



Where Road Traffic and Web Traffic Merge

Outdoor Advertising and the Internet

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Introduction

Welcome to the Arbitron Report: *Where Road Traffic and Web Traffic Merge: Outdoor Advertising and the Internet*. This study examines the relationship between out of home and Internet advertising by profiling the online behavior of people who spend a lot of time traveling in a vehicle each week.

The report focuses on two segments of the outdoor media audience. **Top-motorists** are adults who travel an *above-average* number of miles in a vehicle each week, and **mega-milers** are adults in the top quintile for miles traveled each week. Mega-milers are the heaviest consumers of outdoor media and account for a majority of the gross ad impressions delivered.

Report Contents

These two outdoor media consumer targets are profiled by:

- Viewership of billboard advertising (both static and digital)
- Internet access overall and at work
- Time spent online each week
- Use of Internet search engines
- Top search categories for the outdoor media audience, including automotive, movie listings, financial services, real estate listings, medical services, local news and events, weather and traffic, as well as online couponing
- Online shopping
- Amount spent shopping online
- Top e-commerce categories for the outdoor media audience, including travel reservations, tickets for movies, sports and cultural events, computers and consumer electronics and office and pet supplies
- Use of alternative media delivery methods including reading newspapers online, watching TV programs over the Internet and DVR ownership

Highlights

Brands would benefit from using billboards ads and roadside street furniture to drive Web traffic and e-commerce.

- Consumers who spend a lot of time traveling on the road are more likely to be *both* heavy billboard viewers and heavy Internet users.
- Heavy motorists are more likely than the average consumer to search for product information and coupons online regardless of whether they are making their purchases online or in a store.
- They shop more frequently online and spend more money when they do.
- Heavy road travelers are more likely to access programming, including news and TV content, through non-traditional devices, making them more difficult to reach through traditional advertising schedules.

Data Sources

Scarborough Research (www.scarborough.com; info@scarborough.com): measures the lifestyle and shopping patterns, media behaviors and demographics of more than 210,000 American consumers aged 18 and older annually. The survey is ongoing, with respondents recruited via telephone year-round. A survey booklet is mailed to the respondent's home, completed and returned to Scarborough for processing. Scarborough's core syndicated consumer insight studies are conducted in 77 top-tier markets, with additional sample taken from the balance of the United States to create the national USA+ Study. The statistics in this report come from the Scarborough USA+ Study Release 1, 2010. 12 months database and are subject to rounding.

Arbitron 2009 National In-Car Study: A total of 1,858 people were interviewed to investigate Americans' travel habits and their use of various forms of media. From January 16 to February 15, 2009, telephone interviews were conducted with respondents aged 12 and older. Seventy percent of the sample was chosen at random from a national sample of Arbitron's Fall 2008 survey diarykeepers and 30 percent was recruited through random digit dialing (RDD) sampling in certain geographic areas where Arbitron diarykeepers were not available for the survey. The results of this study are reported among the 1,666 respondents who were aged 18 or older.

Arbitron Digital Billboard Report—Cleveland Case Study: This case study focuses on seven digital billboards operating in Cleveland. The digital displays are located on four interstate highways in the Cleveland area: I-77, I-90, I-271 and I-480. Arbitron Inc. conducted random digit dial (RDD) interviews between November 27 and December 3, 2007, with 402 persons 18 years of age and older in the Arbitron-defined Metro market for Cleveland. To qualify for the survey, respondents had to have traveled in a vehicle (car, truck, bus or taxi) on I-77, I-90, I-271 or I-480 in the 30 days preceding the survey period.

The study was designed and conducted by Arbitron Inc. on behalf of the Outdoor Advertising Association of America. Data were weighed to reflect census figures and factored in the likelihood of each demographic group qualifying for the survey based on the above-mentioned "roads traveled" screening criteria.

These studies and other reports in the Arbitron Out-of-Home Media Series can be downloaded for free at www.arbitron.com.

Definition of Terms

Average consumers: U.S. residents aged 18 or older.

Top-motorists: U.S. residents aged 18 or older who travel an above-average number of miles per week in a vehicle. They represent 40% of the population in Scarborough and 32% in the Arbitron surveys.

Mega-milers: These are the heaviest vehicle travelers among U.S. residents aged 18 or older. They represent 20% of the population in Scarborough.

Why Examine Top-Motorists and Mega-Milers?

To have a clearer understanding of where media dollars are having an effect, we must examine the heavy users. Heavy users of a medium are usually defined as those in the top 20% or 40% (first and second quintile) of the total population in terms of frequency or duration of use. These people account for the majority of the gross impressions delivered by an ad schedule. For example, the top 20% of vehicle travelers (mega-milers) alone account for 62% of all miles traveled in a week.

Better Research Through Indexing

An index is a system used to make comparing information easier. In this case, we are comparing the demography, consumer profiles and media consumption of top-motorists and mega-milers to the U.S. population aged 18 or older as a whole. The goal is to clearly illustrate what makes heavy highway and street travelers different from average adults in order to highlight areas where advertisers might benefit most from using outdoor in conjunction with Internet media.

