



Photo Courtesy of Ecast Network

Arbitron Digital Media Study Ecast Entertainment Network in Bars

A Music and Marketing Cocktail

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Introduction

Welcome to Arbitron's evaluation of the Ecast Interactive Entertainment Network. The goal of this report is to define the audience for touchscreen media in U.S. bars and lounges, and determine the consumer's level of engagement with the network's advertising and content.

Over the past several years, Arbitron has been working closely with place-based (out-of-home) video display networks in order to help advertisers appraise their value proposition as media vehicles. On the whole, the public's reaction to place-based networks has been exceedingly positive, and many of these highly targeted advertising platforms have become vital components in successful media plans.

The Music and Marketing Cocktail

This report focuses on a particular place-based video network administered by an American company called Ecast. The Ecast Network essentially takes a familiar entertainment device, the traditional music jukebox, and reinvents it for a new on-demand, iPod® generation. The Ecast digital music service allows consumers to walk up to a touchscreen in their favorite bar and search an almost infinite catalog of music genres, songs and artists through an embedded Internet connection. The music selection process is part of the entertainment with detailed song/artist information and suggested playlists.

Brand messages are interwoven throughout the Ecast user's experience and are designed to contribute to the overall entertainment value. "Advertising as entertainment" has emerged as an important theme in modern marketing and is often seen as the antidote to standard commercial avoidance. Ecast advertising plays into this new perspective on media planning.

Bars and Lounges as Media

In order to evaluate Ecast as an advertising vehicle, Arbitron had to approach this project from two angles. First, we had to define the audience for bar-based advertising as a whole. Malls, movie theaters and retailers have already positioned themselves as reach and frequency media and have taken their place in media plans along side television, radio and print. Arbitron needed to see how bars fit into this plan. Through a national telephone survey, Arbitron was able to determine that one-half of adults age 21 or older can be reached through bars (as a medium) in a month, and advertisers can create relationships with certain demographic groups, such as young adult males ages 21 to 34, through repeated exposures weekly.

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Connecting with Highly Social and Influential Young Adults

The second phase of Arbitron's research focused on interviews with customers at selected bars carrying the Ecast digital music service. These case studies showed that Ecast attracts a select segment of the overall bar audience—predominately male, upwardly mobile, young adults who consider themselves trendsetters and thought leaders in their social circles. This report details the user's connection with the digital jukeboxes and examines various aspects of the advertiser's return on investment (ROI), including ad recall.

How the Study Was Conducted

The data used to support the findings in this report were derived from three separate surveys:

Arbitron National Telephone Survey

A national telephone survey was conducted with 843 randomly selected respondents aged 21 and older between July 21 and August 7, 2006, using random digit dialing (RDD). In addition to basic demographic information, respondents were asked about their bar or lounge-going habits and consumer attitudes.

Arbitron On-Site Case Study

On-site interviews were conducted with a random sample of 730 customers in eight bars containing the Ecast touchscreen music service. The test locations were selected from participating bars in the New York, Seattle, WA and Columbus, OH, metro areas, and interviews were conducted on weekdays and weekends. In order to qualify for the survey, respondents had to be aged 21 or older and have been in the bar for at least one hour that day. Respondents were positioned so they were not in sight of the screen during the interview process. In order to provide a familiar frame of reference for the respondent, the Ecast touchscreen was referred to simply as "jukebox" or "digital jukebox." An incentive of \$5 was awarded to respondents upon completion of the 10-minute survey. In addition to basic demographic information, respondents were asked about their general bar going habits, interaction with Ecast during that day's visit, advertising recall and consumer attitudes.

Ecast On-Screen Surveys

In addition to the interviews conducted by Arbitron, Ecast served their own customer surveys directly on the screens. The survey was offered to Ecast users who paid to play music (as opposed to those who simply browsed the various features or watched someone else use the device). Appendix C of this report contains information from over 6,700 Ecast administered surveys conducted between Thursday, November 30th and Saturday, December 2nd 2006. The respondents were all between 21 and 55 years old.

About Ecast*

Ecast is a music and entertainment company operating the largest broadband touchscreen media network in the United States. Currently situated in more than 10,000 commercial locations in major metropolitan markets, Ecast reaches millions of patrons on a monthly basis with an ever-growing catalog of music from both independent and major record labels. Ecast's newly launched advertising network is a highly impactful vehicle offering advertisers an interactive and engaging alternative form of out-of-home media.

Ecast's next generation entertainment platform is a turnkey, interactive entertainment solution that shatters the old notion of a jukebox. Ecast boxes run on a secure broadband network that provides access to a massive catalog of songs through a unique interface with advanced interactive selection, video and promotional capabilities.

Adding 300-plus locations per month, the Ecast network represents a powerful, emerging promotional channel for brands and labels to reach the valuable 21- to 34-year-old demographic. With the network's reach, broadband connectivity and interactive capabilities, Ecast delivers an unrivaled on-premise brand experience.

Ecast was founded in 1999, is privately held and headquartered in San Francisco. Investment partners include Crosslink Capital, DCM, El Dorado Ventures, Focus Ventures and Mobius Venture Capital.

How Ecast Works*

Patrons at commercial locations, such as bars, taverns and restaurants, use an Ecast box much like a traditional jukebox, but with several significant differences. Ecast allows patrons to become further immersed in the music experience through its interactive, touchscreen displays. By inserting either cash or credit card, consumers can search through Ecast's library of hundreds of thousands of songs and some 20,000 albums. If customers want to make a selection that is not available at the location, they can pay extra to download tracks from the Ecast network catalog.



* The information in this section is provided by Ecast.

