

Advertising Effectiveness Study For Atlanta MARTA Bus TV Screens



May 2007

Presented By:

CarrollMedia
Services, Inc.

About Transit TV - Atlanta

- 1217 Screens in 538 MARTA Buses
- Full motion video and audio
- :30, :15, and :60 spots
- Commercials are played 1x per hour during each 8-hour rotation purchased (daypart)
- 1,395,000 weekly impressions
- Transit TV CPM: \$6.00



About Carroll Media Services, Inc.

- Leader in Out-of-Home Media, In-Store, and Promotion Compliance/Auditing since 1993
- Performs custom on-site research specializing in media recall, trends, and consumer behavior
- 110 field representatives in 84 North American markets
- Located in Alpharetta, Georgia
- Sample of clients include:
 - Coca-Cola
 - General Motors
 - McDonald's
 - Honda
 - Disney
 - Pernod Ricard
 - Corona Beer
 - Burger King
 - Well Point Healthcare
 - H&R Block
 - Outback Steakhouse
 - Paramount Pictures



MARTA General Information

- 9th largest transit system in the US
- 230,000 average weekday bus ridership
- 120 Bus Routes
- 22.23 million miles of Fixed Bus Route service



The Survey Methodology

- 300 personal interviews
- Conducted May 21 & 22, 2007
- MARTA stations included:
 - Chamblee
 - Hamilton Holmes
 - Avondale
 - North Springs
- Respondents randomly selected as they exited the buses
- Respondents received \$2 for participation
- English and Spanish versions of the survey were administered

Atlanta MARTA Survey

Hi, my name is _____. We are doing a short survey of MARTA bus passengers today. May I ask you a few questions? All information will be kept strictly confidential.

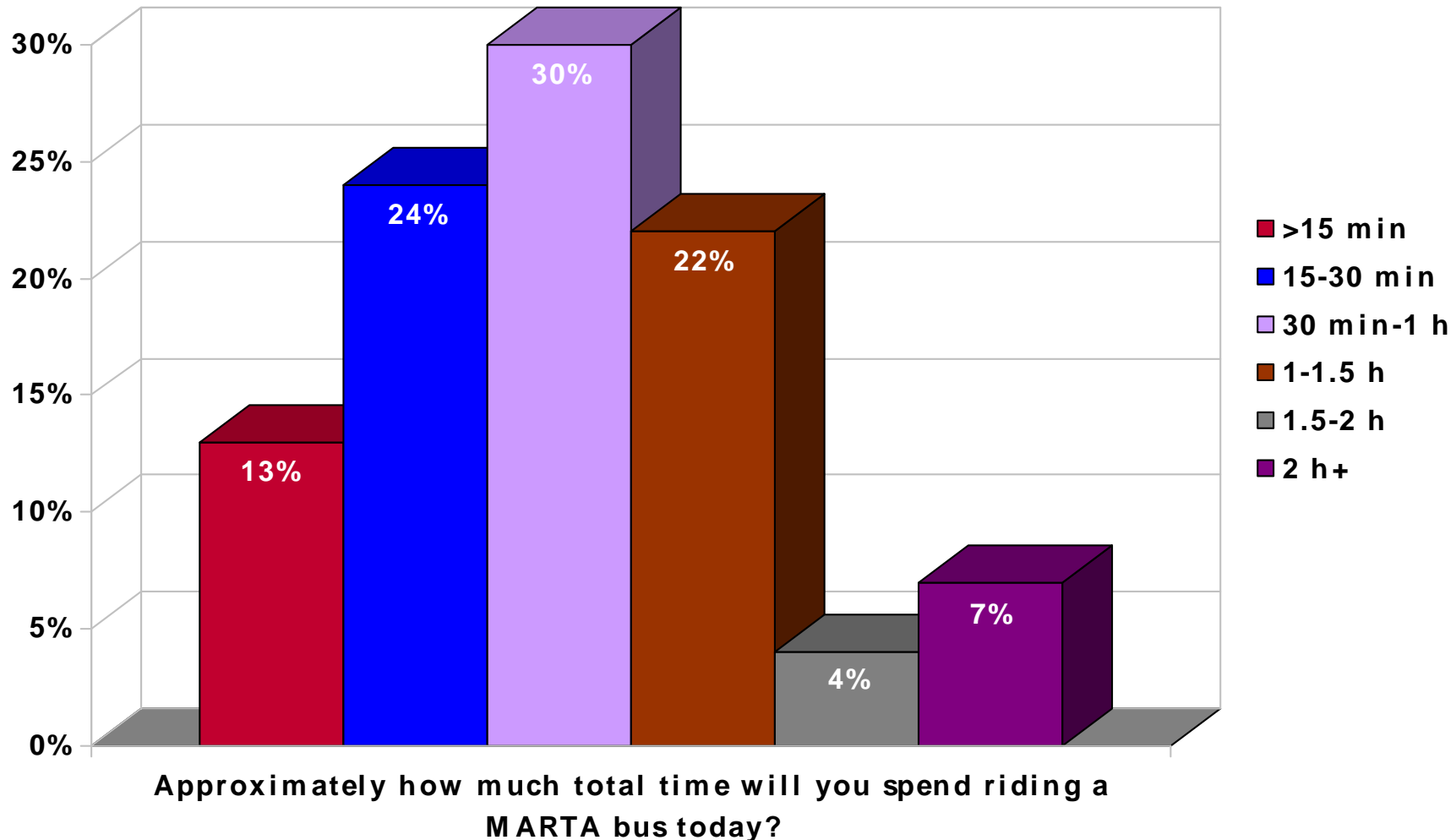
1. In the past week, how many days did you ride a MARTA Bus?
 - a. 1
 - b. 2
 - c. 3
 - d. 4
 - e. 5
 - f. 6
 - g. 7
2. Approximately, how much total time will you spend riding a MARTA bus today?
 - a. >15MIN
 - b. 15-30MIN
 - c. 30MIN-1HR
 - d. 1HR-1.5HR
 - e. 1.5HR-2HR
 - f. 2HR+
3. Thinking about the MARTA bus that you just stepped off of today; did you watch or listen to the television screens at any time?
 - a. Yes
 - b. No
4. During the past Month, have you watched or listened to the television screens on any MARTA bus?
 - a. Yes
 - b. No (if no proceed to Qu. 11)
5. Do you know the name of the company that provides the television screens on MARTA buses?
 - a. Yes – What is the name of the company? _____
 - b. No
6. What is your opinion of the television screens on MARTA buses?
 - a. Very Favorable (5)
 - b. Favorable (4)
 - c. Neutral (3)
 - d. Unfavorable (2)
 - e. Very Unfavorable (1)

