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.
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.
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 x 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.

*Copyright 2009, Claritas, Inc.*
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 \[54\% ÷ 49\% = 110\].

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.
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.
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 video viewers **recalled seeing an advertisement on the screen.**

47%

Those who saw an ad and have **made an unplanned purchase after seeing an item featured on the screen.**

19%

**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

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.

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

Persons estimate: 28 million
Airports deliver a high concentration of:

- Affluent consumers
- People with college degrees

The audience skews:

- Male

### Monthly Digital Video Viewers

#### Airport

**Sex**

- Female: 45%
- Male: 55%

**Household Income**

- Under $25K: 11%
- $25K to <$50K: 16%
- $50K to <$100K: 46%
- Over $100K: 27%

**Age**

- 12-17: 11%
- 18-24: 9%
- 25-34: 22%
- 35-44: 17%
- 45-54: 20%
- 55-64: 14%
- 65+: 8%

**Race/Ethnicity**

- White: 59%
- African-American: 14%
- Hispanic: 17%
- Asian/Other: 10%

**National Average Index**

<table>
<thead>
<tr>
<th></th>
<th>Men</th>
<th>Women</th>
<th>Age 12-24</th>
<th>Age 18-49</th>
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</table>

**Education**

- 4-year College Degree or Higher: 63%

**Household Composition**

- Have Children Under Age 18 Living at Home: 34%

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

*Based on respondents aged 18 or older.*
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.
Bars deliver a high concentration of:

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

**Sex**
- Male 67%
- Female 33%

**Age**

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**Household Income**

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<td>$50K to &lt; $100K</td>
<td>37%</td>
</tr>
<tr>
<td>Over $100K</td>
<td>14%</td>
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</table>

**Race/Ethnicity**

- White: 62%
- African-American: 8%
- Hispanic: 19%
- Asian/Other: 11%

**National Average Index**

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<th>Men</th>
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<th>Age 21-24</th>
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<td>131</td>
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Based on 79% of sample aged 21 or older who provided an income level.

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

**Demographic Profile**

### Sex
- Male: 53%
- Female: 47%

### Age
- 12-17: 14%
- 18-24: 16%
- 25-34: 20%
- 35-44: 19%
- 45-54: 13%
- 55-64: 12%
- 65+: 6%

### Household Income
- Under $25K: 24%
- $25K to $50K: 21%
- $50K to $100K: 33%
- Over $100K: 22%

### Race/Ethnicity
- White: 55%
- African-American: 17%
- Hispanic: 9%
- Asian/Other: 19%

### Education
- 4-year College Degree or Higher: 46%

### Household Composition
- Have Children Under Age 18 Living at Home: 44%

**National Average Index**

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<tr>
<th></th>
<th>Men</th>
<th>Women</th>
<th>Age 12-24</th>
<th>Age 18-49</th>
<th>Age 25-54</th>
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<td>105</td>
<td>113</td>
<td>145</td>
<td>113</td>
<td>125</td>
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</tbody>
</table>

Based on respondents aged 18 or older.
Teen and adult U.S. residents have visited a convenience store in the past month.

**Persons estimate: 187 million**

1. 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.

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

**Persons estimate: 31 million**
Convenience stores deliver a high concentration of:

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

**Sex**
- Male: 57%
- Female: 43%

**Household Income**
- Under $25K: 29%
- $25K to < $50K: 26%
- $50K to < $100K: 33%
- Over $100K: 13%

**Age**
- 12-17: 17%
- 18-24: 14%
- 25-34: 18%
- 35-44: 22%
- 45-54: 14%
- 55-64: 10%
- 65+: 6%

**Race/Ethnicity**
- White: 59%
- African-American: 6%
- Hispanic: 17%
- Asian/Other: 17%

**Household Composition**
- Have Children Under Age 18 Living at Home: 51%

**National Average Index**

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<td>108</td>
<td>89</td>
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*Based on 66% of sample aged 18 or older who provided an income level.*

*Based on respondents aged 18 or older.*

*Based on respondents aged 18 or older.*
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.
Drug stores deliver a high concentration of:

- People with children living in the household

<table>
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<th>Sex</th>
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<tr>
<td>Male 46%</td>
<td>Female 54%</td>
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<thead>
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<td>12-17</td>
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<td>18-24</td>
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<td>35-44</td>
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<td>45-54</td>
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<td>55-64</td>
<td>11%</td>
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<tr>
<td>65+</td>
<td>11%</td>
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<thead>
<tr>
<th>Household Income</th>
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<tr>
<td>Under $25K</td>
<td>29%</td>
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<tr>
<td>$25K to $50K</td>
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<td>Over $100K</td>
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<th>Household Composition</th>
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<tr>
<td>Have Children Under Age 18 Living at Home</td>
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<table>
<thead>
<tr>
<th>National Average Index</th>
<th></th>
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<tbody>
<tr>
<td>Men</td>
<td>Women</td>
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<td>-----------</td>
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<tr>
<td>93</td>
<td>107</td>
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Teen and adult U.S. residents have been in an elevator in the past month.

**Persons estimate:** 150 million

7% of those who have 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.
Elevators deliver a high concentration of:
• Affluent consumers
• Men
• Adults

The audience skews:
• People with children living in the household

**Sex**
- Male: 64%
- Female: 36%

**Age**
- 12-17: 8%
- 18-24: 22%
- 25-34: 24%
- 35-44: 15%
- 45-54: 21%
- 55-64: 7%
- 65+: 3%

**Household Income**
- Under $25K: 16%
- $25K to < $50K: 22%
- $50K to < $100K: 30%
- Over $100K: 32%

**Race/Ethnicity**
- White: 54%
- African-American: 17%
- Hispanic: 7%
- Asian/Other: 7%

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

**Household Composition**
- Have Children Under Age 18 Living at Home: 41%

**National Average Index**

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<th>Men</th>
<th>Women</th>
<th>Age 12-24</th>
<th>Age 18-49</th>
<th>Age 25-54</th>
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<td>135</td>
<td>121</td>
<td>139</td>
<td>233</td>
<td>150</td>
<td>116</td>
</tr>
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</table>
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.

Teen and adult U.S. residents have visited a fast food or casual dining restaurant in the past month. Persons estimate: 204 million

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

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.
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

### Demographic Profile

#### Sex
- Male 56%
- Female 44%

#### Age

<table>
<thead>
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<th>Age Group</th>
<th>Percentage</th>
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<td>55-64</td>
<td>11%</td>
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#### Household Income

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<tr>
<th>Income Range</th>
<th>Percentage</th>
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</tr>
<tr>
<td>Over $100K</td>
<td>17%</td>
</tr>
</tbody>
</table>

#### Race/Ethnicity

- White 60%
- African-American 19%
- Hispanic 15%
- Asian/Other 7%

#### Education

- 4-year College Degree or Higher 40%

#### Household Composition

- Have Children Under Age 18 Living at Home 42%

#### National Average Index

<table>
<thead>
<tr>
<th>Category</th>
<th>Men</th>
<th>Women</th>
<th>Age 12-24</th>
<th>Age 18-49</th>
<th>Age 25-54</th>
<th>Income $50K+</th>
<th>Income $100K+</th>
<th>College Degree or Higher</th>
<th>Children in Household</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>114</td>
<td>87</td>
<td>129</td>
<td>113</td>
<td>104</td>
<td>107</td>
<td>129</td>
<td>98</td>
<td>119</td>
</tr>
</tbody>
</table>
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.

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

**Persons estimate: 227 million**

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

**Persons estimate: 43 million**
Gas stations deliver a high concentration of:

- Affluent consumers
- People with children living in the household

The audience skews:

- Male
- Educated

### Household Income

<table>
<thead>
<tr>
<th>Household Income</th>
<th>Under $25K</th>
<th>$25K to &lt; $50K</th>
<th>$50K to &lt; $100K</th>
<th>Over $100K</th>
</tr>
</thead>
<tbody>
<tr>
<td>19%</td>
<td>26%</td>
<td>33%</td>
<td>22%</td>
<td></td>
</tr>
</tbody>
</table>

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

### Race/Ethnicity

- White: 59%
- African-American: 17%
- Hispanic: 18%
- Asian/Other: 7%

### National Average Index

<table>
<thead>
<tr>
<th>National Average Index</th>
<th>Men</th>
<th>Women</th>
<th>Age 12-24</th>
<th>Age 18-49</th>
<th>Age 25-54</th>
<th>Income $50K+</th>
<th>Income $100K+</th>
<th>College Degree or Higher</th>
<th>Children in Household</th>
</tr>
</thead>
<tbody>
<tr>
<td>4-year College Degree or Higher</td>
<td>46%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Based on respondents aged 18 or older.

