

Why Go Out-of-Home?

National

It's Simple — That's Where the People Are!

According to the 2013 Arbitron Out-of-Home Advertising Study, we are spending even more time out of home — more than 89% of U.S. residents aged 18 or older are exposed to Outdoor advertising each day. Outdoor advertising reaches consumers 24/7 — during their daily commute, on their lunch break and throughout shopping trips. Out-of-home is often the last message a consumer receives before making a service or buying decision.

Today's consumers are increasingly mobile — 70% of their waking hours are spent away from home and with out-of-home ads whether in their cars, riding mass transit, on foot or at the point-of-sale.



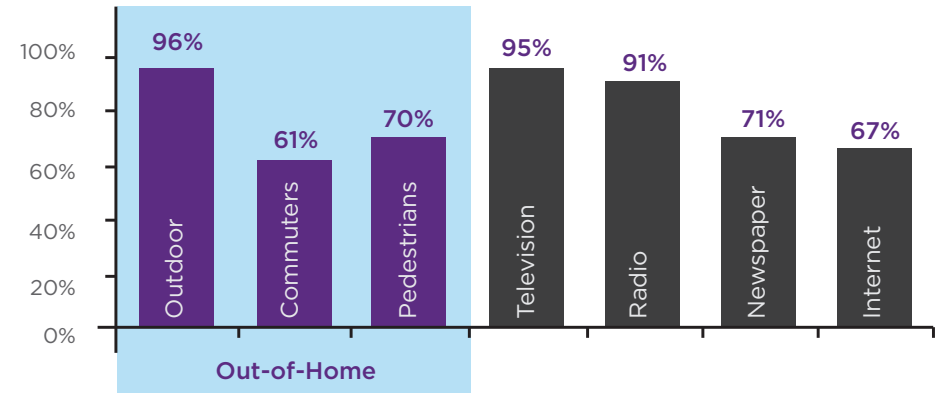
Nearly three-quarters of outdoor viewers shop on their way home from work; more than two-thirds make their shopping decisions while in the car and more than one-third make the decision to stop at the store while on their way home — all times when outdoor advertising has the opportunity to influence purchasing and service decisions.

Source: Arbitron Out-of-Home Advertising Report, 2013

Why Now?

Out-of-home is the LAST mass reach medium. Beyond fragmentation and self-selection is an emerging marketplace that is redefining how we interact with media and content. As the traditional media model gets reconfigured, out-of-home becomes the ONLY mass media choice. We are always there and we are always on.

OOH advertising reaches almost the entire U.S. adult population each week.



Why OUTFRONT Media?

We deliver audience.

Our media is targetable by market and demographic, allowing us to pinpoint accurately who you need to reach, and then reach them consistently — more than 20 times each month. With our newest media measurement system, TAB OOH Ratings, we are able to further refine our delivery.

We deliver service.

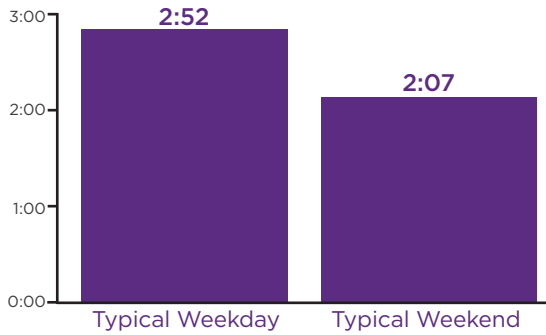
We are committed to delivering research and information that helps tailor a program to achieve your marketing objectives. We are committed to the “after-sale,” following your program through to success.

We deliver America.

Whether it's bulletins in suburban communities, transit shelters and bus kings in our urban centers, rail displays in transportation systems that connect bedroom communities to commercial centers, high-impact digital billboards, or standard billboards on highways entering or leaving major cities, we have you covered.