MARTA Bus Ridership Patterns Of Respondents

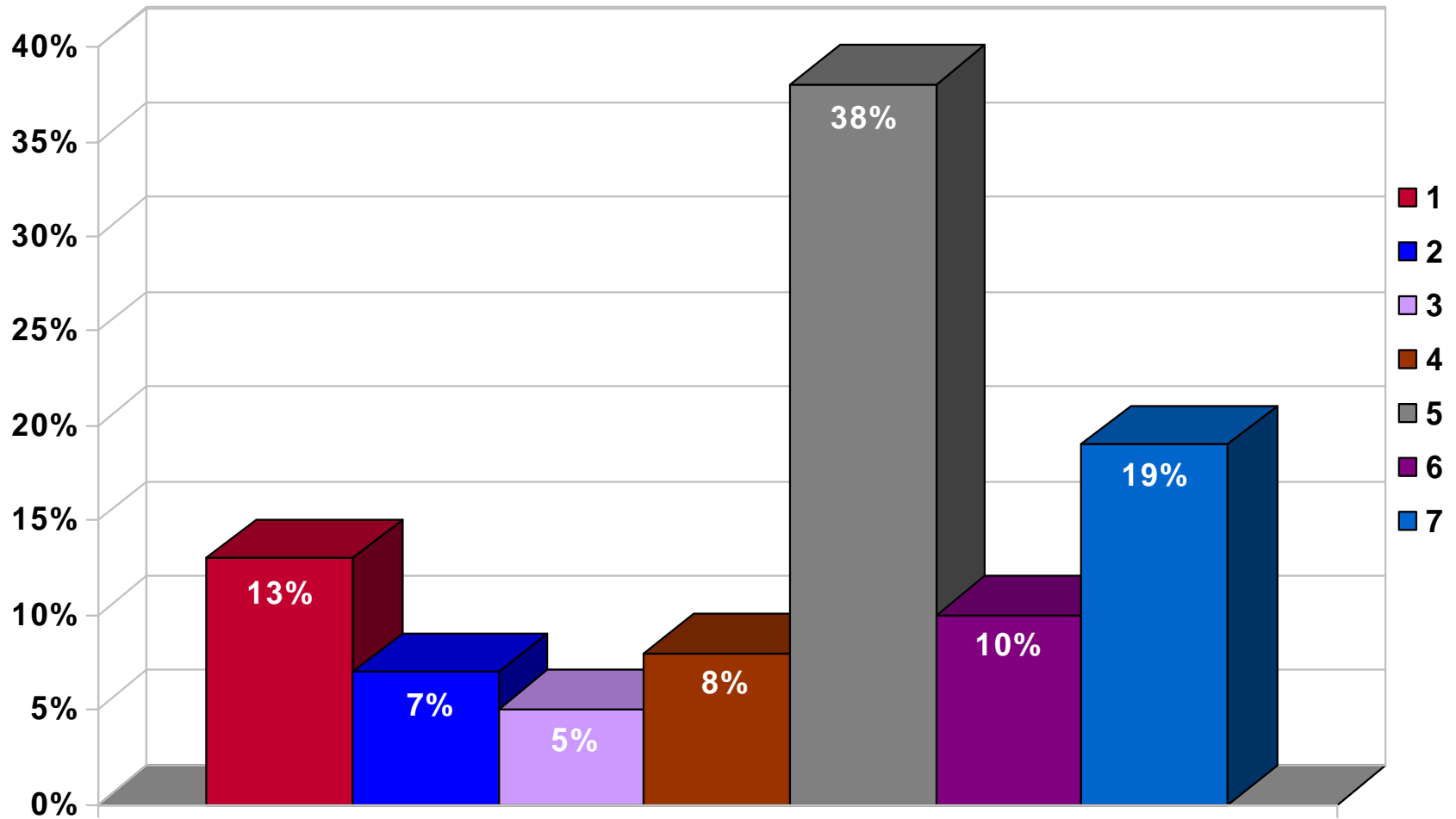
- Significant daily exposure to Transit TV
 - 90% watched Transit TV the day of the survey
- Average time spent on a MARTA bus is 50 minutes per day.
 - Over 50% spend 30-90min on MARTA buses daily
- Average number of days spent riding MARTA buses is 4.6 days per week.
 - 38% ride MARTA buses 5 days per week
 - 67% ride MARTA buses 5-7 days per week



Respondents Spend An Average Of 50 Minutes Per Day On A MARTA Bus

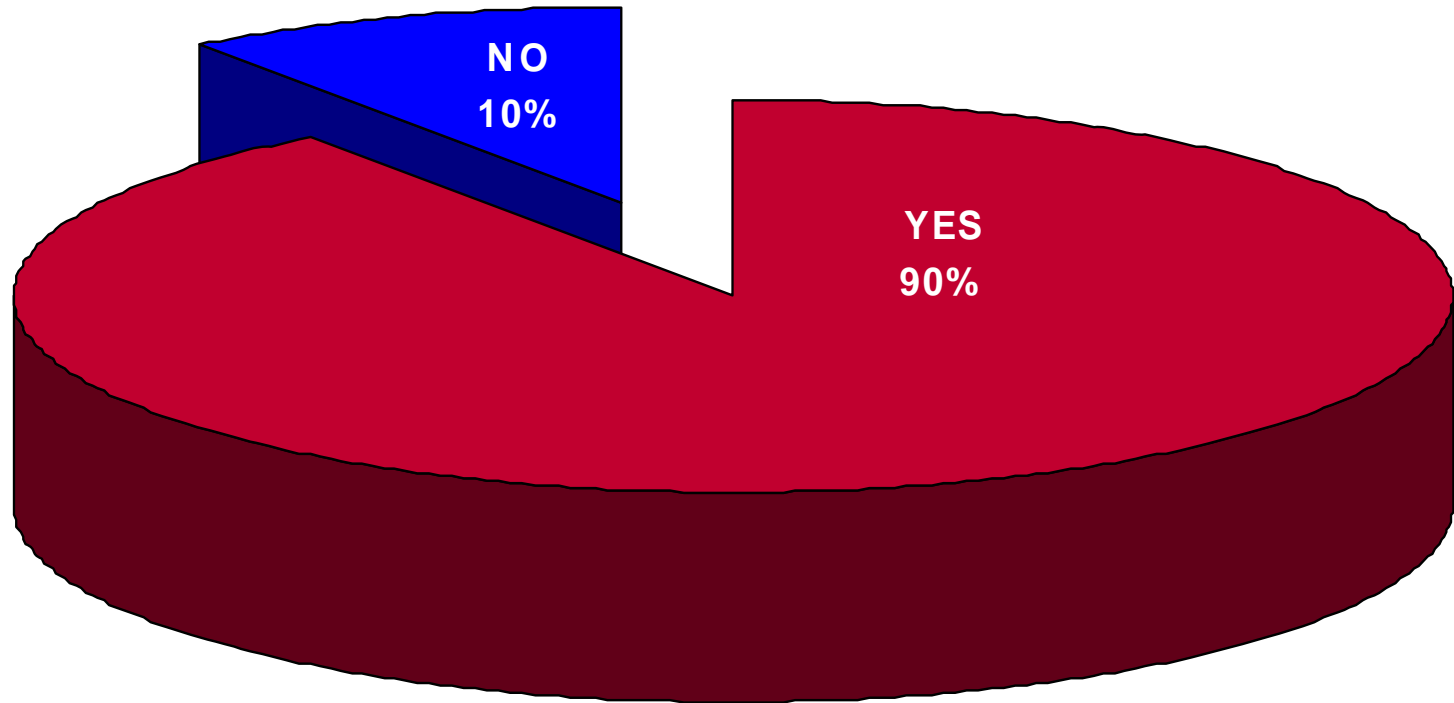


67% of Respondents Ride MARTA Buses 5-7 Days Per Week



In the past week, how many days did you ride a MARTA bus?

