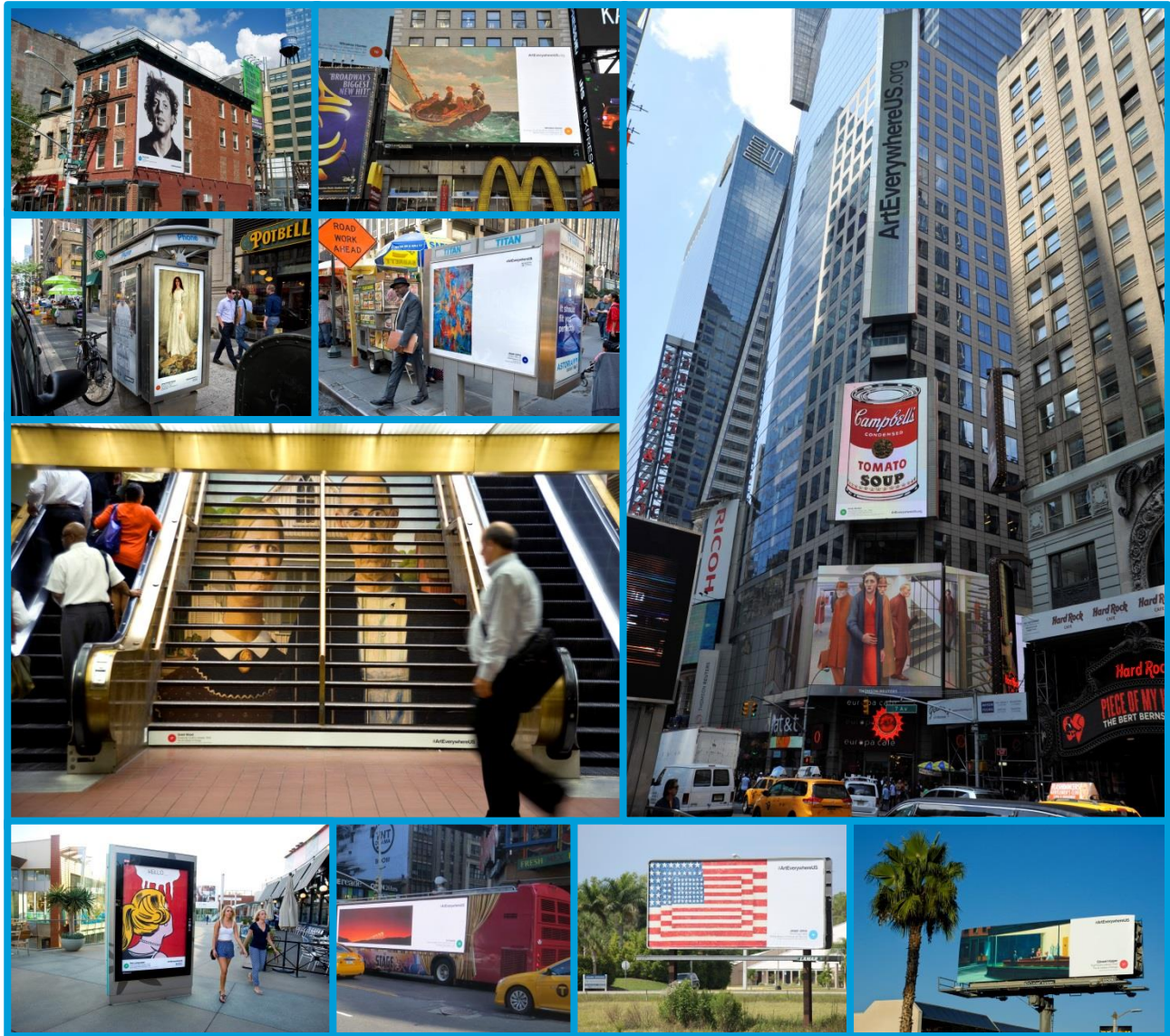


NIELSEN ON LOCATION REPORT

ART EVERYWHERE US

National OOH Campaign Case Study



Diane Williams

Senior Media Research Architect

Nielsen On Location

212.887.1461

diane.williams@nielsen.com

www.nielsen.com

INTRODUCTION

Nielsen On Location provides information services for the out-of-home and place-based advertising marketplace. Earlier this year, Outdoor Advertising Association of America (OAAA) approached Nielsen to track awareness and impact of an ambitious public art project being displayed on outdoor and venue based media networks across the country called *Art Everywhere US*. This report summarizes findings from that study.

