



The Arbitron Outdoor Study

Outdoor Media Consumers and Their Crucial
Role in the Media Mix

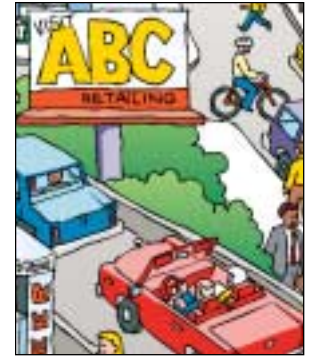
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Overview

Welcome to *The Arbitron Outdoor Study*—a comprehensive examination of American pedestrian traffic, vehicle drivers/passengers, commuters and their media habits. As one of America's most respected media information services companies, Arbitron is excited to present this study on the media habits of Americans exposed to Outdoor advertising. We will profile American pedestrians and vehicle drivers/passengers and examine their media habits in terms of newspaper readership, local television news viewership and radio listenership.



First and foremost, these data reveal the significant reach of Outdoor media, whether targeted to pedestrians or vehicle drivers/passengers. We will see how Outdoor media can play a critical role in a media plan by reaching consumers who are not exposed to either newspaper or local television news. Additionally, this study shows how Outdoor media and radio grow in consumer exposure and complement each other in a media plan.

In addition to the impressive reach, this study clearly demonstrates Outdoor media's ability to reach a core group of consumers repeatedly. We will focus on those consumers heavily exposed to Outdoor media, since they rack up high mileage in vehicles and walk significant pedestrian mileage. We will introduce several new consumer groups: "Power-Pedestrians," "Mega-Milers," and "Super-Commuters." Each of these consumer groups represents 20 percent to 30 percent of Americans who generate a majority of time spent with Outdoor media.

This study is Arbitron's gift to the Outdoor industry, provided free of charge and available on Arbitron's Web site (www.arbitron.com) as well as on the site of the Outdoor Advertising Association of America (www.oaaa.org). We hope the study proves to be both interesting and useful to advertisers, agencies and Outdoor media alike. Arbitron has a long tradition of providing insightful and valuable industry studies to advertisers and media, covering a myriad of topics including Internet use, radio listening, streaming media and now Outdoor media.

In the future, Arbitron will generate additional studies focusing on Outdoor media, especially utilizing the resources of Scarborough Research. Scarborough is the most respected and utilized qualitative database in America today. Scarborough provides data on what people buy and where they shop in 75 top U.S. markets. In addition, Scarborough provides a huge national database. With an annual sample size of over 200,000, Scarborough offers the most comprehensive measures for the Outdoor industry.

Only Scarborough provides local Outdoor measures on specific roads traveled, time spent commuting, miles traveled, pedestrian traffic, along with the most detailed local retail database in the world.

This report begins with a summary of highlights from the study, follows with key findings detailed in a point-by-point manner, and concludes by offering recommendations. Several appendices provide detailed profiles of the Outdoor media audience.

How the Study Was Conducted

A total of 2,003 people were surveyed to probe America's Outdoor media exposure and media habits. Telephone interviews were conducted April 6 through 14, 2001, with 2,003 persons aged 18 and older chosen at random from a national sample. This study used a single-staged, random-digit-dial sample technique to select each respondent from all available residential telephone numbers in the contiguous United States.

Significant Highlights

- This study clearly documents the significant reach of Outdoor media. The media with the strongest reach excel at out-of-home exposure: vehicle driver/passengers (96 percent), radio (86 percent) and pedestrian traffic (79 percent). Outdoor media reach the entire socioeconomic spectrum of Americans.
- Outdoor media play a vital role in the media mix by reaching consumers missed by other media and enhancing the exposure of other media. Outdoor media reach those Americans not exposed or only lightly exposed to newspaper and local television news. Outdoor media and radio are complementary as consumer exposure to both Outdoor and radio grows in lock step.
- One-third of Americans say they shop most near their work or split their shopping between home and work.
- This study has uncovered several new consumer groups: "Power-Pedestrians," "Mega-Milers" and "Super-Commuters." Each group represents about 20 percent to 30 percent of consumers, yet represents a large majority of Outdoor media usage.
 - Power-Pedestrians represent 21 percent of Americans who generate 83 percent of all miles walked. Those who generate the highest pedestrian traffic tend to be younger, single and from each end of the income spectrum.
 - Mega-Milers are 29 percent of consumers who represent 77 percent of all miles traveled.
 - Super-Commuters are 24 percent of Americans who spend 72 percent of all time commuting. Mega-Milers and Super-Commuters tend to be upscale, educated and more likely to be married with children than the national average.