Index Equation:
 $(\text{Target Group} \div \text{Standard Group}) \times 100 = \text{Category Index}$

100 = Average

Above 100 = MORE likely to qualify for category

Below 100 = LESS likely to qualify for category

For Example

Target Group: Top-Motorists

Standard Group: Average Consumers

Category: \$100,000+ Income Household

28% of top-motorists have an annual household income of \$100,000 or more.

21% of average consumers have an annual household income of \$100,000 or more.

$(27.5\% \div 20.6\%) \times 100 = \text{An Index of 134}$

Result: Top-motorists index at 134 for \$100,000+ income households—meaning they are 34% *more likely* than average consumers to live in a household with an annual income of \$100,000 or more. Advertisers looking to reach upper-income consumers should consider using media that targets top-motorists.

Please note: While all percentages are displayed in whole numbers for the purposes of readability, all indexes are calculated to the first decimal point.

Key Findings

A. Heavy Outdoor Media Viewers Are Heavy Internet Users

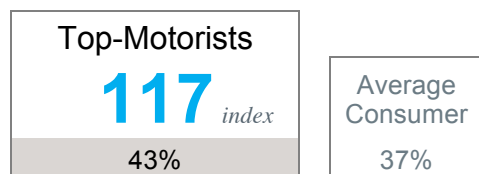
Consumers who spend a lot of time traveling on the road are more likely to be both heavy out of home viewers and heavy Internet users. They are also more likely to access the Internet at work, making out of home the last ads most travelers see before they sit down at their work computers each day.

Heavy Billboard Viewing

Top-motorists are more likely than average consumers to frequently notice ad messages on billboards. Thirty-seven percent of U.S. residents aged 18 or older say they notice the ad message on a billboard each or most of the time they pass one, but 43% of top-motorists frequently take note of outdoor messages.

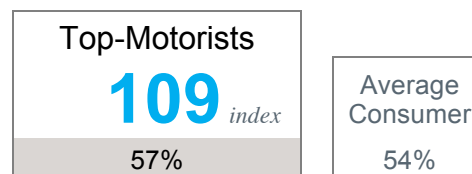
When it comes to the newer digital billboards, top-motorists still demonstrate heightened awareness with 57% noting a digital billboard message each or most of the time compared to 54% of average consumers.

All Billboards



Source: Arbitron 2009 National In-Car Study

Digital Billboards

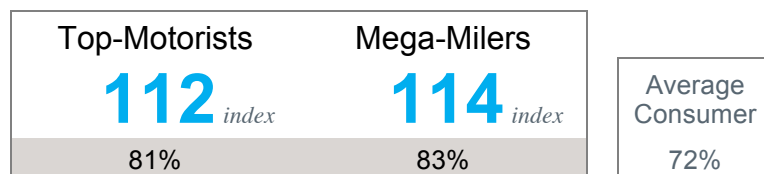


Source: Arbitron Digital Billboard Report—Cleveland Case Study

Heavy Internet Usage

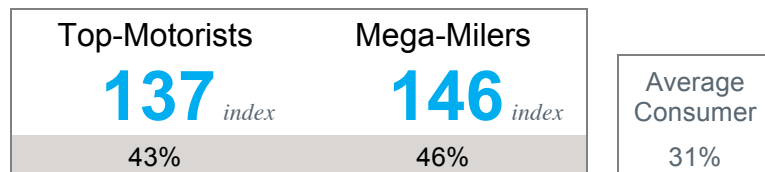
Top-motorists and mega-milers are more likely than the average consumer to access the Internet, especially at work. Seventy-two percent of U.S. residents aged 18 or older access the Internet each month, but 81% of top-motorists and 83% of mega-milers go online each month. Forty-three percent of top-motorists and 46% of mega-milers access the Internet at work, while only 31% of average consumers surf the net while on the job.

Access the Internet in the past month



Source: Scarborough Research, Scarborough USA+ Study, Release 1 2010

Access the Internet at WORK in the past month

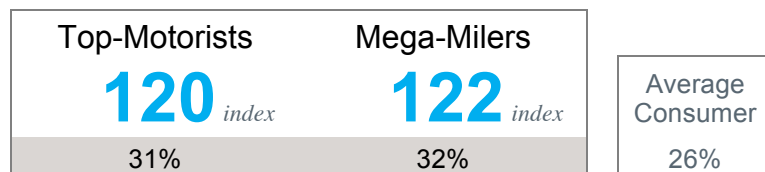


Source: Scarborough Research, Scarborough USA+ Study, Release 1 2010

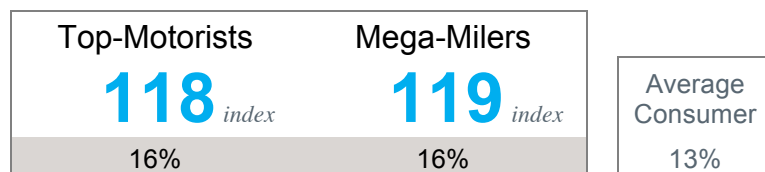
Time Spent Online

Heavy motorists spend more time on the Internet when they do go online. Twenty-six percent of U.S. residents aged 18 or older access the Internet 10 hours or more per week, but 31% of top-motorists and 32% of mega-milers spent that amount of time online. When we examine heavy Internet usage (20+ hours per week), we find top-motorists and mega-milers lead the pack with 16%, respectively, spending extended amounts of time online compared to 13% of average consumers.