Advertising on the Ecast Network*

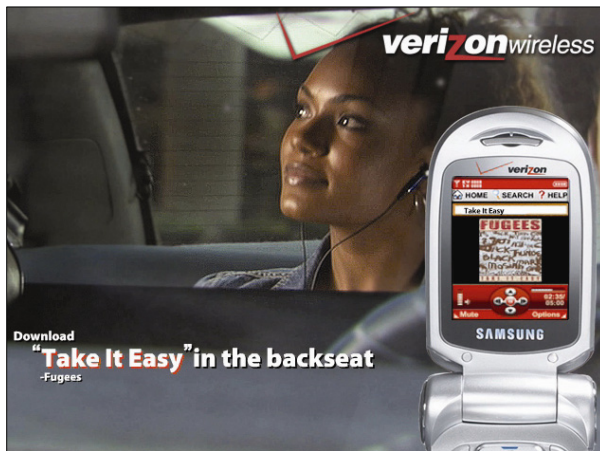
Given its reach, measured interactivity and strategic placement, Ecast offers direct and intimate interactions with a coveted demographic. No other medium can serve interactive ads to thousands of out-of-home (OOH) locations targeting adults with the flip of a switch. Ecast allows advertisers to re-purpose existing creative from online, print and video campaigns. Advertising rates are based upon the number of locations, ad inventory and share of voice. Audience can be targeted by demographics, DMA® and content-consumption patterns.

Ecast has also recently licensed DoubleClick's DART Enterprise advertising management technology to better manage its inventory. DART Enterprise provides sophisticated, flexible and easy-to-use planning, serving and reporting capabilities and enables Ecast to serve advertising that is IAB-compliant.

The DART Enterprise software will enable advertisers to set their own targeting and impression goals; "hyper-target" their ads by venue, geography, type of music browsed/played, etc.; run overlapping, simultaneous, interactive advertising campaigns; and easily manage and report on complex campaigns in a wide array of online and offline environments.

Ecast enables advertisers to capture e-mail addresses, conduct online surveys and participate in the Ecast music discovery program to generate additional ad impressions and engage consumers.

Ecast has already attracted an impressive roster of advertiser partners including Chrysler, Verizon Wireless, McDonald's, Heineken, Absolut Vodka, Allied Domecq, Brown-Forman and Scottish & Newcastle.



Creative Specifications*

Ecast offers several types of ad inventory. Creative copy ranges from the following:

- Static JPG or TGA images
- Animated Flash SWF movies
- QuickTime video
- MPEG-1

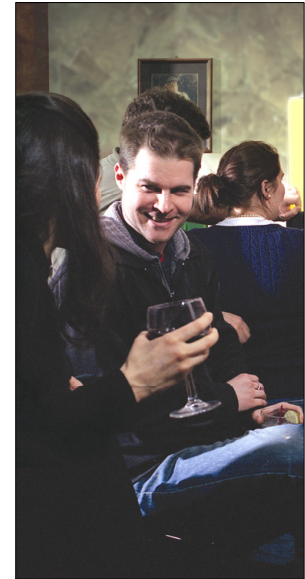
* The information in this section is provided by Ecast.

Significant Highlights

Bars and Lounges as a Reach Medium

One half (50%) of all Americans age 21 or older have visited a bar or lounge as a customer in the past month, including restaurants that contain a bar. Nearly one-third (31%) of adults 21+ have been to a bar in the past week. Monthly bar patrons go to a bar 3.6 days per month and visits 2.8 different bars. Those who have visited a bar in the past week have gone 1.7 days and visited 1.6 different establishments. These findings show that bars, as a medium, not only deliver an impressive reach, but also can reinforce the brand message through frequent exposures.

As for the quality of the audience, the bar-going population skews younger, more educated and upper income compared to the general U.S. population aged 21 or older. Thirty percent of monthly bar patrons are between the ages of 21 to 34, 31% have a household income of \$75K or more and 45% have a four-year college degree or higher. Only 25% of the general population age 21+ live in households that earn \$75K or more and 39% have a four year college degree or higher. For more information about how bar patrons compare to the national average, please consult Appendix B.



Ecast Usage in Bars or Lounges

Seventy-eight percent of patrons in the bars sampled for this project noticed the Ecast touchscreen music service on-premise. One-quarter (25%) of patrons used the Ecast service that day and another 12% watched while someone else interacted with the screen.



Ecast consumers (those who used or watched someone else use Ecast) reported that they had 1.3 other people with them at the screen on average, showing that using the entertainment device is a social activity. Consumers also reported using/observing it in two separate sessions and spending a total of five minutes with the touchscreen on average.

Ecast Attracts Social Young Adults and Music Enthusiasts

Ecast consumers trend significantly younger than the average U.S. population and the bar-goers in general. Twenty-five percent of the general population is between the ages of 21 and 34, 30% of monthly bar-goers also fall into that age range, but 56% of those who use or watch someone else use the Ecast service are in this hard-to-reach, young adult demographic.



Men compose a majority (65%) of the Ecast audience and they tend to go out more often than the typical bar-goer (11.7 days per month for the Ecast consumers as opposed to 3.6 for average bar patrons).

Ecast consumers also feel passionately about music and rate their interest in the subject a 4.1 out of a possible 5. A majority (65%) of the audience agree that the Ecast music service is a good way to experiment with new music, and 70% agree that the touchscreens are a good way to introduce friends and family to music they like.

Catching the Attention of Opinion Leaders and Early Adopters

Ecast attracts a very specific type of consumer. They are young, upwardly mobile and consider themselves to be trendsetters with a significant sway over the purchases of those in their sphere of influence. Nearly one-half (46%) of Ecast consumers consider themselves “early adopters,” meaning they are among the first of their family and friends to try new products or services; only 23% of the general population see themselves as being that cutting edge. Thirty-eight percent of Ecast consumers also frequently recommend new products to other people (compared to 23% of the general population) and 35% feel they are very influential over what their family and friends purchase.



All of these factors create a portrait of a consumer who can be instrumental in launching new brands or creating substantial word-of-mouth campaigns. This is particularly true for the music industry. Ecast consumers are seen as authorities on music by those around them. Thirty-five percent say their family and friends frequently seek their advice about new music, and 45% say they frequently recommend new music to family and friends. Only 18% of average consumers are as persistent in sharing music and influencing the musical tastes of others.