ABOUT ART EVERYWHERE US¹

Five leading US museums came together in 2014 to celebrate the history of American art through great works from each of the museums' collections.

These museums collaborated with the Outdoor Advertising Association of America (OAAA) and artists, estates, foundations, and rights agencies to share images of 100 works with the public. In August 2014, a final selection of 58 works were reproduced in tens of thousands of public spaces nationwide, including billboards, street furniture, transit hubs, and many other advertising channels.

This collaborative effort was the first of its kind in the US and followed a successful 2013 version in the UK, that was repeated in summer 2014. It afforded an unprecedented opportunity to acquaint millions of Americans and visitors to our country with some of America's best and most memorable artworks.

Over 50,000 creative executions were deployed across 26,041 media units.

¹Information in this section was provided by OAAA and has not been independently verified by Nielsen.

SCOPE OF RESEARCH

Nielsen conducted a **13 week online survey** between the dates of **June 4 and August 29, 2014** with an average weekly sample of 550 U.S. residents age 18 or older with Internet access. The total number of **7,110 surveys were completed** over the duration of the study. The sample frame used was a vendor-supplied list of online panelist email addresses proportionate to the population in the Continental U.S., Alaska and Hawaii.

The goal of the survey was to track awareness of the *Art Everywhere US* project from week to week, monitor how information about the campaign was being disseminated and finally track viewership and reaction to the displays.

PROJECT NAME¹

Art Everywhere US

MESSAGE/CREATIVE

58 different pieces of Artwork by American Masters

CAMPAIGN OBJECTIVE

Heighten the public's appreciation of American Art and promote visits to art museums nationwide.

PUBLIC VOTING PERIOD

From April 7 through May 7, 2014 the project was promoted on TV, print, online and social media. The public was encouraged to visit arteverywhereus.org and vote for the works to be included in the out-of-home media public art show.

Total Votes: 169,830

Total Registered Users: 9,876

ART SHOW DATES

August 1 through August 29, 2014.

