The National In-Car Study
The Power of Outdoor Advertising
How the In-Car Study Was Conducted

1,505 telephone interviews were conducted in July 2003

• National U.S. random sample

• 98.4% of the sample had driven or ridden as a passenger in non-public transportation vehicles (car/truck/van, etc.) in the last month
In-Car Trends
Americans Are Spending More Time In-Car

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

- More Time: 39%
- Less Time: 24%
- Same Amount: 37%

Base: Driven/Ridden In a Car in Last Month
Traffic Is Getting Worse

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

More Traffic: 70%
Less Traffic: 13%
Same Amount: 17%

Base: Driven/Ridden In a Car in Last Month
On Average, People Spend More Than 15 Hours Per Week In-Car

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

- Weekdays: 11:00
- Weekend Days: 4:10

Nearly 14% of Waking Hours
Nearly as Much Time Spent In-Car on Weekends as Weekdays

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

Weekday: 2:12
Weekend Day: 2:05
Men Report More Time In-Car Than Women During Weekdays

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

- **Weekday**
  - Men: 2:28
  - Women: 1:57

- **Weekend Day**
  - Men: 2:05
  - Women: 2:05

**Bar Chart**

![Bar Chart](chart.png)
People Cover Plenty of Ground In-Car

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

<table>
<thead>
<tr>
<th></th>
<th>Total</th>
<th>Men</th>
<th>Women</th>
</tr>
</thead>
<tbody>
<tr>
<td>Miles</td>
<td>306</td>
<td>375</td>
<td>239</td>
</tr>
</tbody>
</table>

Base: Driven/Ridden In a Car in Last Month
Who Is the Heavy In-Car Consumer?

“Mega-milers”

<table>
<thead>
<tr>
<th>Category</th>
<th>Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>$100K+ HH Income</td>
<td>142</td>
</tr>
<tr>
<td>Male</td>
<td>131</td>
</tr>
<tr>
<td>Age 35-54</td>
<td>131</td>
</tr>
<tr>
<td>Four-Year Degree or Higher Education</td>
<td>112</td>
</tr>
<tr>
<td>TV Time Spent Viewing</td>
<td>92</td>
</tr>
</tbody>
</table>

Base: Drive/Ride in Car More than 260 Miles Per Week
Only a Small Fraction Regularly Use Cell Phone While In-Car

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

- Do Not Own/Use Cell Phone: 45%
- Almost Never: 13%
- Almost All of the Time: 6%
- Some of the Time: 30%
- Most of the Time: 6%

Base: Driven/Ridden In a Car in Last Month
In-Car Buying Decisions
Exploring the Power of Recency for In-Car Advertising

- **Recency** planning starts with the idea that *when* is the critical variable rather than *how many*—in other words, advertising effects can also be controlled by *when* the message is received.
Targeting Consumers Close to Purchase? The Real Value Is in the afternoon

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

<table>
<thead>
<tr>
<th>Time Event</th>
<th>Frequently</th>
<th>Sometimes</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Before You Get to Work</td>
<td>3%</td>
<td>13%</td>
<td>16%</td>
</tr>
<tr>
<td>During Your Lunch Break</td>
<td>4%</td>
<td>17%</td>
<td>21%</td>
</tr>
<tr>
<td>On Your Way Home from Work</td>
<td>19%</td>
<td>43%</td>
<td>62%</td>
</tr>
<tr>
<td>After You Get Home from Work</td>
<td>20%</td>
<td>44%</td>
<td>64%</td>
</tr>
</tbody>
</table>

Base: Work Full/Part Time
Workers Make Many Stops on the Commute Home

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

- Grocery Store: 77%
- Convenience Store: 62%
- Large Retail Store: 57%
- Drugstore: 49%
- Pick Up Dinner from a Fast-Food Restaurant: 48%
- Department Store: 34%
- Pick Up Dinner from a Sit-Down Restaurant: 17%

Base: Work Full/Part Time
Two Out of Five Consumers Don’t Make the Decision to Shop Until the Last Minute

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

- Earlier in the Day: 53%
- While on Your Way Home: 40%
- Don't Know: 7%

Base: Work Full/Part Time
Men Are More Likely to Be Last-Minute Shoppers

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

While on Your Way Home

<table>
<thead>
<tr>
<th></th>
<th>Men</th>
<th>Women</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>45%</td>
<td>31%</td>
</tr>
</tbody>
</table>

Base: Work Full/Part Time
In-Car Study Shows
Outdoor Gets Results
Outdoor Gets Results

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

- Learn about an event you were interested in: 61%
- Hear/see something funny that you talked about with others that day: 55%
- Learn about a store that you later visited: 53%
- Learn about a restaurant you later visited: 52%
- Learn about or been reminded to listen to a radio station: 47%
- Note a phone number: 34%
- Note a Web address: 29%
Outdoor Can Deliver Immediate Results for an Advertiser

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

<table>
<thead>
<tr>
<th>Timeframe</th>
<th>% Saying “Yes”</th>
</tr>
</thead>
<tbody>
<tr>
<td>Later that Day</td>
<td>20%</td>
</tr>
<tr>
<td>Later that Week</td>
<td>29%</td>
</tr>
</tbody>
</table>

Base: Total Population 12+
Time Spent In-Car Creates More Outdoor Advertising Results

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

- Light (<1 Hour/Day): 16%
- Medium (1 to <2 Hours/Day): 17%
- Heavy (2+ Hours/Day): 24%
Outdoor Advertising Impact Grows with In-Car Exposure

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

- Light (1 Hr./Weekday): 19%
- Medium (1 to <2 Hrs./Weekday): 29%
- Heavy (2+ Hrs./Weekday): 34%
Key Findings

- 15 hours a week in car means high Outdoor advertising exposure

- Outdoor can impact shopping that occurs on the way home from work

- Outdoor gets results – consumers report billboards prompts them to visit stores
The National In-Car Study

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