90% of Respondents Watched Transit TV On The Day Of The Survey



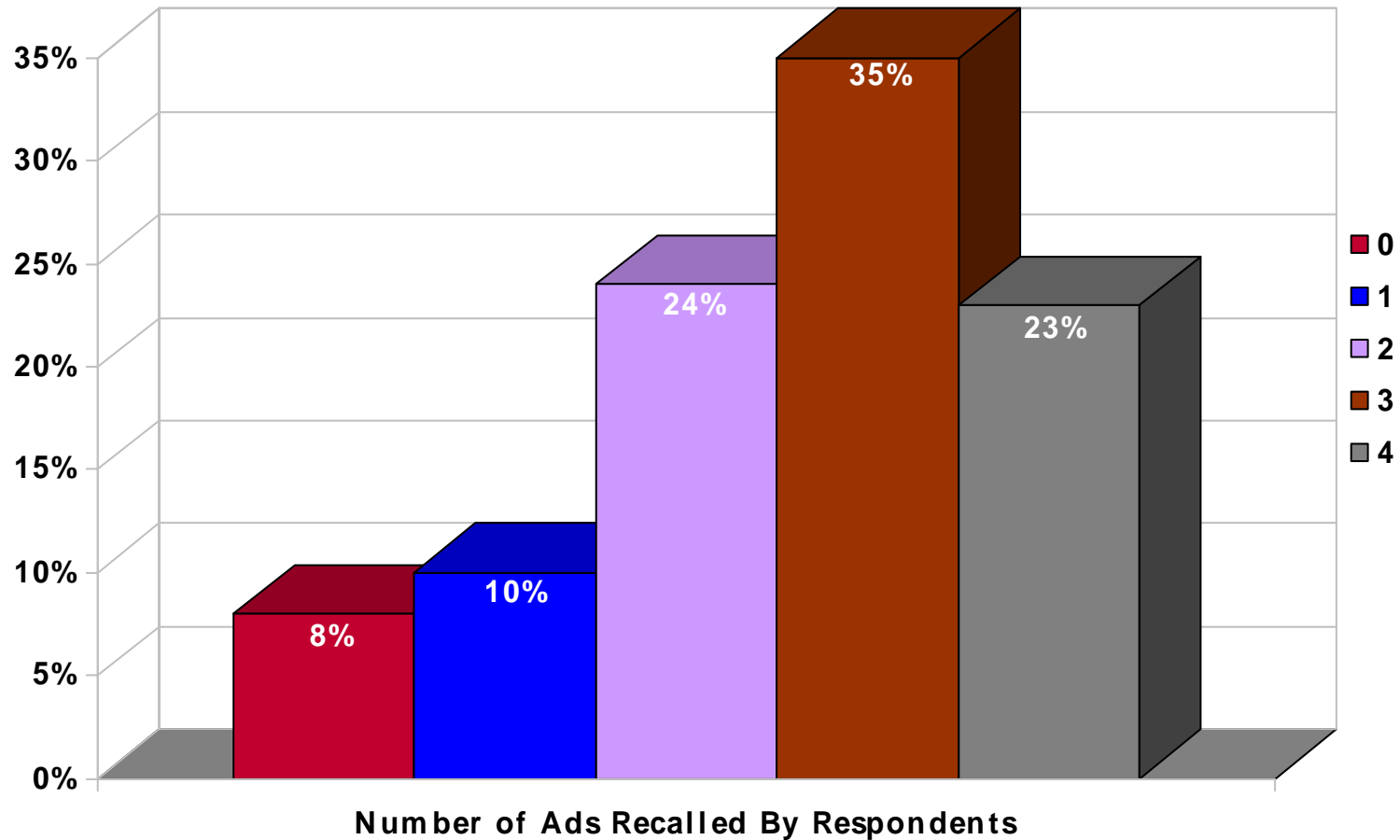
Did you watch or listen to the television screen at any time today?

Transit TV Advertising Effectiveness

- Transit TV ad recall was high
- **59% average aided recall across the 4 brands**
- 3 Types of ad recall measured:
 - Unaided Recall: What are some of the commercials you have seen during the past week on the buses?
 - Aided Recall: Have you seen or heard an ad for the following brand?
 - Super-Aided Recall: Have you seen a commercial which. . . (detailed description of the ad)?

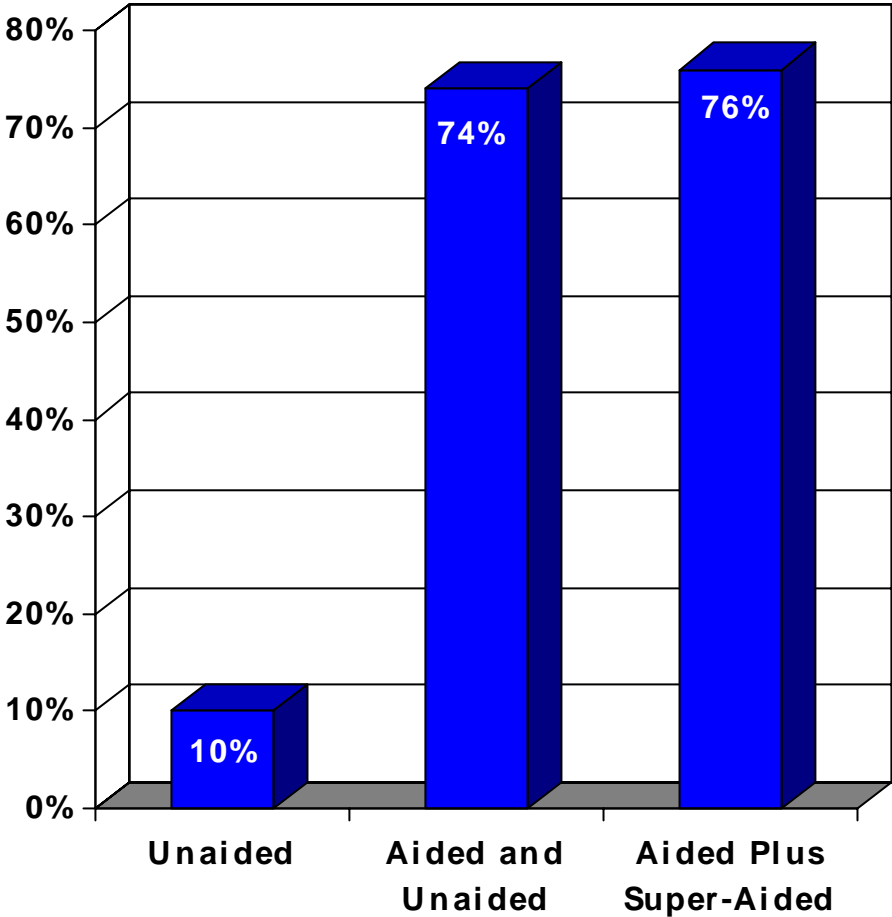
82% of Riders Recalled 2+ Ads

On Average, Riders Recalled 2.55 Ads



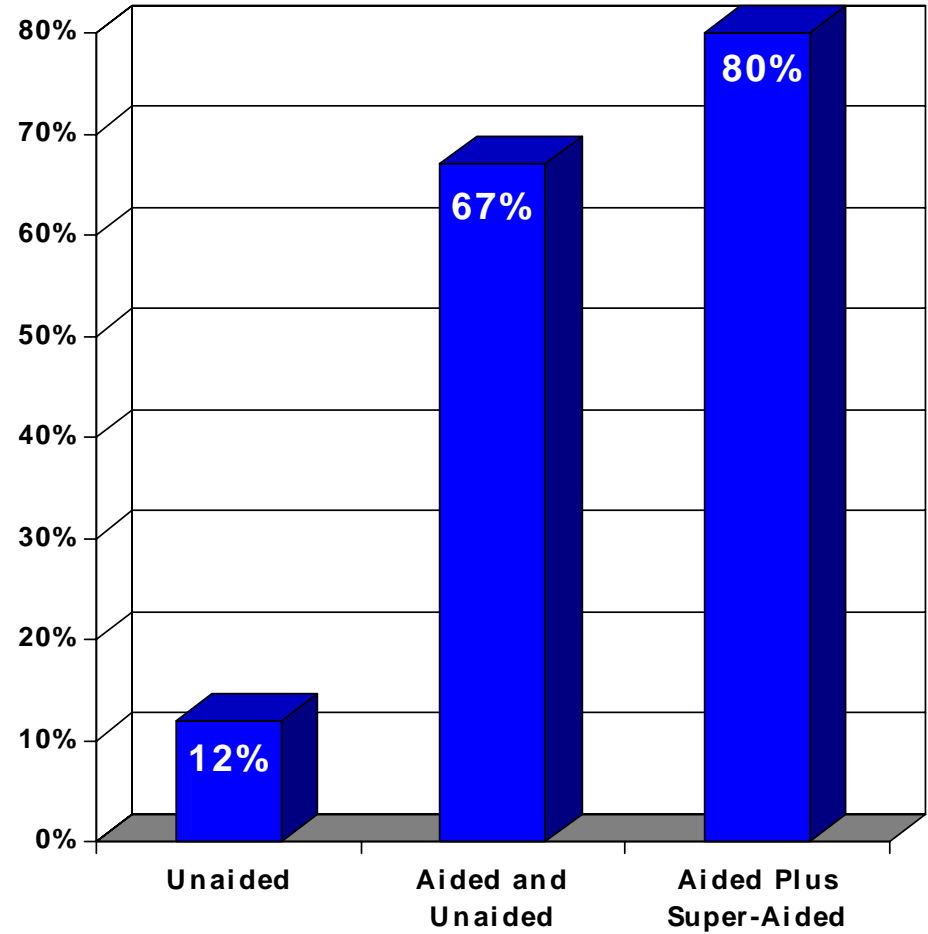
Quick Service Chicken Restaurant

- :30 commercial
- 10% unaided recall
- 76% aided plus super-aided recall
- Women (79%) had a significantly greater aided awareness of the ad relative to male respondents (65%)*