MEDIA UNITS

Airport: 115

Bus: 458

Cinema Pre-show: 15,853

Fitness Centers: 61

Hotel: 1

Shopping Center: 1,030

Outdoor: 6,793

Stairways: 3

Street: 709

Subway Station: 429

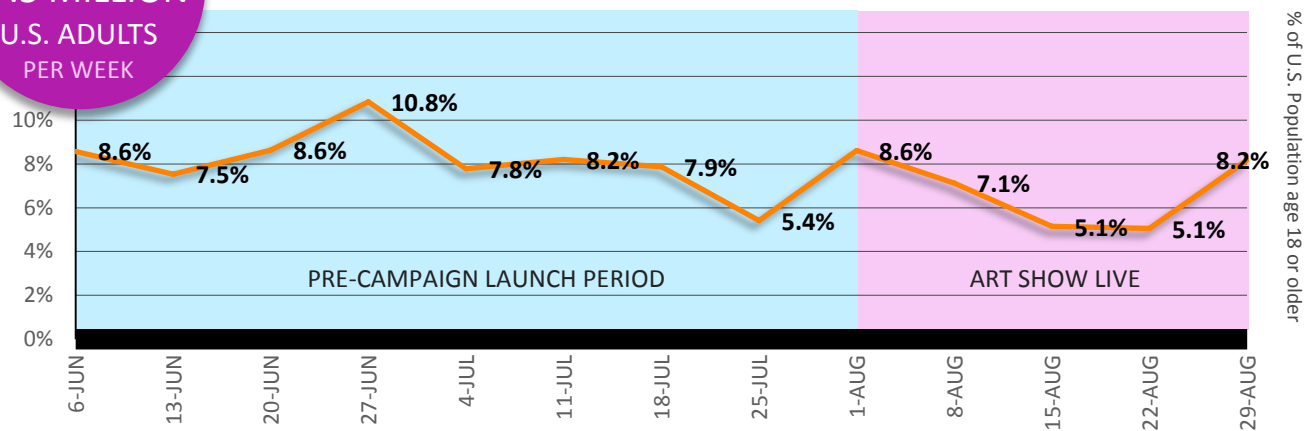
Train Station: 469

Train/Subway Interior: 120

TOTAL: 26,041

**AWARENESS
AMONG
17.5 MILLION
U.S. ADULTS
PER WEEK**

ART EVERYWHERE USA PROJECT AWARENESS WEEK TO WEEK

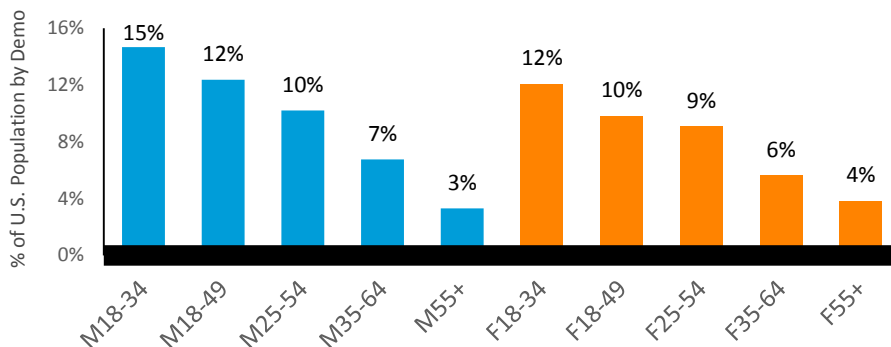


Nielsen tracked awareness of the *Art Everywhere US* project from week to week during the summer of 2014.

On average, 7.6% of the total U.S. population age 18 or older reported awareness of the campaign each week – **equaling a reach of approximately 17.5 million people**. Familiarity with the art show peaked at 10.8% of the U.S. adult pop after some heavy promotion in late June.

AWARENESS BY DEMO GROUP

Knowledge of the art show across all measured weeks was highest among **young adults**; 15% of men age 18 to 34 had heard of *Art Everywhere US* and awareness of the campaign reached 12% of U.S. women age 18-34.



SURVEY QUESTIONS:

PRE-CAMPAIGN LAUNCH PERIOD

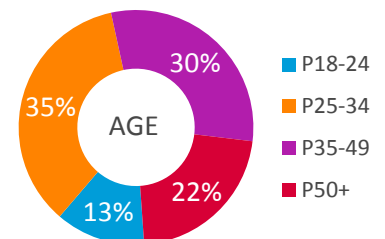
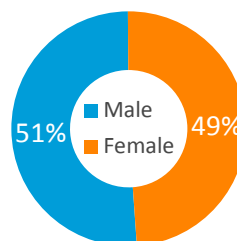
"This summer, images of great American art will be displayed as part of "the largest outdoor art show ever conceived." The 58 artworks that comprise Art Everywhere US will be seen on out of home media billboards, posters, bus shelters etc.) and during movie theater pre-shows from coast to coast throughout the month of August. This upcoming national art project has been promoted over the past few months. Prior to today, were you aware of this project?"

ART SHOW LIVE

"Right now, across America, the largest outdoor art show ever conceived is underway. Currently 58 artworks are being displayed on out of home media (billboards, posters, bus shelters, etc.) and during movie theater pre-shows as part of the Art Everywhere US project. This national art project has been promoted over the past few months. Prior to today, were you aware of this project?"

DEMOGRAPHIC COMPOSITION

The overall profile of those who were aware of the art show campaign was evenly split between men and women; 13% of those aware of the project were very young adults age 18-24 and 35% were age 25 to 34.