Ecast Advertising Effectiveness

During the test period, three brands from different vertical markets were advertised on the touch-screen. One advertisement played at the end of each user session. Because the average audience member engaged in two sessions while using Ecast, each person had the opportunity to see, on average, only two out of the three advertised brands that day. When Ecast consumers were asked specifically if they had seen certain ads, recall rates among those who had an opportunity to see the ad averaged 43%*.

Screen Inventory

Leaderboard



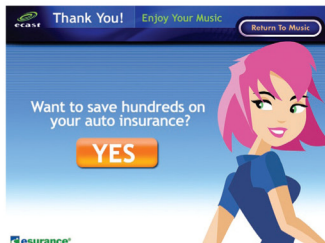
Skyscraper



Jumbo Leaderboard



End of Session



Mini-Site



Registration Collection



Video Attract Loop



Featured Album



Sponsored Playlist



* Recall rates among those Ecast consumers who had an opportunity to see the ads ranged from 29% to 52%. Recall rates among all respondents ranged from 19% to 34%.

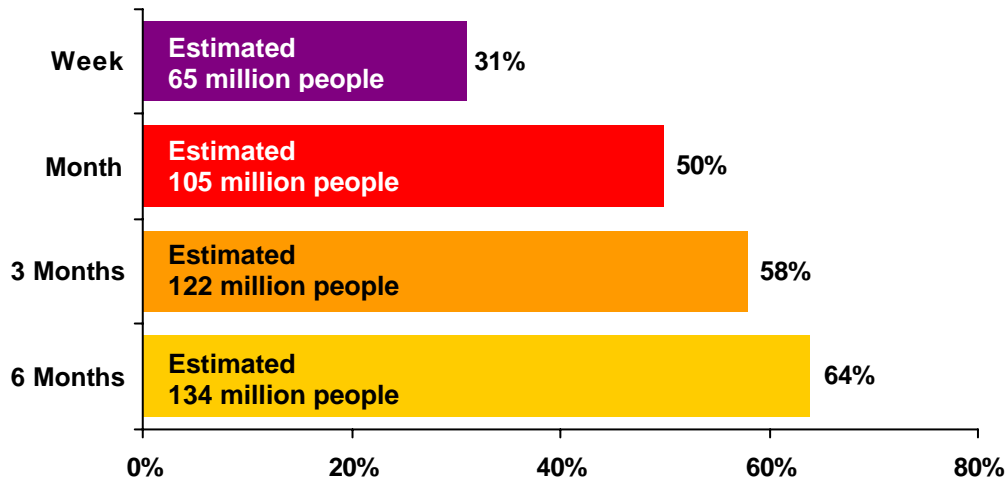
Summary of Key Findings

A. Understanding the American Bar Patron and Ecast Consumers

Half of Americans age 21 or older have been to a bar in the past month. Fifty percent of American adults have visited a bar or lounge in the past 30 days, and 31% have been in a bar in the past seven days. As a result, advertising placed in bars and lounges has the potential to reach a significant portion of U.S. adults on a regular basis.

One Out Of Two American Adults Have Visited a Bar in the Past Month

“When did you last visit any type of bar or lounge as a customer, including any restaurant that has its own bar?”



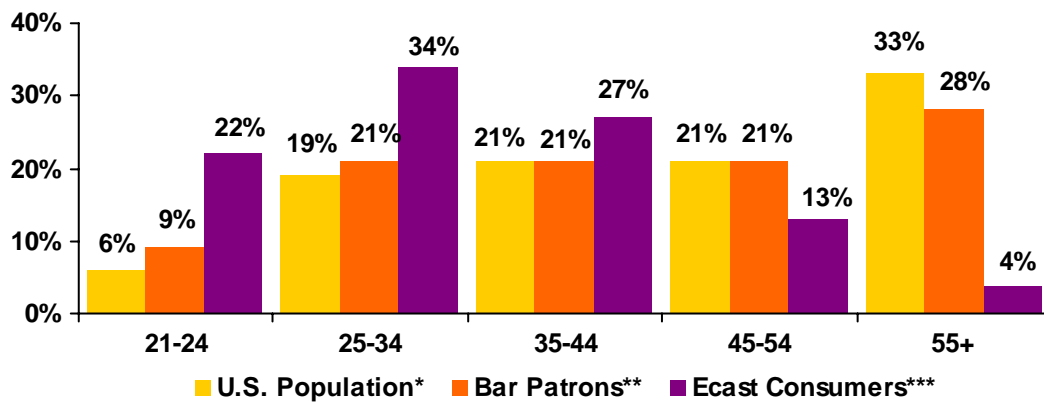
Base: Americans age 21 or older. Projections use a 2005 U.S. population age 21 or older estimate of 210 million.

Ecast consumers skew younger and more male compared to the average U.S. population and even monthly bar-goers in general. More than half (56%) of Ecast consumers are between the ages of 21 and 34; only 25% of all Americans and 30% of bar patrons fall into that young adult demographic. In fact, Ecast delivers over twice the concentration of 21- to 34-year-olds compared to less targeted, general consumption, mass media.

Ecast also attracts a lot of men. Although 49% of the general population and 53% of bar patrons are male, 65% of Ecast consumers are men.

