

ARBITRON RESEARCH



Arbitron Digital Place-Based Video Study 2010



Presented by:

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Introduction

Welcome to the Arbitron Digital Place-Based Video Study 2010

The goal of this research is to set universe estimates for digital place-based video by benchmarking the size and profile of total viewers across the United States. The persons estimates are projected against U.S. residents aged 12 or older and the demographic profiles focus on those who recall seeing a digital video display in specific environments in the past month. These video displays in most cases broadcast advertising and content that are specially created for the out-of-home environment and are distinct from network or cable TV viewing away from home.

The report includes:

- New data collected in 2010
- Monthly and weekly national audience estimates for digital place-based video as a medium
- Info on U.S. residents aged 12 or older (including teens)
- Breakouts for 18 different venue categories
 - Total number of visitors to the venues in the past month
 - Total number of digital video viewers at the venues in the past month
- Demographic profiles of viewers including sex, age, ethnicity, household income, education and presence of children under 18 in the household
- Ad engagement and purchase intent measures
- Directly compares the reach of digital place-based video to other media platforms including online video, text messaging, MP3 ownership (including iPod® and iPhone®), DVRs and Facebook

Additional Data Available

For the first time, Arbitron is providing the data in this report and deeper market-based insights to the industry for a fee. Contact us to learn more:

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Universe Estimates and the Media Plan. Arbitron uses these universe estimates to provide insight and perspective into the audience estimates we produce for individual networks.

The statistics allow us to evaluate a network's size and share in relation to the medium's potential reach overall.

The universe estimates and viewer profiles also help advertisers and agencies make informed decisions on which networks to include in their media plans.

Description of Methodology

Arbitron Inc. in partnership with Edison Research conducted:

- Total of 1,753 completed surveys
- Telephone interview
- Between January 25 and February 22, 2010
- Random sample of persons aged 12 and older
- Respondents selected from Arbitron's Fall 2009 survey of diarykeepers and through random digit dialing (RDD) sampling in certain geographic areas where Arbitron diarykeepers were not available for the survey. Diarykeepers represent 51% of the completed interviews and RDD-sampled respondents represent 49% of the completed interviews
- Includes cell phone sample
- Includes non-Internet households
- Nationally projectable to the full U.S. population aged 12 or older

Note: Persons estimates, demographic compositions and indices are calculated to one decimal point, but rounded to the nearest full percentage point in the report; therefore totals may not add to 100.

The importance of sampling.

Arbitron used telephone recruited sample (both landline and cell phone) to create these universe estimates.

So, unlike Internet panels that can exclude 16% or more of the U.S. population that does not regularly access the Internet, these universe estimates provide a more complete picture of the total market without undercounting or excluding entire segments of the population.

Public Venues

Here is the list of venue categories profiled in the report:

- Airport
- Bar
- Coffeehouse or sandwich shop
- Convenience store
- Drug store
- Elevator
- Fast food or casual dining restaurant
- Gas station
- Grocery store
- Health club
- Hospital or medical test facility
- Large retail or department store
- Medical office (such as a doctor's office, dentist or veterinarian)
- Movie theater
- Office building lobby
- Shopping mall
- Stadium or arena
- Transportation
 - Exterior of a Bus, Bus Stop Shelter, Train or Taxicab
 - Riding Inside a Bus, Train or Taxicab

Why break out individual venues? Think of venues almost like TV programming genres or radio station formats; in most cases, the content is designed to appeal to a specific audience. The same is true for certain venue categories. The types of people reached most frequently in a movie theater may be quite different from those reached in a doctor's office.

Universe estimates and profile breakouts for individual venue categories help advertisers and media planners select networks with the heaviest concentration of their target consumers.

Definition of Terms

- **Venue Visitor:** A person who has been to or was exposed to one of the 18 public venues examined in this report in the past month. The survey question verbatim is:

"In the past month, have you been to...[specific venue]"

- **Monthly Digital Video Viewer:** A person who noticed a digital video screen at one of the 18 public venues examined in this report in the past month. The survey question verbatim is:

"Many public places now have digital video displays. These video displays look like television screens, but rather than broadcasting regular television stations, they feature short programs and advertising relevant to products in the store. For example, a video display at a local grocery store might show food items for sale, while a video display in the lobby of a local movie theater might show the trailer for an upcoming movie.

Now I'm going to read a list of locations, and I'd like you to tell me whether or not you have seen a digital video display at that location recently. Again, we are specifically asking about digital video displays, so please do NOT include TV stations you might have seen on a regular television screen at one of these locations.

In the past month, have you seen a digital video display...[specific venue]"

- **Weekly Digital Video Viewer:** A person who noticed a digital video screen at one of the 18 public venues examined in this report in the past week. The survey question followed the sequence focusing on digital video viewing in the past month; the survey question verbatim is:

"In the past week, have you seen a digital video display...[specific venue]"

- **Persons estimates:** The number of U.S. residents who have watched a digital video screen. This number represents unique people in the population, NOT ad impressions.

For example: The monthly digital video persons estimates for grocery stores is 72 million people aged 12 or older. This number is derived by multiplying the total current U.S. population by the percentage of our representative sample who reported noticing a digital video screen in a grocery store in the past month ($259,000,600 \times 27.9\% = 72,261,167$).

The number of total ad impressions these people represent would vary based on the frequency of their viewing and the number of ads in rotation.

Visitors vs. Viewers. In this report visitors represent the number of people who have been to a particular type of venue in the past month. Since not all venues have screens installed, not everyone who visits a venue is exposed to digital video content.

The visitor estimates are included merely to provide perspective for the audience (viewer) estimates.

The audience estimates represent the number of people who specifically recall seeing a digital video screen at a venue. It is possible to have been in the proximity of a screen (exposed) without noticing it.

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Definition of Terms *(continued)*

- **Sex:** The gender composition for the group; unless otherwise indicated, the total sample is persons aged 12 or older.
- **Age:** The age composition for the group; unless otherwise indicated, the total sample is persons aged 12 or older.
- **Household Income:** The approximate total household income in 2009 from all sources before taxes for the group; unless otherwise indicated, the total sample is persons aged 18 or older. There is typically a certain percent of respondents who decline to provide income information. The household income compositions in this report are projected amongst only those who did provide an income range.
- **Race/Ethnicity:** The race and ethnicity composition for the group; unless otherwise indicated, the total sample is persons aged 12 or older.
- **Education:** The highest completed level of education for the group; unless otherwise indicated, the total sample is persons aged 18 or older.
- **Household Composition:** The percentage of the group who have one or more children under the age of 18 living in their home; unless otherwise indicated, the total sample is persons aged 18 or older.
- **National Average Index:** Compares the demographic composition for the group to the composition of the U.S. population as a whole.

How to use an index: An index of 100 means the group has the same demographic composition as the nation on average.

An index above 100 means that venue attracts more people with that characteristic than we would expect to find in a random sample of the total U.S. population; an index under 100 means the venue under-delivers people with that characteristic.

For example: The total U.S. population of persons aged 12 or older is composed of 49% men; those who have watched a digital video display at a gas station in the past month are 54% men. Therefore, a gas station delivers a high concentration of male viewers and its index is expressed as 110 [$54\% \div 49\% = 110$].

The goal of indices is to identify venues that attract a high concentration of certain consumer targets.

Significant Highlights

Reach

- The availability of digital place-based video has reached a critical mass. 70% of U.S. residents aged 12 or older have seen a digital video display in a public venue in the past month; 52% recall seeing one in the past week.

Comparison to Other Media

- Digital video in public venues reaches more Americans each month (70%) than video over the Internet (43%) or Facebook (41%).

Top Venues for Overall Viewers

- The top five places to reach consumers with digital video are grocery stores (28% of the U.S. population aged 12 or older), shopping malls (27%), large retail or department stores (20%), medical offices (20%) and movie theaters (19%).

Advertising Engagement

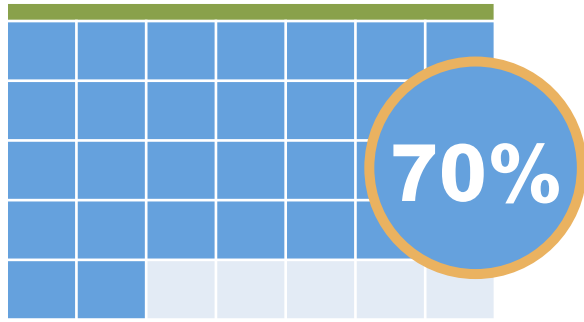
- Viewers are engaged with the content; nearly half (47%) of those who have seen a digital place-based video in the past month specifically recall seeing an ad.

Effect on Purchase Patterns

- Digital video ads have an effect on purchase patterns. Nearly one in five (19%) of those who have seen a digital video ad say they have made an unplanned purchase after seeing an item featured on the screen.



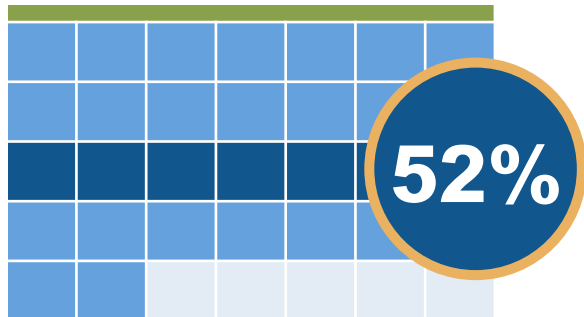
Digital Place-Based Video as a Medium: U.S. Total Reach



Teen and adult U.S. residents have viewed digital video displays at any measured venue in the past **month**.

Monthly persons estimate:

181 Million



Teen and adult U.S. residents have viewed digital video displays at any measured venue in the past **week**.

Weekly persons estimate:

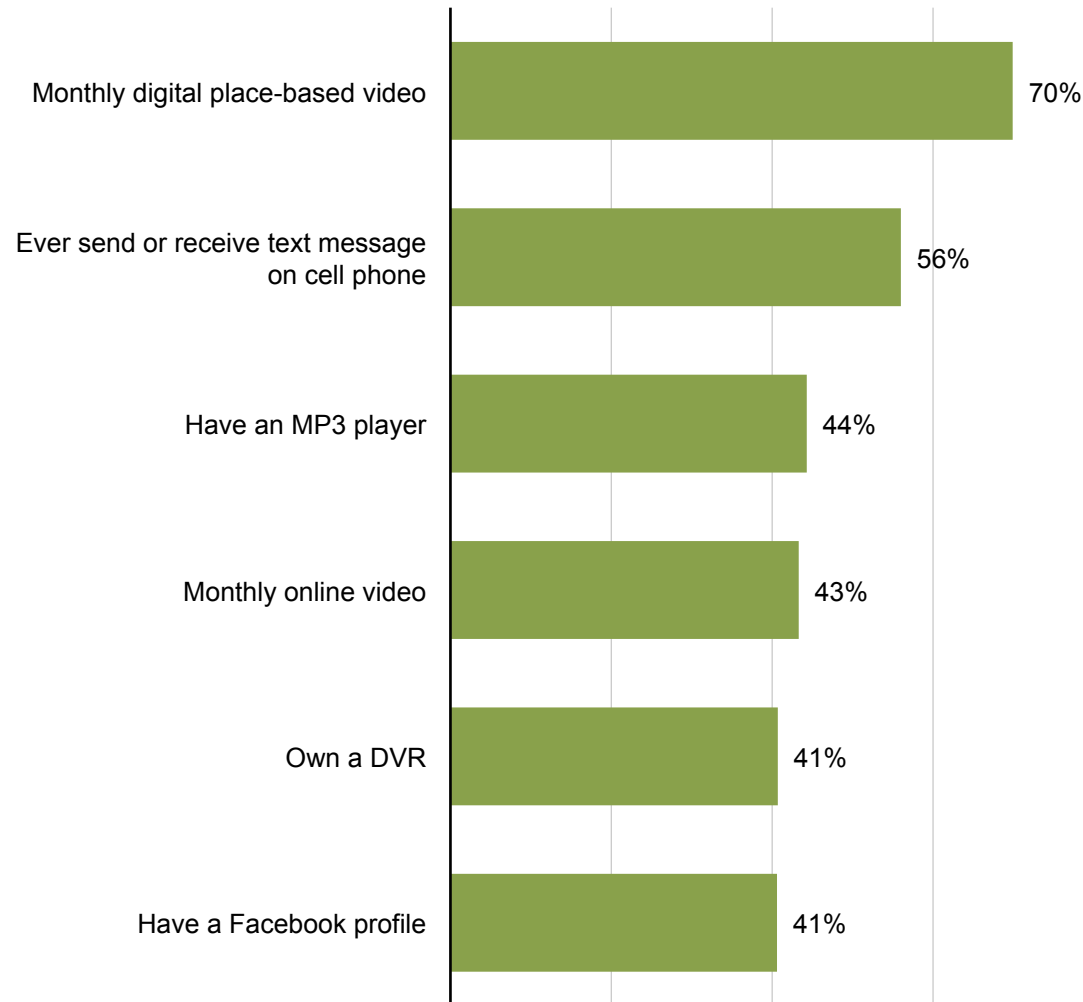
135 Million

Over two-thirds of American teens and adults have seen a digital video screen in a public venue in the past month.

Seventy percent of U.S. residents aged 12 or older recalled seeing a digital video display in at least one of the 18 venue categories examined in this report; that translates to approximately 181 million Americans.

Over half (52% or 135 million) of U.S. teens and adults have seen a digital video screen in just the past week.

Comparing the Reach of Digital Place-Based Video to Other Media



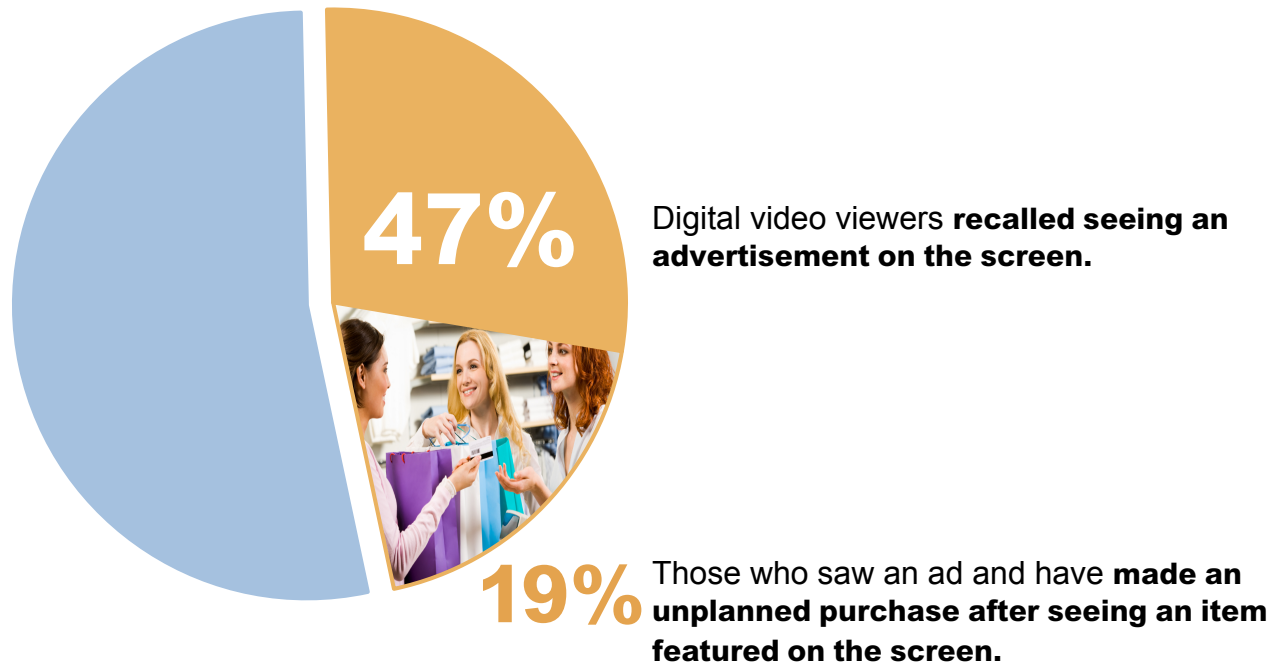
Digital place-based video dwarfs many prominent new media and marketing platforms. More American teens and adults have seen a digital video screen at a public venue in the past month (70%) than have watched online video (43%).

