

Arbitron Out-of-Home Digital Video Display Study 2009

For more information, contact:

Diane Williams

Senior Media Research Analyst
Arbitron Inc.
142 West 57th Street
New York, NY 10019
(212) 887-1461
diane.williams@arbitron.com



Introduction

Welcome to the Arbitron Out-of-Home Digital Video Display Study 2009. The goal of this research is to benchmark the size and profile of the national audience to place-based digital video displays in the United States. The statistics quoted are projected against U.S. residents aged 18 or older 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 (OOH) environment and are distinct from network or cable TV viewing away from home.

Over the past several years, Arbitron has worked closely with 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 TV networks has been exceedingly positive. Consumers seem to particularly welcome video news and entertainment programming in areas where they need to wait, such as store checkout lines, mall food courts or while riding mass transportation.

Out-of-home advertising, in its many forms, has proven to be an effective way to reach busy consumers. Instead of relying on the medium to bring the consumer to the message, advertisers use OOH campaigns to put the message in the path of consumers as they go about their day.

Digital video display networks take OOH advertising to the next level. They are designed to stand out in cluttered environments and engage shoppers at the moment when the buying decision is being made. In many cases, they are the "last voice" to influence consumers before the purchase event.

Description of Methodology

Arbitron Inc. and Edison Research interviewed a total of 1,666 people to investigate Americans' experiences with various forms of media and advertising. From January 16, 2009, to February 15, 2009, telephone interviews were conducted with respondents aged 18 and older who were chosen at random from a national sample of Arbitron's Fall 2008 survey diarykeepers. In certain geographic areas, a sample of Arbitron diarykeepers was not available for the survey and a supplemental sample was interviewed via random-digit-dialing. Diarykeepers represented 70% of the completed interviews and RDD sampled respondents represented 30%. Please note, data totals contained in this report are subject to rounding.

Definition of Research Terms

U.S. Aged 18+ Population: U.S. residents aged 18 or older.

OOH Video Audience: U.S. residents aged 18 or older who have seen a digital video display in any of the following venues in the past month:

1. Airport
2. Bar (asked of respondents aged 21+)
3. Convenience store
4. Doctor's office or hospital
5. Drug store
6. Elevator
7. Gas station
8. Grocery store
9. Health club
10. Large retail or department store
11. Movie theater
12. Office building
13. Restaurant
14. Riding public transit
15. Shopping mall
16. Stadium or arena
17. Waiting for public transit

Persons Estimates: Audience estimates are projected against the 2008 total U.S. population aged 18 or older. Results are reported in the millions.

Significant Highlights

National Reach and Audience Profile

Out-of-home digital video displays as media reach two-thirds (67%) of U.S. residents aged 18 or older each month across the venues measured and deliver a fairly representative cross-section of consumers.

Audience Profile by Venue Type

Of those who recall seeing digital video displays in the past month, 76% noticed seeing them at multiple venues. Digital video displays in retail locations alone (including grocery stores, large retailer/department stores, drug stores, shopping malls or convenience stores) reach over half (53%) of American adults in an average month. OOH digital video displays at gas stations and movie theaters each reach over 1 in 5 U.S. adults per month.

Targeting Consumers by Venue

Out-of-home digital video networks can be mixed and matched to target certain consumer groups including the affluent, men and Hispanics. OOH digital video networks across the board reach a high concentration of young adults aged 18 to 34. In this report we identify some venues that index highest for these key consumer segments.

Key Findings

A. National Reach and Audience Profile

1. **Two-thirds of American adults have seen a digital video screen in a public venue in the past month.** Sixty-seven percent of U.S. residents aged 18 or older recalled seeing a digital video display in at least one of the 17 locations listed in the table below in the past month; that translates to more than 155 million American adults. Of those who recalled seeing a digital video display in the past month, 76% noticed screens at multiple venues.

Monthly Out-of-Home (OOH) Digital Video Display Audience by Venue Type

“In the last month have you seen a digital video display at a...?”

