

# Nielsen Outdoor “GPS based Ratings”

Madrid, Spain

September, 2005



# Spanish Outdoor Adspend 2004

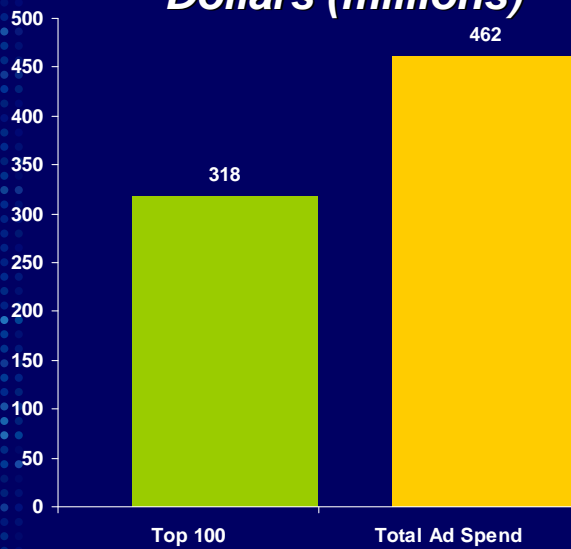
Source: Infoadex



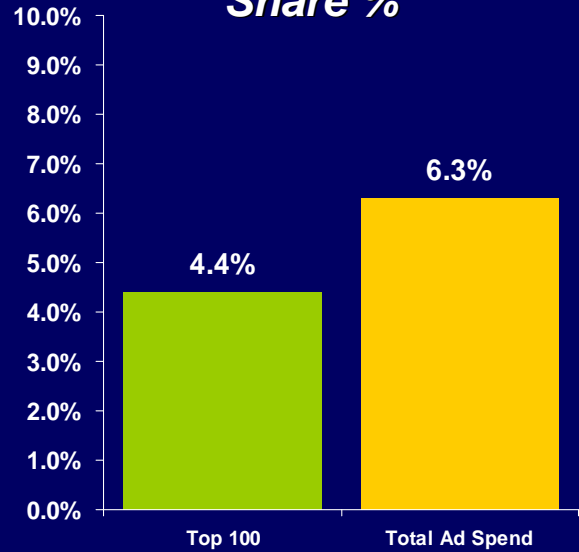
# 2004 Outdoor Ad Spending

estimated net figures

**Dollars (millions)**



**Share %**



Source: NMR AdEx/ Infoadex

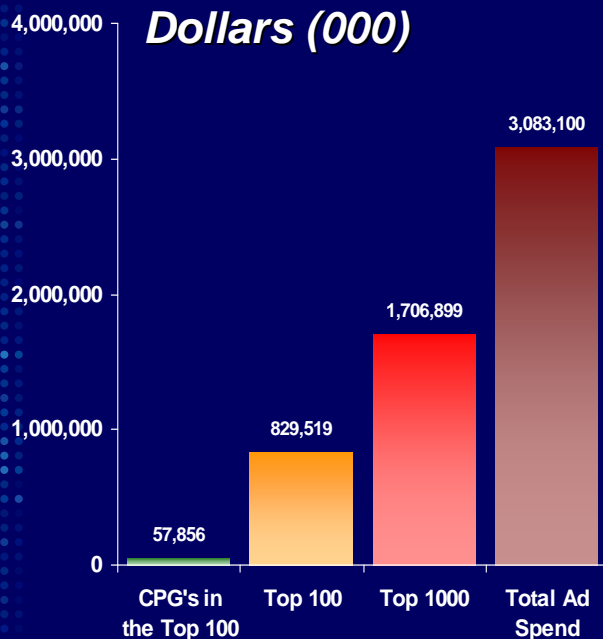
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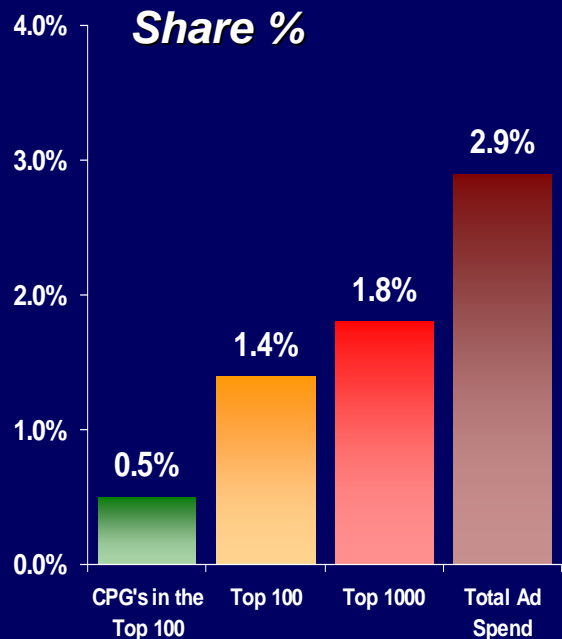