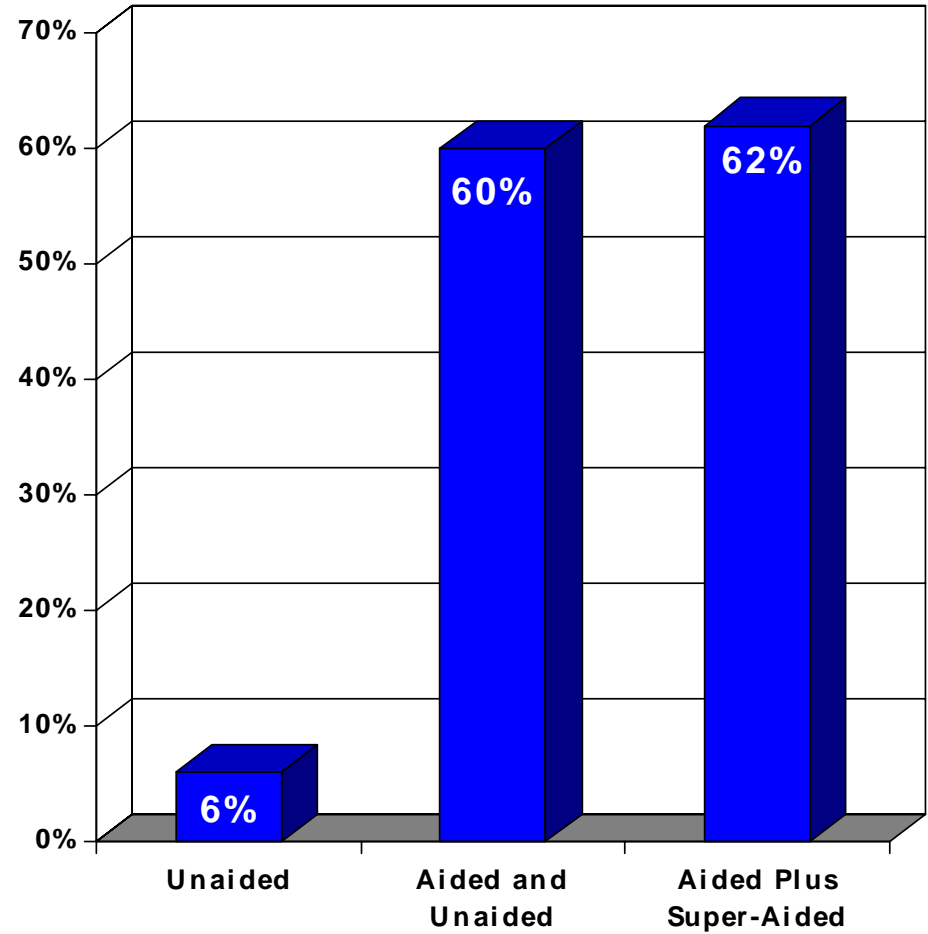
Soda

- :30 commercial
- 12% unaided recall- highest in survey
- 67% aided and unaided recall
- 80% aided plus super-aided recall- highest in survey



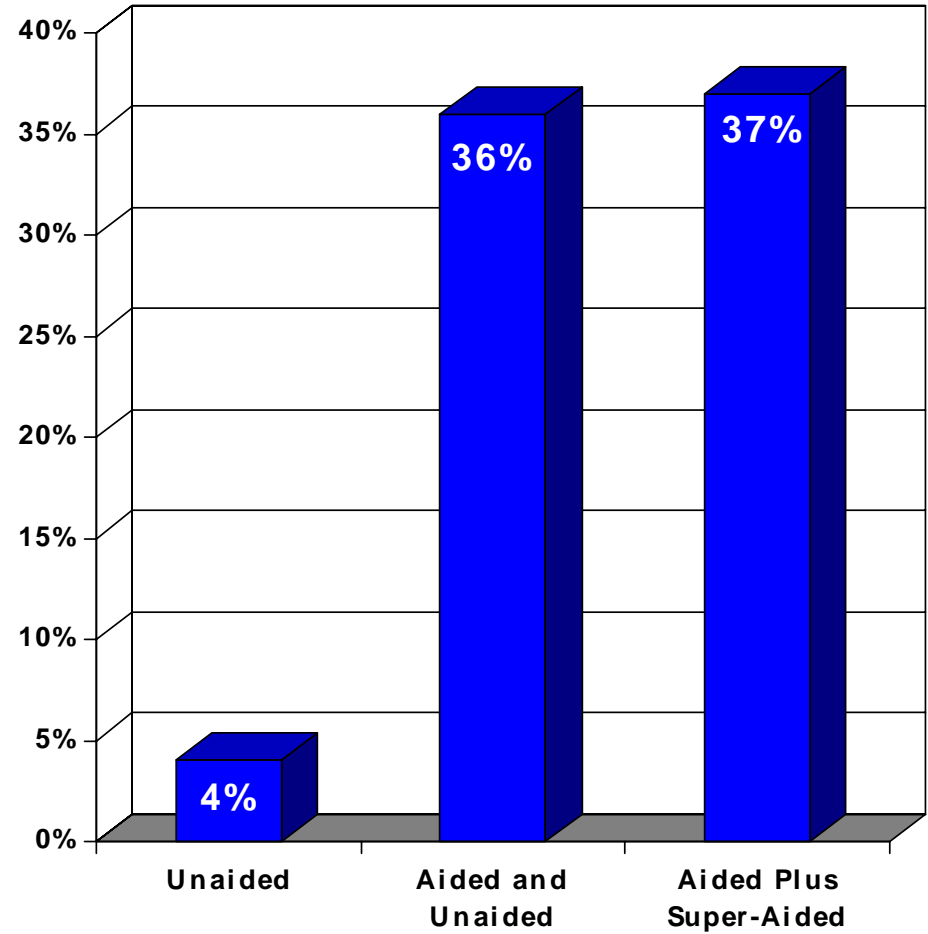
Quick Service Donut and Coffee Restaurant

- :30 commercial
- 6% unaided recall
- 60% aided and unaided recall
- 62% aided plus super-aided recall