Venue	OOH Video Audience (past month)	Persons Estimate (000)
Any venue (listed below)	67%	155,519
Shopping mall	31%	71,957
Grocery store	30%	69,636
Large retail or department store	29%	67,314
Gas station	22%	51,066
Movie theater	21%	48,745
Airport	19%	44,103
Doctor's office or hospital	19%	44,103
Stadium or arena	18%	41,781
Drug store	14%	32,497
Restaurant	14%	32,497
Convenience store	14%	32,497
Office building	11%	25,533
Bar (asked of respondents aged 21+)	8%	18,569
Health club	7%	16,248
Elevator	5%	11,606
Riding public transit	5%	11,606
Waiting for public transit	4%	9,285

Understanding Audience Size—Notice, Visits and Screen Presence: The audience examined in this report are adults who *specifically recall seeing* a digital video display in the past month, as opposed to all those who may have only been exposed to one. In other words, it is possible that some people may have been in the proximity of a video display in the past month, but did not notice it.

Other factors that may influence the total audience for digital video in a particular environment include the volume of Americans who *visit* that type of venue in an average month (i.e., more people visit malls per month than doctors' offices) and the *penetration* of digital video displays in that venue category (i.e., gas stations may be more likely to have video displays installed compared to the interiors of public transit).

2. **The general OOH Video Audience represents a cross-section of American consumers.** The demographic composition of persons who have noticed digital video displays in a public venue in the past month closely mirrors the average U.S. population as a whole. Some groups do over-index for having noticed OOH digital video displays, including young adults. For example, 12% of the U.S. adult population is between the ages of 18 and 24 but 15% of those who noticed an OOH digital video screen fall into that age range, meaning that OOH digital video displays reach a higher concentration of young adults.

Profile of the Out-of-Home Digital Video Display Audience

	U.S Aged 18+ Population	OOH Video Audience	Index
Sex			
Men	48%	51%	106*
Women	52%	49%	94
Age			
18-24	12%	15%	125
25-34	18%	20%	111
35-44	20%	21%	105
45-54	20%	19%	95
55-64	14%	13%	93
65+	17%	13%	76
Race/Ethnicity			
White	71%	69%	97
African-American	11%	12%	109
Hispanic or Latino	12%	13%	108
Asian	2%	2%	100
Other	3%	3%	100
Annual Household Income			
Under \$25K	22%	20%	91
Between \$25K and \$50K	28%	28%	100
Between \$50K and \$75K	22%	24%	109
Between \$75K and \$100K	12%	12%	100
Over \$100K	16%	16%	100

***How to read:** Those who noticed a digital video display in the past month are 6% *more likely* to be male compared to the total U.S. population aged 18 or older.

B. Audience Profile by Venue Type

3. **More than half of American adults have seen a digital video display in a retail environment in the past month.** Fifty-three percent of U.S. residents aged 18 or older have noticed a digital video display at a retail location such as a grocery store, large retailer/department store, drug store, shopping mall or convenience store in the past month.

Profile of the Out-of-Home Digital Video Display Audience at Retail Locations

	Any Retail Location ¹	Shopping Mall	Grocery Store	Large Retail/ Department Store	Drug Store	Convenience Store
Total Audience	53%	31%	30%	29%	14%	14%
Sex						
Men	52% ²	55%	51%	53%	56%	59% ²
Women	48%	45%	49%	47%	44%	41%
Age						
18-24	16%	21%	12%	17%	20%	18%
25-34	20%	22%	21%	21%	18%	18%
35-44	21%	18%	21%	21%	18%	17%
45-54	18%	15%	20%	17%	16%	23%
55-64	14%	12%	14%	13%	14%	13%
65+	12%	12%	12%	13%	14%	11%
Race/Ethnicity						
White	68%	61%	72%	66%	59%	58%
African-American	12%	14%	11%	14%	14%	15%
Hispanic or Latino	14%	18%	12%	14%	20%	22%
Asian	2%	3%	2%	2%	3%	0%
Other	4%	4%	3%	4%	3%	5%
Income						
Under \$25K	19%	18%	18%	19%	23%	24%
Between \$25K and \$50K	28%	28%	27%	30%	31%	28%
Between \$50K and \$75K	24%	24%	24%	25%	18%	25%
Between \$75K and \$100K	12%	11%	13%	12%	11%	11%
Over \$100K	17%	19%	18%	14%	17%	12%

¹“Any retail location” includes shopping malls, grocery stores, large retail or department stores, drug stores or convenience stores.