More people see digital video screens in public venues than have *ever* sent or received a text message (56%); own a DVR, such as a TiVo® or recorder provided through their cable or satellite TV provider (41%); or have a Facebook profile (41%).

And please keep in mind this is a direct comparison across a *single* sample group describing their personal consumption of each media and marketing platform.

Note: See appendix for verbatim survey questions.

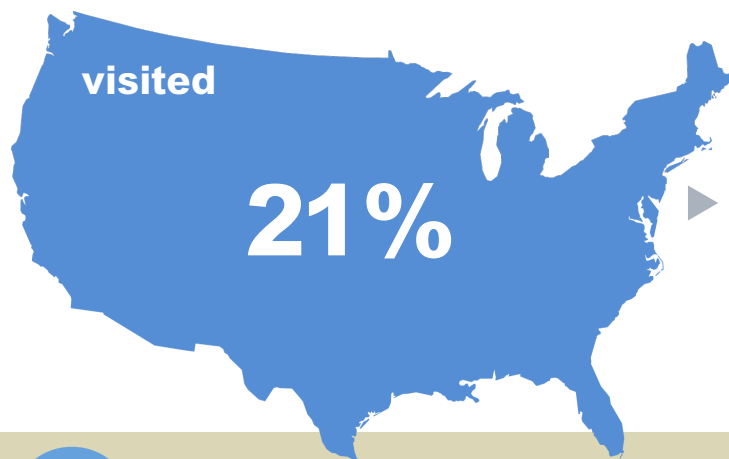
Digital Place-Based Video Advertising Recall



Viewers are not just exposed; they are engaged. Nearly half (47%) of those who have noticed a digital place-based video display in the past month specifically remember an advertisement appearing on the screen.

Nearly 1 in 5 (19%) of those who noticed an ad report having made a purchase they were not already planning on making after seeing an item featured on the video screen (though not necessarily within the same month).

Note: See appendix for verbatim survey questions.

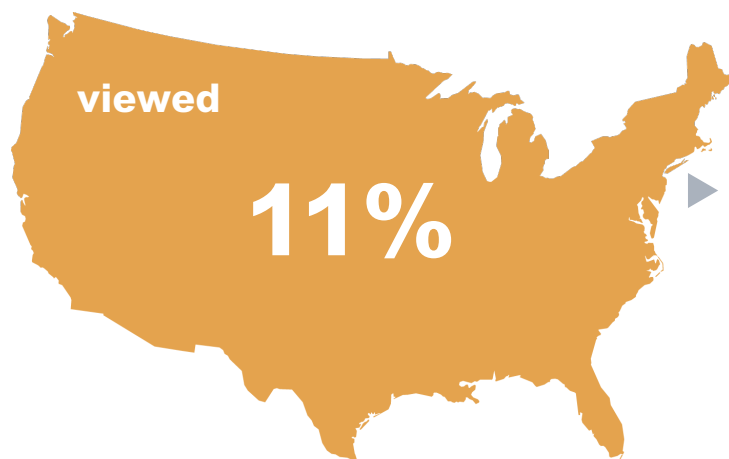


▶ Teen and adult U.S. residents have visited an airport in the past month.

Persons estimate: 54 million

52%

of those who visited an airport in the past month viewed digital video during at least one of those visits.



▶ Teen and adult U.S. residents have viewed digital video at an airport in the past month.

Persons estimate: 28 million



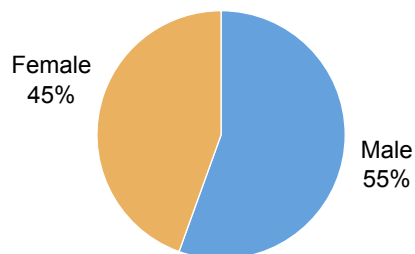
More than one in five Americans have visited an airport in the past month. Twenty-one percent of U.S. residents aged 12 or older have been to an airport in the past month; out of those who visited, 52% noticed a digital video screen at the location on at least one of those visits.

The monthly reach of digital video displays at airports among all American teens and adults is 11% or 28 million unique people.

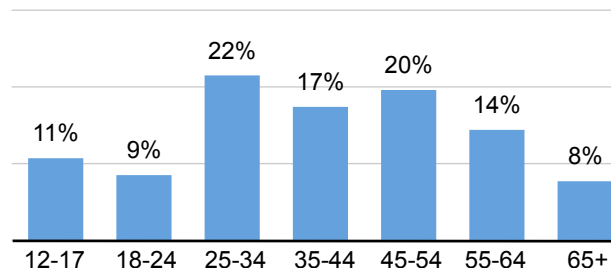
Monthly Digital Video Viewers Airport

Demographic Profile

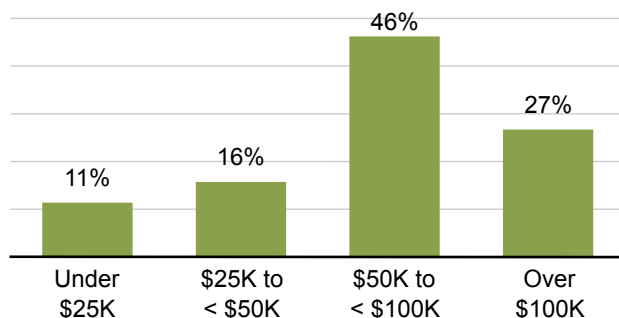
Sex



Age

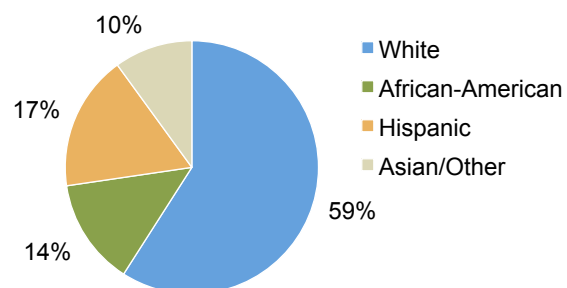


Household Income



Based on 74% of sample aged 18 or older who provided an income level.

Race/Ethnicity



Education

4-year College Degree or Higher **63%**

Based on respondents aged 18 or older.

Household Composition

Have Children Under Age 18 Living at Home **34%**

Based on respondents aged 18 or older.

National Average Index

Men	Women	Age 12-24	Age 18-49	Age 25-54	Income \$50K+	Income \$100K+	College Degree or Higher	Children in Household
113	87	89	110	118	161	191	157	96

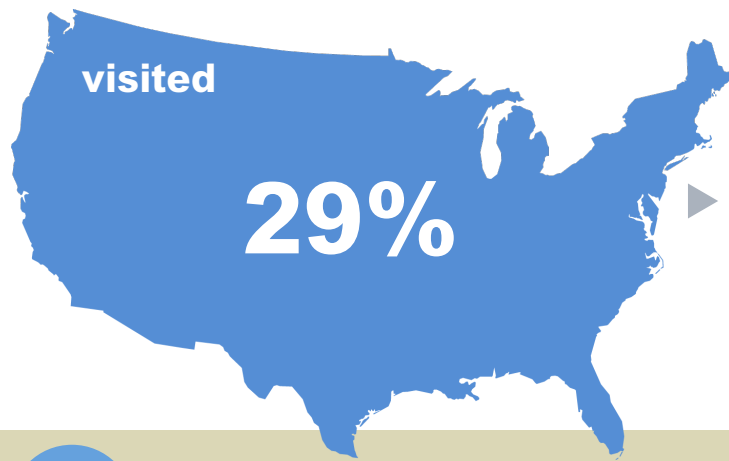


Airports deliver a high concentration of:

- Affluent consumers
- People with college degrees

The audience skews:

- Male

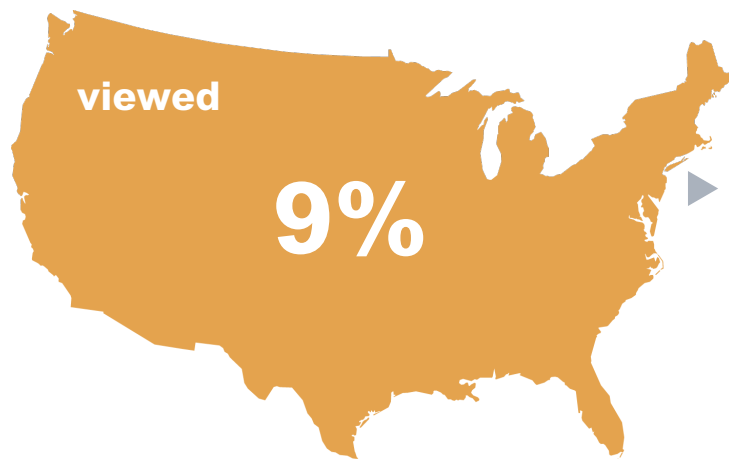


▶ Adult U.S. residents aged 21 or older have visited a bar in the past month.

Persons estimate: 65 million

30%

of those who visited a bar in the past month viewed digital video during at least one of those visits.



▶ Adult U.S. residents aged 21 or older have viewed digital video at a bar in the past month.

Persons estimate: 20 million

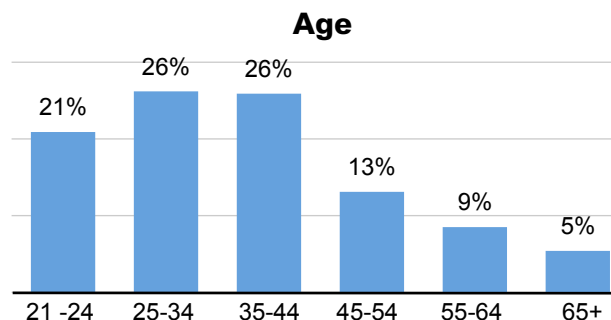
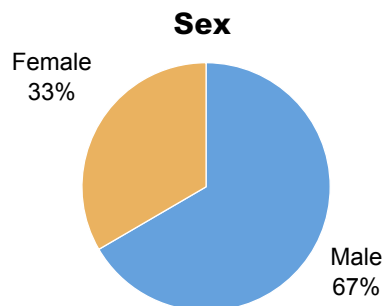


More than one-quarter of American adults of legal age have visited a bar in the past month. Twenty-nine percent of U.S. residents aged 21 or older have been to a bar in the past month; out of those who visited, 30% noticed a digital video screen at the location on at least one of those visits.

The monthly reach of digital video displays at bars among all American adults of legal age is 9% or 20 million unique people.

Monthly Digital Video Viewers Bar

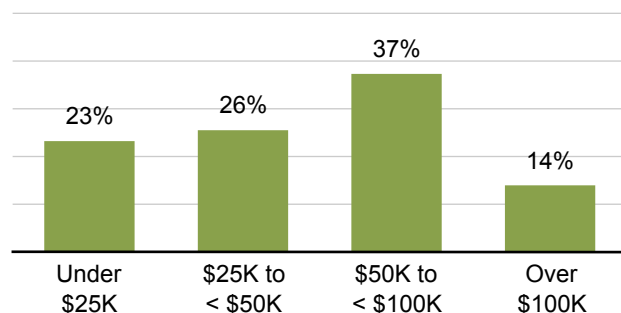
Demographic Profile



Bars deliver a high concentration of:

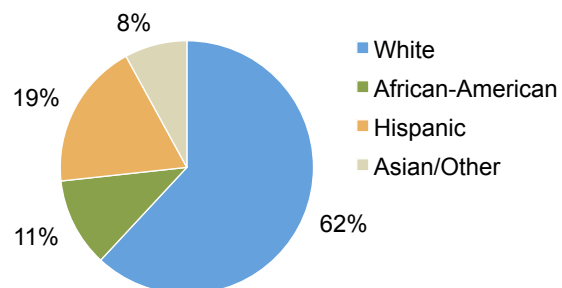
- Young adults aged 21-24
- Adults
- Men
- People with a college degree

Household Income



Based on 79% of sample aged 21 or older who provided an income level.

Race/Ethnicity



Education

4-year College Degree or Higher **51%**

Household Composition

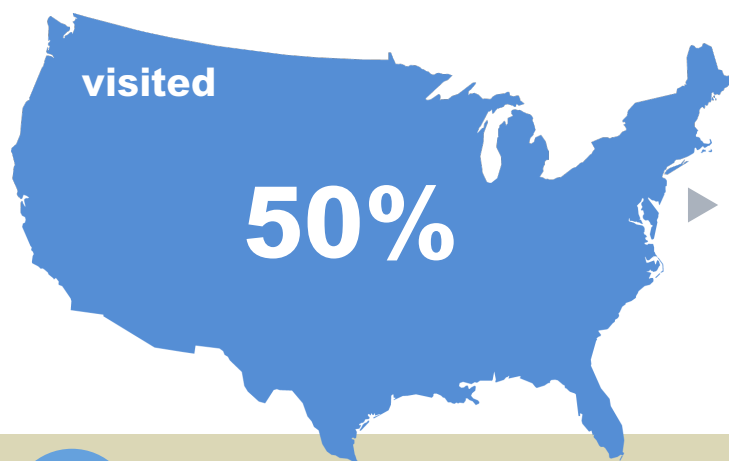
Have Children Under Age 18 Living at Home **39%**

All bar-related data are based on respondents aged 21 or older.

National Average Index

Men	Women	Age 21-24	Age 21-49	Age 25-54	Income \$50K+	Income \$100K+	College Degree or Higher	Children in Household
136	66	243	141	131	121	107	125	112

Coffeehouse or Sandwich Shop

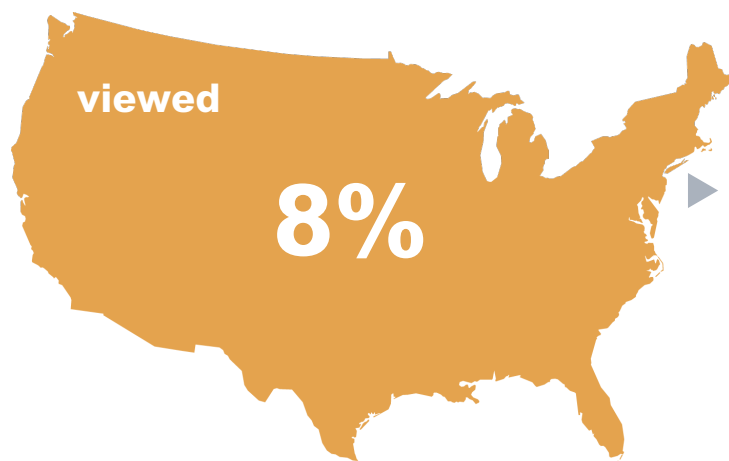


▶ Teen and adult U.S. residents have visited a coffeehouse or sandwich shop in the past month.

Persons estimate: 130 million

16%

of those who visited a coffeehouse or sandwich shop in the past month viewed digital video during at least one of those visits.



▶ Teen and adult U.S. residents have viewed digital video at a coffeehouse or sandwich shop in the past month.

Persons estimate: 21 million



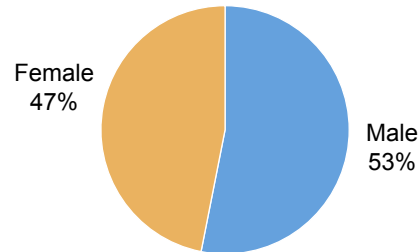
One in two Americans have visited a coffeehouse or sandwich shop in the past month. Fifty percent of U.S. residents aged 12 or older have been to a coffeehouse or sandwich shop in the past month; out of those who visited, 16% noticed a digital video screen at the location on at least one of those visits.

The monthly reach of digital video displays at convenience stores among all American teens and adults is 8% or 21 million unique people.