# 2004 Outdoor Ad Spending- USA

**Dollars (000)**



**Share %**



Source: Monitor-Plus

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## Top 10 Spain Advertiser \$96m (20.7%)

### Liquor, cigarettes & telecoms

Company	Total \$(m)
DIAGEO ESPANA, S.A.	\$14.1
ALLIED DOMECQ ESPANA, S.A.	\$12.9
PHILIP MORRIS SPAIN, S.A.	\$11.5
TELEFONICA MOVILES, S.A.	\$11.2
ALTADIS, S.A.	\$10.7
EL CORTE INGLES, S.A.	\$7.9
BACARDI ESPANA, S.A.	\$7.9
BRITISH AMERICAN TOBACCO ESPANA	\$6.8
VODAFONE ESPANA, S.A.	\$6.7
PARTIDO POPULAR	\$5.9

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Source: NMR AdEx

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## Top 10 USA '04 \$289m (9.4%)

### Beer, Telecoms & Fast Foods

Company	Total \$(000)
Anheuser-Busch Inc	\$50.8
Warner Bros Entertainment Inc	\$38.9
Verizon Communications Inc	\$37.8
McDonalds Corp	\$34.7
Clear Channel Broadcasting Inc	\$29.5
Washington Mutual Financial Group	\$21.9
Miller Brewing Co	\$21.8
Nissan North America Inc	\$18.3
General Motors Corp	\$18.0
Nextel Communications Inc	\$17.2

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Source: Monitor-Plus

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# Outdoor Industry Video

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## Nielsen Outdoor Goals

- Using a passive electronic device, accurately track exposure to maximum number of Outdoor sites ( 96% in Chicago)
- Recognize Outdoor as viable mainstream media for national advertisers/agencies
- Provide ROI and accountability for the medium
- Assist Outdoor industry grow market share through comparable, credible audience measurement estimates



## What are GPS based ratings?

**Accurately tracks a representative sample of individuals travel via a passive electronic GPS device (Npod) and converts it to a credible audience measurement currency via sophisticated computer software.**

# Created Global Advisory Council

- Media Owners
  - JCDecaux
  - Clear Channel Outdoor
  - Viacom Outdoor
  - Van Wagner
  - Lamar Outdoor
- Advertising Agencies
  - Mediacom
  - Universal McCann
  - Starcom Mediavest Group
  - Mindshare
- Industry Groups
  - OAAA (Outdoor Advertising Association of America)
  - Traffic Audit Bureau (consult/alliance)

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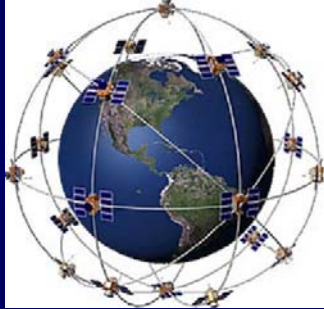


## Outdoor Audience Estimates

“Reach, Frequency and Ratings”



