER & MAGAZINES

INTERNET
CURRENT SCENARIO

• FAST AND INNOVATIVE EVOLUTION

• MORE MEDIA OPTIONS; TRADITIONAL MEDIA TENDS TO BE “STAGNANT” OR “ERODING”.

• LOWER INVESTMENT LEVELS

• HIGHER “CLIENT” EXPECTATIONS

• COMPLEX SELECTION PROCESS

Source: In-depth interviews
“CUALQUIER PUNTO DE CONTACTO CON EL CONSUMIDOR ES UN MEDIO DE PUBLICIDAD.”
OOH Media is Highly Recognized

- Out of Home Media clearly demonstrates to be very effective in terms of recall.
- National total awareness of billboards is at the top at 95% tied with television and above radio (93%).
- Results from all other OOH Media did very well, from 74% to 32% awareness.
### NATIONAL ADVERTISING MEDIA

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<thead>
<tr>
<th></th>
<th>UNAIDED</th>
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<tbody>
<tr>
<td><strong>OUTDOOR:</strong></td>
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<tr>
<td>Billboards</td>
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<td>Bus Shelters</td>
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<tr>
<td>Mesh</td>
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<td><strong>TRADITIONAL:</strong></td>
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<tr>
<td>TV Local</td>
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<td>Radio</td>
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<tr>
<td>Newspapers</td>
<td>53</td>
<td>31</td>
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<tr>
<td>Paid TV</td>
<td>42</td>
<td>32</td>
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<td>Magazines</td>
<td>17</td>
<td>48</td>
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<tr>
<td>Social Networks</td>
<td>24</td>
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BASE: ALL PARTICIPANTS
## Regional / Segmented Outdoor Media

### Island Wide:

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<thead>
<tr>
<th>Category</th>
<th>UNAIDED</th>
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<tbody>
<tr>
<td>Plasma - Shopping Malls</td>
<td>8</td>
<td>61</td>
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<tr>
<td>Doctors' Offices</td>
<td>6</td>
<td>57</td>
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<tr>
<td>Shopping Malls &quot;Banners&quot;</td>
<td>9</td>
<td>46</td>
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<tr>
<td>Plasma - College, Hospitals, Banks...</td>
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<td>51</td>
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<tr>
<td>Beach / Waste Receptacles</td>
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### Urban Area:

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<tr>
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<td>Taxi Cabs</td>
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<td>54</td>
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<td>Aerial Signs</td>
<td>2</td>
<td>58</td>
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<td>Elevators</td>
<td>4</td>
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<tr>
<td>Rest Rooms</td>
<td>4</td>
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<td>Parkings</td>
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<td>38</td>
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<tr>
<td>Tren Urbano</td>
<td>2</td>
<td>30</td>
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Base: All Participants

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*Note: The numbers represent the percentage of participants aware of the respective outdoor media elements.*
BEST MEDIA TO RECEIVE “PRODUCT” INFORMATION:  TOP 10 MENTIONS

- LOCAL TV: 79
- BILLBOARDS: 66
- NEWSPAPERS: 55
- RADIO: 53
- PAID TV: 44
- SOCIAL MEDIA: 26
- MESH: 18
- DIGITAL PLASMA "MALLS": 18
- MAGAZINES: 17
- BUS SHELTERS: 14

BASE: Those aware
How is OOH perceived?

• In terms of:
  – Brand Exposure
  – Capturing Attention
  – Media Likeability for Advertising
  – Effectiveness of Media Delivery
ALTERNATIVE

Restrooms
Doctor Offices
Elevators
Gas Pumps
Parking Garages
Shopping Mall Banners
Plasmas at POP, Banks,
Hosp. and Malls
REST ROOMS (18-34 yrs of age)
### REST ROOMS (18-34 yrs of age)

**Awareness**
- **Unaided**: 4
- **Aided**: 50
- **Total**: 54

**Exposure Frequency**
- **Weekly**: 11
- **Less than once a week**: 32

**Brand Exposure**
- Captures Attention: 64
- Media Ad Likeability: 56
- Message Delivery / Effectiveness: 46
- Those Exposed / In Agreement: 49

**Top Categories**
- Consumer Products
- Telecommunications
- Alcoholic Beverages
- Soft drinks / Beverages
- Insurance
DOCTORS OFFICES
DOCTORS OFFICES

AWARENESS

6 63 69

EXPOSURE FREQUENCY

10 61

BRAND EXPOSURE

75

CAPTURES ATTENTION

68

MEDIA AD LIKEABILITY

64

MESSAGE DELIVERY / EFFECTIVENESS

70

TOP CATEGORIES

Insurance
Health
Consumer Products
Soft drinks / Beverages
Banks / Financial Services
ELEVATORS