Spent 10+ hours on the Internet in an average week



Spent 20+ hours on the Internet in an average week



Source: Scarborough Research, Scarborough USA+ Study, Release 1 2010

B. Road Travelers Are Heavy Users of Internet Search Engines

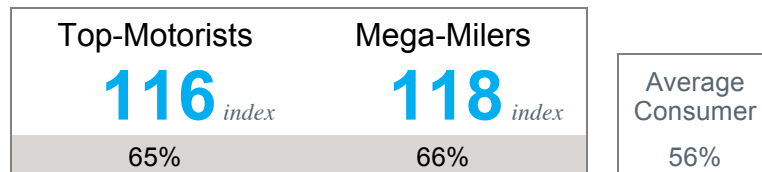
Heavy motorists are more likely than the average consumer to use major search engines. They are also more likely to use the Internet to get information on automobiles, movie listings, financial services, real estate and medical services; seek out local information, such as community events, weather and traffic; and search for coupons.

Even if an advertiser is not engaged in direct e-commerce, they should still consider using out of home to drive people to their Web sites for more in-depth messaging or coupons for their business.

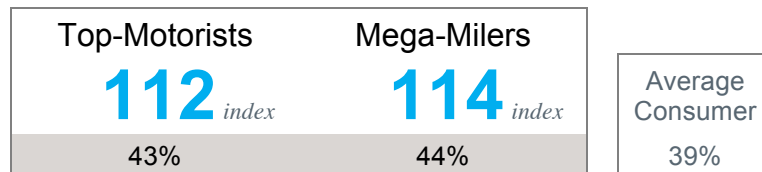
Searching High and Low

Top-motorists and mega-milers are more likely to turn to major search engines such as Google™ and Yahoo™. Fifty-six percent of U.S. residents aged 18 or older have visited the Google search Web page in the past month and 39% have visited Yahoo's homepage, but 65% of top-motorists and 66% of mega-milers have used Google and 43% and 44%, respectively, have used Yahoo.

Visited Google past month



Visited Yahoo past month



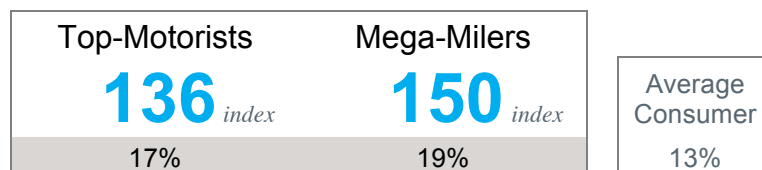
Source: Scarborough Research, Scarborough USA+ Study, Release 1 2010

Driving Automobile Information on the Web

Top-motorists and mega-milers are more likely to use the Internet to search for automobiles.

Thirteen percent of U.S. residents aged 18 or older have searched for automobile information online in the past month, but 17% of top-motorists and 19% of mega-milers have turned to the Internet to look up vehicles in the past month.

Used Internet for automobile information in the past month



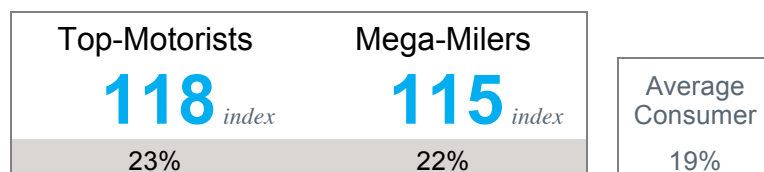
Source: Scarborough Research, Scarborough USA+ Study, Release 1 2010

From the Little Screen to the Big Screen

Top-motorists and Mega-milers are more likely to use the Internet to search for movie listings.

Nineteen percent of U.S. residents aged 18 or older have searched for movie listings online in the past month, but 23% of top-motorists and 22% of mega-milers turned to the Internet before heading out to the theater.

Used Internet for movie listings in the past month

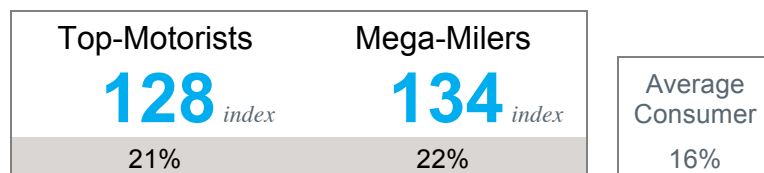


Source: Scarborough Research, Scarborough USA+ Study, Release 1 2010

Money and Mouse Clicks

Financial information and services are more likely to be searched for online by top-motorists and mega-milers. Sixteen percent of U.S. residents aged 18 or older have searched for financial information and services online in the past month, but 21% of top-motorists and 22% of mega-milers turned to the Web for help managing their money.