²How to read: Fifty-two percent of those who have seen a digital video display at any retail location in the past month are male vs. 59% of those who have seen a digital video display specifically at a convenience store in the past month.



4. **Nearly one in five adults have seen a digital video screen in a restaurant or bar.** Eighteen percent of Americans aged 18 or older have seen a digital video display in a place serving food or beverages in the past month; 14% have noticed an OOH digital video display in a restaurant and 8% (of adults aged 21 or older) have seen a display in a bar.



Profile of the Out-of-Home Digital Video Display Audience at Restaurants or Bars

	Restaurant or Bar	Restaurant	Bar*
Total Audience	18%	14%	8%
Sex			
Men	55%	52%	56%
Women	45%	48%	44%
Age			
18-24	16%	19%	12%
25-34	27%	24%	35%
35-44	18%	20%	18%
45-54	18%	18%	18%
55-64	10%	10%	9%
65+	10%	10%	8%
Race/Ethnicity			
White	63%	61%	67%
African-American	17%	16%	19%
Hispanic or Latino	16%	18%	11%
Asian	2%	3%	2%
Other	2%	2%	1%
Income			
Under \$25K	25%	24%	22%
Between \$25K and \$50K	30%	32%	30%
Between \$50K and \$75K	19%	20%	19%
Between \$75K and \$100K	12%	13%	15%
Over \$100K	13%	12%	16%

*Asked of respondents aged 21 or older.

5. **Seven percent of adults have seen a digital video display while waiting for or riding mass transit in the past month.** Four percent of Americans aged 18 or older have noticed OOH digital video displays while waiting for public transportation in the past month and 5% have seen video while riding mass transit.



Profile of the Out-of-Home Digital Video Display Audience Using Public Transportation

	While Waiting for or Riding Public Transit	Waiting for Public Transit	Riding Public Transit
Total Audience	7%	4%	5%
Sex			
Men	52%	59%	49%
Women	48%	41%	51%
Age			
18-24	25%	24%	25%
25-34	19%	21%	15%
35-44	21%	20%	25%
45-54	22%	23%	20%
55-64	6%	7%	6%
65+	7%	5%	9%
Race/Ethnicity			
White	52%	49%	53%
African-American	21%	22%	21%
Hispanic or Latino	21%	24%	17%
Asian	5%	3%	7%
Other	2%	3%	3%
Income			
Under \$25K	37%	33%	40%
Between \$25K and \$50K	17%	17%	15%
Between \$50K and \$75K	27%	26%	24%
Between \$75K and \$100K	6%	6%	7%
Over \$100K	14%	17%	14%

6. **One in seven adults have noticed a digital video display in an office building or elevator in the past month.** Fourteen percent of Americans aged 18 or older have seen a digital video display in an office building or in an elevator in the past month.



Profile of the Out-of-Home Digital Video Display Audience in Office Buildings/Elevators

	Office Building or Elevator	Elevator	Office Building
Total Audience	14%	5%	11%
Sex			
Men	59%	64%	57%
Women	41%	36%	43%
Age			
18-24	18%	21%	18%
25-34	23%	24%	22%
35-44	21%	21%	20%
45-54	20%	25%	19%
55-64	9%	4%	11%
65+	9%	5%	11%
Race/Ethnicity			
White	59%	63%	61%
African-American	20%	21%	18%
Hispanic or Latino	14%	9%	15%
Asian	2%	2%	2%
Other	4%	4%	4%
Income			
Under \$25K	20%	25%	18%
Between \$25K and \$50K	26%	16%	26%
Between \$50K and \$75K	20%	21%	21%
Between \$75K and \$100K	13%	9%	14%
Over \$100K	21%	30%	21%

7. **Americans encounter OOH digital video displays in a wide variety of venues, including gas stations, movie theaters, airports, doctors' offices, stadiums/arenas and health clubs.** More than one in five Americans aged 18 or older have seen a digital video display at a movie theater (21%) or gas station (22 percent) in the past month and nearly one in five have noticed video screens at a doctor's office or hospital (19%) and stadiums/arenas (18%). Seven percent of adults have viewed an OOH digital video display at a health club in the past month.