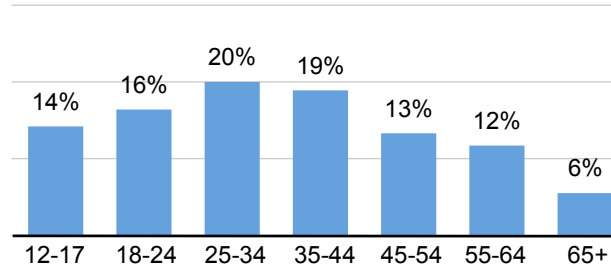
Coffeehouse or Sandwich Shop

Demographic Profile

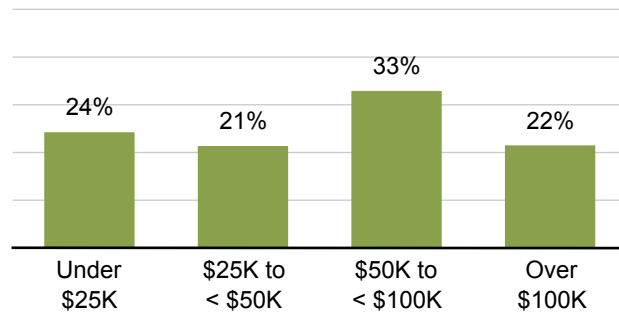
Sex



Age

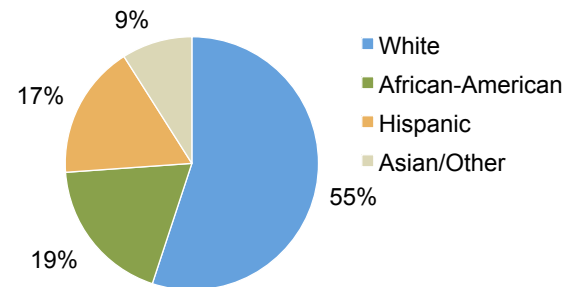


Household Income



Based on 69% of sample aged 18 or older who provided an income level.

Race/Ethnicity



Education

4-year College Degree or Higher **46%**

Based on respondents aged 18 or older.

Household Composition

Have Children Under Age 18 Living at Home **44%**

Based on respondents aged 18 or older.

National Average Index

Men	Women	Age 12-24	Age 18-49	Age 25-54	Income \$50K+	Income \$100K+	College Degree or Higher	Children in Household
108	92	141	120	105	113	145	113	125

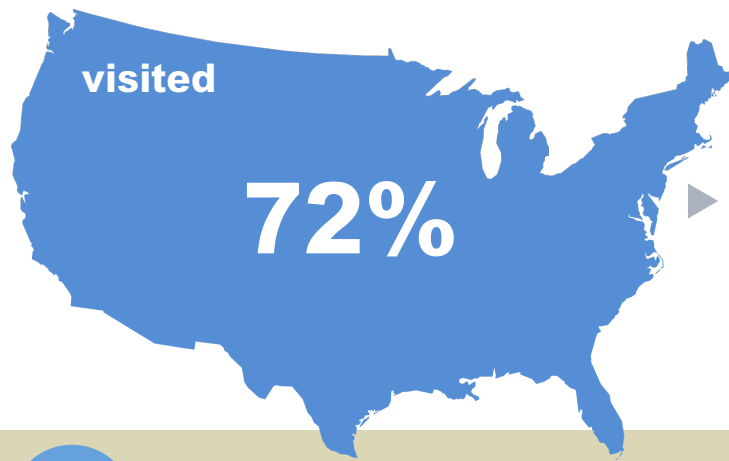


Coffeehouses or sandwich shops deliver a high concentration of:

- Affluent consumers
- Teens and young adults
- People with children living in the household

The audience skews:

- Male

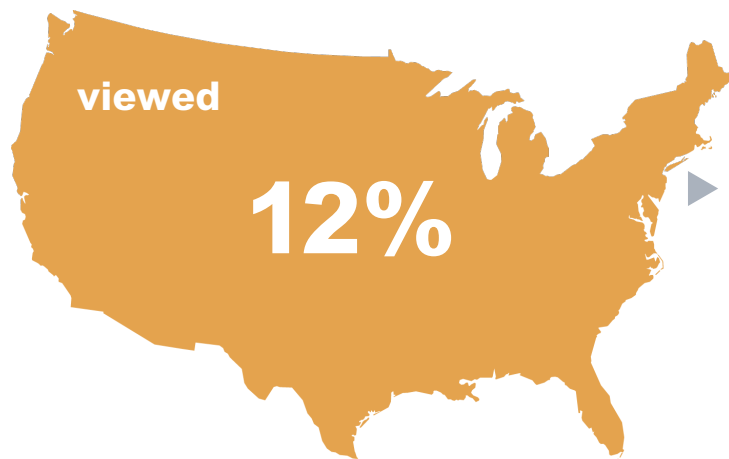


▶ Teen and adult U.S. residents have visited a convenience store in the past month.

Persons estimate: 187 million

16%

of those who visited a convenience store in the past month viewed digital video during at least one of those visits.



▶ Teen and adult U.S. residents have viewed digital video at a convenience store in the past month.

Persons estimate: 31 million



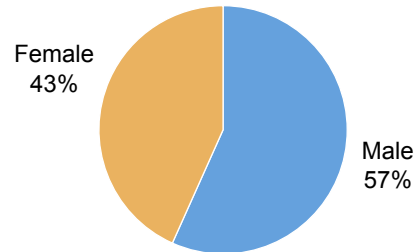
More than seven in 10 Americans have visited a convenience store in the past month. Seventy-two percent of U.S. residents aged 12 or older have been to a convenience store in the past month; out of those who visited, 16% noticed a digital video screen at the location on at least one of those visits.

The monthly reach of digital video displays at convenience stores among all American teens and adults is 12% or 31 million unique people.

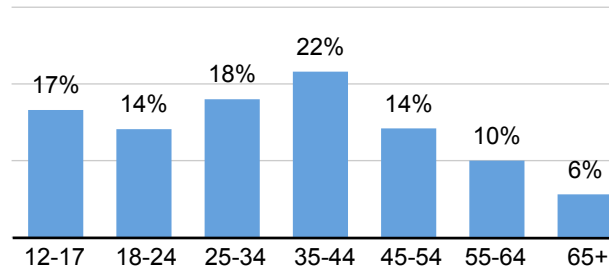
Monthly Digital Video Viewers Convenience Store

Demographic Profile

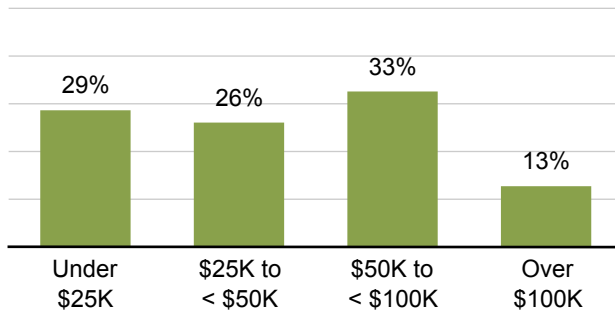
Sex



Age

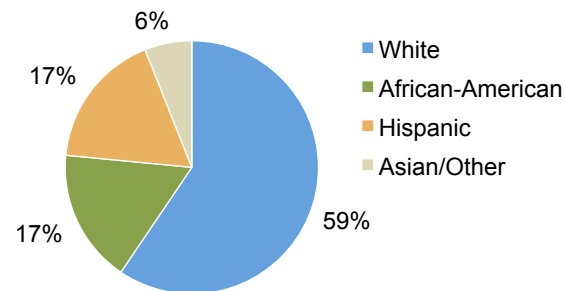


Household Income



Based on 66% of sample aged 18 or older who provided an income level.

Race/Ethnicity



Education

4-year College Degree or Higher **41%**

Based on respondents aged 18 or older.

Household Composition

Have Children Under Age 18 Living at Home **51%**

Based on respondents aged 18 or older.

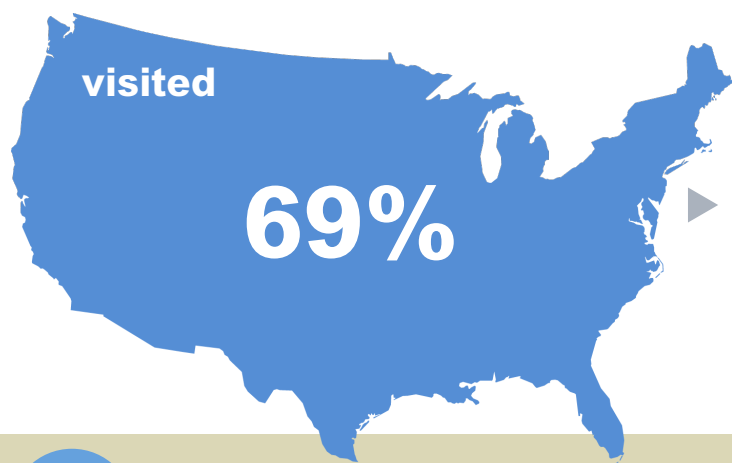
National Average Index

Men	Women	Age 12-24	Age 18-49	Age 25-54	Income \$50K+	Income \$100K+	College Degree or Higher	Children in Household
115	85	141	116	108	89	82	100	144



Convenience stores deliver a high concentration of:

- People with children living in the household
- Teens and young adults
- Men

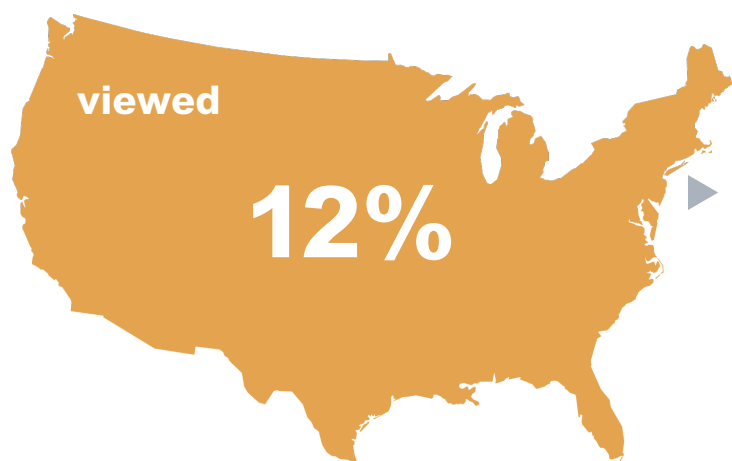


▶ Teen and adult U.S. residents have visited a drug store in the past month.

Persons estimate: 179 million

17%

of those who visited a drug store in the past month viewed digital video during at least one of those visits.



▶ Teen and adult U.S. residents have viewed digital video at a drug store in the past month.

Persons estimate: 30 million



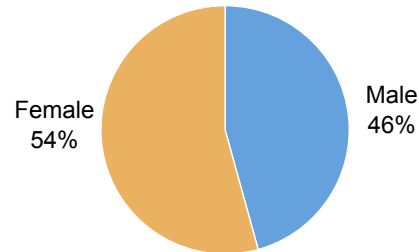
Nearly seven in 10 Americans have visited a drug store in the past month. Sixty-nine percent of U.S. residents aged 12 or older have been to a drug store in the past month; out of those who visited, 17% noticed a digital video screen at the location on at least one of those visits.

The monthly reach of digital video displays at health clubs among all American teens and adults is 12% or 30 million unique people.

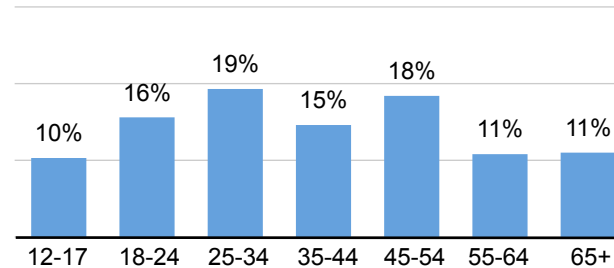
Monthly Digital Video Viewers Drug Store

Demographic Profile

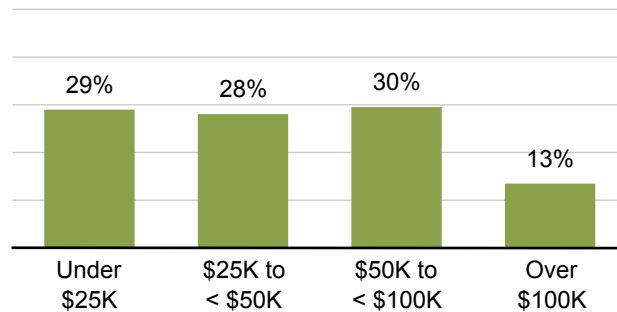
Sex



Age

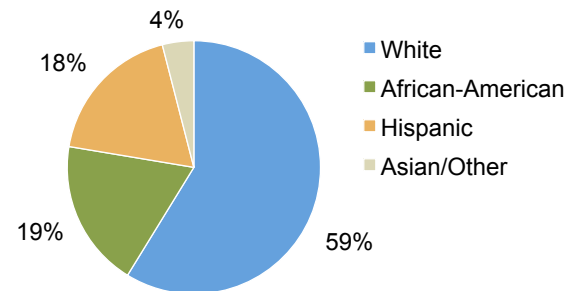


Household Income



Based on 74% of sample aged 18 or older who provided an income level.

Race/Ethnicity



Education

4-year College Degree or Higher **43%**

Based on respondents aged 18 or older.

Household Composition

Have Children Under Age 18 Living at Home **43%**

Based on respondents aged 18 or older.

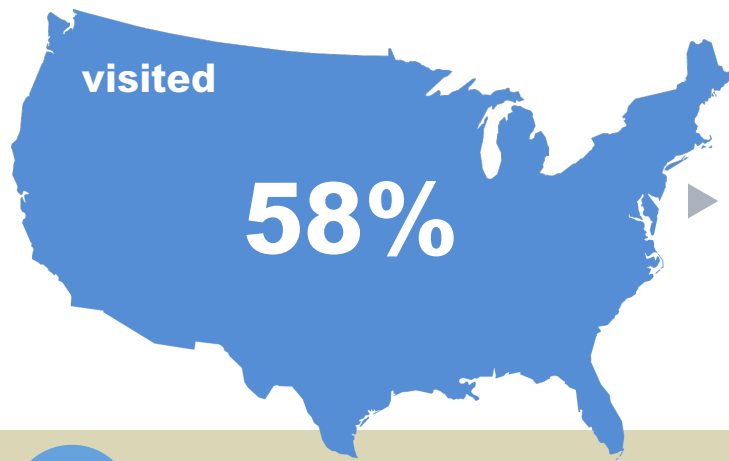
National Average Index

Men	Women	Age 12-24	Age 18-49	Age 25-54	Income \$50K+	Income \$100K+	College Degree or Higher	Children in Household
93	107	119	108	105	96	97	105	123



Drug stores deliver a high concentration of:

- People with children living in the household

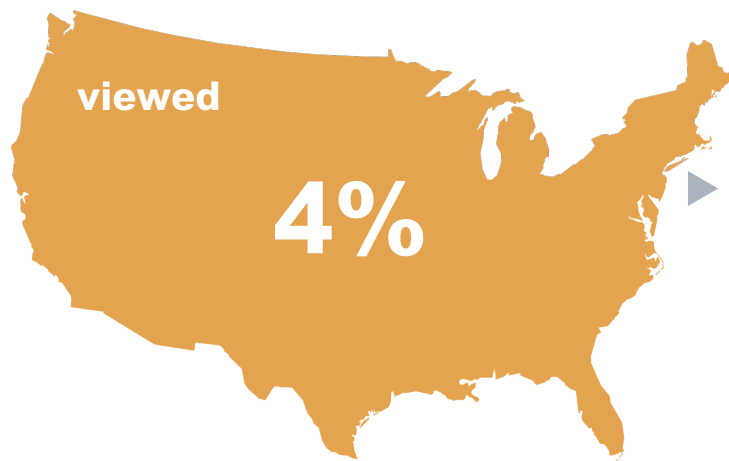


► Teen and adult U.S. residents have been in an elevator in the past month.

Persons estimate: 150 million

7%

of those who been in an elevator in the past month viewed digital video during at least one of those visits.



► Teen and adult U.S. residents have viewed digital video in an elevator in the past month.

Persons estimate: 10 million



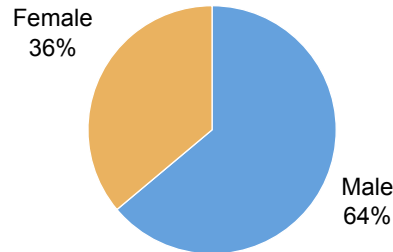
Nearly six in 10 Americans have been in an elevator in the past month. Fifty-eight percent of U.S. residents aged 12 or older have been in an elevator in the past month; out of those who have, 7% noticed a digital video screen at the location on at least one of those visits.

The monthly reach of digital video displays in elevators among all American teens and adults is 4% or 10 million unique people.