Used Internet for financial information and services in the past month



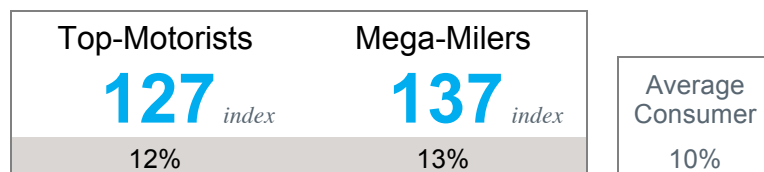
Source: Scarborough Research, Scarborough USA+ Study, Release 1 2010

Web Address to Street Address

Top-motorists and mega-milers are more likely to use the Internet to search for real estate listings.

Ten percent of U.S. residents aged 18 or older have searched for real estate listings online in the past month, but 12% of top-motorists and 13% of mega-milers turned to the Web to search for homes and property investments.

Used Internet for real estate listings in the past month

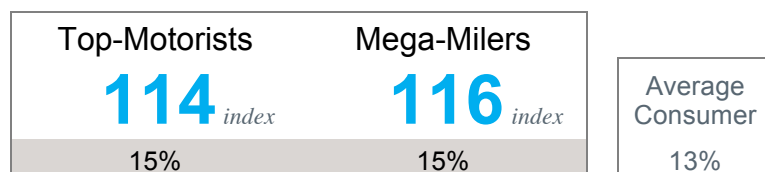


Source: Scarborough Research, Scarborough USA+ Study, Release 1 2010

From Dot Com to MD

Top-motorists and mega-milers are more likely to use the Internet to search for medical services and information. Twelve percent of U.S. residents aged 18 or older have searched for medical services and information online in the past month, but 15% of top-motorists and mega-milers, respectively, have used the Web for healthcare information.

Used Internet for medical services/information in the past month

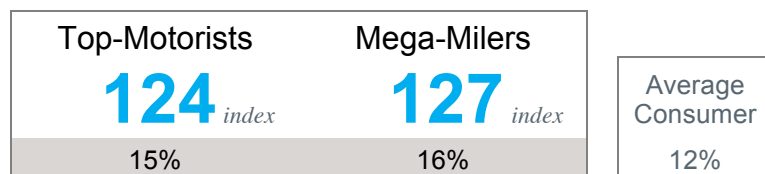


Source: Scarborough Research, Scarborough USA+ Study, Release 1 2010

Going Online Before Hitting the Town

Top-motorists and mega-milers are more likely to use the Internet to search for local community events. Twelve percent of U.S. residents aged 18 or older have searched for local community events online in the past month, but 15% of top-motorists and 16% of mega-milers turned to the Web to find out what was going on around town.

Used Internet for local community events in the past month

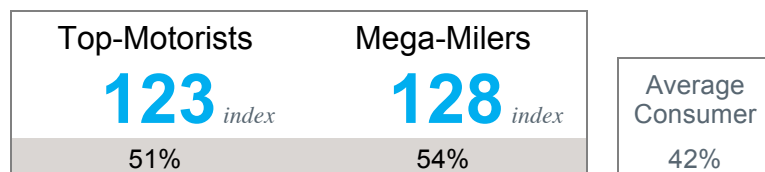


Source: Scarborough Research, Scarborough USA+ Study, Release 1 2010

Weather, Traffic and the Web

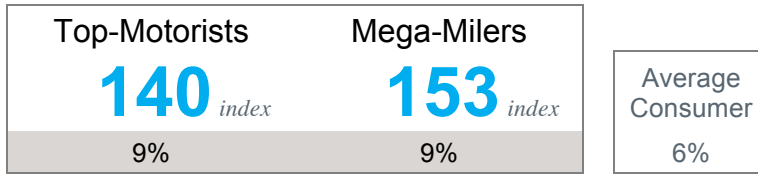
Weather and traffic are two pieces of information top-motorists and mega-milers are more likely to search for online. Forty-two percent of U.S. residents aged 18 or older have searched for weather information online in the past month and 6% have looked for traffic news, but 51% of top-motorists and 54% of mega-milers have looked for weather info over the Internet and 9%, respectively, have turned to the Web to stay ahead of the traffic.

Used Internet for weather information in the past month



Source: Scarborough Research, Scarborough USA+ Study, Release 1 2010

Used Internet for traffic information in the past month

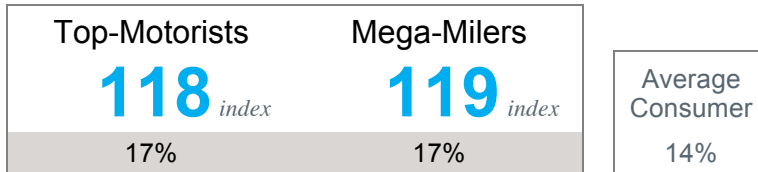


Source: Scarborough Research, Scarborough USA+ Study, Release 1 2010

Printing Is the New Clipping

Top-motorists and mega-milers are more likely to use the Internet to search for coupons. Fourteen percent of U.S. residents aged 18 or older have searched for coupons online in the past month, but 17% of top-motorists and mega-milers respectively turned to the Web to save money on retail purchases.