# How does Global Positioning System (GPS) work?



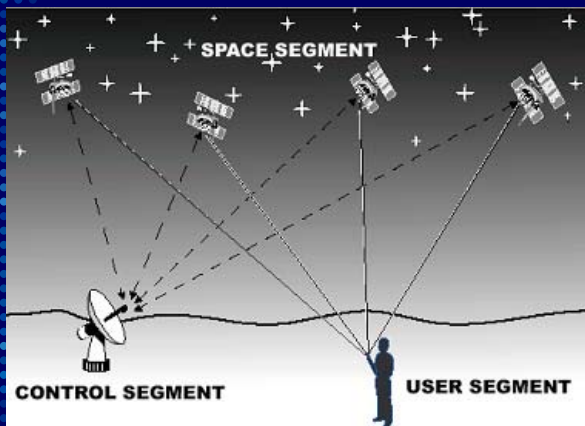
- 24 satellites orbiting the earth
- Satellites emit a timing Pulse which can be picked up by a GPS receiver

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# How does GPS work to track travel data ?



- GPS receiver detects signal from 3 or more satellites
- Using triangulation, exact location on Earth can be found

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# NPOD

- Has the ability to collect data even when few GPS satellites can be received.
- Power is supplied by prismatic Lithium ion battery pack, giving over 24 hours of use between charges.
- NPOD has an on-board microprocessor which is responsible for data storage, system status message generation and monitoring battery voltage
- Data storage card is extracted from Npod after use by respondent, data downloaded and ready for re-use.



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## What makes Npod™ better than standard GPS devices?

- Npod™ has customised standard GPS to accommodate Outdoor need
- Acquires satellite much more quickly than standard GPS
- Requires fewer than 3 satellites to acquire a fix - vital for “urban canyons”
- Converts travel to a credible audience measurement currency via sophisticated computer software.



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# Npod Post Processing

- Npod captured accurate travel data in majority of areas.
- Post processing is applied to Npod data using proprietary Artificial Intelligence (AI) software based on a customized Bayesian logic or “decision tree” program.
- Post Processing can be applied within identified constraint areas, (e.g Chicago Loop), or on the entire DMA by post processing each individual impact zone.
- Post Processing software is applicable in Chicago and around the world (as validated in Chicago and Frankfurt, Germany).

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# Npod™ Validation

- Independent test conducted in Frankfurt by German AGMA with consultant and Nielsen employee.
- Data post-processed for the Frankfurt downtown “constraint area”, and compared with actual travel – by car and walking.
- Incredibly accurate!
- Similar test conducted in Chicago

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# Frankfurt test incredibly accurate



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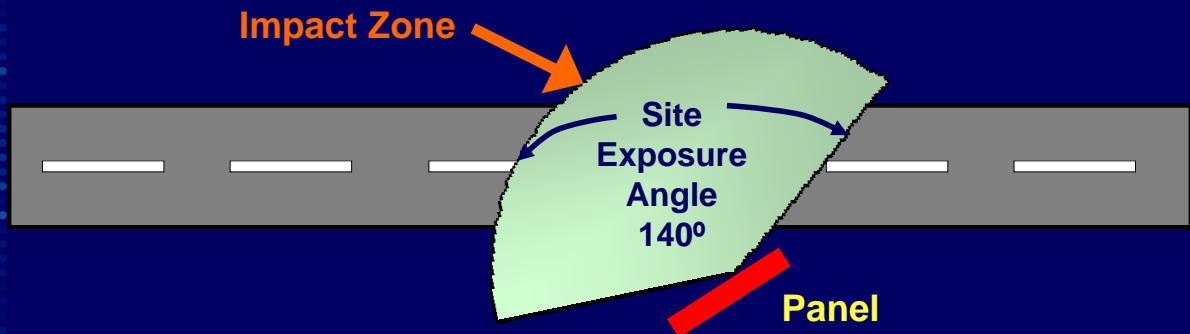


## Converting “Travel” to “Passage”



# Converting Travel to Passage

- Nielsen Outdoor developed concept of “Impact Zones” which accurately measures passage past site when traveling on the primary road only, direction favorable
- Impact Zones were created based on radius of partial circle around site where OTS was possible