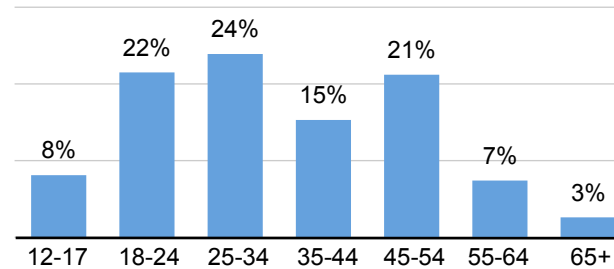
Monthly Digital Video Viewers Elevator

Demographic Profile

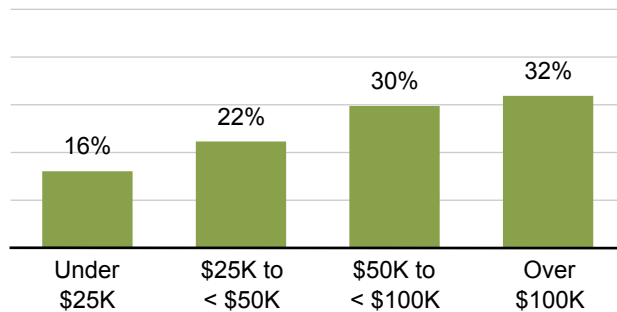
Sex



Age

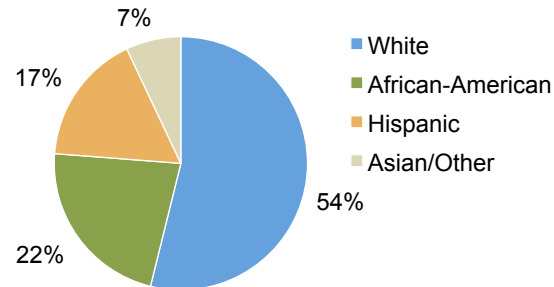


Household Income



Based on 75% of sample aged 18 or older who provided an income level.

Race/Ethnicity



Education

4-year College Degree or Higher **61%**

Based on respondents aged 18 or older.

Household Composition

Have Children Under Age 18 Living at Home **41%**

Based on respondents aged 18 or older.

National Average Index

Men	Women	Age 12-24	Age 18-49	Age 25-54	Income \$50K+	Income \$100K+	College Degree or Higher	Children in Household
130	71	136	135	121	139	233	150	116



Elevators deliver a high concentration of:

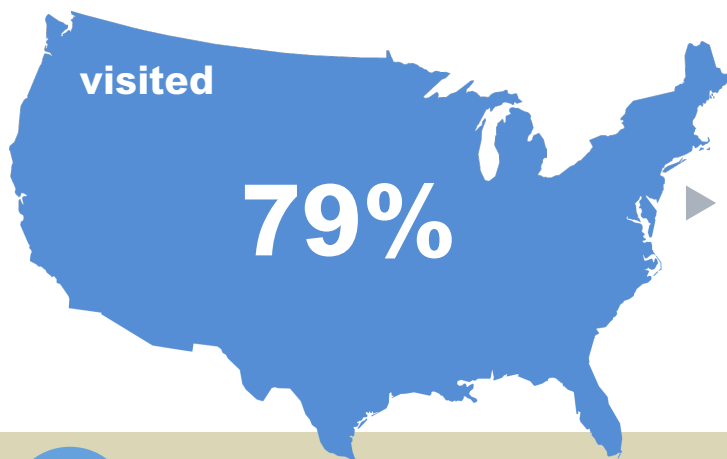
- Affluent consumers
- Men
- Adults

The audience skews:

- People with children living in the household

Fast Food or Casual Dining Restaurant

Audience Estimates

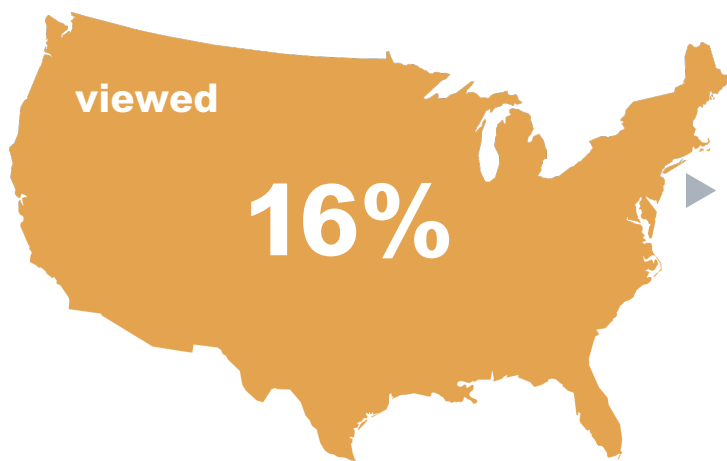


▶ Teen and adult U.S. residents have visited a fast food or casual dining restaurant in the past month.

Persons estimate: 204 million

21%

of those who visited a fast food or casual dining restaurant in the past month viewed digital video during at least one of those visits.



▶ Teen and adult U.S. residents have viewed digital video at a fast food or casual dining restaurant in the past month.

Persons estimate: 42 million



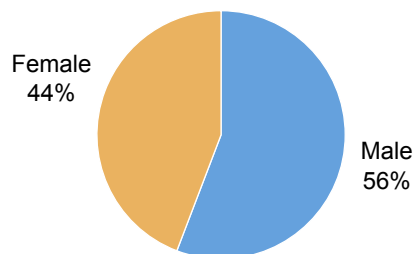
Almost eight in 10 Americans have visited a fast food or casual dining restaurant in the past month. Seventy-nine percent of U.S. residents aged 12 or older have been to a fast food or casual dining restaurant in the past month; out of those who visited, 21% noticed a digital video screen at the location on at least one of those visits.

The monthly reach of digital video displays at fast food or casual dining restaurants among all American teens and adults is 16% or 42 million unique people.

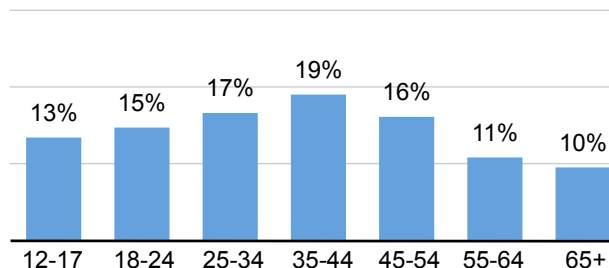
Fast Food or Casual Dining Restaurant

Demographic Profile

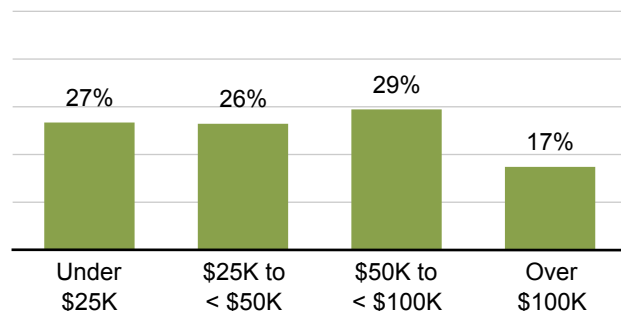
Sex



Age

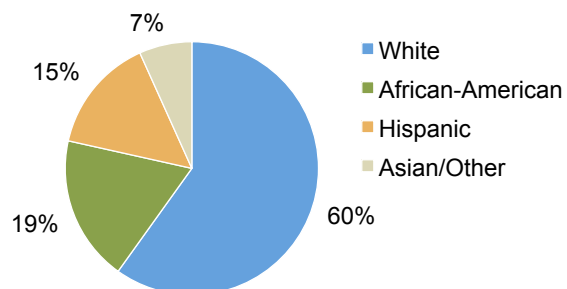


Household Income



Based on 76% of sample aged 18 or older who provided an income level.

Race/Ethnicity



Fast food or casual dining restaurants deliver a high concentration of:

- Teens and young adults
- Affluent consumers

The audience skews:

- Male
- People with children living in the household

Education

4-year College Degree or Higher **40%**

Based on respondents aged 18 or older.

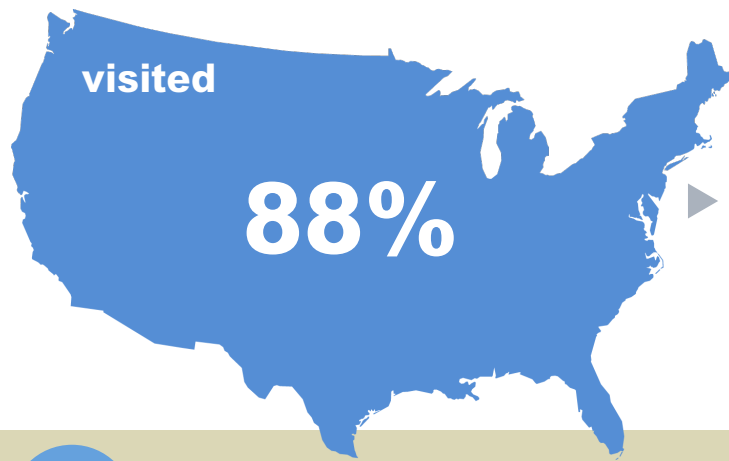
Household Composition

Have Children Under Age 18 Living at Home **42%**

Based on respondents aged 18 or older.

National Average Index

Men	Women	Age 12-24	Age 18-49	Age 25-54	Income \$50K+	Income \$100K+	College Degree or Higher	Children in Household
114	87	129	113	104	107	129	98	119

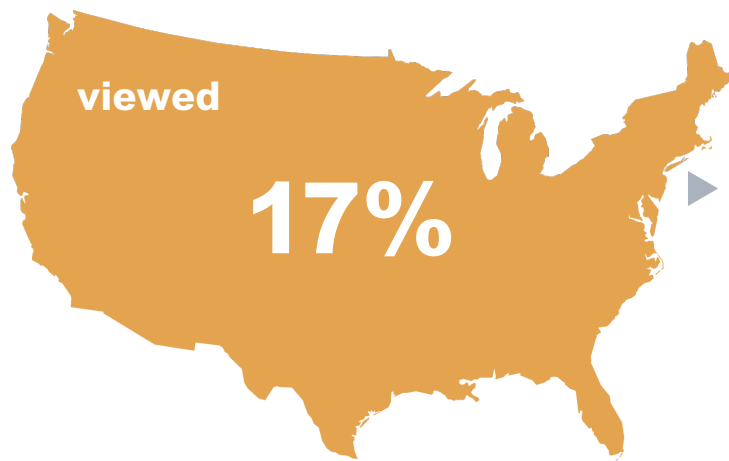


► Teen and adult U.S. residents have visited a gas station in the past month.

Persons estimate: 227 million

19%

of those who visited a gas station in the past month viewed digital video during at least one of those visits.



► Teen and adult U.S. residents have viewed digital video at a gas station in the past month.

Persons estimate: 43 million



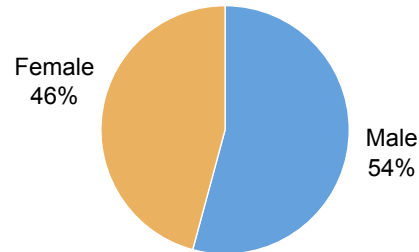
Nearly nine in 10 Americans have visited a gas station in the past month. Eighty-eight percent of U.S. residents aged 12 or older have been to a gas station in the past month; out of those who visited, 19% noticed a digital video screen at the location on at least one of those visits.

The monthly reach of digital video displays at gas stations among all American teens and adults is 17% or 43 million unique people.

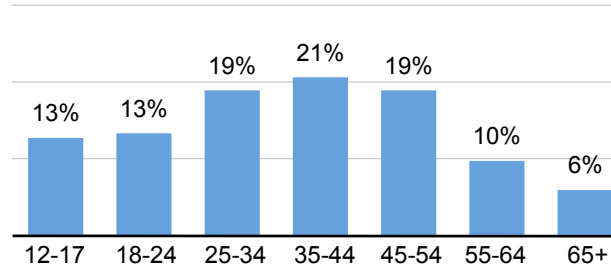
Monthly Digital Video Viewers Gas Station

Demographic Profile

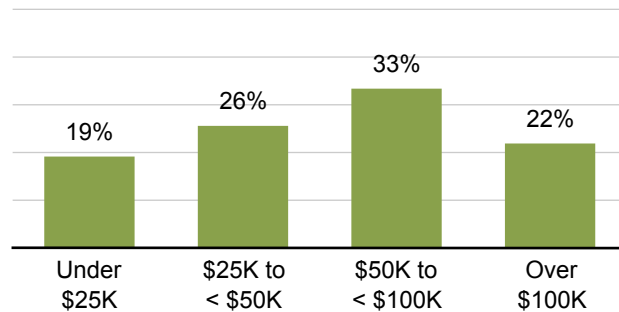
Sex



Age

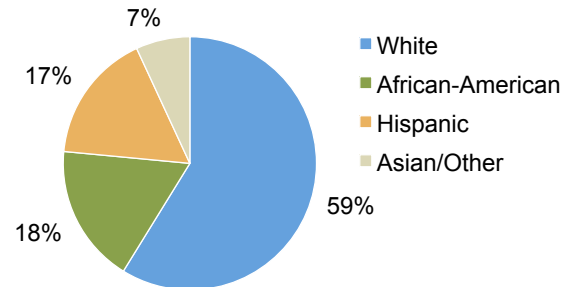


Household Income



Based on 73% of sample aged 18 or older who provided an income level.

Race/Ethnicity



Education

4-year College Degree or Higher **46%**

Based on respondents aged 18 or older.

Household Composition

Have Children Under Age 18 Living at Home **50%**

Based on respondents aged 18 or older.

National Average Index

Men	Women	Age 12-24	Age 18-49	Age 25-54	Income \$50K+	Income \$100K+	College Degree or Higher	Children in Household
110	90	120	120	117	121	155	114	144

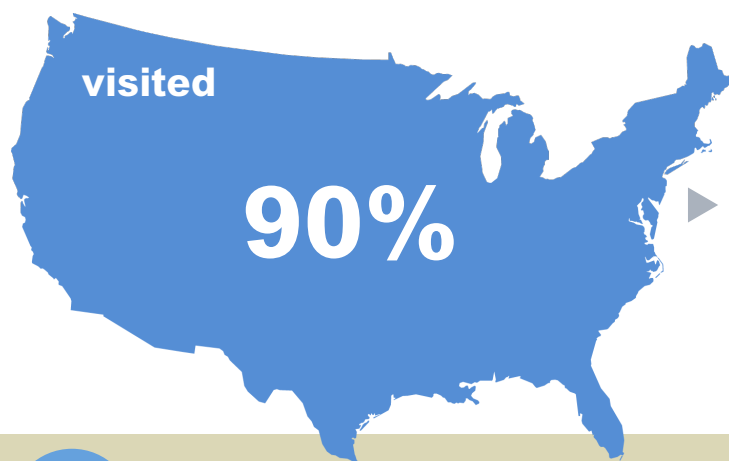


Gas stations deliver a high concentration of:

- Affluent consumers
- People with children living in the household

The audience skews:

- Male
- Educated

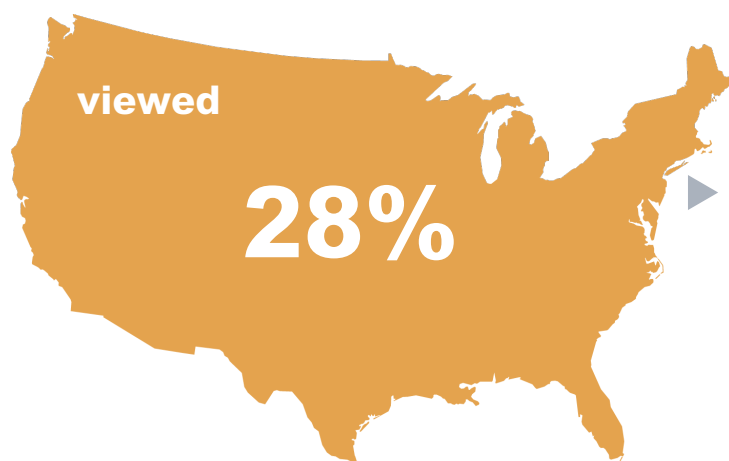


► Teen and adult U.S. residents have **visited** a grocery store in the past month.