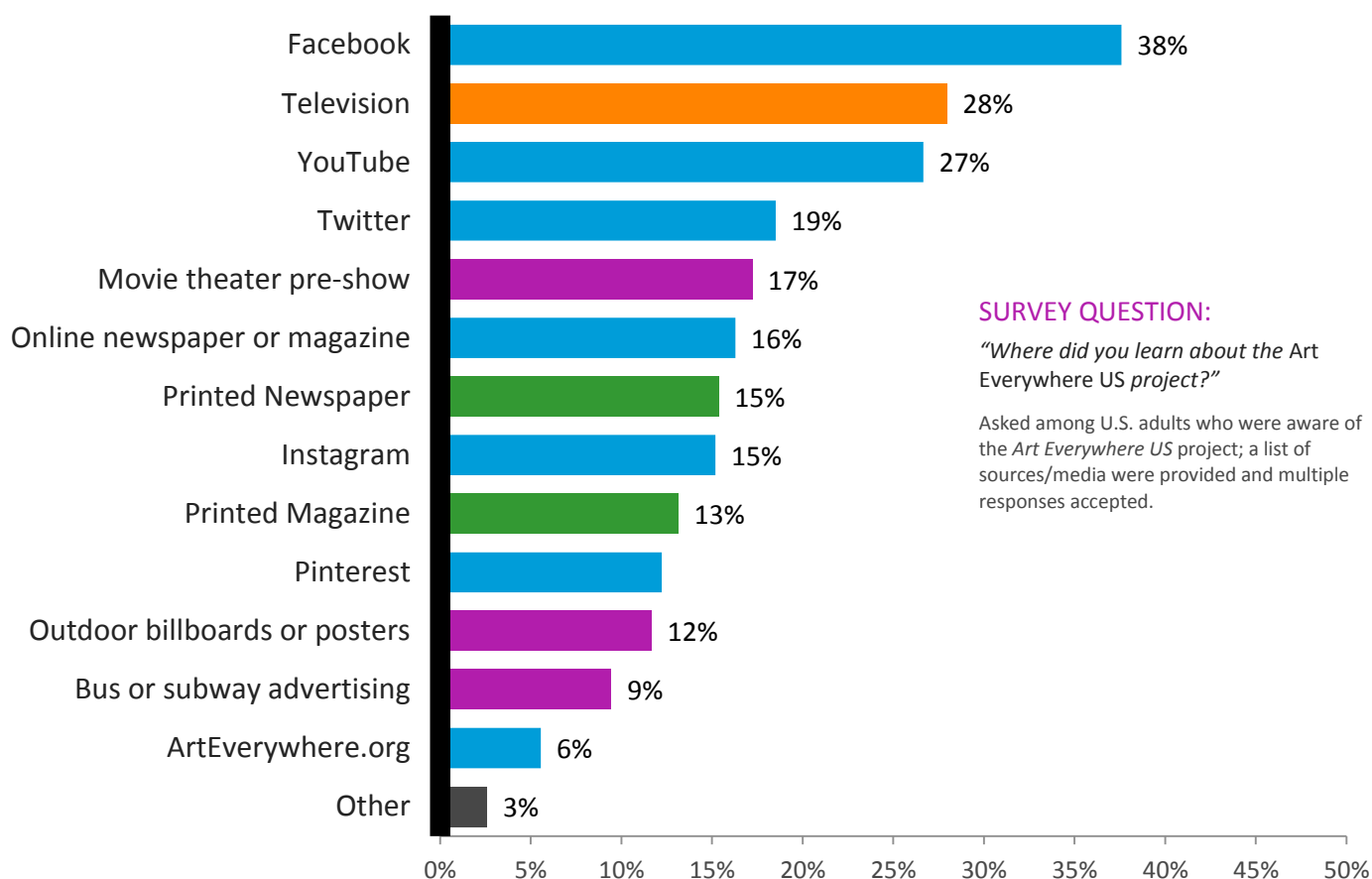
SPREADING THE WORD ABOUT ART EVERYWHERE

Social media took the lead in driving awareness of the art show. Close to 40% of those who were familiar with the project learned about it through Facebook, 27% learned about it on YouTube and 19% on Twitter.