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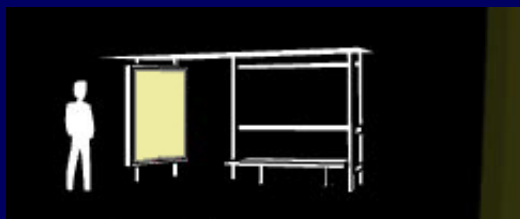
## Impact Zone Determination

Six site type/sizes are used for computing passage:

**8 Sheet – 5' x 11'**



**30 Sheet – 12' x 24'**



**Bus shelter**




**Bulletin 1 (up to 12' x 45')**  
**Bulletin 2 (> B1 and < B2)**  
**Bulletin 3 (20' x 60' +)**

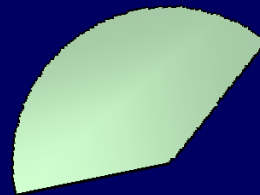
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# What the computer sees...

- A trip through Chicago's Northwest suburbs into the heart of the city, into the downtown area
- Each satellite fix is shown as a red 'plus' sign.
- The visibility area for each site is shown as a  green cone (like a pizza slice).

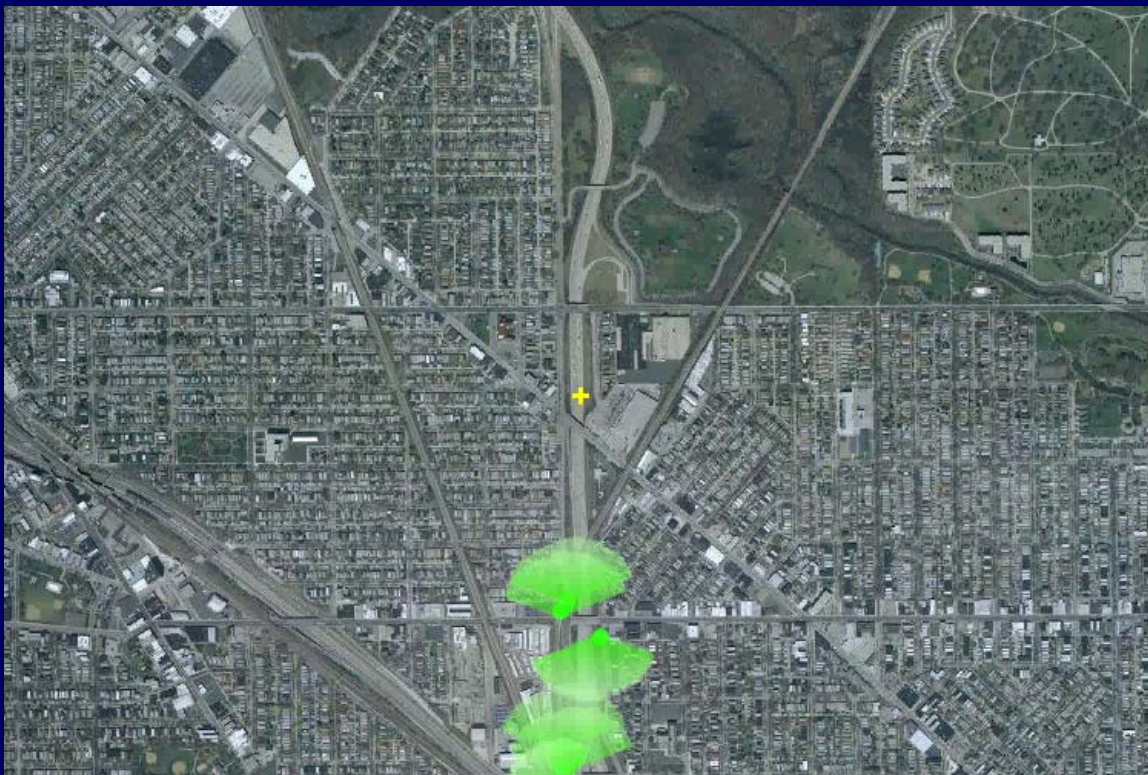


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# A Trip Through Downtown Chicago