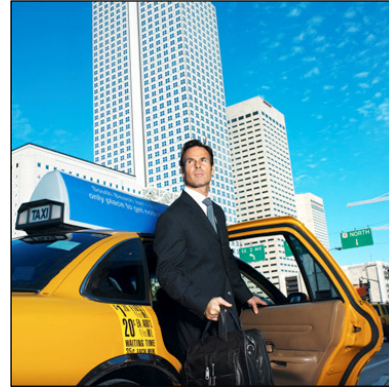


Profile of the Out-of-Home Digital Video Display Audience at Various Public Spaces

	Gas Station	Movie Theater	Airport	Doctor's Office or Hospital	Stadium or Arena	Health Club
Total Audience	22%	21%	19%	19%	18%	7%
Sex						
Men	57%	49%	57%	49%	61%	57%
Women	43%	51%	43%	51%	39%	43%
Age						
18-24	15%	21%	15%	18%	22%	18%
25-34	21%	21%	22%	17%	25%	26%
35-44	22%	21%	20%	19%	18%	26%
45-54	20%	17%	22%	18%	18%	15%
55-64	12%	11%	11%	13%	7%	8%
65+	11%	9%	10%	14%	10%	7%
Race/Ethnicity						
White	62%	61%	67%	65%	65%	58%
African-American	13%	17%	13%	18%	12%	23%
Hispanic or Latino	17%	15%	13%	12%	17%	11%
Asian	3%	2%	3%	1%	3%	3%
Other	4%	4%	4%	4%	3%	5%
Income						
Under \$25K	17%	24%	20%	24%	21%	16%
Between \$25K and \$50K	26%	23%	18%	31%	21%	21%
Between \$50K and \$75K	25%	25%	20%	21%	26%	27%
Between \$75K and \$100K	12%	12%	14%	11%	13%	8%
Over \$100K	20%	16%	28%	14%	19%	28%

C. Targeting Consumers by Venue

8. Office buildings, airports and health clubs deliver a particularly high concentration of upper-income consumers. Sixteen percent of Americans aged 18 or older have an annual household income of \$100,000 or more, but several OOH digital video venues reach an audience with a much higher composition of affluent consumers. Twenty-eight percent of the audience for video in airports live in households earning \$100,000 or more, meaning a person watching a video display in an airport is *75% more likely* to be affluent than the population at large.



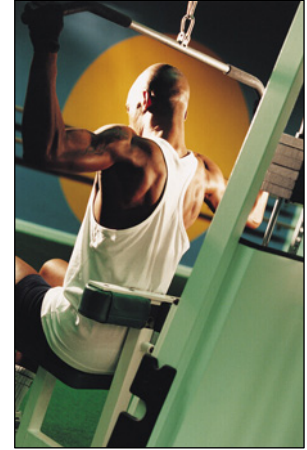
Affluent Targeted Venues

Sixteen percent of the total U.S. population aged 18 or older lives in a household with an annual income of \$100K or higher.

Venue	% of Audience With a Household Income of \$100K or Higher	Index
Elevator	30%	188
Airport	28%	175
Health club	28%	175
Office building	21%	131
Gas station	20%	125
Stadium or arena	19%	119
Shopping mall	19%	119
Grocery store	18%	113
Drug store	17%	106
Waiting for public transit	17%	106
Movie theater	16%	100
Bar*	16%	100
Large retail or department store	14%	88
Riding public transit	14%	88
Doctor's office or hospital	14%	88
Restaurant	12%	75
Convenience store	12%	75

*Asked of respondents aged 21 or older.

- 9. Elevator, stadium/arena and convenience store digital video displays reach a higher concentration of men.** Forty-eight percent of Americans aged 18 or older are men, but certain public venues reach a higher concentration of men than others. Sixty-one percent of the audience for video at stadiums/arenas are men, meaning a person watching a video screen at a sporting event is *27% more likely* to be a man than the population at large.