### Demographic Profile

- Male: 54%
- Female: 46%

- Age 12-17: 13%
- Age 18-24: 13%
- Age 25-34: 19%
- Age 35-44: 21%
- Age 45-54: 19%
- Age 55-64: 10%
- Age 65+: 6%

- Household Income:
  - Under $25K: 19%
  - $25K to < $50K: 26%
  - $50K to < $100K: 33%
  - Over $100K: 22%

- Children in Household: 50%

Based on respondents aged 18 or older.

- Household Composition: 50%
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

Grocery stores deliver a high concentration of:
• Teens and young adults
• People with children living in the household

Sex
- Female 49%
- Male 51%

Household Income
- Under $25K: 26%
- $25K to < $50K: 29%
- $50K to < $100K: 30%
- Over $100K: 15%

Age
- 12-17: 12%
- 18-24: 14%
- 25-34: 17%
- 35-44: 19%
- 45-54: 17%
- 55-64: 10%
- 65+: 11%

Race/Ethnicity
- White: 64%
- African-American: 14%
- Hispanic: 14%
- Asian/Other: 8%

Education
- 4-year College Degree or Higher: 40%

Household Composition
- Have Children Under Age 18 Living at Home: 44%

National Average Index

<table>
<thead>
<tr>
<th></th>
<th>Men</th>
<th>Women</th>
<th>Age 12-24</th>
<th>Age 18-49</th>
<th>Age 25-54</th>
<th>Income $50K+</th>
<th>Income $100K+</th>
<th>College Degree or Higher</th>
<th>Children in Household</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>103</td>
<td>97</td>
<td>123</td>
<td>111</td>
<td>106</td>
<td>96</td>
<td>102</td>
<td>99</td>
<td>126</td>
</tr>
</tbody>
</table>

Based on respondents aged 18 or older.
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.
Health clubs deliver a high concentration of:
- Affluent consumers
- Young people
- People with college degrees

### Education

<table>
<thead>
<tr>
<th>4-year College Degree or Higher</th>
<th>67%</th>
</tr>
</thead>
</table>

Based on respondents aged 18 or older.

### Household Income

<table>
<thead>
<tr>
<th>Income Level</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Under $25K</td>
<td>9%</td>
</tr>
<tr>
<td>$25K to &lt; $50K</td>
<td>16%</td>
</tr>
<tr>
<td>$50K to &lt; $100K</td>
<td>47%</td>
</tr>
<tr>
<td>Over $100K</td>
<td>28%</td>
</tr>
</tbody>
</table>

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

### Age

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>12-17</td>
<td>13%</td>
</tr>
<tr>
<td>18-24</td>
<td>21%</td>
</tr>
<tr>
<td>25-34</td>
<td>17%</td>
</tr>
<tr>
<td>35-44</td>
<td>19%</td>
</tr>
<tr>
<td>45-54</td>
<td>15%</td>
</tr>
<tr>
<td>55-64</td>
<td>10%</td>
</tr>
<tr>
<td>65+</td>
<td>7%</td>
</tr>
</tbody>
</table>

### Race/Ethnicity

- White: 63%
- African-American: 10%
- Hispanic: 15%
- Asian/Other: 12%

### Household Composition

<table>
<thead>
<tr>
<th>Have Children Under Age 18 Living at Home</th>
<th>36%</th>
</tr>
</thead>
</table>

Based on respondents aged 18 or older.

### National Average Index

<table>
<thead>
<tr>
<th>Men</th>
<th>Women</th>
<th>Age 12-24</th>
<th>Age 18-49</th>
<th>Age 25-54</th>
<th>Income $50K+</th>
<th>Income $100K+</th>
<th>College Degree or Higher</th>
<th>Children in Household</th>
</tr>
</thead>
<tbody>
<tr>
<td>100</td>
<td>100</td>
<td>154</td>
<td>120</td>
<td>101</td>
<td>168</td>
<td>205</td>
<td>164</td>
<td>103</td>
</tr>
</tbody>
</table>
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.
Hospitals or medical test facilities deliver a high concentration of:
- People with children living in the household