Movie theaters were the top out-of-home media to raise awareness of the campaign with 17% of those who knew about the project – or 3 million U.S. adults – learning about *Art Everywhere US* during the cinema pre-show.

3 MILLION

LEARNED OF THE
PROJECT AT THE
MOVIE
THEATER



A VERY VERY BIG ART SHOW

The art show went live during the month of August across over 26,000 outdoor and venue based ad units. Over half (54%) of those who were aware of the campaign while it was live, recalled personally seeing some of the artwork on display – that translates to 3.6% of U.S. adults or just over **8.4 million viewers** for the nation's largest summer art show.

These are particularly impressive recall levels given the fact that the *Art Everywhere US* branding on the displays were deliberately limited to small gallery style placards so not to distract from the artwork.



8.4 MILLION
PERSONALLY VIEWED
ARTWORK
ON DISPLAY

SURVEY QUESTION:

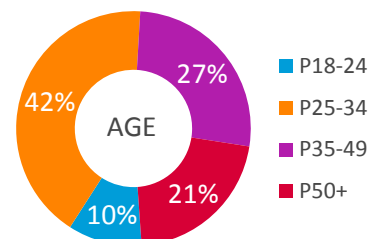
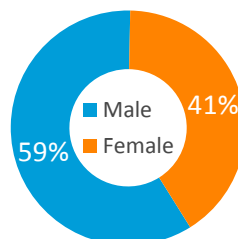
"Have you personally seen any of the artwork on display?"

Asked among U.S. adults who were aware of the *Art Everywhere USA* project during the weeks the art show was live.

VIEWER PROFILE

While the gender composition of those who were aware of the *Art Everywhere US* project was split nearly even, those who recalled personally seeing the artwork on display skewed male.

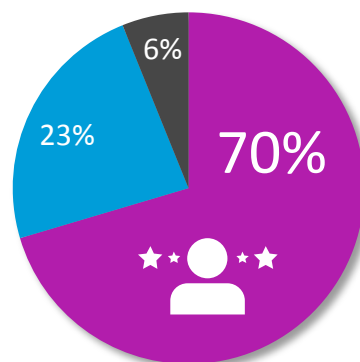
Over half (52%) of viewers were young adults between the ages of 18 and 34.



CHANGING MINDS

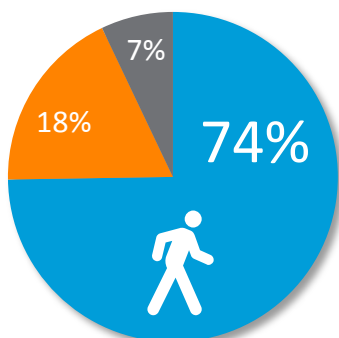
The project also succeeded in generating admiration for American art among viewers. 7 in 10 people who personally saw a piece of artwork from the *Art Everywhere US* project felt they were **much more appreciative of American art**.

- Yes, I am **MUCH MORE APPRECIATIVE** of American Art
- Yes, I am **SOMEWHAT MORE APPRECIATIVE** of American Art
- It did not have an impact on me



INSPIRING ACTION

The campaign succeeded in piquing the interest of viewers. Three-quarters of those who personally saw a piece of artwork from the *Art Everywhere US* project felt they were **much more interested in visiting an art museum**.