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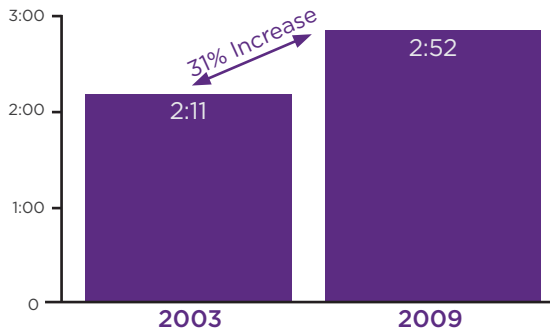
18 1/2 Hours per week on the road!



How much time in hours or minutes do you spend combined, either driving or riding as a passenger in any vehicle, on a typical weekday/weekend?

Results displayed in hours: minutes

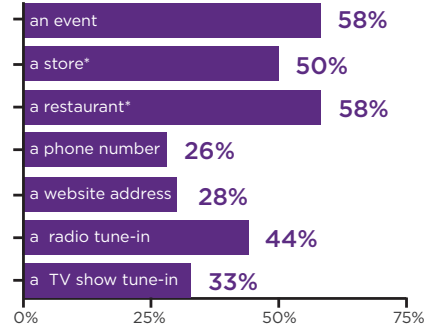
31% Increase in time spent in-car.



During our 2003 national in-car media survey, Arbitron found that Americans averaged 2 hours and 11 minutes in their cars during an average weekday; in 2009, Americans are reporting spending 2 hours and 52 minutes in their cars per weekday — a 31% increase.

Billboards move consumers to action!**

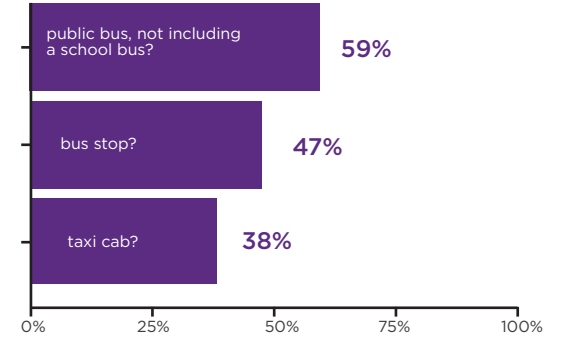
On a roadside billboard, have you ever learned of...



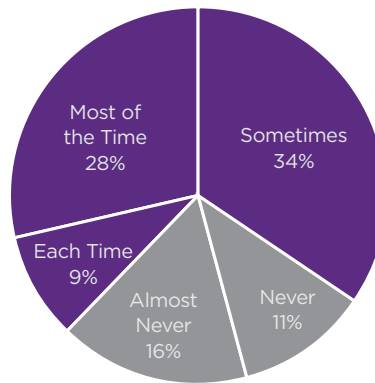
*and visited establishment

Buses & Shelters get attention!**

At any time in the past 7 days have you noticed a...(total)

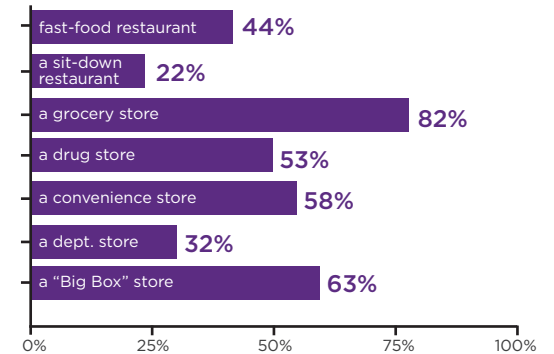


71% of travelers notice Billboard Ads.*



Workers shop on their way home.**

From work to...



Base: United States residents aged 18 or older who have traveled in any vehicle in the past month. ** Based on respondents that noticed ads. Source: Arbitron National In-Car Study 2009

7 out of 10



Adults say that they've seen an OOH ad in the past month

And among those who have seen an OOH ad:



70%

Say OOH is very, or somewhat likely, to influence a purchase.



58%

Search the web as a direct result of seeing an ad.



55%

Use mobile /social media to share information while viewing an OOH ad.



41%

Are more likely to learn about the brand being advertised.