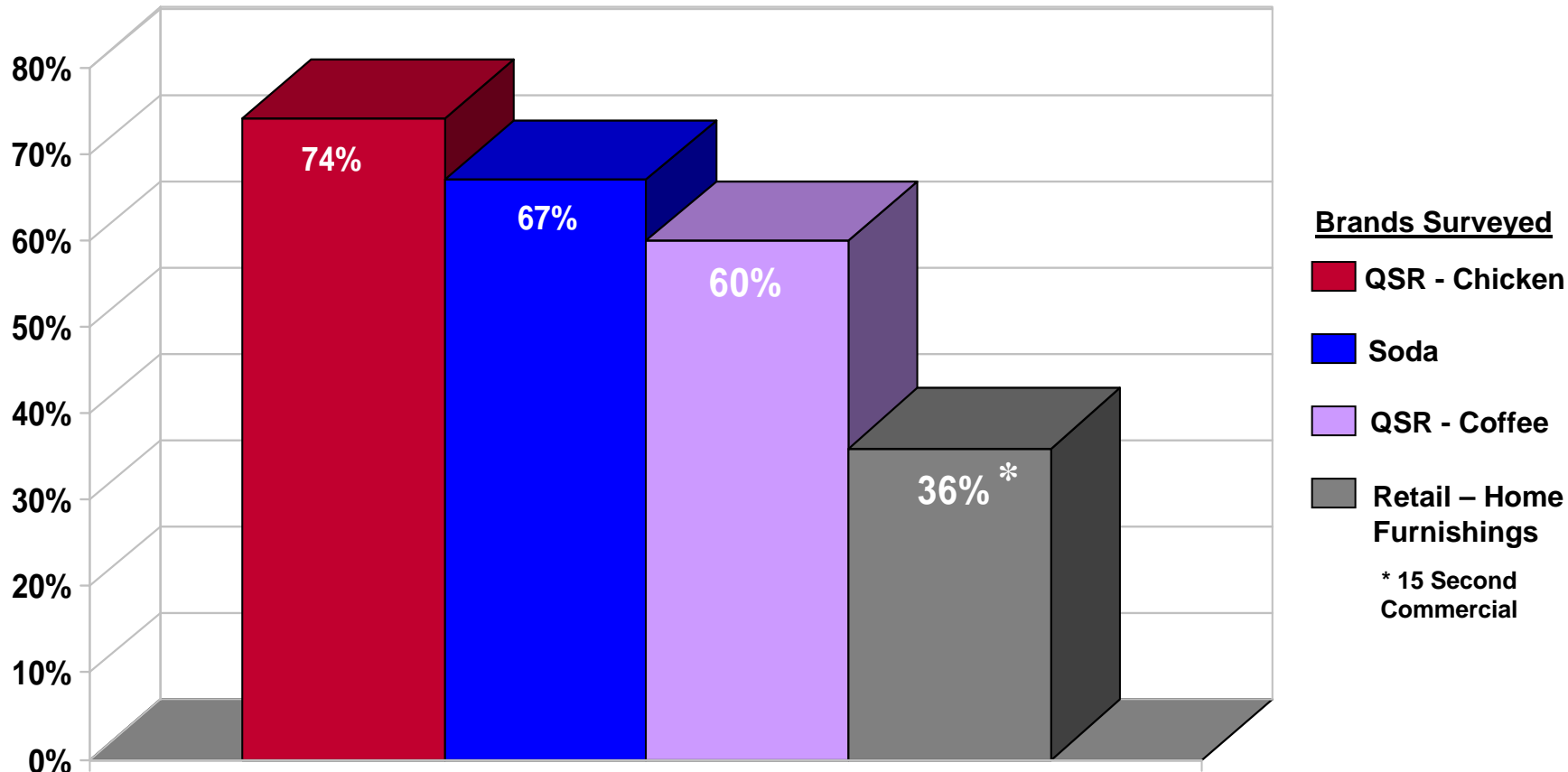


Home Furnishings Retail Store

- **:15 commercial**
- 36% aided and unaided recall
- 37% aided plus super-aided recall
- Women (44%) had a significantly greater aided awareness of the ad relative to male respondents (23%)*



Average Aided Recall of 59%



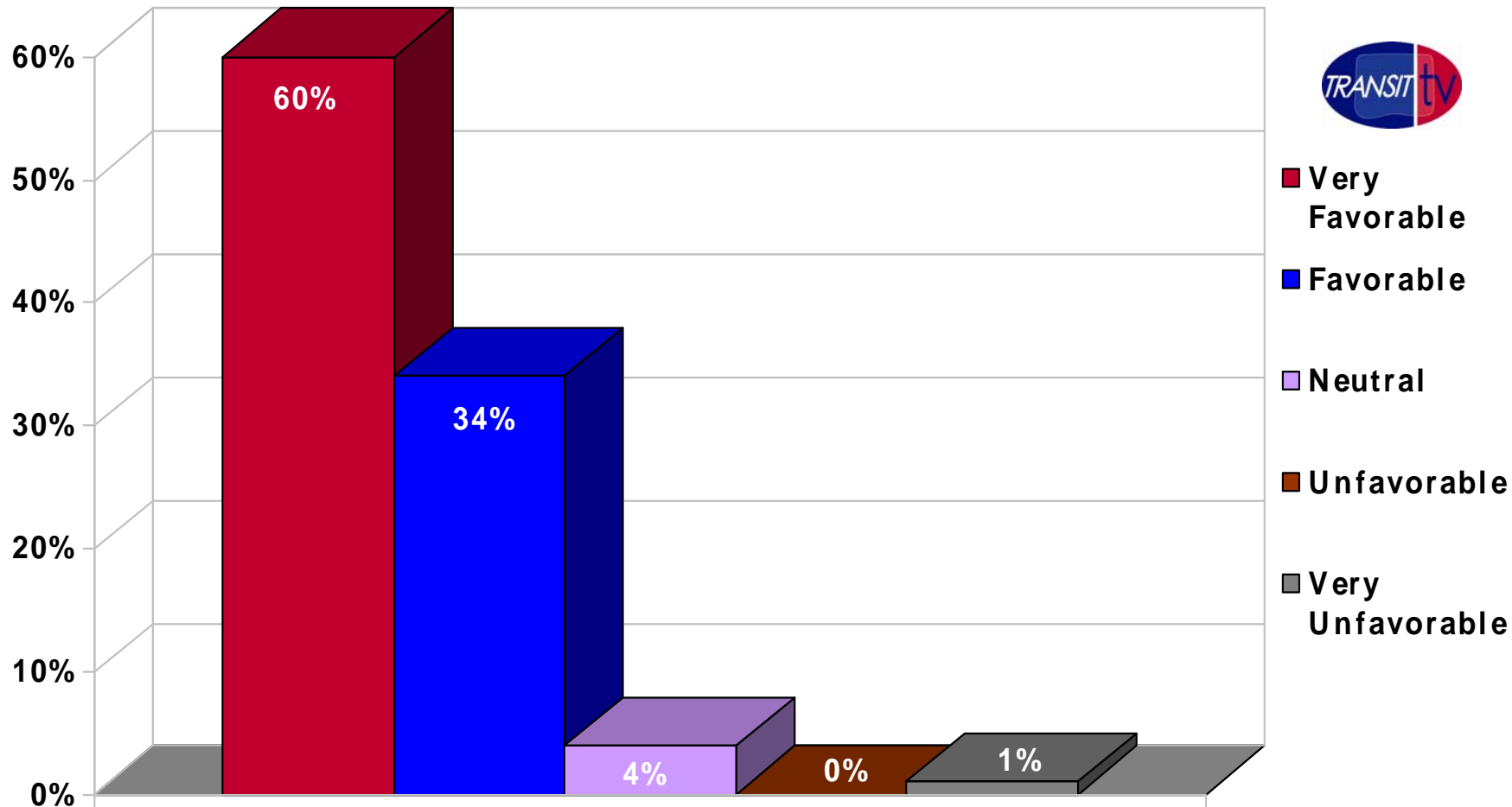
In the past week, have you heard or seen any commercials for the following brands on the TVs in the bus?

Transit TV Acceptance and Engagement Of Respondents

- 94% rated Transit TV screens as very favorable or favorable.
- 79% say Transit TV makes their ride seem faster and more enjoyable.
- Almost 75% say Transit TV is entertaining.
- 20% rate Transit TV as a primary source for news and weather.
- 72% say the volume level of the TVs on MARTA buses is just right, but 24% would prefer it louder.