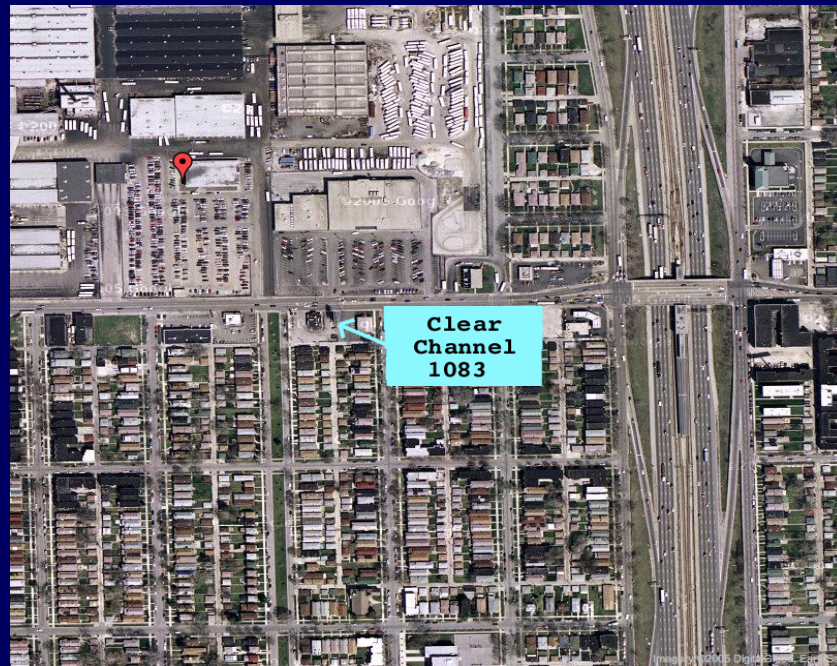
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# Satellite image for Site 1083



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## Chicago Results

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# Delivering OTS ratings

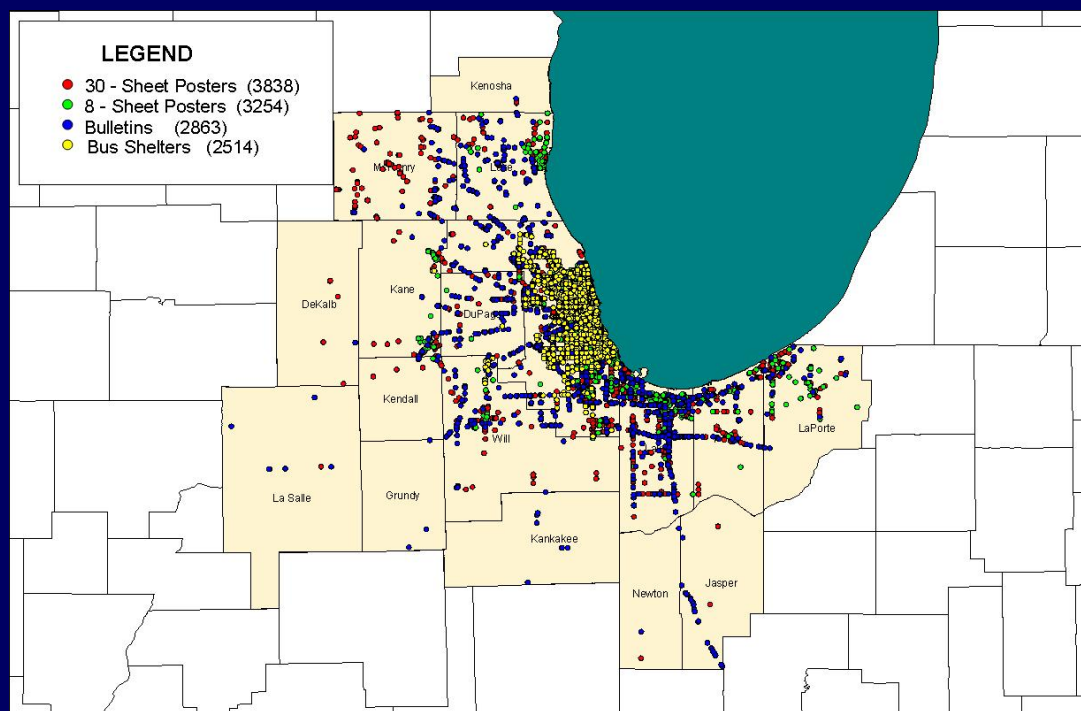
- “Respondent is in the geographical area of the site location, has a potential line of sight and is traveling in a direction favorable to the site”
- Key measurement inputs which determine data metrics:
  - Site location co- ordinates
  - Sample composition and size, projected to Universe
  - Impact Zone and radius
  - Site specific harmonization with reputable traffic count data where available
  - Reach, frequency and ratings of Nielsen-defined market and the market’s associated demographics