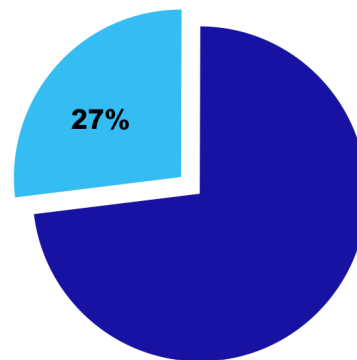
Used Internet for coupons in the past month



Source: Scarborough Research, Scarborough USA+ Study, Release 1 2010

Noting Web Addresses

Over one in four top-motorists have written down a Web address they saw on outdoor media. Twenty-seven percent of top-motorists specifically recall noting a Web address they saw on a billboard.



Source: Arbitron 2009 National In-Car Study

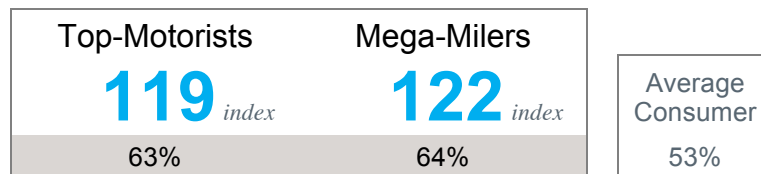
C. E-commerce

Heavy travelers are more likely to make purchases over the Internet and spend more when they do. Advertisers looking to do business online should consider using out of home to drive traffic to their e-commerce sites.

Online Shopping

Top-motorists and mega-milers are more likely to shop online. Fifty-three percent of U.S. residents aged 18 or older have bought any items over the Internet in the past year, but 63% of top-motorists and 64% of mega-milers turned to the Web for their retail needs.

Bought any items online in the past year



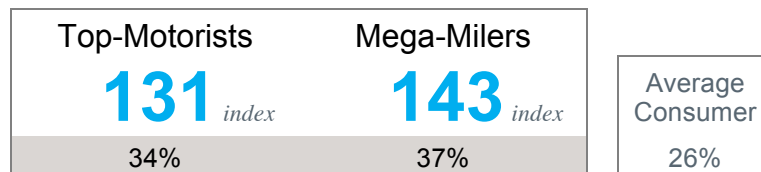
Source: Scarborough Research, Scarborough USA+ Study, Release 1 2010

Online Spending

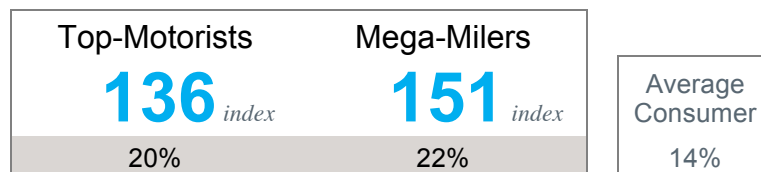
Motorists spend more money on the Internet. Twenty-six percent of U.S. residents aged 18 or older have spent \$500 or more online in the past year, but 34% of top-motorists and 37% of mega-milers spent that amount online.

When we examine even higher spending levels, we see an even greater affinity for online shopping among heavy motorists; 20% of top-motorists have spent \$1,000 or more online in the past year and 8% have spent \$2,500 or more compared to only 14% and 6% of average consumers. Mega-milers are also mega-spenders: 22% of them have spent more than \$1,000 online in the past year and 9% have spent over \$2,500.

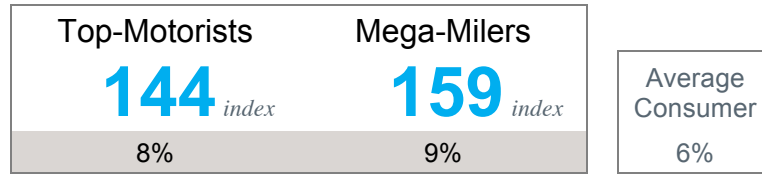
Spent \$500+ online in the past year



Spent \$1,000+ online in the past year



Spent \$2,500+ online in the past year



Source: Scarborough Research, Scarborough USA+ Study, Release 1 2010

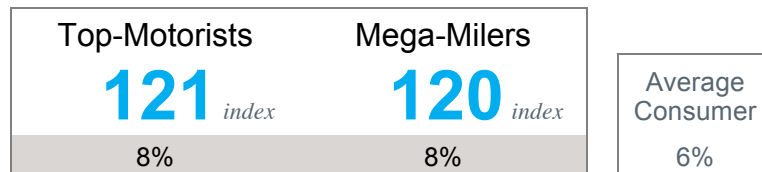
Tickets, Tickets, Tickets

Top-motorists and mega-milers are more likely to buy tickets for movies, sports and cultural events online. Six percent of U.S. residents aged 18 or older have purchased movie tickets over the Internet in the past year, but 8% of top-motorists and mega-milers, respectively, have bought movie theater tickets online.