Male Targeted Venues

Forty-eight percent of the total U.S. population aged 18 or older are men.

Venue	% of Audience Who Are Men	Index
Elevator	64%	133
Stadium or arena	61%	127
Convenience store	59%	123
Waiting for public transit	59%	123
Health club	57%	119
Office building	57%	119
Airport	57%	119
Gas station	57%	119
Drug store	56%	117
Bar*	56%	117
Shopping mall	55%	115
Large retail or department store	53%	110
Restaurant	52%	108
Grocery store	51%	106
Riding public transit	49%	102
Doctor's office or hospital	49%	102
Movie theater	49%	102

*Asked of respondents aged 21 or older.

10. Most OOH digital video displays reach a high concentration of young adult consumers. Thirty percent of Americans aged 18 or older fall within the young adult demographic of 18- to 34-year-olds, but most OOH digital video locations reach a much higher composition of young adults – 46% of the audience for video in bars are between the ages of 21 and 34, meaning a person watching video content in a bar is 53% *more likely* to be a young adult than the population at large.



Young Adult Targeted Venues

Thirty percent of the total U.S. population is between the ages of 18 and 34.

Venue	% of Audience Who Are Between the Ages of 18 and 34	Index
Stadium or arena	47%	157
Bar*	46%	153
Elevator	45%	150
Waiting for public transit	45%	150
Health club	44%	147
Shopping mall	43%	143
Restaurant	43%	143
Movie theater	41%	137
Riding public transit	41%	137
Office building	40%	133
Drug store	38%	127
Large retail or department store	37%	123
Airport	37%	123
Convenience store	37%	123
Gas station	35%	117
Doctor's office or hospital	35%	117
Grocery store	33%	110

*Asked of respondents aged 21 or older.

11. Advertisers targeting Hispanic consumers would also do well with OOH digital video displays in a number of venues including transit, convenience stores and restaurants.

Twelve percent of U.S. residents identify themselves as being Hispanic or Latino, but many OOH digital video environments deliver a much higher concentration of Hispanic viewers. Twenty-four percent of those who noticed a digital video display while waiting for public transit are Hispanic, meaning a person watching a video display at a transit hub is *twice as likely* to be Hispanic compared to the population at large.



Hispanic Targeted Venues

Twelve percent of the total U.S. population aged 18 or older identifies itself as being Hispanic or Latino.

Venue	% of Audience Who Are Hispanic/Latino	Index
Waiting for public transit	24%	200
Convenience store	22%	183
Drug store	20%	167
Restaurant	18%	150
Shopping mall	18%	150
Stadium or arena	17%	142
Gas station	17%	142
Riding public transit	17%	142
Movie theater	15%	125
Office building	15%	125
Large retail or department store	14%	117
Airport	13%	108
Grocery store	12%	100
Doctor's office or hospital	12%	100
Bar*	11%	92
Health club	11%	92
Elevator	9%	75

*Asked of respondents aged 21 or older.

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, a new technology for media and marketing research.

Arbitron’s Out-of-Home division provides training, consumer behavioral data, audience profiles and analysis software for out-of-home media. Currently, nearly 100 out-of-home plants/place-based media clients and thousands of media industry clients—agencies, advertisers, stations, marketers and networks—utilize Arbitron and Scarborough consumer behavior information and software.

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.

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 fifteen 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.



Headquarters

9705 Patuxent Woods Drive
Columbia, MD 21046-1572
(410) 312-8000

Atlanta

9000 Central Parkway
Suite 300
Atlanta, GA 30328-1639
(770) 668-5400

Chicago

222 South Riverside Plaza
Suite 630
Chicago, IL 60606-6101
(312) 542-1900

Dallas

13355 Noel Road
Suite 1120
Dallas, TX 75240-6646
(972) 385-5388

Los Angeles

10877 Wilshire Boulevard
Suite 1400
Los Angeles, CA 90024-4341
(310) 824-6600

New York

142 West 57th Street
New York, NY 10019-3300
(212) 887-1300

www.arbitron.com