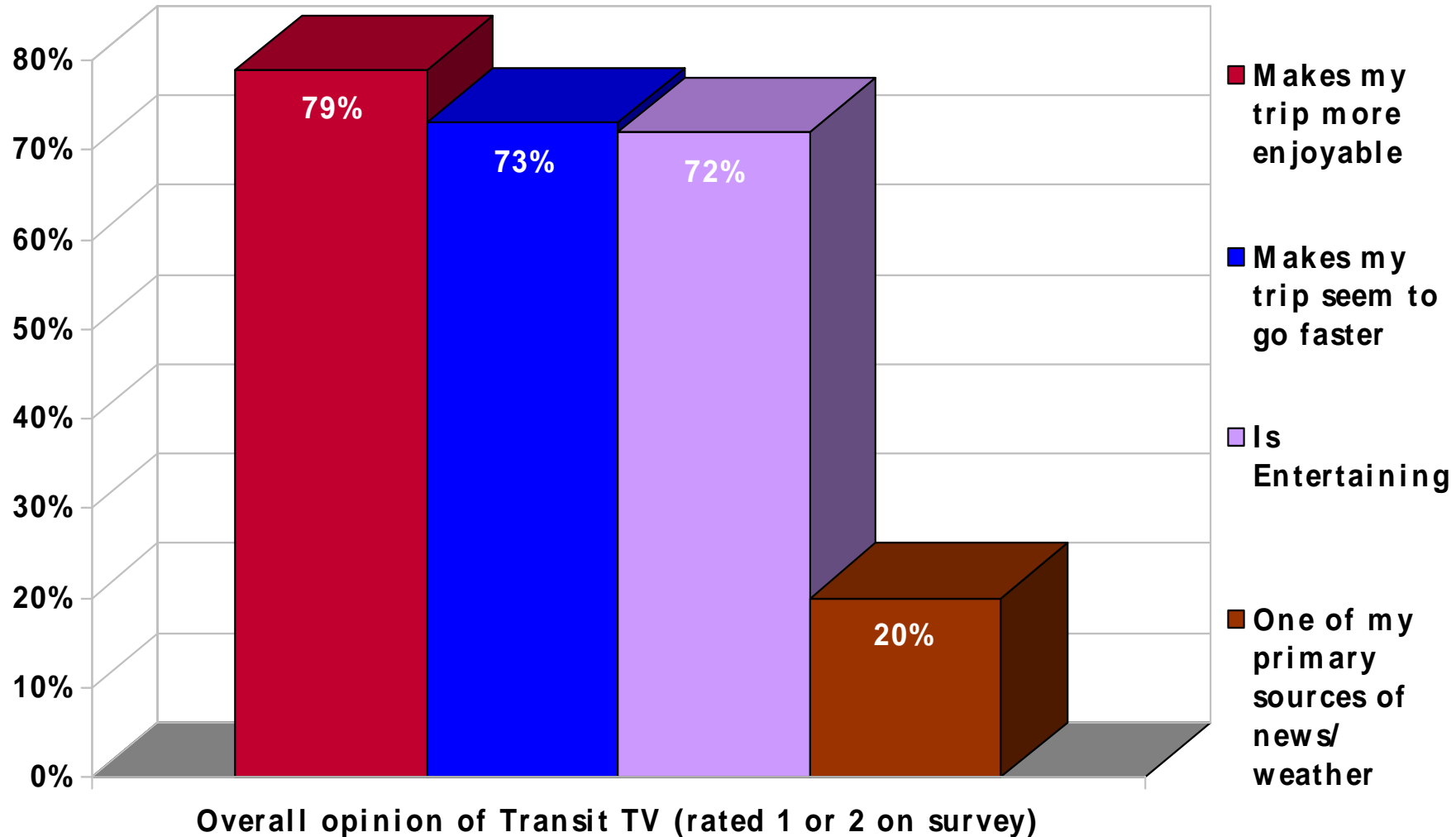


94% of Respondents Have A Positive Attitude Towards Transit TV



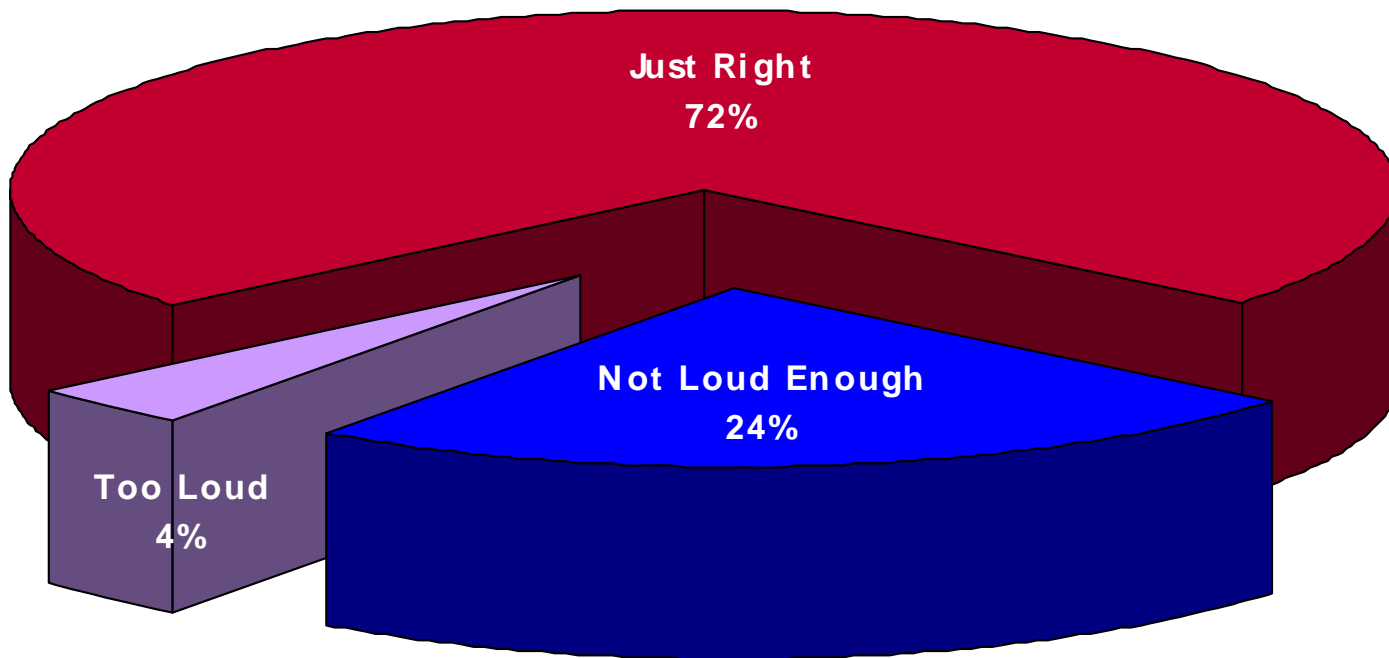
What is your opinion of the television screens on MARTA buses?

Over 75% Think Transit TV Makes Their MARTA Bus Ride More Enjoyable



Base: Atlanta MARTA Surveyed Bus Riders Who Have Watched Transit TV During The Past Month

72% of Respondents Consider The Transit TV Volume Just Right



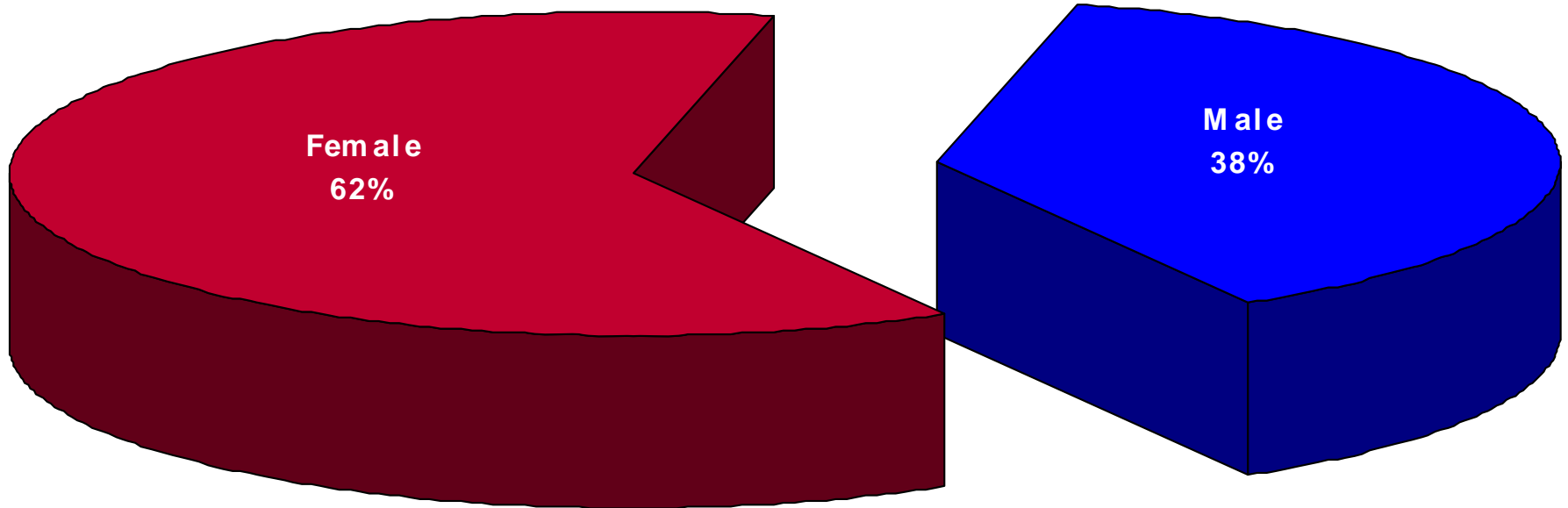
In general, what do you think about the volume of the TVs on MARTA buses?