AWARENESS
- UNAIDED 4
- AIDED 55

EXPOSURE FREQUENCY
- WEEKLY 5
- LESS THAN ONCE A WEEK 35

BRAND EXPOSURE
- CAPTURES ATTENTION 71
- MEDIA AD LIKEABILITY 60
- MESSAGE DELIVERY / EFFECTIVENESS 48

TOP CATEGORIES
- Insurance
- Health
- Telecommunications
- Banks / Financial Services
- Soft drinks / Beverages
GAS STATION PUMPS

AWARENESS
- UNAIDED
- AIDED

EXPOSURE FREQUENCY
- WEEKLY
- LESS THAN ONCE A WEEK

BRAND EXPOSURE
- CAPTURES ATTENTION
- MEDIA AD LIKEABILITY
- MESSAGE DELIVERY / EFFECTIVENESS

TOP CATEGORIES
- Soft drinks / Beverages
- Telecommunications
- Alcoholic Beverages
- Cars / Auto Services
- Restaurants / Fast Foods
PARKING GARAGES
PARKING GARAGES

AWARENESS
- UNAIDED: 3
- AIDED: 38
- TOTAL: 41

EXPOSURE FREQUENCY
- WEEKLY: 5
- LESS THAN ONCE A WEEK: 22

BRAND EXPOSURE CAPTURES ATTENTION MEDIA AD LIKEABILITY MESSAGE DELIVERY / EFFECTIVENESS
- THOSE EXPOSED / IN AGREEMENT: 53
- 46
- 39
- 35

TOP CATEGORIES
- Insurance
- Telecommunications
- Banks / Financial Services
- Restaurants / Fast Foods
- Health
SHOPPING MALLS BANNERS
SHOPPING MALLS BANNERS

AWARENESS

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EXPOSURE FREQUENCY

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BRAND EXPOSURE

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CAPTURES ATTENTION

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MEDIA AD LIKEABILITY

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MESSAGE DELIVERY / EFFECTIVENESS

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</table>

TOP CATEGORIES

- Telecommunications
- Restaurants / Fast Foods
- Banks / Financial Services
- Soft drinks / Beverages
- Consumer Products
PLASMA – COLLEGES, HOSP., SUPER., BANKS...
PLASMA – COLLEGES, HOSP., SUPER., BANKS...

**Awareness**
- *Unaided*: 5%
- *Aided*: 56%
- *Total*: 61%

**Exposure Frequency**
- *Weekly*: 22%
- *Less Than Once A Week*: 43%

**Brand Exposure**
- *Captures Attention*: 84%

**Media Ad Likeability**
- *Message Delivery / Effectiveness*: 76%

**Top Categories**
- Banks / Financial Services
- Telecommunications
- Soft drinks / Beverages
- Insurance
- Health
PLASMA – SHOPPING MALLS
# PLASMA – SHOPPING MALLS

**Awareness**
- UNAIDED: 8
- AIDED: 69
- Total: 77

**Exposure Frequency**
- Weekly: 32
- Less than once a week: 47

**Brand Exposure**
- Captures Attention: 86
- Media Ad Likeability: 83
- Message Delivery / Effectiveness: 77

**Top Categories**
- Telecommunications
- Restaurants / Fast Foods
- Banks / Financial Services
- Insurance
- Consumer Products
BEACH WASTE RECEPTACLES
BEACH WASTE RECEPTACLES

**Awareness**
- UNAIDED: 3
- AIDED: 36
- TOTAL: 39

**Exposure Frequency**
- WEEKLY: 1
- LESS THAN ONCE A WEEK: 28

**Brand Exposure**
- Captures Attention: 65
- Media Ad Likeability: 55
- Message Delivery / Effectiveness: 45

**TOP CATEGORIES**
- Public Services
- Alcoholic Beverages
- Soft drinks / Beverages
- Telecommunications
- Restaurants / Fast Foods

\[41\]
TRANSIT

“Tren Urbano”
Taxi Signs
Aerial Signs
Bus Shelters
“TREN URBANO” - METRO
**TREN URBANO** - METRO

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<td>LESS THAN ONCE A WEEK</td>
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</table>

**Brand Exposure**
- Captures Attention: 65
- Media Ad Likeability: 53
- Message Delivery / Effectiveness: 41

**Top Categories**
- Telecommunications
- Insurance
- Banks / Financial Services
- Alcoholic Beverages
- Soft drinks / Beverages
TAXI SIGNS

AWARENESS
- UNAIDED: 9
- AIDED: 54
- TOTAL: 63

EXPOSURE FREQUENCY
- WEEKLY: 12
- LESS THAN ONCE A WEEK: 37

BRAND EXPOSURE
- CAPTURES ATTENTION: 54
- MEDIA AD LIKEABILITY: 46
- MESSAGE DELIVERY / EFFECTIVENESS: 36

TOP CATEGORIES
- Health
- Restaurants / Fast Foods
- Banks / Financial Services
- Insurance
- Telecommunications
AERIAL SIGNS