The Ecast Delivers a High Concentration of Young Adults

Age Composition



Base: * Americans aged 21+
** Americans aged 21+ who have been in a bar in the past month
*** Used or watched someone else use an Ecast touchscreen

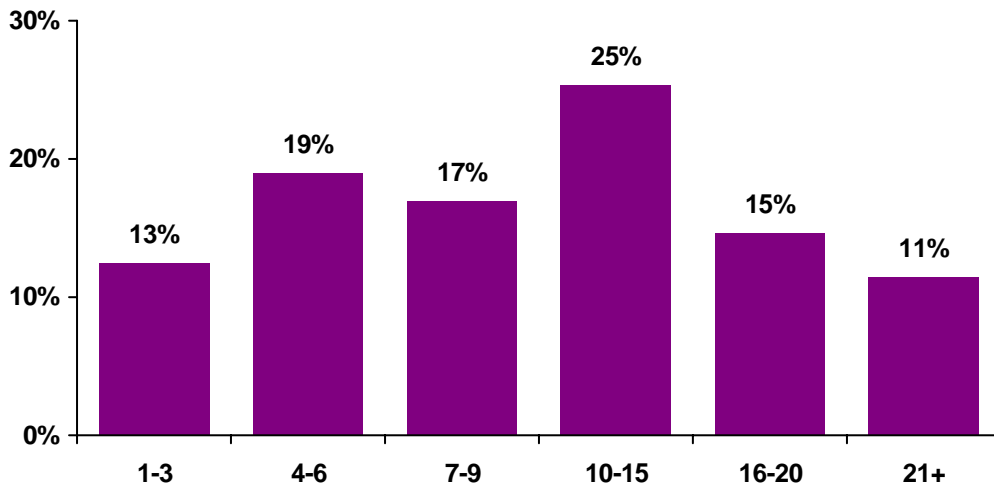
Ecast consumers are highly social people who go out to bars several days per month. The average monthly bar patron visits a bar or lounge approximately 3.6 days per month; Ecast consumers on the other hand go out to a bar 11.6 days a month on average.

Ecast consumers also go to a wider variety of bars per month than average monthly bar patrons; Ecast consumers visit 4.7 different bars on average each month, but typical bar-goers patronize 2.8 unique bars in a 30-day period.



Ecast Consumers Are Frequent Bar-Goers

“How many days out of the past 30 days did you visit any type of bar or lounge?”



Base: Used or watched someone else use an Ecast touchscreen

Quick Fact:

Thirty percent of Ecast consumers plan to visit a fast-food restaurant or convenience store after they leave the bar that evening.

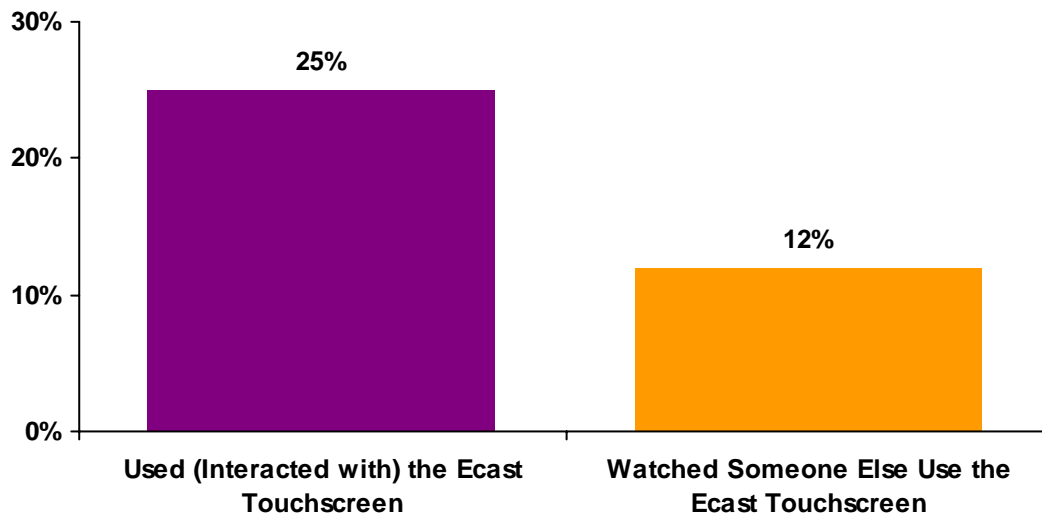
B. Ecast Users and Consumers

Over one in three bar customers are exposed to Ecast on an average night. Seventy-eight percent of the patrons in the bars sampled for this project noticed the Ecast touchscreen on-premise. One-quarter (25%) of patrons used Ecast that day, and another 12% watched while someone else interacted with the screen. So in total, 37% of customers in the bars viewed the Ecast touchscreen.

Over One-Third of Bar Visitors View the Ecast Touchscreen

*“Did you use the jukebox in this bar today?”**

*“Did you watch while someone else used the jukebox?”**



Base: Random sample of customers in bars that contain an Ecast touchscreen

Additional Persons Viewing:

Ecast consumers (those who used or watched someone else use Ecast) reported that they had 1.3 other people with them at the screen on average, making the average number of viewers per session 2.3.

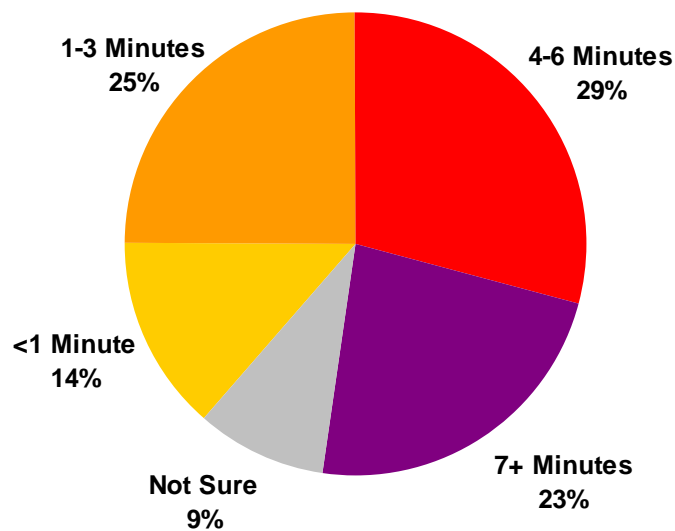
** In order to provide a familiar frame of reference for the respondent, the Ecast touchscreen was referred to simply as “jukebox” or “digital jukebox.”*



Over half of Ecast consumers estimate they spend four minutes or more with the touchscreen. Fifty-two percent of consumers report spending over four minutes using or watching someone else use the Ecast service; the average time spent was five minutes in total. Consumers report walking up to use or watch someone else use Ecast two times a night on average.