The audience skews:
- Upper income

### Demographic Profile

#### Sex
- Female: 51%
- Male: 49%

#### Age
- 12-17: 8%
- 18-24: 15%
- 25-34: 20%
- 35-44: 17%
- 45-54: 15%
- 55-64: 11%
- 65+: 14%

#### Household Income
- Under $25K: 28%
- $25K to < $50K: 21%
- $50K to < $100K: 34%
- Over $100K: 17%

#### Race/Ethnicity
- White: 60%
- African-American: 16%
- Hispanic: 19%
- Asian/Other: 6%

#### Education
- 4-year College Degree or Higher: 42%

#### Household Composition
- Have Children Under Age 18 Living at Home: 44%

#### National Average Index

<table>
<thead>
<tr>
<th></th>
<th>Men</th>
<th>Women</th>
<th>Age 12-24</th>
<th>Age 18-49</th>
<th>Age 25-54</th>
<th>Income $50K+</th>
<th>Income $100K+</th>
<th>College Degree or Higher</th>
<th>Children in Household</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>101</td>
<td>99</td>
<td>105</td>
<td>115</td>
<td>104</td>
<td>110</td>
<td>118</td>
<td>103</td>
<td>124</td>
</tr>
</tbody>
</table>
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.
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

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

- Male: 54%
- Female: 46%

- Age 12-17: 11%
- Age 18-24: 16%
- Age 25-34: 16%
- Age 35-44: 22%
- Age 45-54: 16%
- Age 55-64: 9%
- Age 65+: 10%

- Under $25K: 21%
- $25K to < $50K: 30%
- $50K to < $100K: 33%
- Over $100K: 17%
Teen and adult U.S. residents have visited a medical office in the past month.

**Persons estimate: 151 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 offices deliver a high concentration of:
- People with children living in the household

The audience skews:
- Female
- Upper income

Demographic Profile

**Sex**
- Female: 57%
- Male: 43%

**Age**
- 12-17: 8%
- 18-24: 14%
- 25-34: 17%
- 35-44: 17%
- 45-54: 20%
- 55-64: 13%
- 65+: 12%

**Household Income**
- Under $25K: 21%
- $25K to < $50K: 28%
- $50K to < $100K: 34%
- Over $100K: 16%

**Race/Ethnicity**
- White: 58%
- African-American: 6%
- Hispanic: 16%
- Asian/Other: 6%

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

**Household Composition**
- Have Children Under Age 18 Living at Home: 43%

Based on respondents aged 18 or older.

National Average Index

<table>
<thead>
<tr>
<th></th>
<th>Men</th>
<th>Women</th>
<th>Age 12-24</th>
<th>Age 18-49</th>
<th>Age 25-54</th>
<th>Income $50K+</th>
<th>Income $100K+</th>
<th>College Degree or Higher</th>
<th>Children in Household</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>89</td>
<td>111</td>
<td>100</td>
<td>110</td>
<td>107</td>
<td>114</td>
<td>119</td>
<td>98</td>
<td>122</td>
</tr>
</tbody>
</table>
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.
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
Movie Theater

Sex
- Male 54%
- Female 46%

Household Income
- Under $25K: 19%
- $25K to < $50K: 27%
- $50K to < $100K: 38%
- Over $100K: 15%

Age
- 12-17: 21%
- 18-24: 18%
- 25-34: 21%
- 35-44: 16%
- 45-54: 12%
- 55-64: 8%
- 65+: 4%

Race/Ethnicity
- White: 62%
- African-American: 15%
- Hispanic: 15%
- Asian/Other: 8%

Education
- 4-year College Degree or Higher: 50%

Household Composition
- Have Children Under Age 18 Living at Home: 42%

National Average Index

<table>
<thead>
<tr>
<th>Men</th>
<th>Women</th>
<th>Age 12-24</th>
<th>Age 18-49</th>
<th>Age 25-54</th>
<th>Income $50K+</th>
<th>Income $100K+</th>
<th>College Degree or Higher</th>
<th>Children in Household</th>
</tr>
</thead>
<tbody>
<tr>
<td>109</td>
<td>91</td>
<td>179</td>
<td>119</td>
<td>98</td>
<td>118</td>
<td>110</td>
<td>124</td>
<td>120</td>
</tr>
</tbody>
</table>

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

Based on respondents aged 18 or older.