AWARENESS

EXPOSURE FREQUENCY

BRAND EXPOSURE
- CAPTURES ATTENTION: 59
- MEDIA AD LIKEABILITY: 71
- MESSAGE DELIVERY / EFFECTIVENESS: 40

TOP CATEGORIES
- Banks / Financial Services
- Education
- Telecommunications
- Alcoholic Beverages
- Insurance
BUS SHELTERS
BUS SHELTERS

AWARENESS
- UNAIDED: 11
- AIDED: 63
- TOTAL: 74

EXPOSURE FREQUENCY
- WEEKLY: 41
- LESS THAN ONCE A WEEK: 39

BRAND EXPOSURE
- CAPTURES ATTENTION: 73
- MEDIA AD LIKEABILITY: 63
- MESSAGE DELIVERY / EFFECTIVENESS: 54

THOSE EXPOSED / IN AGREEMENT

TOP CATEGORIES
- Alcoholic Beverages
- Telecommunications
- Soft drinks / Beverages
- Restaurants / Fast Foods
- Insurance
OUTDOOR

Mesh Billboards
MESH
MESH

AWARENESS

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EXPOSURE FREQUENCY

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BRAND EXPOSURE

CAPTURES ATTENTION

MEDIA AD LIKEABILITY

MESSAGE DELIVERY / EFFECTIVENESS

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<td>CAPTURES ATTENTION</td>
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<td>MEDIA AD LIKEABILITY</td>
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<td>MESSAGE DELIVERY / EFFECTIVENESS</td>
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</table>

TOP CATEGORIES

Telecommunications
Insurance
Banks / Financial Services
Alcoholic Beverages
Soft drinks / Beverages
BILLBOARDS
BILLBOARDS

AWARENESS  

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EXPOSURE FREQUENCY  

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BRAND EXPOSURE  

- 92

CAPTURES ATTENTION  

- 91

MEDIA AD LIKEABILITY  

- 88

MESSAGE DELIVERY / EFFECTIVENESS  

- 86

THOSE EXPOSED / IN AGREEMENT

TOP CATEGORIES
- Telecommunications
- Restaurants / Fast Foods
- Alcoholic Beverages
- Cars / Auto Services
- Banks / Financial Services
## NATIONAL ADVERTISING MEDIA

<table>
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<tr>
<th>OUTDOOR:</th>
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<tbody>
<tr>
<td>BILLBOARDS</td>
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<td>MESH</td>
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<td>BUS SHELTERS</td>
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<table>
<thead>
<tr>
<th>TRADITIONAL:</th>
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<tbody>
<tr>
<td>TV LOCAL</td>
<td>98</td>
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<td>NEWSPAPERS</td>
<td>96</td>
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<td>RADIO</td>
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<td>PAID TV</td>
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<td>SOCIAL NETWORKS</td>
<td>91</td>
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<tr>
<td>MAGAZINES</td>
<td>68</td>
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</table>

*MODERATE TO GREAT IMPACT*
# MEDIA EFFECTIVENESS / IMPACT

## REGIONAL / SEGMENTED OUTDOOR MEDIA

<table>
<thead>
<tr>
<th>ISLAND WIDE:</th>
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<tbody>
<tr>
<td>PLASMA - HOSPITALS, BANKS, ETC.</td>
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<tr>
<td>PLASMA - SHOPPING MALLS</td>
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<tr>
<td>SHOPPING MALL &quot;BANNERS&quot;</td>
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<td>BEACH WASTE RECEPTACLES</td>
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<tr>
<td>PARKING GARAGES</td>
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- MODERATE TO GREAT IMPACT
In Summary

- 85% of Puerto Ricans spend 11.9 hours a day Out of Home
- 91% owns an automobile
- Awareness & Impact of Out of Home Media is outstanding
- Outdoor is an important component of the Media Mix
On average people spend 85% of their time Out of Home.

BASE: 18-64
REPORTED TIME: 6:00AM - 5:00PM
AWAY FROM HOME

BY TIME OF THE DAY

PEAK TIME FOR “AWAY FROM HOME”
6am to 8pm.

BASE: 18-64
No need to tune in!!!

- Surrounds and immerses hard-to-reach consumers
- Goes where other media can’t go
“Each OOH component of your media plan will deliver according to your goals and target”.
What Lies Ahead!

- More creative thinking
- High impact creative executions
- New digital technologies
- Interactivity
- Ubiquitous & impactful formats
- Improved eco-friendly materials and lighting
- Improved business practices
- More professional & consultative selling
- Seek improved metrics
# A world of Outdoor Companies with One Goal: Getting your brand Out There

## Directory

### Outdoor

<table>
<thead>
<tr>
<th>Media</th>
<th>Company</th>
<th>Phone</th>
<th>Website</th>
<th>Contact</th>
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<td>ALUMMOBILES</td>
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### Outdoor Alternatives

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### Affiliates

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