Consumers Spend an Average of Five Minutes with Ecast

“Approximately how much total time in minutes did you spend standing at the jukebox?”



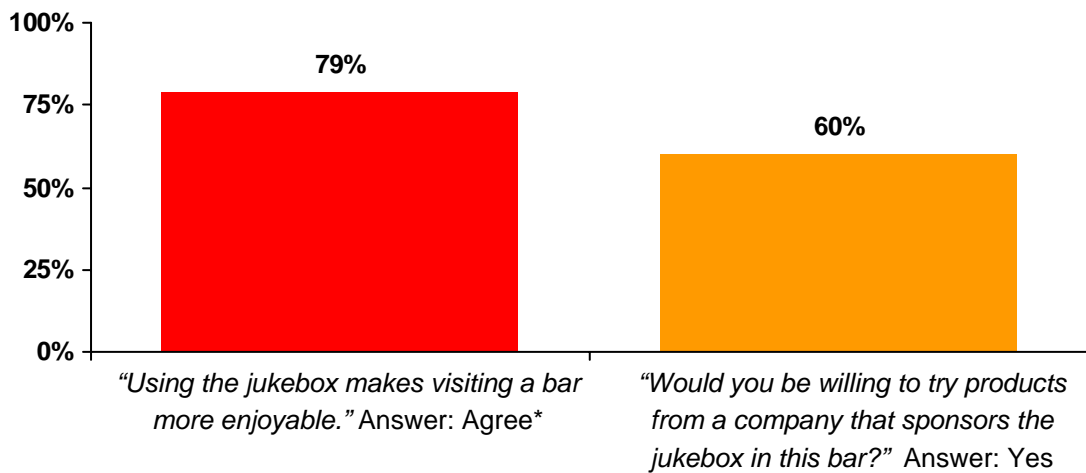
Base: Used or watched someone else use an Ecast touchscreen

C. Engagement and Acceptance of Ecast

Ecast consumers are left with a very positive attitude towards the music service and those good feelings are extended to the advertised brands. Nearly 8 in 10 (79%) of Ecast consumers agree that using it makes visiting a bar more enjoyable, and 60% of consumers say they would be willing to try products from companies that advertise on the music service in their bar.



Consumers Have a Positive Attitude Toward Ecast



Base: Used or watched someone else use an Ecast touchscreen

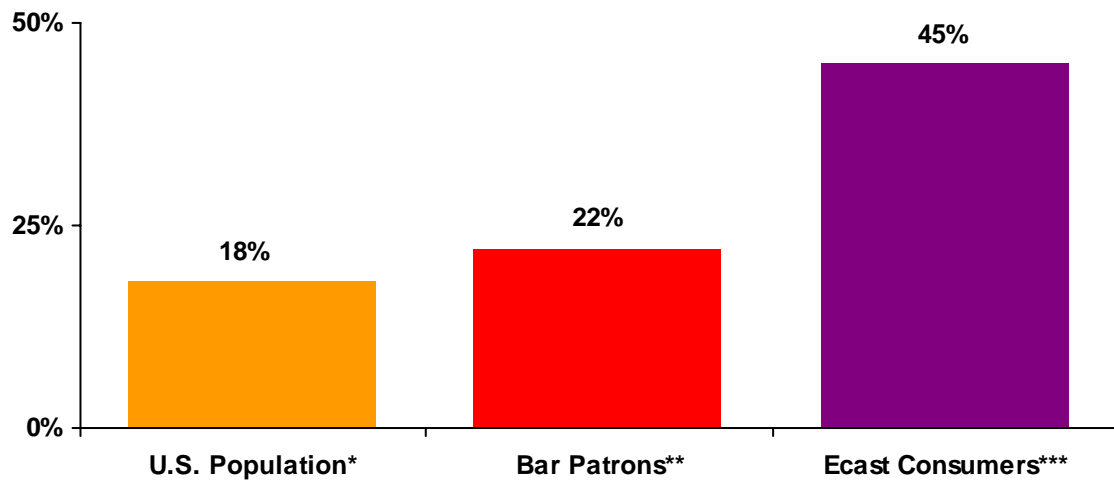
* Rating 4 or 5 on a 5-point scale, with 1 being strongly disagree and 5 being strongly agree

Ecast consumers are heavily into the music scene and like to use the network to explore and share new songs and artists. Seventy-nine percent of Ecast consumers feel passionately about music and rate their interest a 4 or 5 out of a possible 5. A majority (65%) of the audience agree that Ecast is a good way to experiment with new music and 70% agree that Ecast is a good way to introduce friends and family to music they like. In fact, Ecast consumers are two and half times more likely to frequently recommend new music to family and friends than average Americans (45% versus 18%).

Ecast Consumers Are Heavily into Sharing New Music Discoveries

“How often do you **RECOMMEND** new music to family and friends?”

Answer: **FREQUENTLY**



Base: * Americans aged 21+
** Americans aged 21+ who have been in a bar in the past month
*** Used or watched someone else use an Ecast touchscreen

Ecast Allows Consumers to Explore Their Interest in Music

How would you rate your interest in music? ¹	79%
The jukebox is a good way to introduce my friends to music or artists I like. ²	70%
Jukeboxes are a good way to experiment with new music. ²	65%

Base: Ecast Consumers

¹Interest scale: Answer 4 or 5 on a scale of 1 to 5, with 1 being strongly uninterested and 5 being strongly interested.