Persons estimate: 232 million

31%

of those who visited a grocery store in the past month viewed digital video during at least one of those visits.



► Teen and adult U.S. residents have **viewed** digital video at a grocery store in the past month.

Persons estimate: 72 million



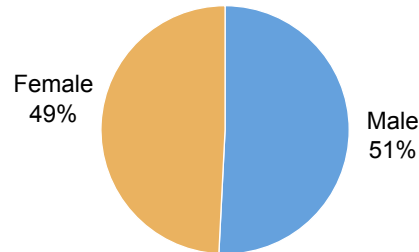
The majority of Americans have visited a grocery store in the past month. Ninety percent of U.S. residents aged 12 or older have been to a grocery store in the past month; out of those who visited, 31% noticed a digital video screen at the location on at least one of those visits.

The monthly reach of digital video displays at grocery stores among all American teens and adults is 28% or 72 million unique people.

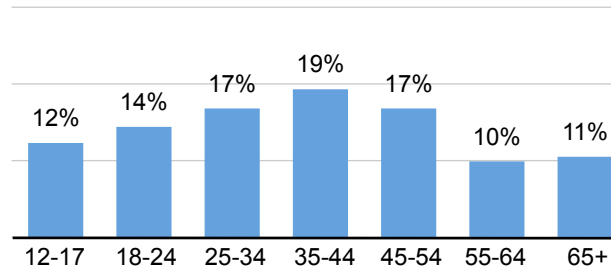
Monthly Digital Video Viewers Grocery Store

Demographic Profile

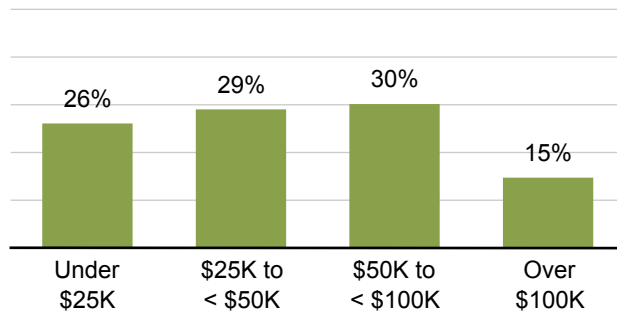
Sex



Age

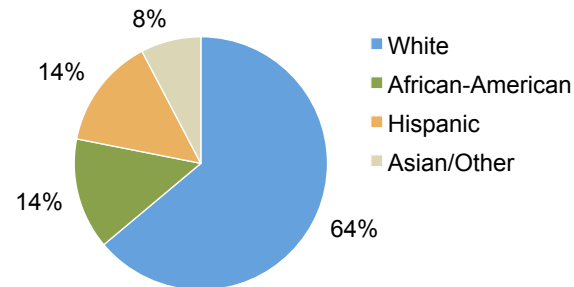


Household Income



Based on 71% of sample aged 18 or older who provided an income level.

Race/Ethnicity



Education

4-year College Degree or Higher **40%**

Based on respondents aged 18 or older.

Household Composition

Have Children Under Age 18 Living at Home **44%**

Based on respondents aged 18 or older.

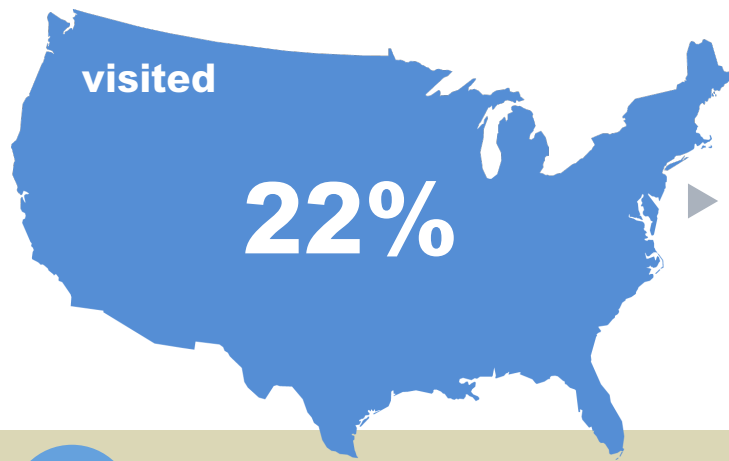
National Average Index

Men	Women	Age 12-24	Age 18-49	Age 25-54	Income \$50K+	Income \$100K+	College Degree or Higher	Children in Household
103	97	123	111	106	96	102	99	126



Grocery stores deliver a high concentration of:

- Teens and young adults
- People with children living in the household

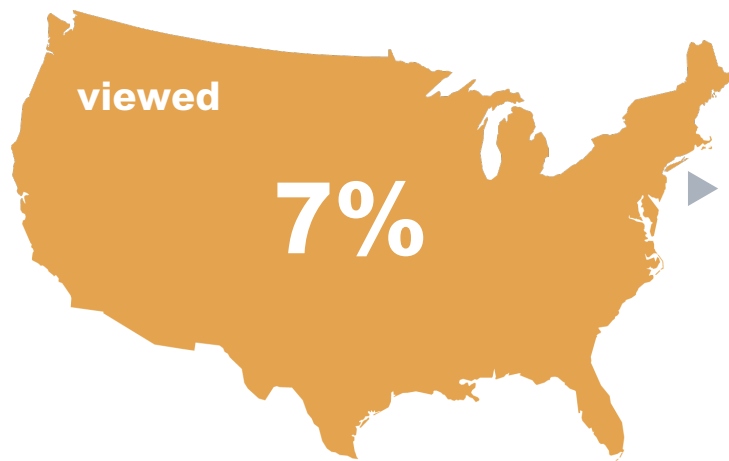


▶ Teen and adult U.S. residents have visited a health club in the past month.

Persons estimate: 56 million

32%

of those who visited a health club in the past month viewed digital video during at least one of those visits.



▶ Teen and adult U.S. residents have viewed digital video at a health club in the past month.

Persons estimate: 18 million



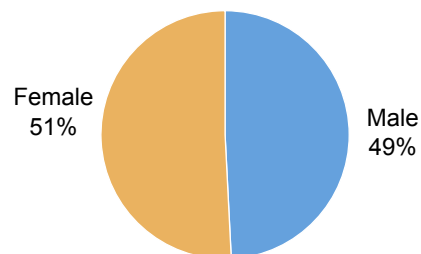
Over one in five Americans have visited a health club in the past month. Twenty-two percent of U.S. residents aged 12 or older have been to a health club in the past month; out of those who visited, 32% noticed a digital video screen at the location on at least one of those visits.

The monthly reach of digital video displays at health clubs among all American teens and adults is 7% or 18 million unique people.

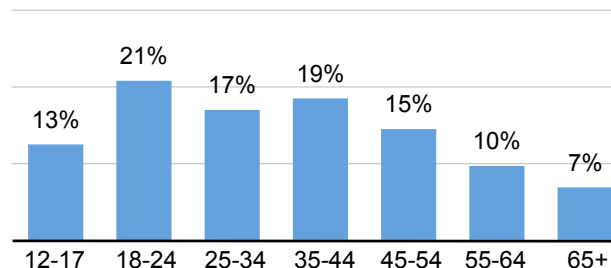
Monthly Digital Video Viewers Health Club

Demographic Profile

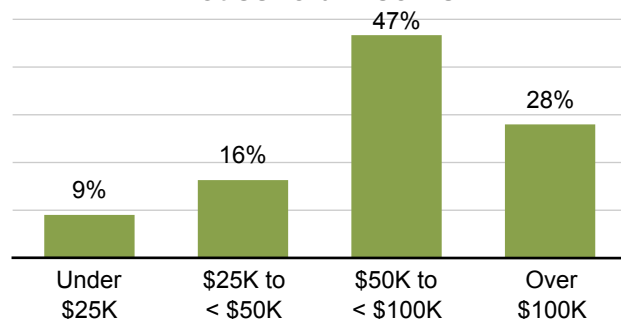
Sex



Age

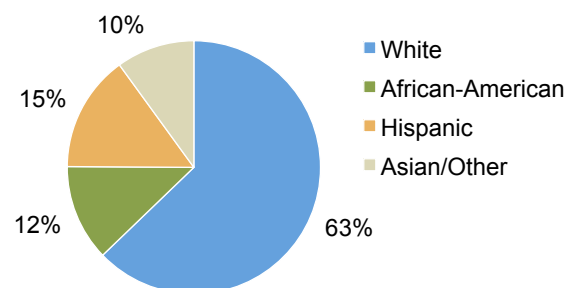


Household Income



Based on 75% of sample aged 18 or older who provided an income level.

Race/Ethnicity



Education

4-year College Degree or Higher **67%**

Based on respondents aged 18 or older.

Household Composition

Have Children Under Age 18 Living at Home **36%**

Based on respondents aged 18 or older.

National Average Index

Men	Women	Age 12-24	Age 18-49	Age 25-54	Income \$50K+	Income \$100K+	College Degree or Higher	Children in Household
100	100	154	120	101	168	205	164	103

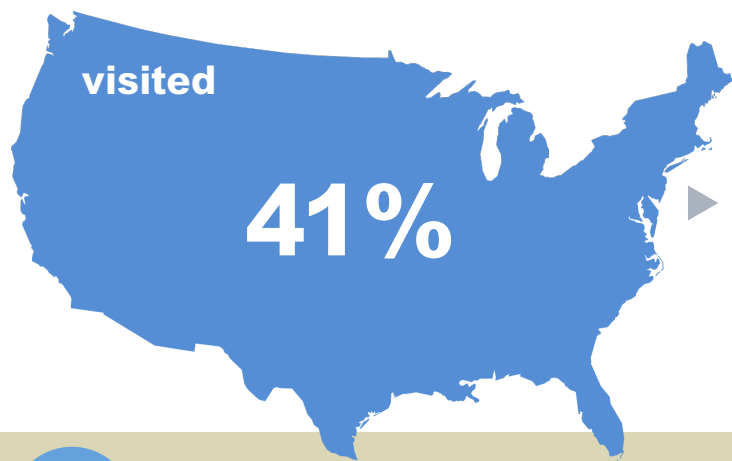


Health clubs deliver a high concentration of:

- Affluent consumers
- Young people
- People with college degrees

Hospital or Medical Test Facility

Audience Estimates

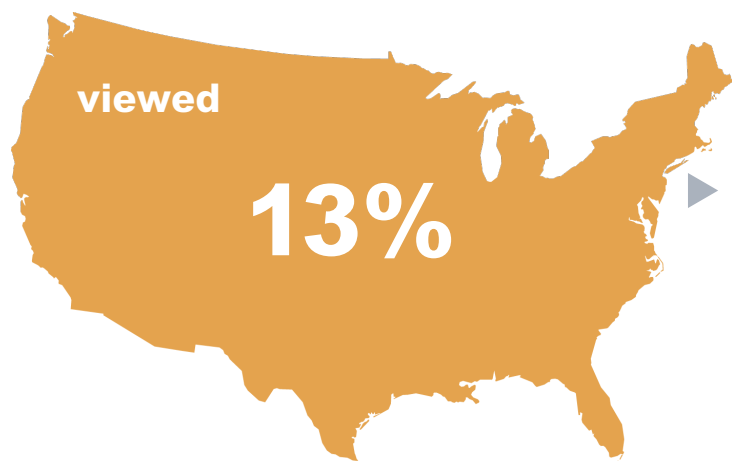


► Teen and adult U.S. residents have visited a hospital or medical test facility in the past month.

Persons estimate: 106 million

33%

of those who visited a hospital or medical test facility in the past month viewed digital video during at least one of those visits.



► Teen and adult U.S. residents have viewed digital video at a hospital or medical test facility in the past month.

Persons estimate: 34 million



Four in 10 Americans have visited a hospital or medical test facility in the past month.

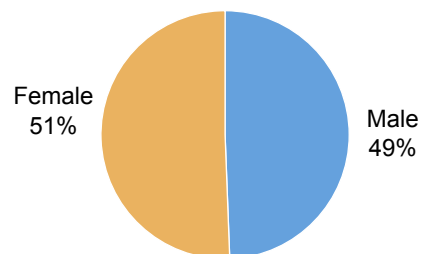
Forty-one percent of U.S. residents aged 12 or older have been to a hospital or medical test facility in the past month; out of those who visited, 33% noticed a digital video screen at the location on at least one of those visits.

The monthly reach of digital video displays at hospitals or medical test facilities among all American teens and adults is 13% or 34 million unique people.

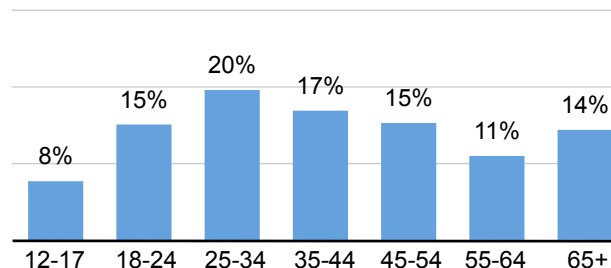
Hospital or Medical Test Facility

Demographic Profile

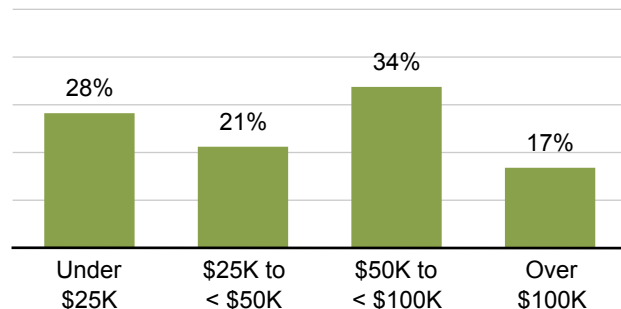
Sex



Age

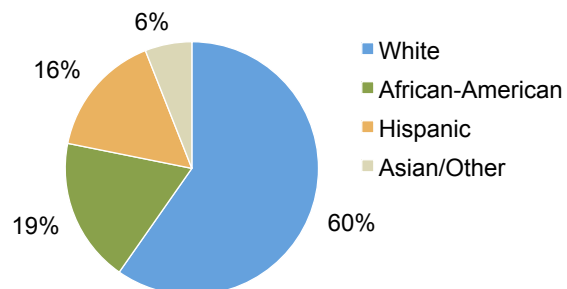


Household Income



Based on 73% of sample aged 18 or older who provided an income level.

Race/Ethnicity



Education

4-year College Degree or Higher **42%**

Based on respondents aged 18 or older.

Household Composition

Have Children Under Age 18 Living at Home **44%**

Based on respondents aged 18 or older.

National Average Index

Men	Women	Age 12-24	Age 18-49	Age 25-54	Income \$50K+	Income \$100K+	College Degree or Higher	Children in Household
101	99	105	115	104	110	118	103	124



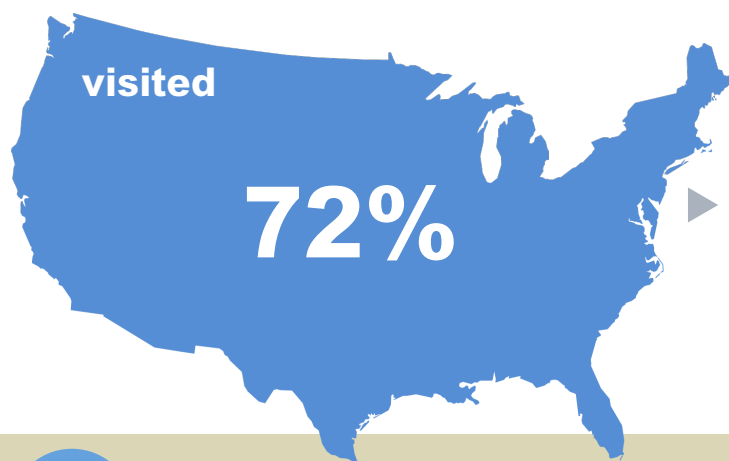
Hospitals or medical test facilities deliver a high concentration of:

- People with children living in the household

The audience skews:

- Upper income

Large Retail or Department Store

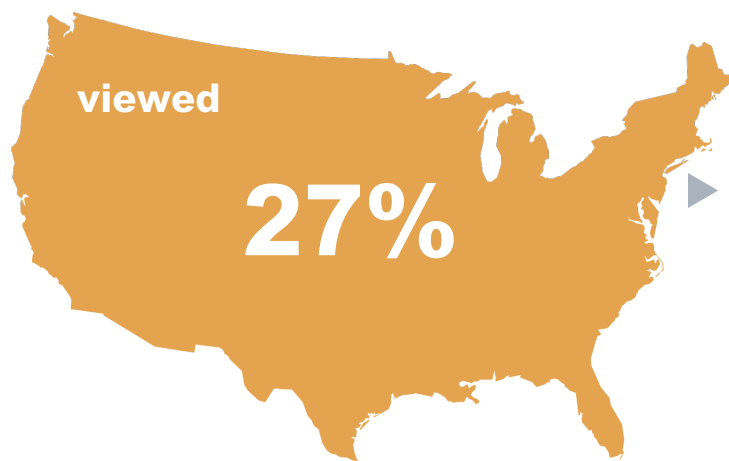


▶ Teen and adult U.S. residents have visited a large retail or department store in the past month.