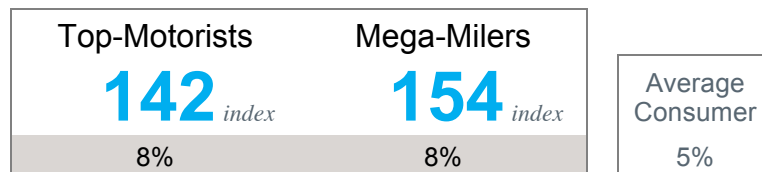
Five percent of average consumers have purchased sporting event tickets online compared to 8%, respectively, of top-motorists and mega-milers.

Heavy motorists are also more likely to buy tickets to cultural events online; 5% of average consumers have purchased tickets for a cultural event online in the past year compared to 6% of top-motorists and 7% of mega-milers.

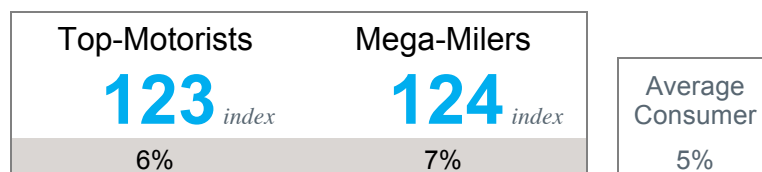
Bought movie tickets over the Internet in the past year



Bought sporting event tickets over the Internet in the past year



Bought cultural event tickets over the Internet in the past year

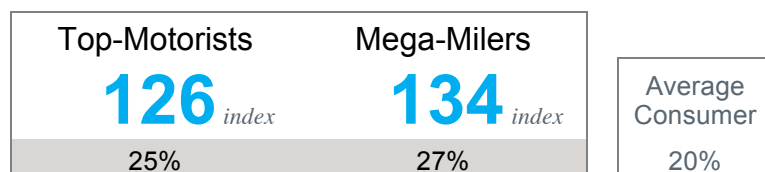


Source: Scarborough Research, Scarborough USA+ Study, Release 1 2010

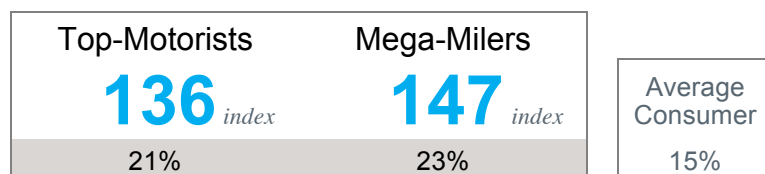
Booking Travel Online

Top-motorists and mega-milers are more likely to buy airline tickets and book hotels or rental cars online. Twenty percent of U.S. residents aged 18 or older have purchased airline tickets over the Internet in the past year and 15% have booked a hotel or auto rental, but 25% of top-motorists and 27% of mega-milers booked a flight online and 21% and 23%, respectively, have booked hotels or rental cars.

Bought airline tickets over the Internet in the past year



Made hotel or auto rental reservations over the Internet in the past year

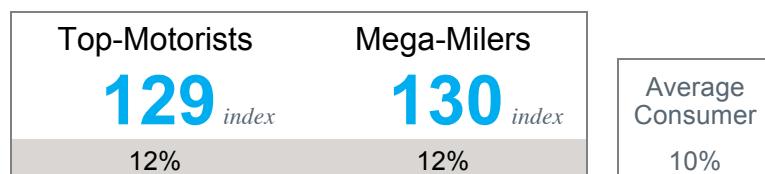


Source: Scarborough Research, Scarborough USA+ Study, Release 1 2010

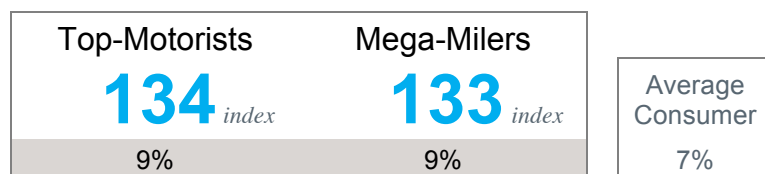
Buying Computers on a Computer

Computer hardware, software and consumer electronics are more likely to be bought online by heavy motorists. Ten percent of U.S. residents aged 18 or older have purchased computer hardware or software over the Internet in the past year and 7% have purchased other consumer electronics online. Twelve percent of top-motorists and mega-milers, respectively, have turned to the Web for computer-related items and 9%, respectively, have bought other consumer electronics.

Bought computer hardware/software over the Internet in the past year



Bought consumer electronics over the Internet in the past year

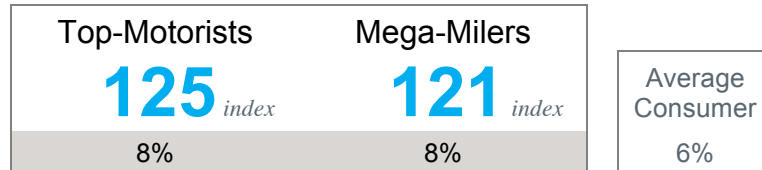


Source: Scarborough Research, Scarborough USA+ Study, Release 1 2010

Office Supplies Online

Top-motorists and mega-milers are more likely to buy office supplies over the Internet. Six percent of U.S. residents aged 18 or older have purchased office supplies over the Internet in the past year, but 8% of top-motorists and mega-milers, respectively, have turned to the Web for items they need on the job.