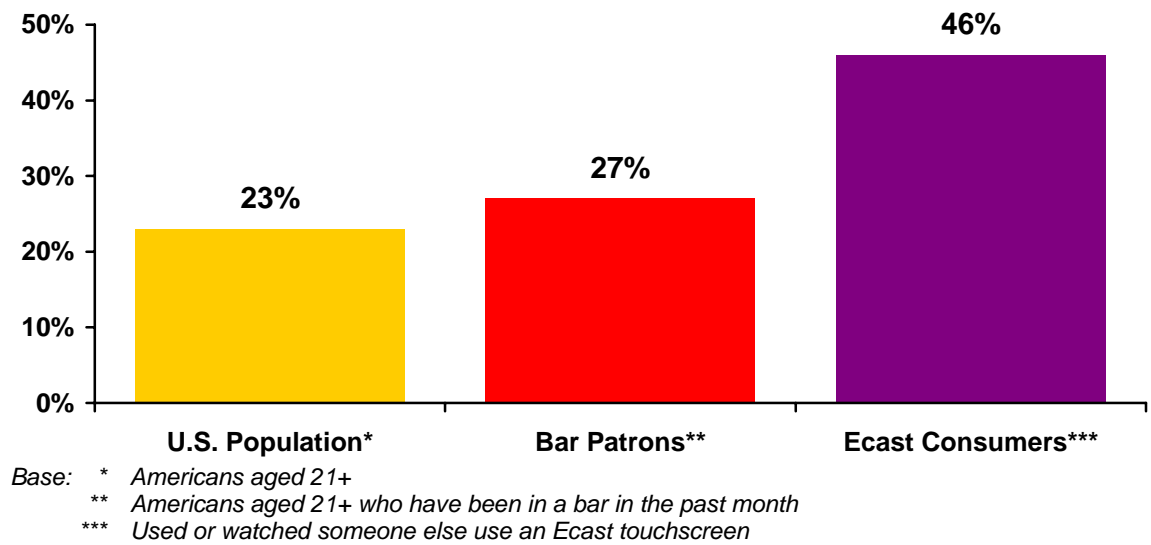
²Agreement scale: Answer 4 or 5 on a scale of 1 to 5, with 1 being strongly disagree and 5 being strongly agree

D. Buying Habits of Ecast Consumers

Nearly half of Ecast consumers consider themselves “early adopters” of new products and services. Forty-six percent of Ecast consumers say they are among the first to buy or try a new product or service compared to other people they know. This means that advertising placed on the Ecast network is twice as likely to reach an early adopter compared to ads placed in less targeted, general market media.

Ecast Consumers Are Early Adopters of New Products and Services

Buy or try new products or services either *FIRST* or *BEFORE* most of the people they know.



Consumer Adoption Scale

Think about when you buy or try new products or services compared to other people you know. In general, would you say you...?

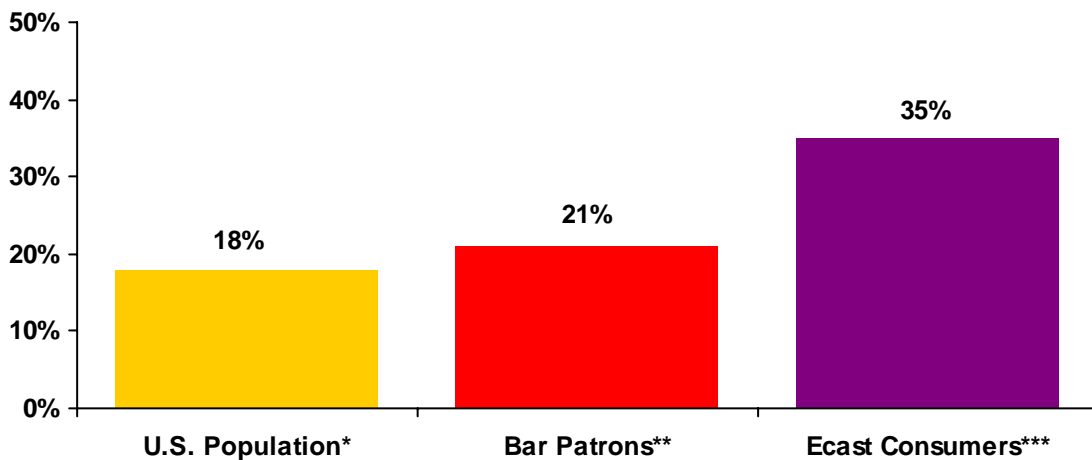
- Are among the *FIRST* people to buy or try new products or services.
- Buy or try new products or services *BEFORE* others—but not first.
- Buy or try new products or services at the *SAME* time as others.
- Buy or try new products or services *AFTER* others but not the last.
- Are usually the *LAST* you know to buy or try new products or services.

Consumers who frequently recommend new products fuel potential word-of-mouth campaigns and influence the purchases of others. Thirty-five percent of Ecast consumers consider themselves to be "very influential" when it comes to shaping the purchasing decisions of their family and friends (compared to only 18% of the general population) and 38% of Ecast consumers say they frequently recommend new products to other people.

Ecast Consumers Influence the Purchases of Those Around Them

"How *INFLUENTIAL* are you over what your family and friends purchase?"

Answer: *VERY influential*



Base: * Americans aged 21+
** Americans aged 21+ who have been in a bar in the past month
*** Used or watched someone else use an Ecast touchscreen

Quick Fact:

Twenty-nine percent of Ecast consumers plan to buy a new automobile within the next 12 months.

E. Ecast Advertising Recall

On average, over 40% of Ecast consumers who had an opportunity to see a specific advertisement could recall the brand. Brand recall across the three tested Ecast advertisers averaged 28%. The ad recall rate is even more impressive when you take into consideration that only two out of three consumers even had an opportunity to see a particular brand's message*. Therefore, the recall rate among those who had an opportunity to see each ad averaged 43%.



* One advertisement was displayed per user session, and the average Ecast consumer had two sessions during the test period. As a result, the average consumer had the opportunity to see only two out of the three tested brands, or a 66% chance of seeing any individual ad. Ecast consumers were asked specifically if they remembered seeing an ad for each tested brand on the touchscreen that day. The advertising recall among respondents who had the opportunity to see a particular ad ranged from 29% to 52%. Among all respondents the recall rate ranged from 19% to 34%.

Media Planning Implications

Brands targeting trendsetters, thought leaders and consumer influentials should consider adding Ecast to their media mix. Ecast attracts a very select user base, people who are the first among their family and friends to try new products or services and wield a significant amount of influence over the purchasing decisions of those around them. Ecast consumers are those rare, active, social adults who have the power to create strong word-of-mouth campaigns and profoundly affect consumer trends.