Persons estimate: 186 million

37%

of those who visited a large retail or department store in the past month viewed digital video during at least one of those visits.



▶ Teen and adult U.S. residents have viewed digital video at a large retail or department store in the past month.

Persons estimate: 69 million



Nearly three-quarters of Americans have visited a large retail or department store in the past month. Seventy-two percent of U.S. residents aged 12 or older have been to a large retail or department store in the past month; out of those who visited, 37% noticed a digital video screen at the location on at least one of those visits.

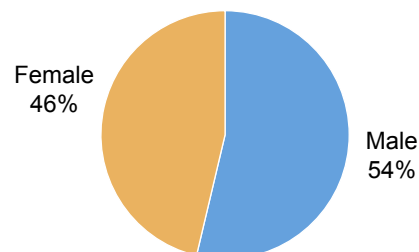
The monthly reach of digital video displays at large retail or department stores among all American teens and adults is over one-quarter (27%) or 69 million unique people.

Monthly Digital Video Viewers

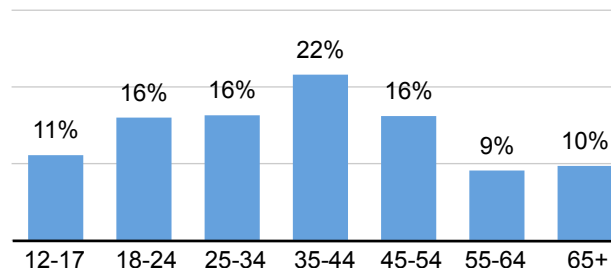
Large Retail or Department Store

Demographic Profile

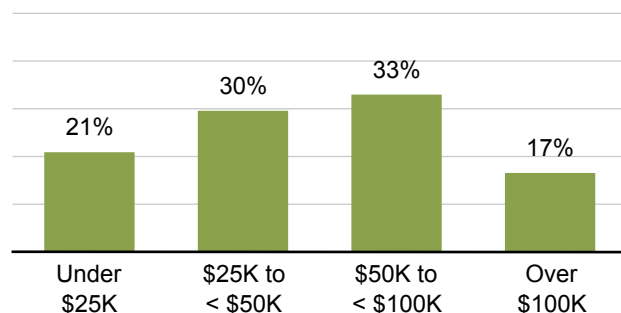
Sex



Age

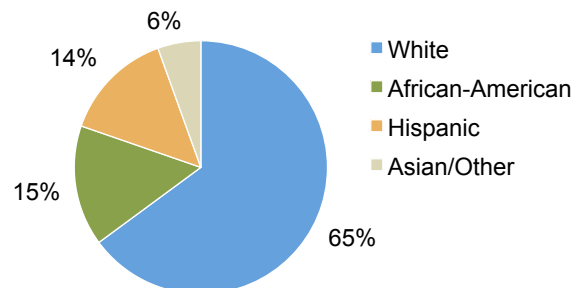


Household Income



Based on 74% of sample aged 18 or older who provided an income level.

Race/Ethnicity



Education

4-year College Degree or Higher **41%**

Based on respondents aged 18 or older.

Household Composition

Have Children Under Age 18 Living at Home **42%**

Based on respondents aged 18 or older.

National Average Index

Men	Women	Age 12-24	Age 18-49	Age 25-54	Income \$50K+	Income \$100K+	College Degree or Higher	Children in Household
109	91	125	115	109	109	118	100	121



Large retail or department stores deliver a high concentration of:

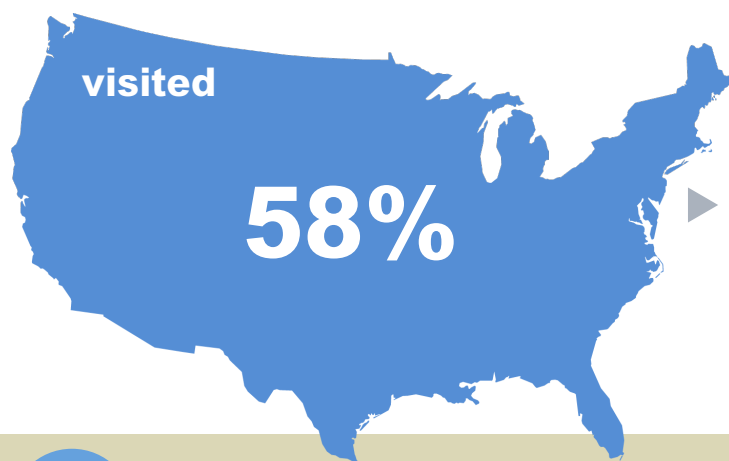
- Teens and young adults
- People with children living in the household

The audience skews slightly:

- Male
- Upper income

Medical Office (such as a doctor's office, dentist or veterinarian)

Audience Estimates

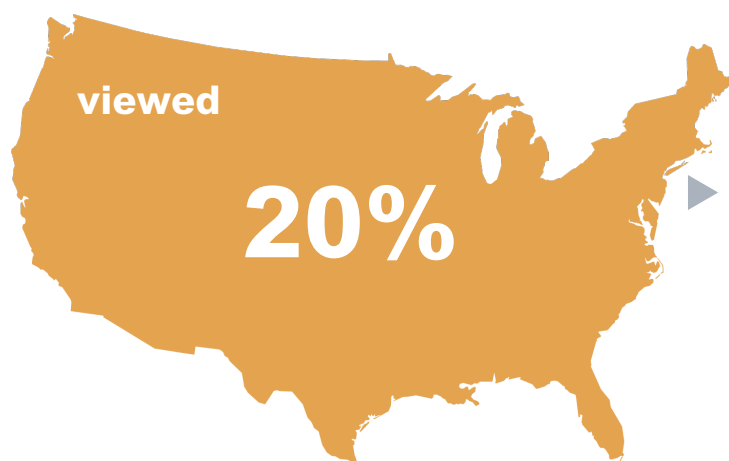


▶ Teen and adult U.S. residents have visited a medical office in the past month.

Persons estimate: 151 million

34%

of those who visited a medical office in the past month viewed digital video during at least one of those visits.



▶ Teen and adult U.S. residents have viewed digital video at a medical office in the past month.

Persons estimate: 52 million



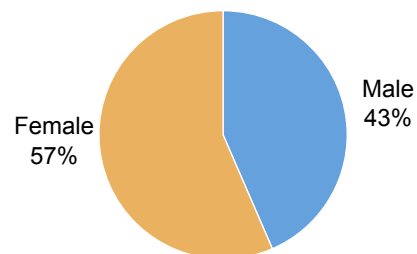
Nearly six in 10 Americans have visited a medical office in the past month. Fifty-eight percent of U.S. residents aged 12 or older have been to a medical office such as a doctor's office, dentist or veterinarian in the past month; out of those who visited, 34% noticed a digital video screen at the location on at least one of those visits.

The monthly reach of digital video displays at medical offices such as doctor's offices, dentists or veterinarians among all American teens and adults is one in five (20%) or 52 million unique people.

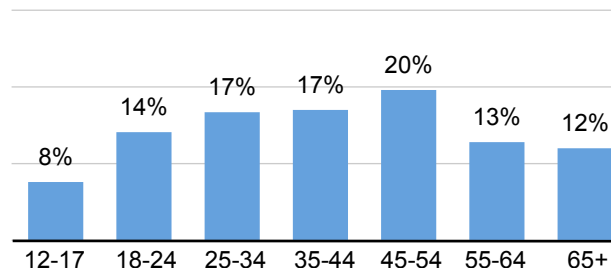
Medical Office (such as a doctor's office, dentist or veterinarian)

Demographic Profile

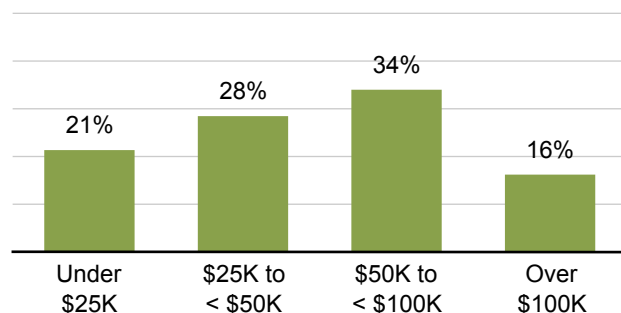
Sex



Age

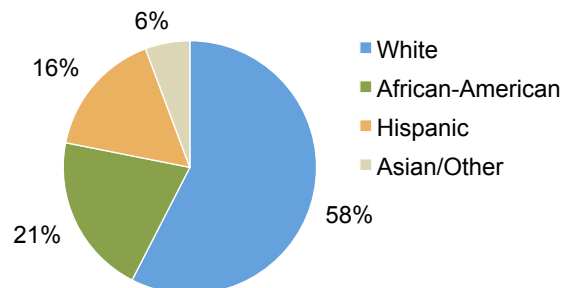


Household Income



Based on 76% of sample aged 18 or older who provided an income level.

Race/Ethnicity



Education

4-year College Degree or Higher **40%**

Based on respondents aged 18 or older.

Household Composition

Have Children Under Age 18 Living at Home **43%**

Based on respondents aged 18 or older.

National Average Index

Men	Women	Age 12-24	Age 18-49	Age 25-54	Income \$50K+	Income \$100K+	College Degree or Higher	Children in Household
89	111	100	110	107	114	119	98	122

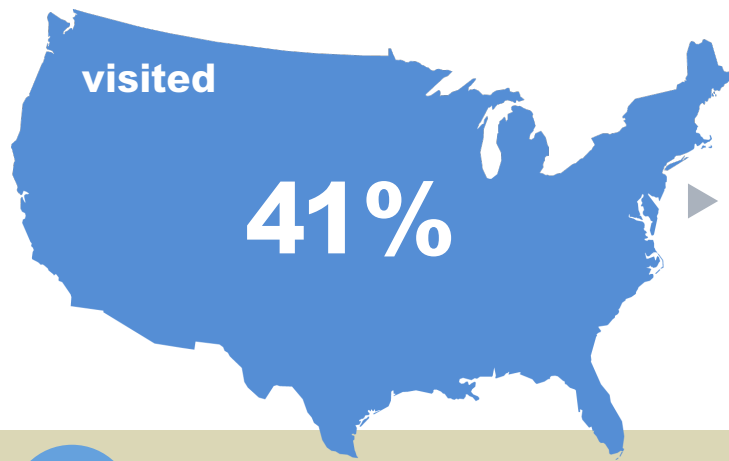


Medical offices deliver a high concentration of:

- People with children living in the household

The audience skews:

- Female
- Upper income

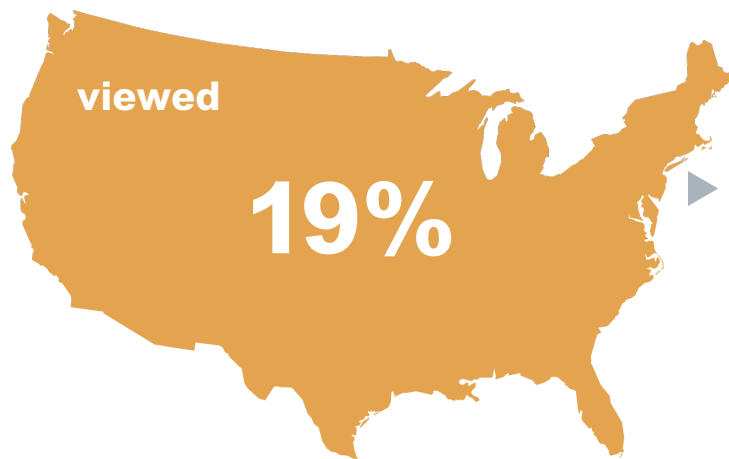


► Teen and adult U.S. residents have visited a movie theater in the past month.

Persons estimate: 107 million

47%

of those who visited a movie theater in the past month viewed digital video during at least one of those visits.



► Teen and adult U.S. residents have viewed digital video at a movie theater in the past month.

Persons estimate: 50 million



More than four in 10 Americans have visited a movie theater in the past month. Forty-one percent of U.S. residents aged 12 or older have been to a movie theater in the past month; out of those who visited, 47% noticed a digital video screen at the location on at least one of those visits.

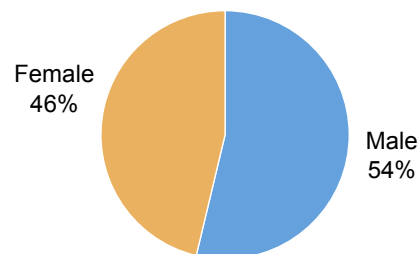
The monthly reach of digital video displays at movie theaters among all American teens and adults is almost one in five (19%) or 50 million unique people.

Monthly Digital Video Viewers

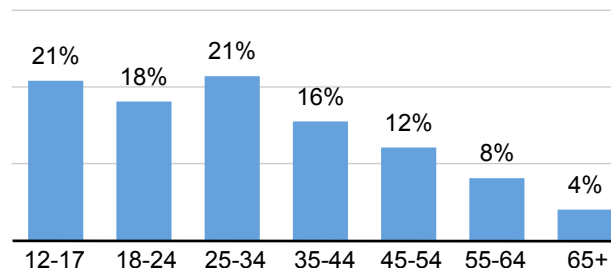
Movie Theater

Demographic Profile

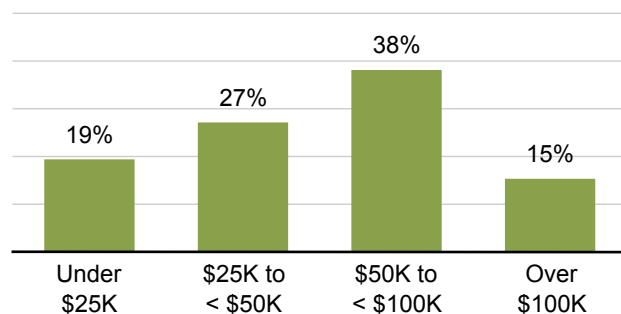
Sex



Age

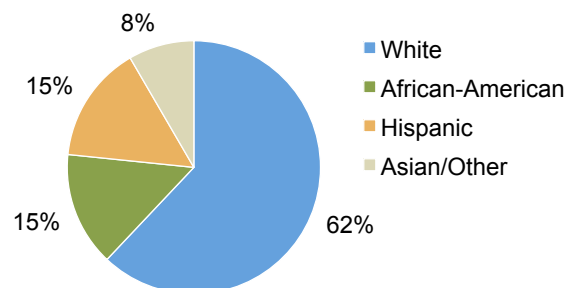


Household Income



Based on 74% of sample aged 18 or older who provided an income level.

Race/Ethnicity



Education

4-year College Degree or Higher **50%**

Based on respondents aged 18 or older.

Household Composition

Have Children Under Age 18 Living at Home **42%**

Based on respondents aged 18 or older.