Source: Touchpoints USA Billboard Study, 2012

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7 out of 10



Adults say that they've seen an OOH ad in the past month

And among those who have seen an OOH ad:



40%

viewed a DIRECTIONAL ad



40%

WATCHED a TV program advertised



40%

visited a RESTAURANT advertised



39%

TALKED about a product advertised



33%

ATTENDED an event advertised



29%

shopped a SALE in-store that week



28%

shopped a SALE online that week



26%

visited a WEBSITE that was advertised



26%

IMMEDIATELY visited business



18%

CALLED a phone number advertised

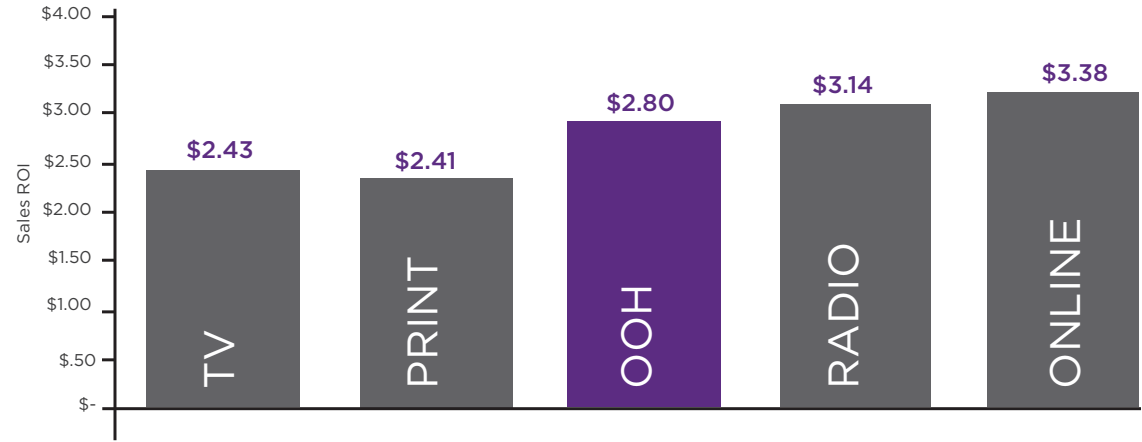
Source: Arbitron OOH Industry Report, 2013

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OOH: A Return On Your Investment

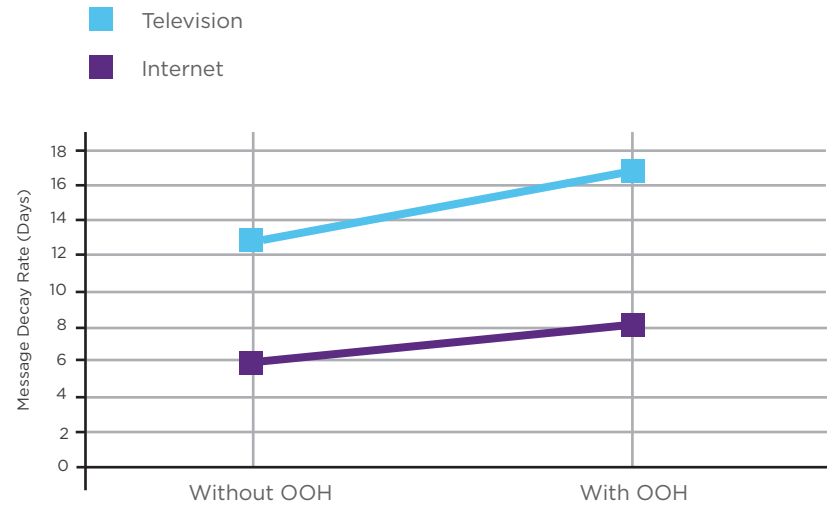
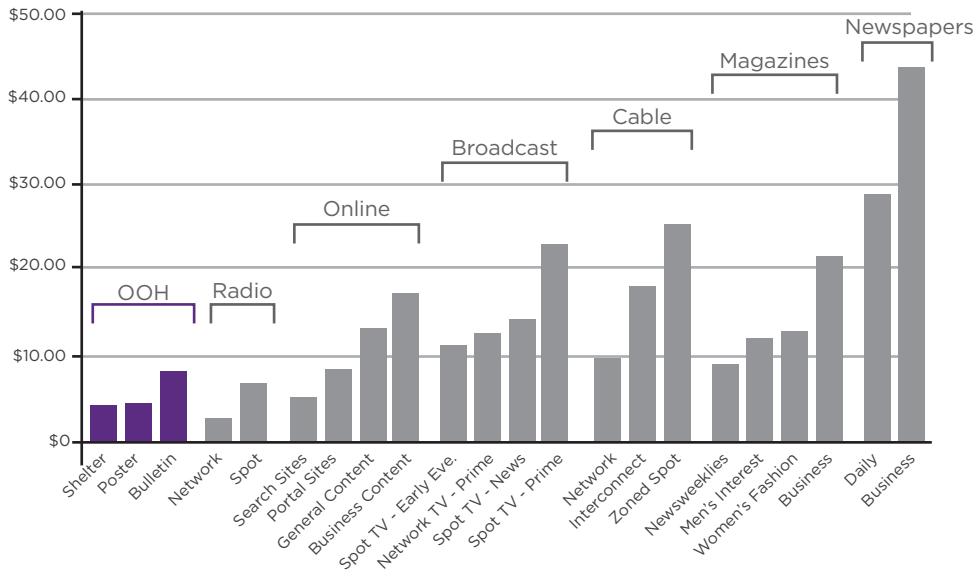
It's Simple — That's Where the People Are!