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## Site Locations in Chicago



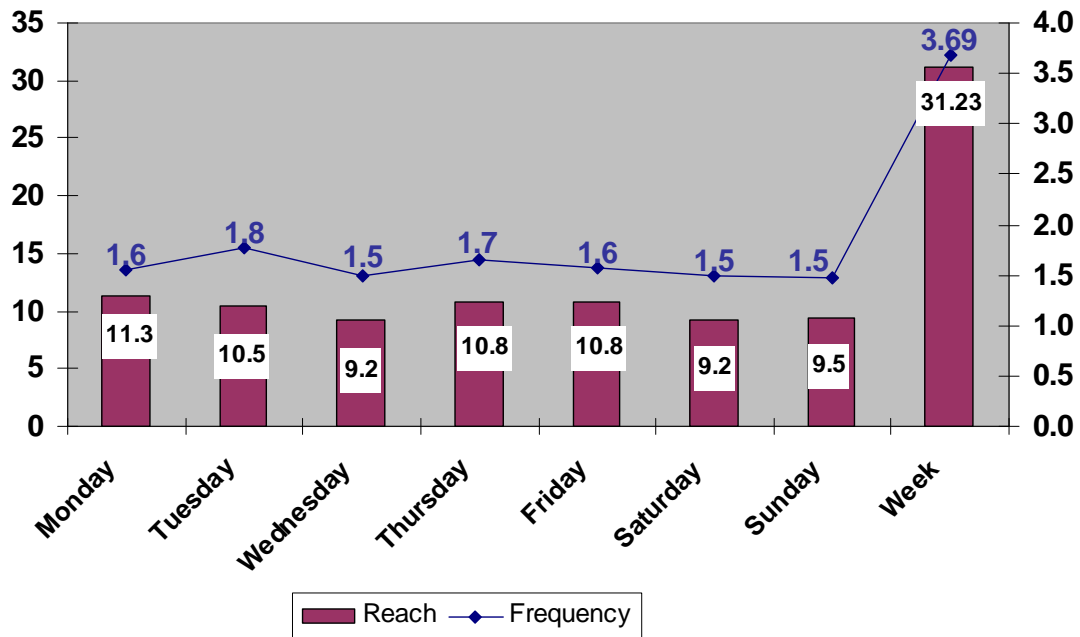
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### Sample Chicago Bulletin Weekly Campaign (500 GRP / Month)