Based on respondents aged 18 or older.
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.
Office building lobbies deliver a high concentration of:

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

The audience skews:
- Female

### Demographic Profile

#### Monthly Digital Video Viewers
**Office Building Lobby**

#### Sex

- Female: 55%
- Male: 45%

#### Household Income

- Under $25K: 20%
- $25K to < $50K: 25%
- $50K to < $100K: 33%
- Over $100K: 22%

#### Age

- 12-17: 11%
- 18-24: 14%
- 25-34: 22%
- 35-44: 21%
- 45-54: 17%
- 55-64: 10%
- 65+: 5%

#### Race/Ethnicity

- White: 58%
- African-American: 11%
- Hispanic: 7%
- Asian/Other: 14%

#### Education

- 4-year College Degree or Higher: 52%

#### Household Composition

- Have Children Under Age 18 Living at Home: 48%

#### National Average Index

<table>
<thead>
<tr>
<th></th>
<th>Men</th>
<th>Women</th>
<th>Age 12-24</th>
<th>Age 18-49</th>
<th>Age 25-54</th>
<th>Income $50K+</th>
<th>Income $100K+</th>
<th>College Degree or Higher</th>
<th>Children in Household</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>92</td>
<td>108</td>
<td>114</td>
<td>125</td>
<td>120</td>
<td>127</td>
<td>163</td>
<td>129</td>
<td>137</td>
</tr>
</tbody>
</table>

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

*Based on respondents aged 18 or older.*

*Based on respondents aged 18 or older.*
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.
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

Based on 71% of sample aged 18 or older who provided an income level.
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
### Monthly Digital Video Viewers
#### Stadium or Arena

**Sex**
- Male: 59%
- Female: 41%

**Household Income**
- Under $25K: 14%
- $25K to < $50K: 26%
- $50K to < $100K: 35%
- Over $100K: 25%

**Race/Ethnicity**
- White: 71%
- African-American: 11%
- Hispanic: 8%
- Asian/Other: 10%

**Age**
- 12-17: 16%
- 18-24: 18%
- 25-34: 20%
- 35-44: 20%
- 45-54: 15%
- 55-64: 7%
- 65+: 5%

**Monthly Digital Video Viewers**

<table>
<thead>
<tr>
<th>Gender</th>
<th>Men</th>
<th>Women</th>
</tr>
</thead>
<tbody>
<tr>
<td>59%</td>
<td>80</td>
<td>157</td>
</tr>
</tbody>
</table>

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

**Household Composition**
- Have Children Under Age 18 Living at Home: 33%

**National Average Index**

<table>
<thead>
<tr>
<th>Men</th>
<th>Women</th>
<th>Age 12-24</th>
<th>Age 18-49</th>
<th>Age 25-54</th>
<th>Income $50K+</th>
<th>Income $100K+</th>
<th>College Degree or Higher</th>
<th>Children in Household</th>
</tr>
</thead>
<tbody>
<tr>
<td>121</td>
<td>80</td>
<td>157</td>
<td>125</td>
<td>110</td>
<td>131</td>
<td>176</td>
<td>139</td>
<td>94</td>
</tr>
</tbody>
</table>

Stadiums and arenas deliver a high concentration of:
- Men
- Affluent consumers
- Teens and adults
- People with college degrees

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

*Based on respondents aged 18 or older.*

*Based on respondents aged 18 or older.*
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**

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.
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

### Demographic Profile

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

**Sex**

- Male 52%
- Female 48%

**Household Income**

- Under $25K: 23%
- $25K to < $50K: 26%
- $50K to < $100K: 30%
- Over $100K: 21%

**Age**

- 12-17: 4%
- 18-24: 20%
- 25-34: 23%
- 35-44: 17%
- 45-54: 17%
- 55-64: 11%
- 65+: 8%

**Race/Ethnicity**

- White: 50%
- African-American: 18%
- Hispanic: 12%
- Asian/Other: 20%

**Education**

- 4-year College Degree or Higher: 43%

**Household Composition**

- Have Children Under Age 18 Living at Home: 43%

**National Average Index**

<table>
<thead>
<tr>
<th></th>
<th>Men</th>
<th>Women</th>
<th>Age 12-24</th>
<th>Age 18-49</th>
<th>Age 25-54</th>
<th>Income $50K+</th>
<th>Income $100K+</th>
<th>College Degree or Higher</th>
<th>Children in Household</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>105</td>
<td>95</td>
<td>113</td>
<td>129</td>
<td>114</td>
<td>109</td>
<td>146</td>
<td>107</td>
<td>123</td>
</tr>
</tbody>
</table>
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**

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.

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

**Persons estimate: 9 million**
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?”
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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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.