The British media research firm Brandscience analyzed over 600 econometric case studies to gauge the impact of out-of-home on sales results. The information is used to provide insights about how out-of-home advertising works relative to other media, independently and in synergy with other media. Brandscience found for each dollar spent on out-of-home advertising, an average of \$2.80 was received in sales. Television and print advertising have a lower ROI, yet receive a greater share of the dollars in the average media mix.



Research studies have repeatedly shown that OOH significantly lowers the cost of advertising. To reach 1,000 people, online can cost up to \$17.50 per thousand impressions, magazines can cost up to \$21.00 per thousand. At \$3.38-\$8.65 per thousand impressions, OOH delivers the same audience at significantly lower costs. Only radio comes anywhere close.

Using out-of-home in combination with other media improves the retention of a campaign's advertising message. This works particularly well for television and online advertising.

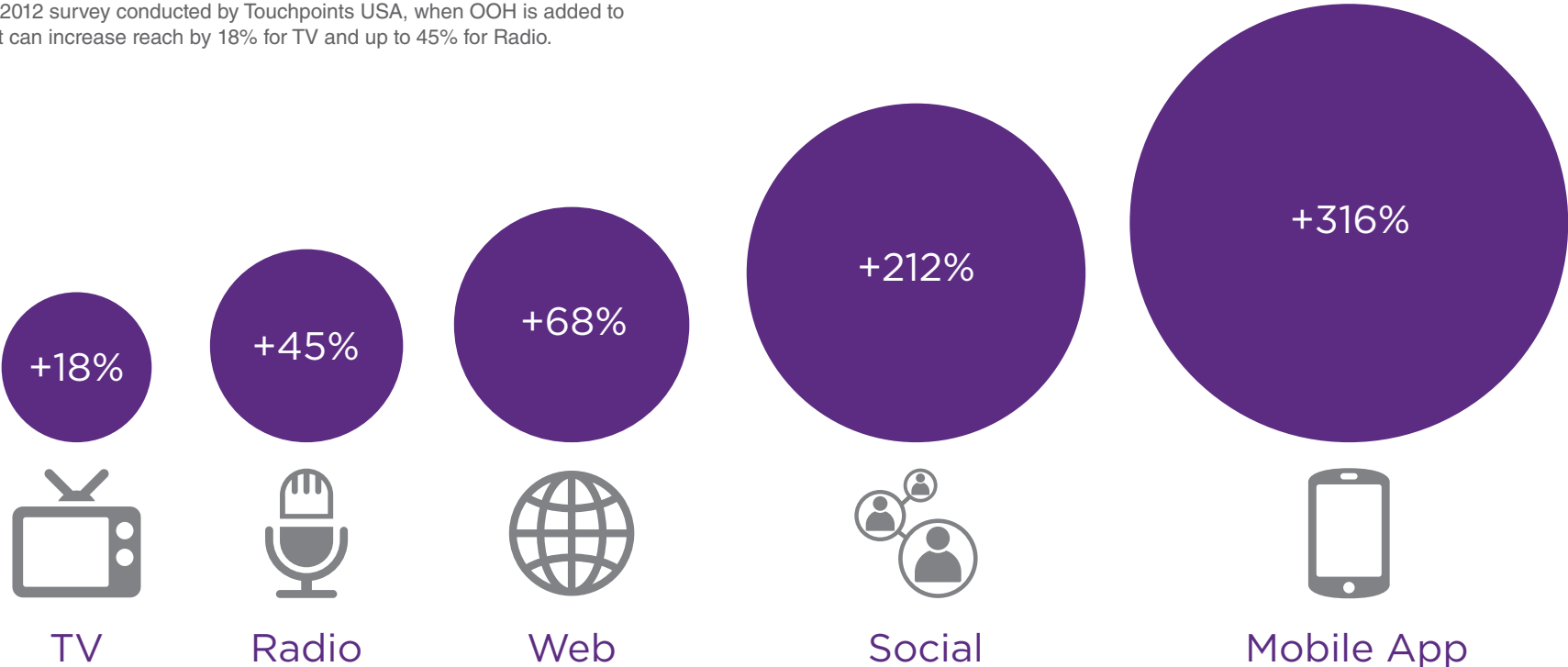


Source: OAAA.org, 2013

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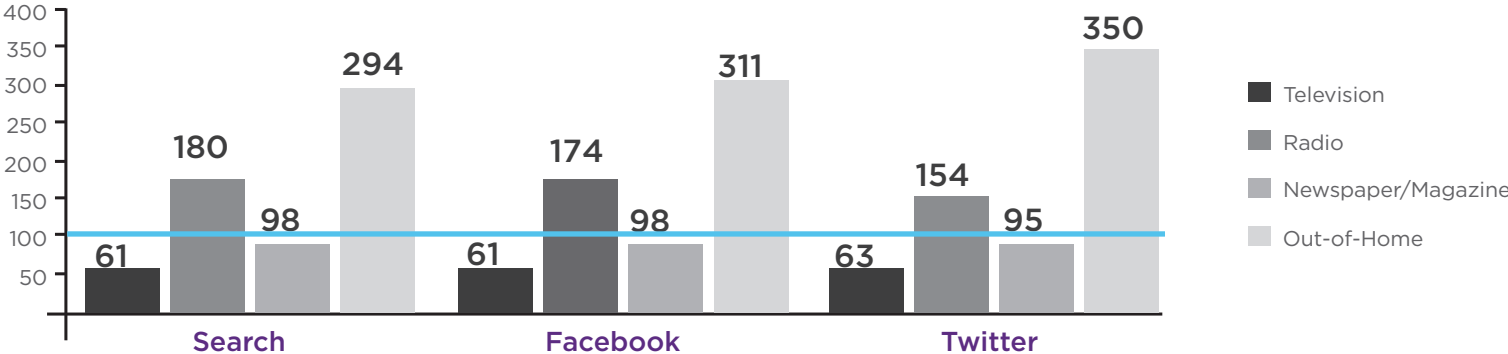
Increase Your Reach!

According to a 2012 survey conducted by Touchpoints USA, when OOH is added to a media plan, it can increase reach by 18% for TV and up to 45% for Radio.



Source: Touchpoints USA Billboard Study, 2012

Out-of-home media delivers more online activity per advertising dollar spent compared to other offline media.