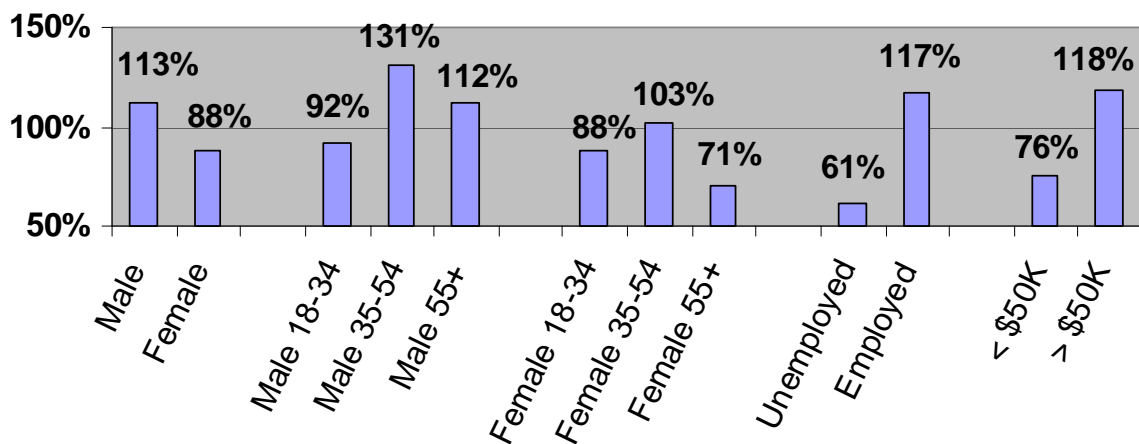


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### GRPs of 25 Bulletins Campaign Indexed to Total Adult 18+

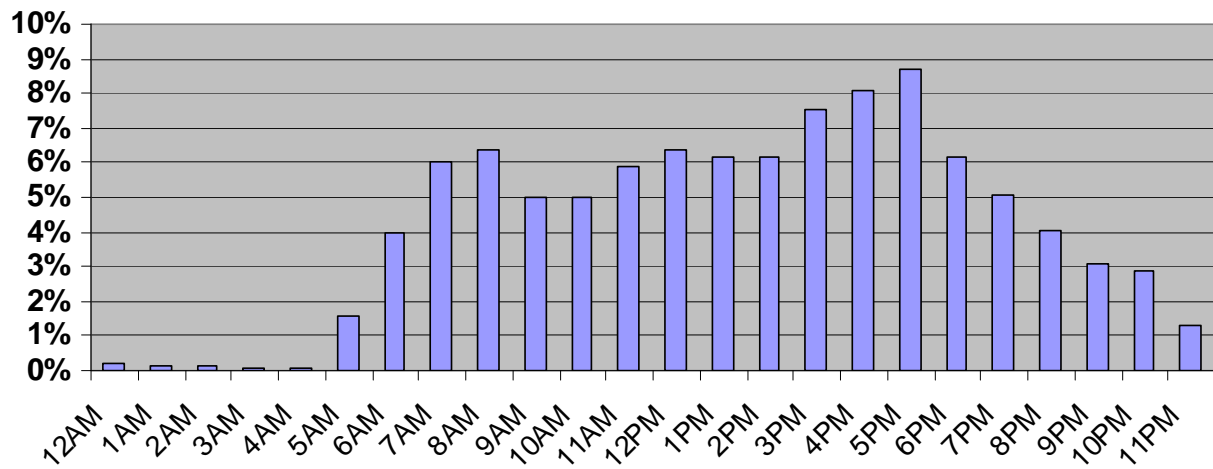


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### Percent of Daily GRPs by Time of Day



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## Average 28-Day Reach and Frequency for 500 GRP Campaign\*

	# of Sites	Reach	Frequency
Bus Shelters	68	40.1%	12.9
8 Sheets	149	45.1%	11.2
30 Sheets	79	57.2%	8.9
Bulletins	25	50.8%	9.3

\* Based on the average of 10 campaigns

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# Media Comparisons (4 Week, 500 GRP)

	Spot Prime	Spot Total Day	Spot Radio	Bulletin	30 Sheet	8 Sheet	Bus Shelter
Reach %	78.2	79.2	71.5	50.8	57.2	45.1	40.1
Ave Freq	6.4	6.3	7.0	9.3	8.9	11.2	12.9
# spots / sites	100	215	460	25	79	149	68

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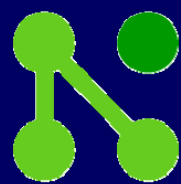
## Current Status

- Nielsen Outdoor worked with TAB Board and TAB technical committee to validate edit rules for Chicago currency
- TAB Board is tripartite alliance of media owners, agencies and advertisers. Major global owners include Clear Channel, Viacom and JCDcaux plus all global Media agencies
- TAB Technical committee approved edit rules .
- IMS have developed OutdoorRF as preferred VNU deliverable, but data to be available via all Third Party Processors if they have subscribing clients
- Planned Market roll out now being discussed in USA
- South African tender awarded to Nielsen Outdoor for 06

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