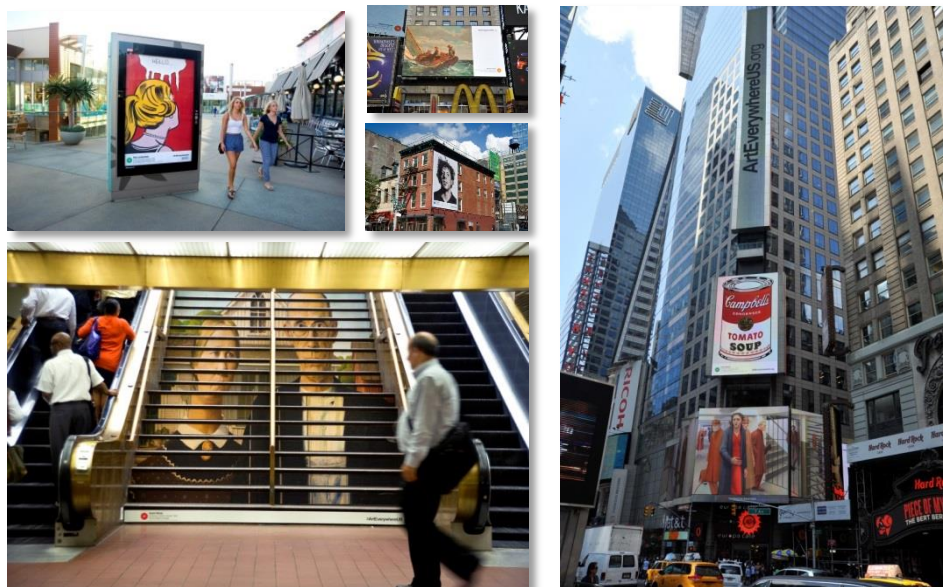
- Yes, I am **MUCH MORE Interested in VISITING** an art museum
- Yes, I am **SOMEWHAT MORE Interested in VISITING** an art museum
- It did not have an impact on me

SURVEY QUESTION:

"Did seeing the Art Everywhere US project increase your appreciation for American Art?"

"Did seeing the Art Everywhere US project make you more interested in visiting an art museum?"

Asked among U.S. adults who personally viewed an *Art Everywhere USA* display during the weeks the art show was live; a list of three answers were provided and only one response accepted.



APPENDIX

	TOTAL	AWARE	VIEWER
U.S. RESIDENTS AGE 18+	100%	7.6%	3.6%
POP ESTIMATE	230,590,000	17,546,000	8,416,000

GROUP COMPOSITION	TOTAL	AWARE	VIEWER
MALE	48%	51%	59%
FEMALE	52%	49%	41%
P18-24	8%	12%	10%
P25-34	20%	35%	42%
P35-49	27%	30%	27%
P50+	46%	22%	21%

DEMOGRAPHIC BREAKOUTS	TOTAL	AWARE	VIEWER
P18-34	27%	48%	52%
P18-49	54%	78%	79%
P25-54	56%	71%	73%
M18-34	12%	24%	30%
M18-49	25%	40%	45%
M25-54	25%	34%	40%
M35-64	27%	24%	22%
M55+	19%	8%	11%
F18-34	15%	24%	22%
F18-49	29%	38%	34%
F25-54	31%	37%	34%
F35-64	29%	22%	18%
F55+	18%	9%	5%

DEFINITION OF TERMS:

TOTAL: U.S. residents age 18 or older who participated in Nielsen's weekly trending survey between Jun 4 and Aug 29, 2014. (sample size: 7,110)

AWARE: U.S. residents age 18 or older who were aware of the *Art Everywhere US* project between Jun 4 and Aug 29, 2014. (sample size: 541)

VIEWER: U.S. resident age 18 or older who personally saw artwork on display from the *Art Everywhere US* project while the campaign was live between Aug 1 - 29, 2014. (sample size 98)

HOW TO READ:

7.6% of U.S. residents age 18 or older were aware of the *Art Everywhere US* Project and that roughly equates to 17.5 million U.S. adults.

48% of our U.S. population sample were male but 59% of those viewed an *Art Everywhere US* display were male.

ABOUT NIELSEN

Nielsen Holdings N.V. (NYSE: NLSN) is a global information and measurement company with leading market positions in marketing and consumer information, television and other media measurement, online intelligence, mobile measurement, trade shows and related properties. Nielsen has a presence in approximately 100 countries, with headquarters in New York, USA and Diemen, the Netherlands.

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