Bought office supplies over the Internet in the past year

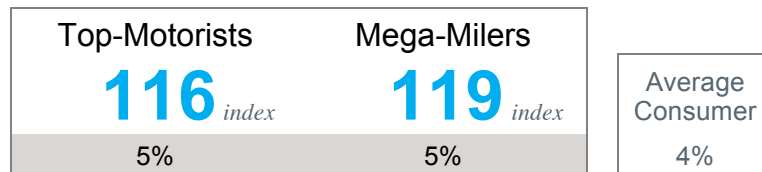


Source: Scarborough Research, Scarborough USA+ Study, Release 1 2010

Net Pets

Top-motorists and mega-milers are more likely to buy pet supplies over the Internet. Four percent of U.S. residents aged 18 or older have purchased pet supplies over the Internet in the past year, but 5% of top-motorists and mega-milers, respectively, have turned to the Web to spend money on their furry, feathery or scaly companions.

Bought pet supplies over the Internet in the past year

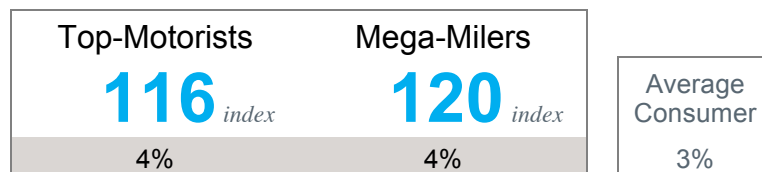


Source: Scarborough Research, Scarborough USA+ Study, Release 1 2010

Online Alumni

Top-motorists and mega-milers are more likely to take college courses online. Three percent of U.S. residents aged 18 or older have taken college courses over the Internet in the past month, but 4% of top-motorists and mega-milers, respectively, have advanced their education through online classes.

Used Internet to take college courses in the past month



Source: Scarborough Research, Scarborough USA+ Study, Release 1 2010

D. Out of home Still Delivers Despite Changing Media Habits

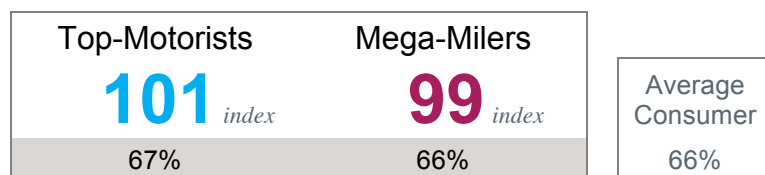
Heavy road travelers are more likely to access content, including news and TV programming, through non-traditional platforms and use devices that allow them to skip ads, thus making them more difficult to reach through traditional advertising schedules. Out of home advertising is not impacted by these changes in technology since there are no alternative methods for avoiding or replacing outdoor messaging.

New News Access

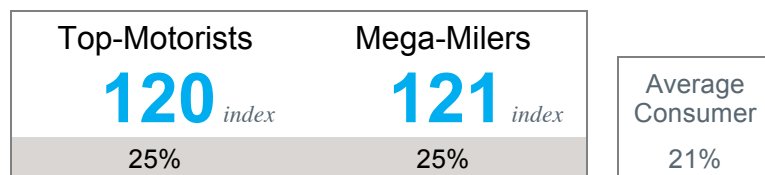
Top-motorists and mega-milers are average print newspaper readers, but they are above-average visitors to newspaper Web sites. Sixty-six percent of U.S. residents aged 18 or older read a daily or weekend printed newspaper in an average week. That level of readership is on par with top-motorists (67%) and mega-milers (66%), but top-motorists and mega-milers are more likely to turn to a newspaper’s Web site for news 25%, respectively, compared to 21% of average consumers.

Cable TV News Web sites are also a draw for top-motorists and mega-milers. Ten percent of U.S. residents aged 18 or older get their news from cable TV news Web sites such as CNN.com and FOXNews.com each month, but 12% of top-motorists and mega-milers get their news from CNN’s Web site and 13% of top-motorists and 14% of mega-milers from FOXNews.com, respectively.