National Average Index

Men	Women	Age 12-24	Age 18-49	Age 25-54	Income \$50K+	Income \$100K+	College Degree or Higher	Children in Household
109	91	179	119	98	118	110	124	120



Movie theaters deliver a high concentration of:

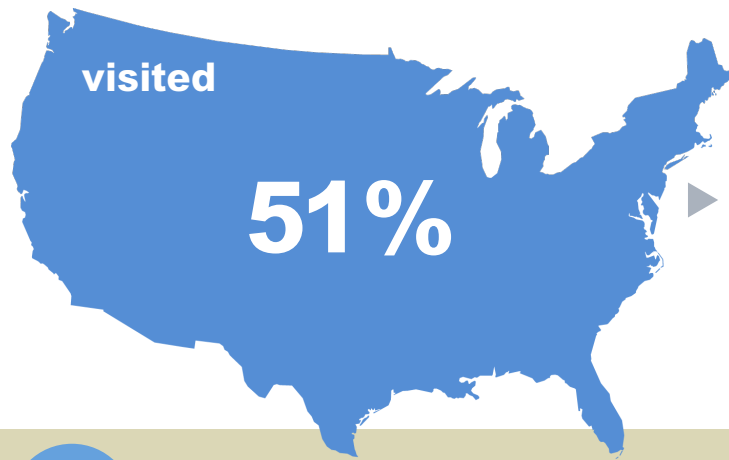
- Teens and young adults
- People with college degrees
- People with children living in the household

The audience skews slightly:

- Male
- Upper income

Monthly Digital Video Viewers Office Building Lobby

Audience Estimates

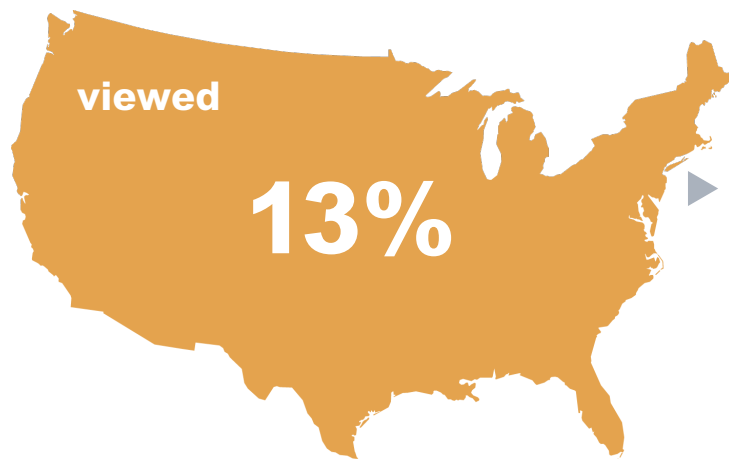


▶ Teen and adult U.S. residents have visited an office building lobby in the past month.

Persons estimate: 132 million

26%

of those who visited an office building lobby in the past month viewed digital video during at least one of those visits.



▶ Teen and adult U.S. residents have viewed digital video at an office building lobby in the past month.

Persons estimate: 34 million



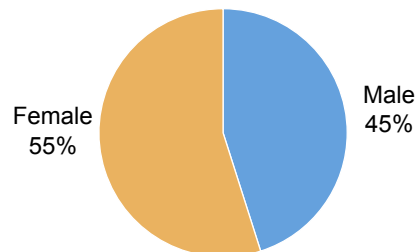
Half of Americans have visited an office building lobby in the past month. Fifty-one percent of U.S. residents aged 12 or older have been to an office building lobby in the past month; out of those who visited, 26% noticed a digital video screen at the location on at least one of those visits.

The monthly reach of digital video display in office building lobbies among all American teens and adults is 13% or 34 million unique people.

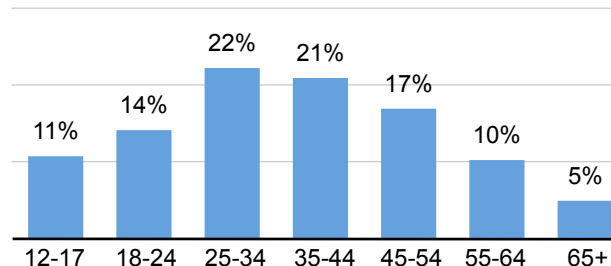
Monthly Digital Video Viewers Office Building Lobby

Demographic Profile

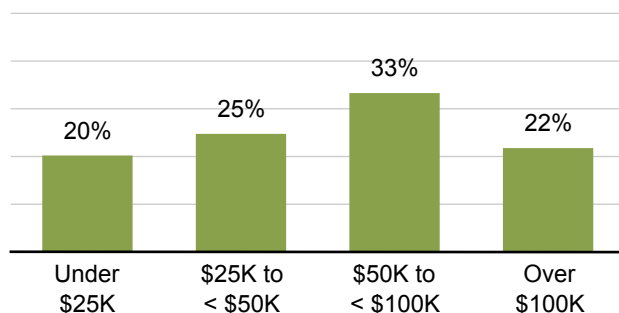
Sex



Age

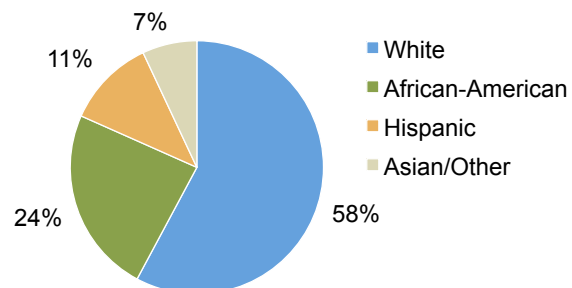


Household Income



Based on 77% of sample aged 18 or older who provided an income level.

Race/Ethnicity



Education

4-year College Degree or Higher **52%**

Based on respondents aged 18 or older.

Household Composition

Have Children Under Age 18 Living at Home **48%**

Based on respondents aged 18 or older.

National Average Index

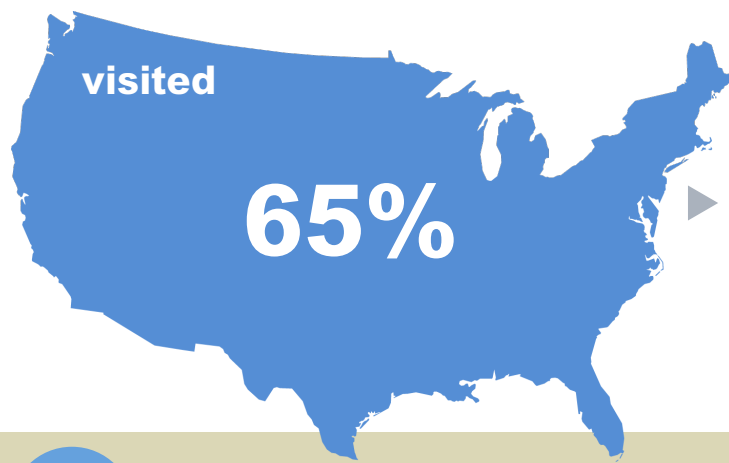
Men	Women	Age 12-24	Age 18-49	Age 25-54	Income \$50K+	Income \$100K+	College Degree or Higher	Children in Household
92	108	114	125	120	127	163	129	137

Office building lobbies deliver a high concentration of:

- Affluent consumers
- People with children living in the household
- Adults

The audience skews:

- Female

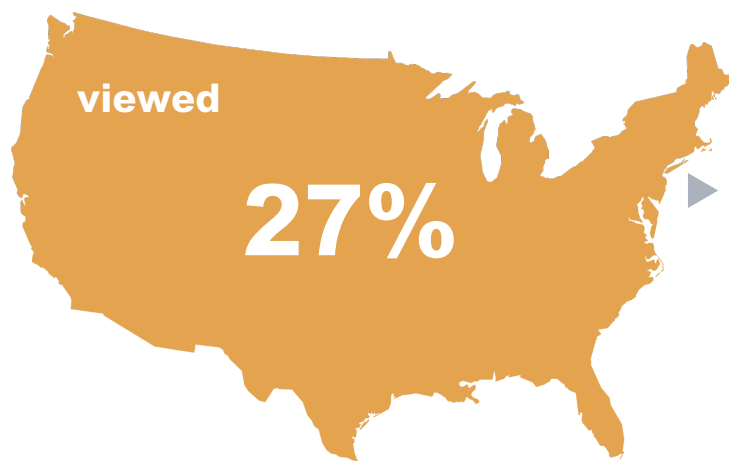


▶ Teen and adult U.S. residents have visited a shopping mall in the past month.

Persons estimate: 169 million

42%

of those who visited a shopping mall in the past month viewed digital video during at least one of those visits.



▶ Teen and adult U.S. residents have viewed digital video at a shopping mall in the past month.

Persons estimate: 70 million



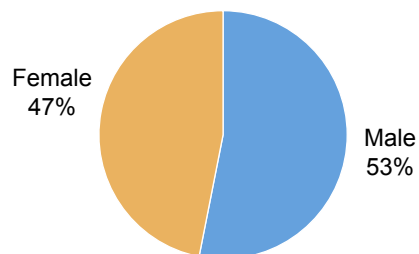
Nearly two-thirds of Americans have visited a shopping mall in the past month. Sixty-five percent of U.S. residents aged 12 or older have been to a shopping mall in the past month; out of those who visited, 42% noticed a digital video screen at the location on at least one of those visits.

The monthly reach of digital video displays at shopping malls among all American teens and adults is more than one in four (27%) or 70 million unique people.

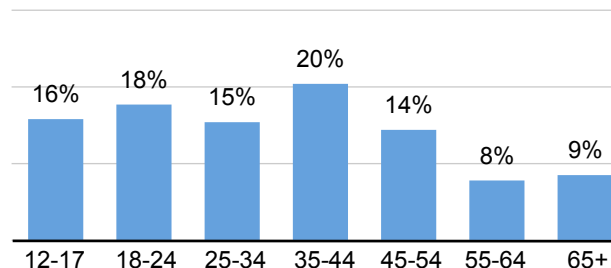
Monthly Digital Video Viewers Shopping Mall

Demographic Profile

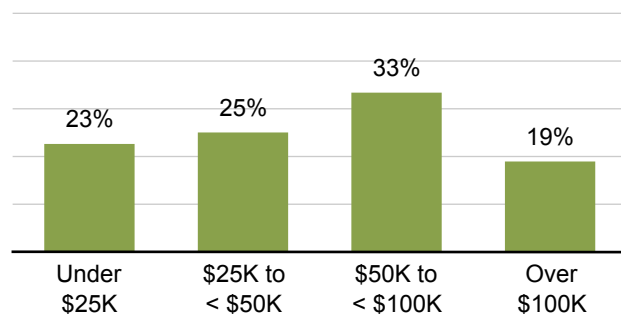
Sex



Age

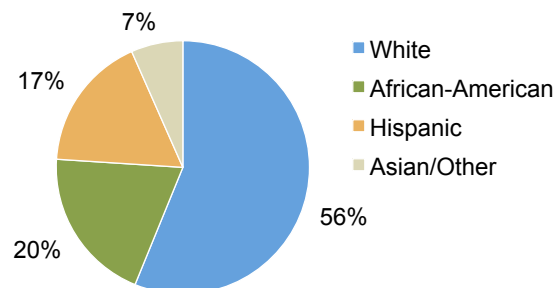


Household Income



Based on 71% of sample aged 18 or older who provided an income level.

Race/Ethnicity



Education

4-year College Degree or Higher **43%**

Based on respondents aged 18 or older.

Household Composition

Have Children Under Age 18 Living at Home **44%**

Based on respondents aged 18 or older.

National Average Index

Men	Women	Age 12-24	Age 18-49	Age 25-54	Income \$50K+	Income \$100K+	College Degree or Higher	Children in Household
108	92	154	117	101	110	130	105	125



Shopping malls deliver a high concentration of:

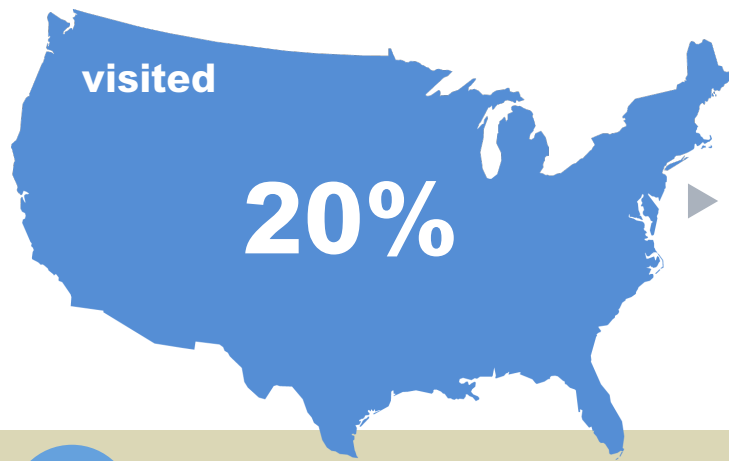
- Teens and young adults
- Affluent consumers
- People with children living in the household

The audience skews slightly:

- Male

Monthly Digital Video Viewers Stadium or Arena

Audience Estimates

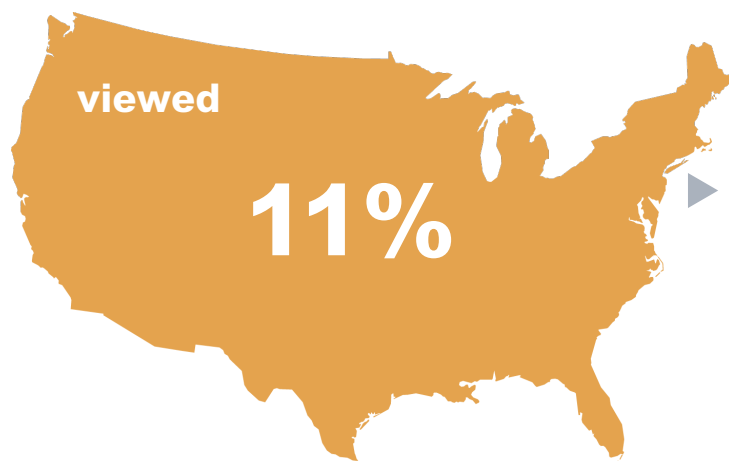


▶ Teen and adult U.S. residents have visited a stadium or arena in the past month.

Persons estimate: 51 million

55%

of those who visited a stadium or arena in the past month viewed digital video during at least one of those visits.



▶ Teen and adult U.S. residents have viewed digital video at a stadium or arena in the past month.

Persons estimate: 28 million



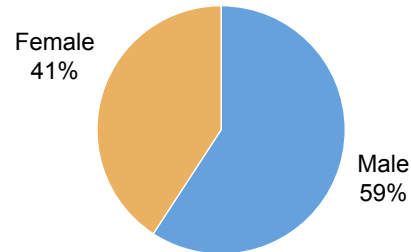
One in five Americans have visited a stadium or arena in the past month. Twenty percent of U.S. residents aged 12 or older have been to a stadium or arena in the past month; out of those who visited, 55% noticed a digital video screen at the location on at least one of those visits.

The monthly reach of digital video displays at stadiums and arenas among all American teens and adults is 11% or 28 million unique people.

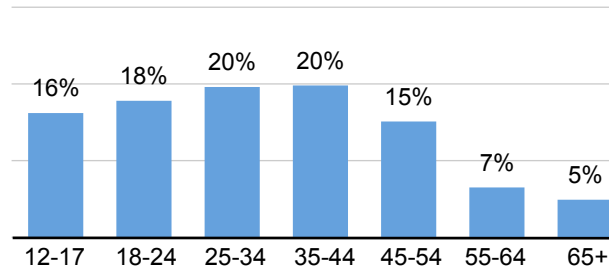
Monthly Digital Video Viewers Stadium or Arena

Demographic Profile

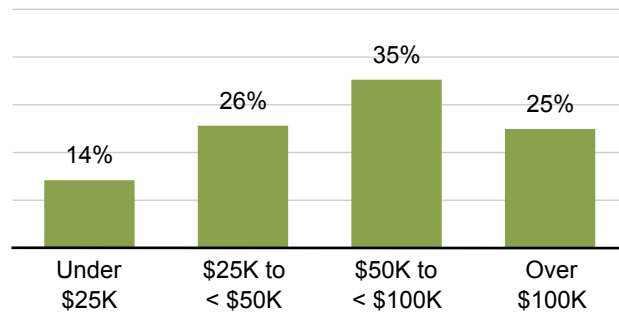
Sex



Age

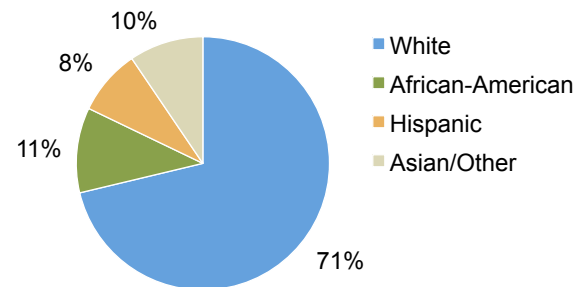


Household Income



Based on 73% of sample aged 18 or older who provided an income level.