Consumers seek out Ecast touchscreens, making them an antidote to advertising avoidance. Tech-savvy, early adopters such as Ecast consumers are taking more control over their media experiences through DVRs (TiVo®), MP3 players (iPod), DVDs and the Internet. The by-product of this on-demand culture is the ability to skip advertising messages and get straight to the content. So the elite, trendsetting consumers who would be ideal targets for new campaign launches are often the hardest ones to reach through traditional ads. These same consumers seek out time with the Ecast music service and its ubiquitous advertising presence.

Advertisers looking for new opportunities to reinforce their brand message among young adult males should also consider placement in bar-based media. Young men under the age of 34 are presenting a special challenge to marketers. In addition to using on-demand media, they are also heavy gamers, and this extended time spent with video gaming systems further limits their exposure to traditional advertising messages. Ecast presents another opportunity to reinforce a brand message among this increasingly hard-to-reach young male consumer target.

Interactive media increase consumer response to advertised brands. Consumers focus on the Ecast touchscreens and have the ability to get personally involved with the ads. This elevated level of consumer engagement generates measurable results. It combines the strategic placement of out-of-home advertising with the one-on-one marketing experience of the Internet.

Positive feelings toward the Ecast music service can make consumers feel good about the advertised brands. Ecast is different from other place-based advertising because, unlike stand-alone out-of-home posters or billboards, Ecast is an entertainment destination in and of itself. Ecast actually attracts consumers to the display, where they interact, listen and have a good time. This experience creates a personal connection with the consumer, and those positive feelings can become associated with the advertised brands.

Bar-or lounge-based advertising, such as Ecast, can provide many advertisers with a powerful recency media planning vehicle. Noted media researcher Erwin Ephron has popularized the concept of recency media planning. According to Ephron, recency “is the idea that the advertising media ‘sell’ those consumers that are ready to buy the product. It is as if there is a window of opportunity for the ad messages preceding each purchase. Advertising’s job is to influence the purchase; media’s job is to put that message in that window.”



Ecast can be instrumental to the recency media plans for music promoters, beverage companies and quick-service restaurants. Ecast consumers are in the immediate market to purchase products sold in bars, such as beer, wine, spirits and soft drinks. They are also open to making strong connections with new music and artists through Ecast. Finally, many consumers plan to visit a quick-service restaurant or convenience store after they leave the bar, so Ecast is in a prime position to influence purchase decisions they will make for the rest of the night.

The positive associations these spots create are placed in the paths of consumers while they are in the shopping mind-set for these products. This makes Ecast a potentially strong recency planning medium.

Appendix A: Bar's Reach Among Americans Aged 21 and Over

Have visited a bar or lounge in the past...

Week: 31%	Estimated 65 million people
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Month: 50%	Estimated 105 million people
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3 Months: 58%	Estimated 122 million people
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6 Months: 64%	Estimated 134 million people
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Based on Arbitron's National Telephone Survey results. Audience estimates based on 2005 U.S. population aged 21 or older estimate of 210 million.

Appendix B: Profile of the U.S. Population and Ecast Consumers

Sex			
	U.S. Population	Ecast Consumers	Index
Men	49%*	65%*	133*
Women	51%	35%	69

Buying Demo Age Break

	U.S. Population	Ecast Consumers	Index
21-24	6%	22%	367
21-34	25%	58%	232
21-49	57%	89%	156
21-54	67%	93%	139
55+	33%	4%	12

Highest Level of Education Completed

	U.S. Population	Ecast Consumers	Index
High school or less	29%	24%	83
Some college credits (may include current students)	29%	41%	141
4-year college degree (B.A., B.S.)	20%	28%	140
Graduate credits or degree (M.A., M.B.A., Ph.D.)	19%	6%	32

How many DAYS out of the last 30 days did you visit any type of bar or lounge?

	U.S. Population	Ecast Consumers	Index
Average no. of days	1.8	11.7	650

How many DIFFERENT bars or lounges did you visit the last 30 days?

	U.S. Population	Ecast Consumers	Index
Average no. of bars	–	4.7	–

* How to read: Forty-nine percent of the U.S. population aged 21 and older are male versus 65% of those who consumed Ecast content. An index of 133 for males indicates that Ecast consumers are 33% more likely to be male compared to the general U.S. population aged 21 or older.

U.S. Population age 21 or older data source: Arbitron National Telephone Survey
 Ecast Consumers (those who used or watched someone else use an Ecast touchscreen) data source: Arbitron On-Site Case Study

Appendix B: Profile of the U.S. Population and Ecast Consumers *(continued)*

Early Adopters and Influentials Scale

Think about when you buy or try new services compared to other people you know.

	U.S. Population	Ecast Consumers	Index
Are you among the FIRST to buy/try?	10%	23%	230
Do you buy/try BEFORE most others, but not first?	13%	23%	177
Are you ABOUT THE SAME time as others?	29%	33%	114
Do you buy/try AFTER most others, but not the last?	22%	10%	45
Are you usually among the LAST to buy/try?	22%	10%	45

Purchase Recommendations

How often do you recommend NEW PRODUCTS or services to other people?

	U.S. Population	Ecast Consumers	Index
Frequently	23%	38%	165
Sometimes	47%	45%	96
Almost never	28%	16%	57

How often do you recommend NEW MUSIC to your family and friends?

	U.S. Population	Ecast Consumers	Index
Frequently	18%	45%	250
Sometimes	36%	40%	111
Almost never	45%	15%	33

Influence Over the Purchases of Others

How influential are you over what family and friends purchase?

	U.S. Population	Ecast Consumers	Index
Very influential	18%	35%	194
Somewhat influential	59%	51%	86
Not at all influential	22%	12%	55

How often do your friends and family seek your advice about NEW MUSIC?