Respondent Survey Demographics

- 62% female
- 61% age 44 or younger
- 22% students
 - The majority were in college.
- Over 50% African American
 - 20% Caucasian/ White
 - 20% Hispanic

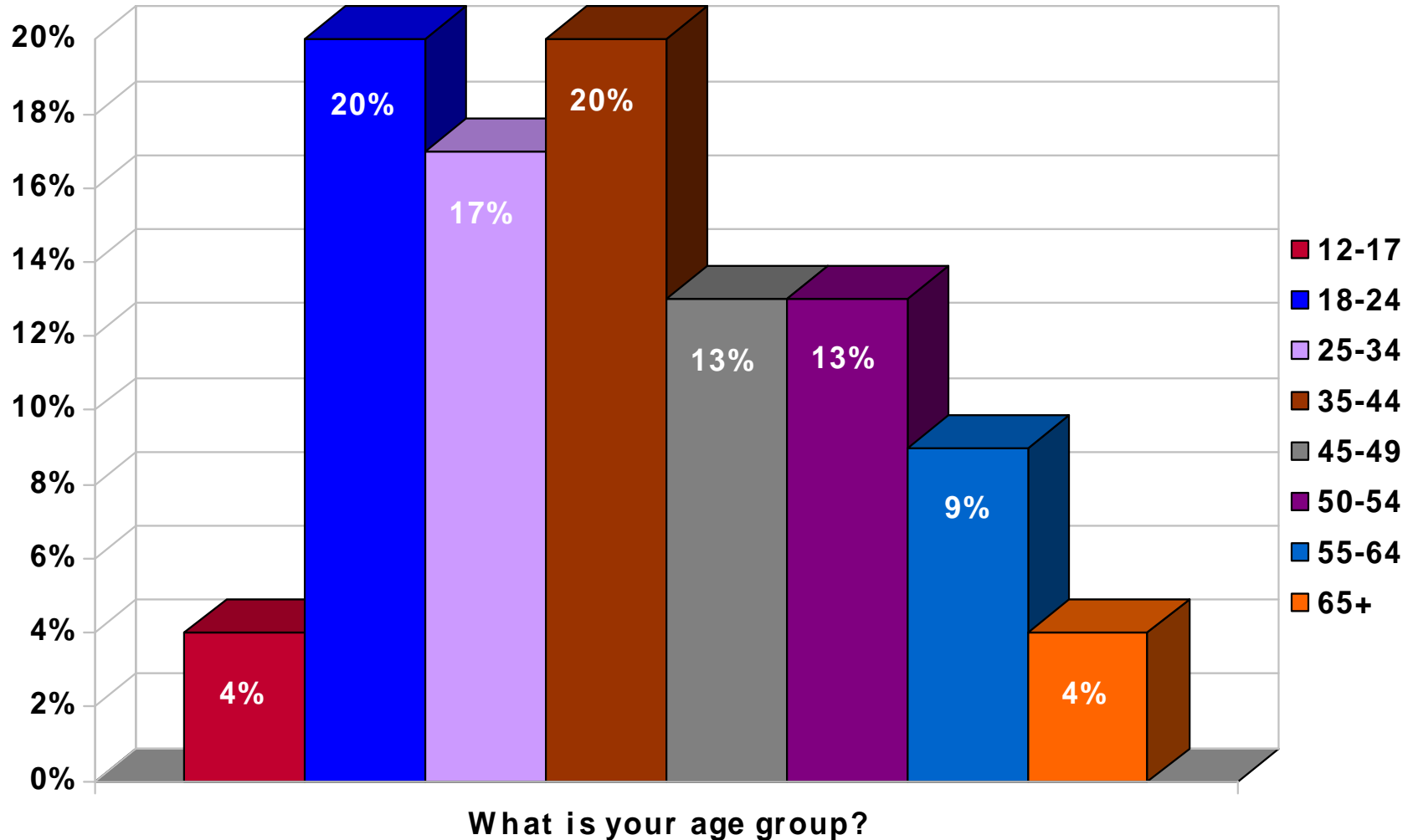


More Than Half Of The Respondents Were Female

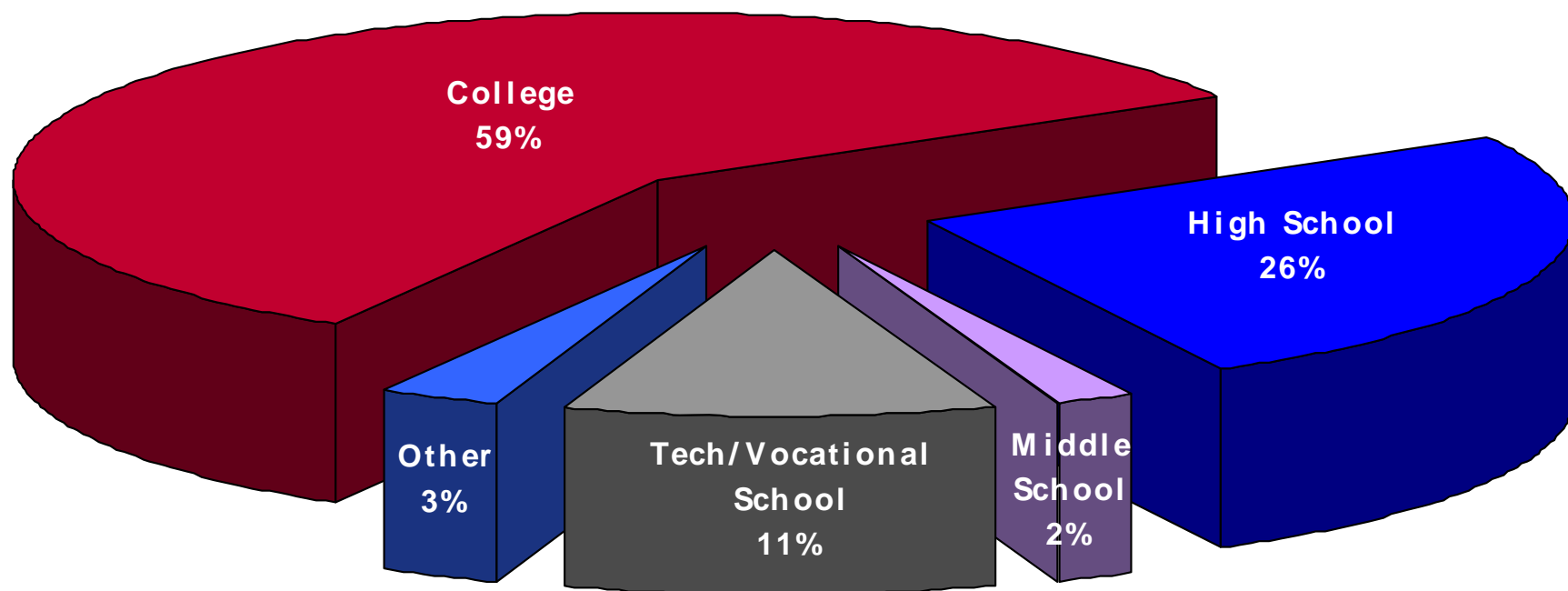


Gender

Over Half Of The Respondents Were 44 Years Old Or Younger

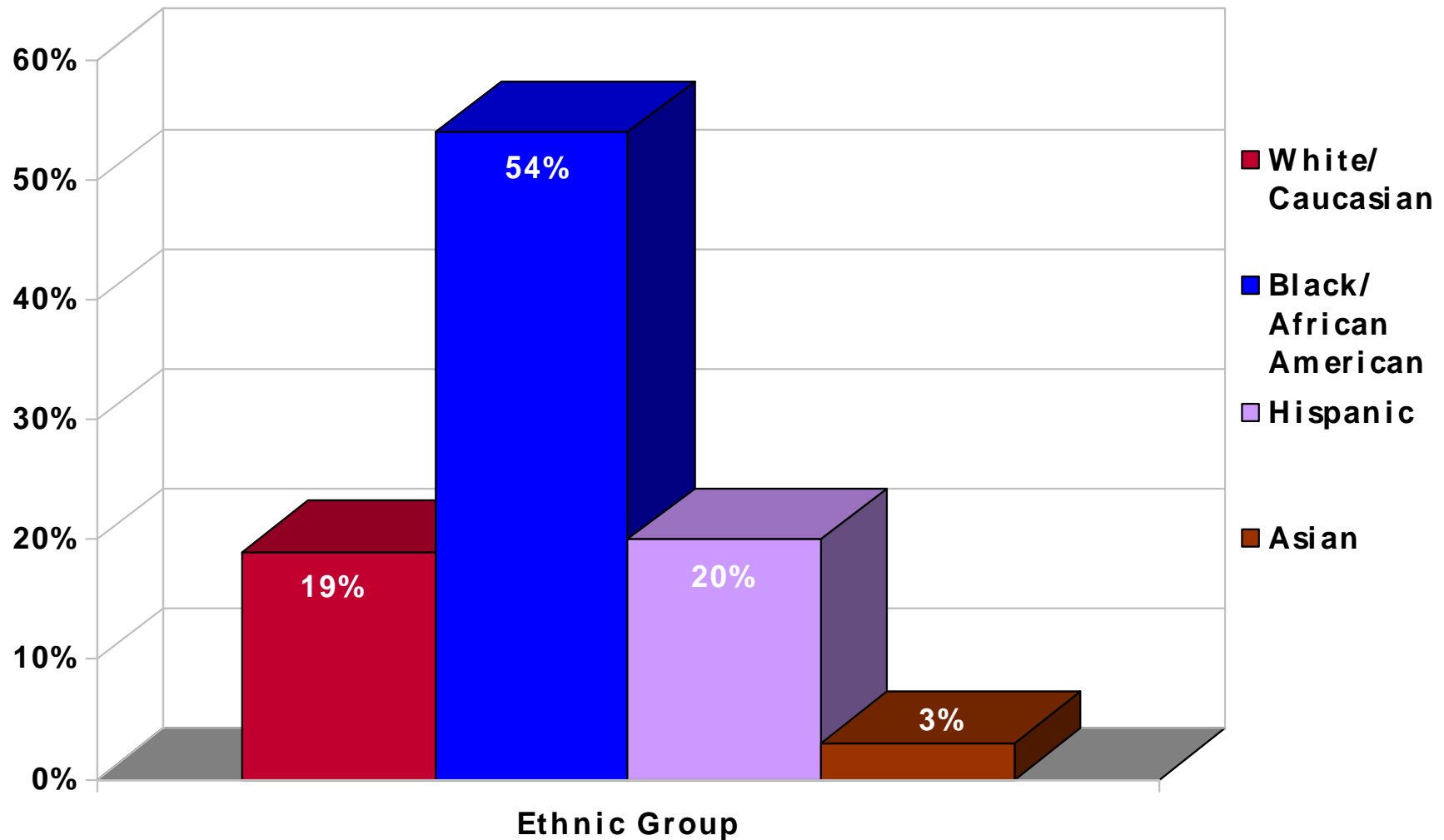


22% Of The Respondents Were Students - 59% Of Them Were In College



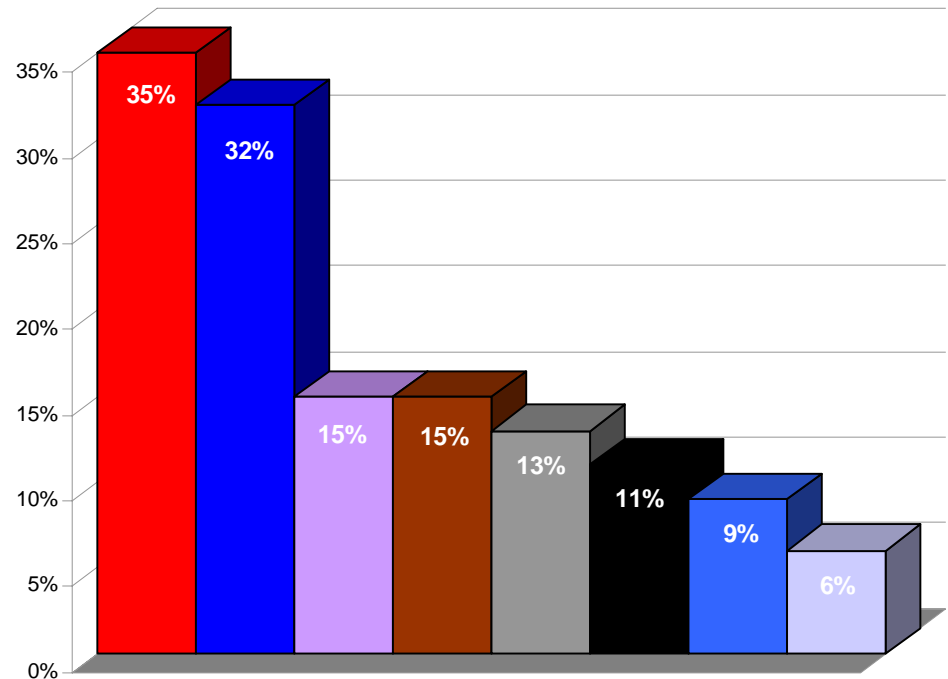
What type of school do you attend?

Over Half Of All Respondents Were African American

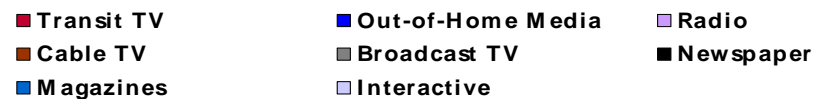


Ad Awareness Comparisons By Media Type

- **Transit TV**- 35% - Carroll Media Study Atlanta
- **Out-of-Home Media (traditional)** - 32% Outdoor Association of America
- **Radio** - 15% - Radio Effectiveness Lab
- **Cable TV** - 14.9% - Cable Advertising Bureau
- **Broadcast TV** - 12.9% - Nielsen Media Research
- **Newspaper** - 11% - Advo, the Food Marketing Institute and New American Dimensions
- **Magazines** - 9.3% - Magazine Publishers Association
- **Interactive/Online** - 5.9% - Dynamic Logic



Ad Awareness By Media Type



Summary of Key Findings

Exposure Patterns

- Exposure to Transit TV is high with 67% of respondents riding 5-7 days a week.
 - More than half of the respondents spent 30 – 90 minutes on a MARTA bus
- 90% of respondents watched Transit TV on the day of the survey.

Advertising Effectiveness

- Ad recall from Transit TV was significant
 - More than 7 out of 10 respondents could recall an ad that aired on an aided basis
- There was an average advertising recall of 59% for the 4 brands measured in the survey.

Acceptance and Engagement

- There are very positive attitudes towards TV screens on MARTA buses
 - 94% rated them very favorable/favorable and agreed they made their rides more enjoyable.
- African American and Hispanic respondents agreed that Transit TV was a primary source of news and weather more often than Caucasians.

Study Observations

- Transit TV has an effective media delivery system inside MARTA buses that is engaging and well received by bus riders.
- Transit TV had very high advertising recall for most commercials tested in the survey, and scored significantly better on recall than all other published media recall studies obtained.
- A significant percentage of bus riders considered Transit TV a primary source for daily news and weather.
- The exposure frequency for Transit TV commercials is high, since 67% of those surveyed ride the bus 5-7 days per week.
- With well-defined demographics, Transit TV is positioned to frequently target a consumer that has a positive opinion of the medium, and who is likely to have an above-average recall of commercial messages viewed on the bus.