Race/Ethnicity



Stadiums and arenas deliver a high concentration of:

- Men
- Affluent consumers
- Teens and adults
- People with college degrees

Education

4-year College Degree or Higher **56%**

Based on respondents aged 18 or older.

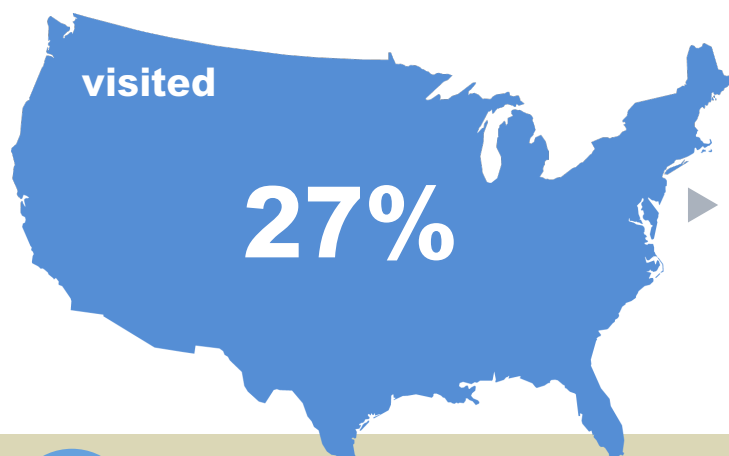
Household Composition

Have Children Under Age 18 Living at Home **33%**

Based on respondents aged 18 or older.

National Average Index

Men	Women	Age 12-24	Age 18-49	Age 25-54	Income \$50K+	Income \$100K+	College Degree or Higher	Children in Household
121	80	157	125	110	131	176	139	94

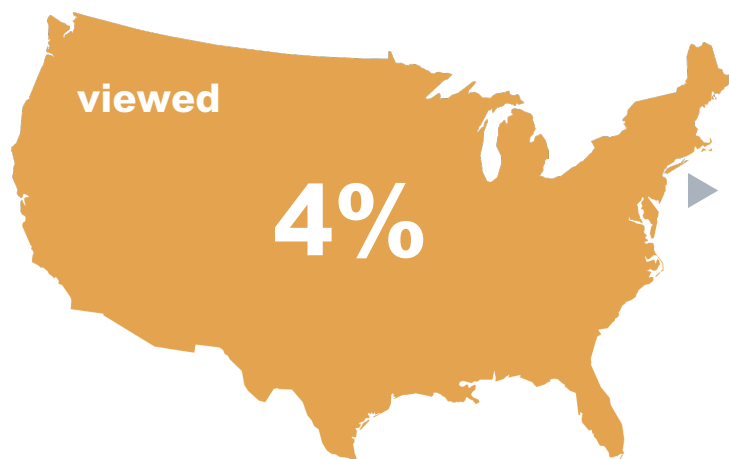


► Teen and adult U.S. residents have been exposed to a public bus, bus stop shelter, train or taxicab in the past month.

Persons estimate: 69 million

16%

of those who have been exposed to a public bus, bus stop shelter, train or taxicab in the past month viewed digital video on the outside of the vehicles or structures during at least one of those occasions.



► Teen and adult U.S. residents have viewed digital video on the outside of a bus, bus stop shelter, train or taxicab in the past month.

Persons estimate: 11 million



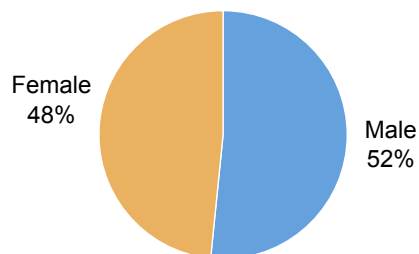
Over one-quarter of Americans have seen digital video on the outside of a bus, bus stop shelter, train or taxicab in the past month. Twenty-seven percent of U.S. residents aged 12 or older have been exposed to a bus, bus stop shelter, train or taxicab in the past month; out of those who were exposed, 16% noticed a digital video screen on the outside of the vehicle or structure on at least one of those occasions.

The monthly reach of digital video displays on the outside of buses, bus stop shelters, trains or taxicabs among all American teens and adults is 4% or 11 million unique people.

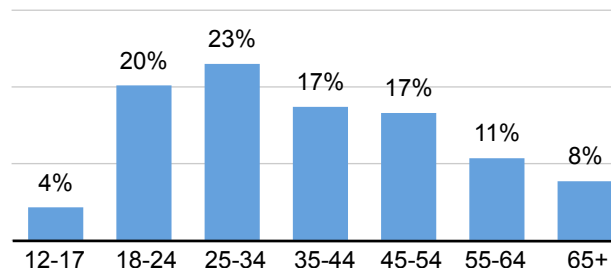
Transportation: Exterior of a Bus, Bus Stop Shelter, Train or Taxicab

Demographic Profile

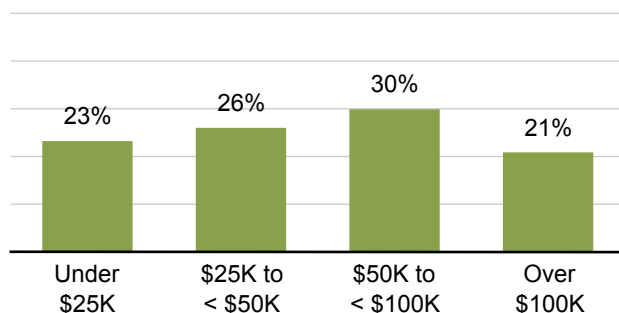
Sex



Age

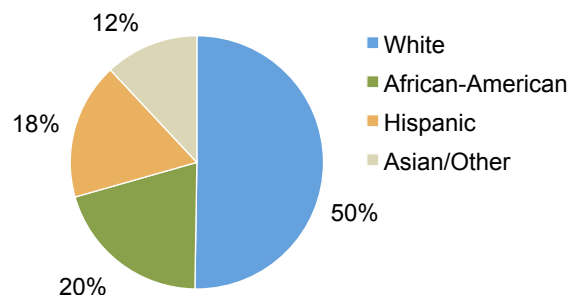


Household Income



Based on 72% of sample aged 18 or older who provided an income level.

Race/Ethnicity



Education

4-year College Degree or Higher **43%**

Based on respondents aged 18 or older.

Household Composition

Have Children Under Age 18 Living at Home **43%**

Based on respondents aged 18 or older.

National Average Index

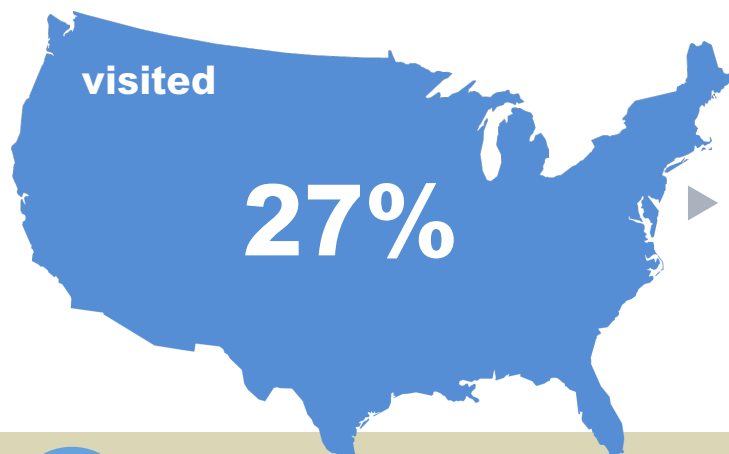
Men	Women	Age 12-24	Age 18-49	Age 25-54	Income \$50K+	Income \$100K+	College Degree or Higher	Children in Household
105	95	113	129	114	109	146	107	123



The outside of buses, bus stop shelters, trains or taxicabs deliver a high concentration of:

- Affluent consumers
- Adults
- People with children living in the household

Transportation: Riding Inside a Bus, Train or Taxicab

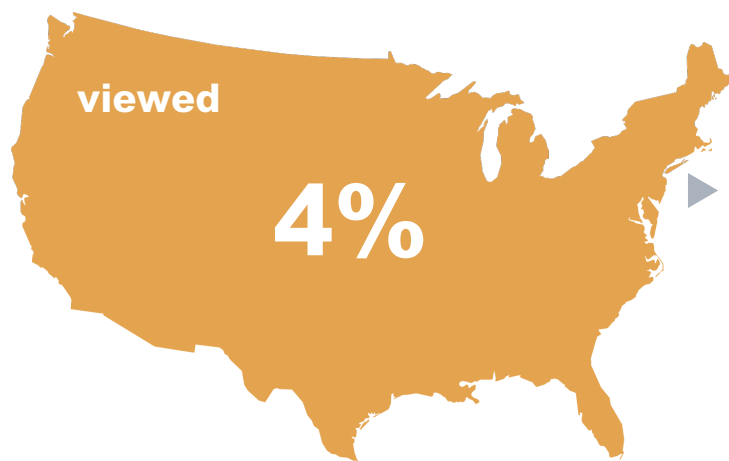


► Teen and adult U.S. residents have been exposed to a public bus, bus stop shelter, train or taxicab in the past month.

Persons estimate: 69 million

13%

of those who have been exposed to a public bus, bus stop shelter, train or taxicab in the past month viewed digital video while riding on the inside of the vehicle on at least one of those occasions.



► Teen and adult U.S. residents have viewed digital video inside a bus, train or taxicab.

Persons estimate: 9 million



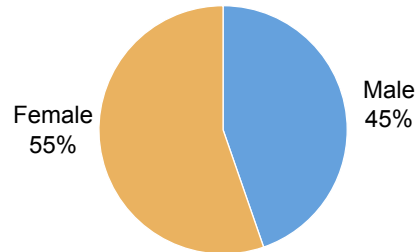
Over one-quarter of Americans have seen digital video while riding a bus, train or taxicab in the past month. Twenty-seven percent of U.S. residents aged 12 or older have been exposed to a bus, bus stop shelter, train or taxicab in the past month; out of those who were exposed, 13% noticed a digital video screen on at least one of those occasions.

The monthly reach of digital video displays while riding buses, trains or taxicabs among all American teens and adults is 4% or 9 million unique people.

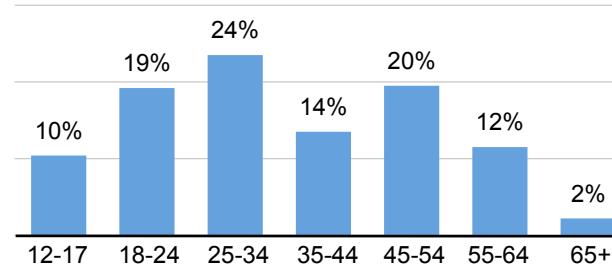
Transportation: Riding Inside a Bus, Train or Taxicab

Demographic Profile

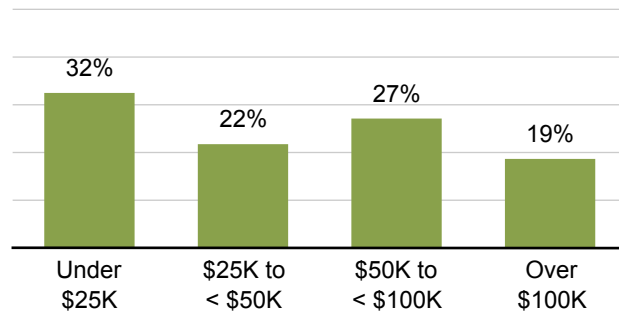
Sex



Age

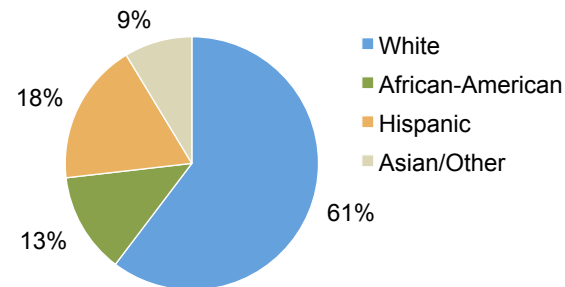


Household Income



Based on 75% of sample aged 18 or older who provided an income level.

Race/Ethnicity



Education

4-year College Degree or Higher **39%**

Based on respondents aged 18 or older.

Household Composition

Have Children Under Age 18 Living at Home **53%**

Based on respondents aged 18 or older.

National Average Index

Men	Women	Age 12-24	Age 18-49	Age 25-54	Income \$50K+	Income \$100K+	College Degree or Higher	Children in Household
91	109	137	121	114	102	135	95	151



The interior of buses, trains or taxicabs deliver a high concentration of:

- People with children living in the household
- Affluent consumers
- Teens and adults

The audience skews slightly:

- Female

Appendix

Verbatim survey questions from page 9:

Monthly digital place-based video: *"Many public places now have digital video displays. These video displays look like television screens, but rather than broadcasting regular television stations, they feature short programs and advertising relevant to products in the store. For example, a video display at a local grocery store might show food items for sale, while a video display in the lobby of a local movie theater might show the trailer for an upcoming movie.*

Now I'm going to read a list of locations, and I'd like you to tell me whether or not you have seen a digital video display at that location recently. Again, we are specifically asking about digital video displays so please do NOT include TV stations you might have seen on a regular television screen at one of these locations.

In the past month, have you seen a digital video display...[specific venue]"

Ever send or receive text message on cell phone: *"How often do you send or receive text messages on your cell phone?" Combined responses: Multiple times per day, About once a day, Multiple times per week, About once a week, A few times per month or less.*

Have an MP3 player: *"Do you currently own... [the Apple iPod, the Apple iPhone, any portable MP3 audio players, other than the Apple iPod family of MP3 players]"*

Monthly online video: *"Have you viewed video over the Internet in the last month?" or "Have you watched video clips or other Internet video programming from... [Hulu, YouTube] in the last month?"*

Own a DVR: *"Do you currently... [own a TiVo branded Digital Video Recorder, use a non-TiVo branded Digital Video Recorder supplied by local cable company or satellite TV company]"*

Have a Facebook profile: *"Do you currently have your own profile page on Facebook?"*

Verbatim survey questions from page 10:

"In the last month, do you recall seeing any advertisements or product promotions on any digital video displays?"

"Have you ever made a purchase that you were not already planning on making after seeing a product featured on the digital video display?"

For More Information

About Arbitron

Arbitron Inc. (NYSE: ARB) is a media and marketing research firm serving the media—radio, television, cable, online radio and out-of-home—as well as advertisers and advertising agencies. Arbitron's core businesses are measuring network and local market radio audiences across the United States; surveying the retail, media and product patterns of local market consumers; and providing application software used for analyzing media audience and marketing information data. The company has developed the Portable People Meter™ device, a new technology for media and marketing research.

About Edison Research

Edison Research conducts survey research and provides strategic information to radio stations, television stations, newspapers, cable networks, record labels, Internet companies and other media organizations. Edison Research is also the sole provider of election exit poll data for the six major news organizations: ABC, CBS, CNN, FOX, NBC and the Associated Press. Edison Research works with many of the largest American radio ownership groups, including Entercom, Citadel, CBS Radio, Bonneville and Westwood One; and also conducts strategic and perceptual research for a broad array of companies including Time Warner, Google, Yahoo!, Sony Music, Princeton University, Northwestern University, Universal Music Group, Time Life Music and the Voice of America. Edison Research has a 15-year history of thought-leadership in the radio industry, and has provided services to successful radio stations in South America, Africa, Asia, Canada and Europe.

All of Edison Research's industry studies can be found on the company's Web site at www.edisonresearch.com and can be downloaded free of charge.

New

Additional reports with exclusive data are available for a fee and include:

- Top 25 markets
- Weekly viewership with reach/frequency analysis
- Target demos (Persons 18-49 or women with children living in the household, etc.)
- Venue combos (unduplicated estimates for grocery stores and drugstores combined, etc.)

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