	U.S. Population	Ecast Consumers	Index
Frequently	16%	35%	219
Sometimes	29%	41%	141
Almost never	54%	24%	44

U.S. Population Source: Arbitron National Telephone Survey

Ecast Consumers Source: Arbitron On-Site Case Study

Appendix C: Profile of Ecast Consumer Habits

Electronics

When was the last time you were in an electronics store?

Today or plan to shop today	20%
In the past week	29%
In the past month	18%
In the past 3 months	11%
In the past 6 months	5%
Not in the past 6 months	14%

How much money have you spent in an electronics store the past 30 days?

\$0	28%
\$1-\$50	26%
\$50-\$250	22%
\$250-\$1,000	9%
\$1,000 or more	9%

Do you currently own any of the following items?

High-definition TV—plasma or LCD	34%
Cell phone	67%
Camcorder or digital camera	39%
Video game console	40%

Do you plan to buy any of the following items in the next six months?

High-definition TV—plasma or LCD	38%
Cell phone	47%
Camcorder or digital camera	34%
Video game console	32%

Source: Ecast On-Screen Survey—Respondents between the ages of 21 and 55

Appendix C: Profile of Ecast Consumer Habits *(continued)*

Movies

When was the last time you saw a movie in a theater?

Today or plan to see a movie tonight	10%
In the past week	19%
In the past month	24%
In the past 3 months	16%
In the past 6 months	7%
More than 6 months ago	20%

How many times have you gone to a movie theater in the past 30 days?

0	40%
1	22%
2-3	19%
4-5	5%
5 or more	6%

What influences your movie choices the most?

Movie trailers	35%
Movie reviews	23%
Recommendations from friends	35%

How many DVDs (movies or TV shows) have you bought in the past 30 days?

0	29%
1-3	32%
4-6	13%
6-10	7%
10 or more	10%

How many DVDs (movies or TV shows) do you own?

0	9%
1-10	16%
10-20	14%
20-40	19%
50-100	15%
100 or more	17%

Source: Ecast On-Screen Survey—Respondents between the ages of 21 and 55

Appendix C: Profile of Ecast Consumer Habits *(continued)*

Video Games

When was the last time you played a video game?

Today or plan to play one tonight	32%
In the past week	19%
In the past month	10%
In the past 3 months	8%
In the past 6 months	4%
More than 6 months ago	23%

How many times in the past 30 days have you played a video game?

0	31%
1-7	25%
8-14	10%
15-21	7%
22 or more	18%

How many video games have you bought in the past 30 days?

0	50%
1-3	22%
4-6	6%
6-10	3%
10 or more	8%

How many video games do you own?

0	27%
1-10	22%
10-20	14%
20-40	12%
50-100	6%
100 or more	7%

What influences your video game purchases the most?

Game demos	19%
Reviews	13%
Commercials	15%
Recommendations from friends	44%

Source: Ecast On-Screen Survey—Respondents between the ages of 21 and 55

Appendix C: Profile of Ecast Consumer Habits *(continued)*

Music

How interested are you in music?

Extremely	62%
Very	24%
Somewhat	8%
A little	2%
Not at all	2%

Travel

When was the last time you traveled out of town?

In the past week	41%
In the past month	22%
In the past 3 months	14%
In the past 6 months	6%
More than 6 months ago	14%

Do you regularly travel for business or pleasure?

Mostly business	20%
Mostly pleasure	62%
Equal amount of business and pleasure	14%

How do you usually choose airline and hotel accommodations?

Internet sites, such as Expedia, Travelocity or Priceline	45%
A travel agent (in person or over the phone)	16%
Ask friends or colleagues for recommendations	31%

Source: Ecast On-Screen Survey—Respondents between the ages of 21 and 55

Appendix C: Profile of Ecast Consumer Habits *(continued)*

Clothes

When was the last time you went clothes shopping?

Today or plan to shop today	18%
In the past week	27%
In the past month	20%
In the past 3 months	12%
In the past 6 months	18%

How much money have you spent on clothes in the past 30 days?

\$0	21%
\$1-\$50	21%
\$50-\$250	32%
\$250-\$1,000	12%
\$1,000 or more	8%

Which statement best describes the clothes you wear?

Looking professional is important to me.	17%
Comfort is what I look for most.	55%
I like to dress to impress.	24%

Smoking

Do you ever smoke cigarettes (even if only on an occasional basis)?

Yes	55%
Yes, but only when I'm drinking alcohol	12%
No	31%

If you do smoke (regularly or occasionally), what influences you to select a particular brand?

Advertising	31%
Word of mouth	58%

Source: Ecast On-Screen Survey—Respondents between the ages of 21 and 55

About Arbitron Inc.

Arbitron Inc. (NYSE: ARB) is an international media and marketing research firm serving radio broadcasters, cable companies, advertisers, advertising agencies and outdoor advertising companies in the United States, Mexico and Europe. 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 is developing the Portable People Meter™ (PPM), a new technology for radio, broadcast television and cable ratings.

Arbitron's marketing and business units are supported by a world-renowned research and technology organization located in Columbia, Maryland. Arbitron has approximately 1,700 employees; its executive offices are located in New York City. Through its Scarborough Research joint venture with The Nielsen Company, Arbitron also provides media and marketing research services to the broadcast television, magazine, newspaper, outdoor and online industries.

Arbitron's Out-of-Home division provides training, consumer shopping data and audience profiles for out-of-home and outdoor media. Currently, more than 100 outdoor plants, place-based media and thousands of agencies and advertisers utilize Arbitron Out-of-Home consumer shopping data and software. The company is currently working with the industry to develop an outdoor audience ratings service.

Credible third-party measurement helps advertisers justify their investment in the medium. The company's 50+ years of audience measurement experience help sellers focus on selling the value of their advertising rather than justifying the credibility of their measurement. Arbitron research studies about cinema advertising, the outdoor industry and traditional and nontraditional media can be found on the company's Web site at www.arbitron.com and can be downloaded free of charge.

All photos used in this report were provided by Ecast Network.



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