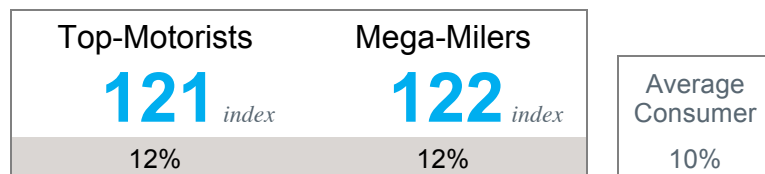
Read any daily or weekend print newspapers in an average week



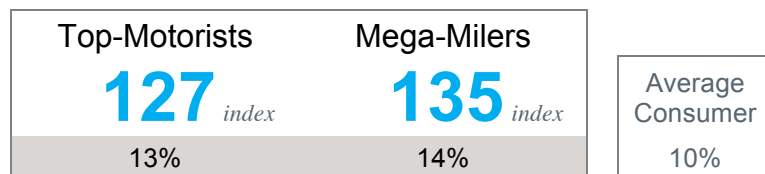
Visited any newspaper Web site in the past week



Visited CNN.com in the past month



Visited FOXNews.com in the past month

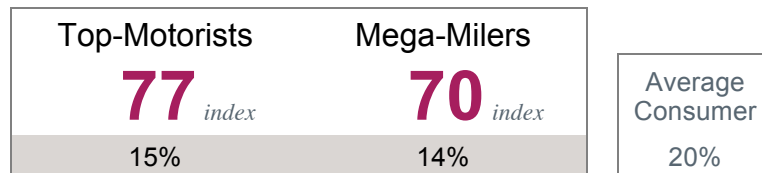


Source: Scarborough Research, Scarborough USA+ Study, Release 1 2010

More Drive Time Means Less TV Time

Heavy motorists are less likely to be heavy TV viewers. Twenty percent of U.S. residents aged 18 or older are in the top quintile for TV viewing, meaning they watch the most hours of television per week and account for a disproportionately high percentage of the gross ad impressions delivered, but only 15% of top-motorists and 14% of mega-milers qualify for this heavy TV viewing audience.

Member of first (highest) television quintile

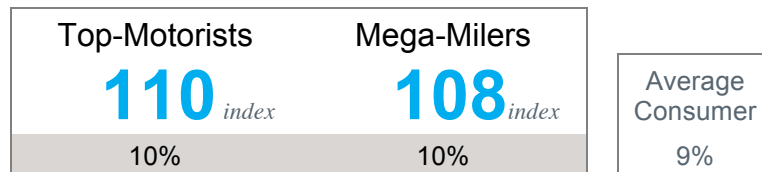


Source: Scarborough Research, Scarborough USA+ Study, Release 1 2010

TV Without the Television

Top-motorists and mega-milers are slightly more likely to stream or download TV programs over the Internet. Nine percent of U.S. residents aged 18 or older have watched TV programming by streaming or downloading a show from the Internet in the past month, but 10% of top-motorists and mega-milers watch TV programs using these alternative methods.

Used Internet for TV programs (watch or download) in the past month

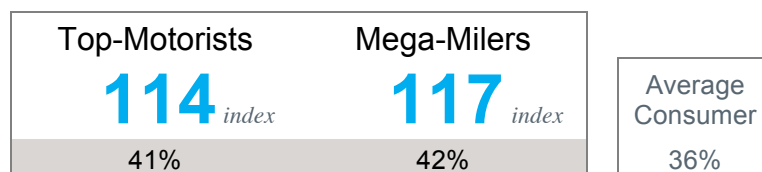


Source: Scarborough Research, Scarborough USA+ Study, Release 1 2010

Commercial TV Without the Commercials

Top-motorists and mega-milers are more likely to use a DVR when they do watch network or cable TV. Thirty-six percent of U.S. residents aged 18 or older live in a household that owns a digital video recorder. These devices allow the user to record or pause programming and fast-forward through the commercial breaks. Forty-one percent of top-motorists and 42% of mega-milers own technology that allows them to skip TV commercials at will.

Household owns DVR (digital video recorder)



Source: Scarborough Research, Scarborough USA+ Study, Release 1 2010

About Outdoor Advertising Association of America (OAAA)

The Outdoor Advertising Association of America is the lead trade association representing the outdoor advertising industry. Founded in 1891, OAAA is dedicated to uniting, promoting, protecting and advancing outdoor advertising interests in the U.S. With nearly 1,100 member companies, OAAA represents more than 90% of industry revenues.

Information supplied by OAAA.

About Arbitron Inc.

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™ and PPM 360™, new technologies for media and marketing research.

Through its Scarborough Research, Arbitron provides additional media and marketing research services to the broadcast television, newspaper and online industries.

Arbitron's Out-of-Home division provides training, consumer behavioral data, audience profiles and analysis software for out-of-home media.

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 Scarborough Research

Scarborough Research (www.scarborough.com, info@scarborough.com) measures the lifestyle and shopping patterns, media behaviors and demographics of American consumers, and is considered the authority on local market research. Scarborough's core syndicated consumer insight studies in 77 Top-Tier Markets, its Multi-Market Study and its national USA+ Study are Media Rating Council (MRC) accredited. Other products and services include Scarborough Mid-Tier Local Market Studies, Hispanic Studies and Custom Research Solutions. Scarborough measures 2,000 consumer categories and serves a broad client base that includes marketers, advertising agencies, print and electronic media (broadcast and cable television, radio stations), sports teams and leagues and out-of-home media companies. Surveying more than 210,000 adults annually, Scarborough is a joint venture between Arbitron Inc. (www.arbitron.com) and The Nielsen Company (www.nielsen.com).



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