Source: Arbitron OOH Industry Report, 2013

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Top 50 Market Coverage

National

Market	CBSA Population Age 18 +	Bulletins/ Walls	Posters/ Jr. Posters	Commuter Rail/ Subway	Buses	Street Furniture	Wrapped Media	Lifestyle Centers
New York, NY /	15,542,241	● ● ●		● ●	●	● ● ●	●	
North Jersey & Central Jersey		● ● ●	● ●			●		
Los Angeles-Long Beach, CA	10,097,604	● ● ●	● ●	●	●	● ●	●	●
Chicago, IL-IN-WI	7,240,935	● ● ●	● ●			●		
Dallas-Ft. Worth-Arlington, TX	5,021,427	● ● ●				●		
Philadelphia, PA-NJ-DE-MD /	4,685,125	● ● ●	●			●		
South Jersey		●	●					
Miami-Ft. Lauderdale, FL	4,630,257	● ● ●		● ●	● ●	● ● ●	● ●	
Houston-The Woodlands, TX	4,618,841	● ●						
Washington, DC-VA-MD-WV	4,586,521	● ●		● ●	● ●	●	● ●	
Atlanta, GA	4,151,743	● ●	● ●	● ●	●	●	●	
Boston-Cambridge-Newton, MA-NH	3,719,611	● ●			●	●	●	
San Francisco /	3,581,937	● ● ●	●	●	●	●	●	
Oakland /		● ●	●	●		●		
San Jose, CA		● ●	●			●		
Detroit-Warren-Dearborn, MI	3,304,083	● ●	●		●		●	
Phoenix-Mesa-Scottsdale, AZ	3,291,338	● ●	● ●	●		●	●	
Riverside, CA	3,198,983	●	●					
Seattle-Tacoma-Bellevue, WA	2,801,694	●						
Minneapolis - St. Paul, MN	2,619,027	● ● ●	●			● ●	● ●	
San Diego-Carlsbad, CA	2,482,234	●	●					
Tampa-St. Petersburg (Sarasota), FL	2,295,936	● ●	●					
Baltimore-Columbia-Towson, MD	2,160,112	●						
St. Louis, MO-IL	2,154,121	● ●	● ●					
Denver-Aurora-Lakewood, CO	2,048,026	● ●	●			●		
Pittsburgh, PA	1,903,671	●						
Portland-Vancouver, OR-WA	1,787,126	●						

● indicates OUTFRONT media available ● indicates new VW media available ● indicates digital media available

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Top 50 Market Coverage

National

Market	CBSA Population Age 18 +	Bulletins/Walls	Posters/Jr. Posters	Commuter Rai/Subway	Buses	Street Furniture	Wrapped Media	Lifestyle Centers
Orlando-Kissimmee-Sanford, FL	1,761,904	••	•					
Charlotte-Concord, NC-SC	1,755,360	•						
San Antonio-New Braunfels, TX	1,693,865	•						
Sacramento-Roseville, CA	1,692,858	••	••					
Cincinnati, OH-KY-IN	1,618,382	•						
Cleveland-Elyria, OH	1,600,000	•						
Kansas City, MO-KS	1,542,644	••	•					
Las Vegas-Henderson-Paradise, NV	1,534,839	••••	•		•		•	
Columbus, OH	1,493,736	••	•					
San Jose-Sunnyvale, CA	1,471,292	••	•					
Indianapolis-Carmel-Anderson, IN	1,458,887	••						
Austin-Round Rock, TX	1,432,156							
Nashville-Davidson, TN	1,342,734	••						
Virginia Beach, VA-NC	1,326,944	•						
Providence-Warwick, RI-MA	1,269,798	•						
Milwaukee-Waukesha, WI	1,196,260	•						
Jacksonville, FL	1,074,558	••						
Memphis, TN-MS-AR	1,005,686	••						
Oklahoma City, OK	994,106							
Louisville, KY-IN	968,041	••	•			•		
Richmond, VA	965,375	•						
New Orleans-Metairie, LA	960,471	••	••					
Hartford-West Hartford, CT	957,210	••	••					
Raleigh, NC	908,951	•						
Buffalo-Cheektowaga, NY	899,003							
Birmingham-Hoover, AL	873,778							
Rochester, NY	849,624	•						

• indicates OUTFRONT media available • indicates new VW media available • indicates digital media available

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