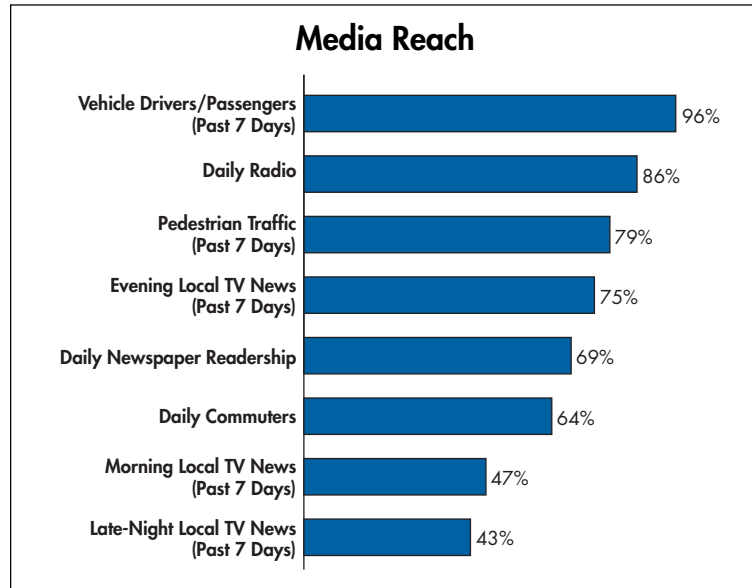
- Americans report traveling an average of 302 miles in a vehicle in the past seven days. The average person says their mileage over the past four weeks is 1,101 miles.
- Eight out of 10 Americans report having walked in any town, city or downtown in the past seven days. Pedestrians report they walk an average of 6.1 miles in the past seven days in downtown areas.
- The average American's one-way commute takes 27 minutes, with the round-trip commute taking nearly an hour. The heaviest commuters, Super-Commuters, spend nearly two hours a day getting to and from work.
- Those with heavy vehicle mileage and long commutes are more difficult to reach with newspaper and local TV news. Heavy commuters spend 19 percent less time reading newspaper and are less likely to be reached by local TV newscasts, especially the local evening news.



Overall Media Habits

We begin with an examination of reach among the significant local media.

Out-of-home media occupy the top three slots in media reach (vehicle drivers/passengers, radio and pedestrian traffic). Of the three local TV news options, it is the evening local news that garners the largest reach.



Below we examine how long/often Americans are exposed to each medium.

Medium	Exposure
Daily Newspaper Readership	32 minutes
Pedestrian Traffic (Past 7 Days)	6.1 miles
Vehicle Driver/Passenger (Past 7 Days)	302 miles
Average Daily Commute (Round-Trip)	54 minutes
Daily Radio	2 hrs. 57 mins.
Morning Local TV News (Days Watched Past 7 Days)	2.1 days
Evening Local TV (Days Watched Past 7 Days)	3.5 days
Late-Night Local TV News (Days Watched Past 7 Days)	1.8 days

Almost one out of three Americans do not read a daily newspaper.

Among those who do, average time spent reading is 32 minutes. When asked to estimate the amount of time spent reading a local daily newspaper in a typical day, 29 percent say they do not read a newspaper. Twenty percent (20%) spend one to 15 minutes reading the paper, 28 percent

spend 16 to 30 minutes, and 23 percent spend 31 or more minutes per day. Overall, the socioeconomic profile of those who do not read a local daily newspaper does not differ dramatically from the overall U.S. population. Those not reached by newspaper lean younger and slightly more female.

Seventy-five percent (75%) of Americans indicate they have watched the local TV evening news in the past seven days, followed by the morning news (47 percent) and the late news (43 percent). Over half of all Americans have not watched either the morning or the late news in the past week. One out of four Americans have not watched the evening news in the past week. The chart below indicates the number of days of local TV news watched in the past week:

Percent of Americans Who Watch Local TV News			
Past 7 Days			
# of Days Viewed Past 7 Days	Morning News	Evening News	Late News
Do Not Watch	54%	25%	56%
1-2 Days	11%	15%	13%
3-5 Days	18%	31%	18%
6-7 Days	18%	29%	12%

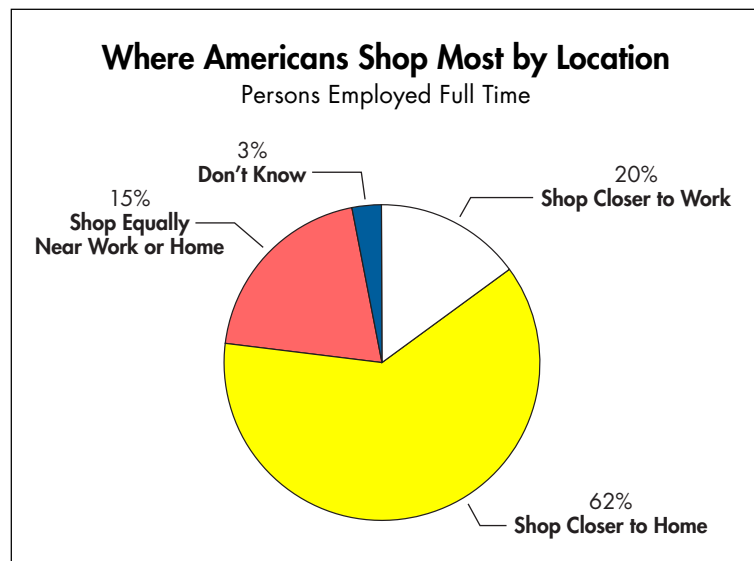
Americans who do not read the newspaper tend not to watch local morning television news. Fifty-nine percent (59%) of those who do not read the newspaper indicate they *do not* watch the local morning TV news. This represents an opportunity for Outdoor media. Advertisers can use Outdoor media to reach consumers not exposed to either newspaper or morning television news.



Where Do Americans Shop, Closer to Home or Work?

Over one-third of Americans shop most near work. Among full-time employed, 62 percent say they do most of their shopping closer to home. Thirty-five percent (35%) indicate they shop equally near home/work or shop mostly near work. Consumers who do most of their shopping closest to work have longer commute times and greater weekly vehicle mileage than those who shop mostly near home.

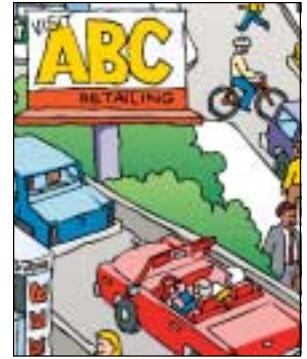
Advertisers cannot just target consumers who live near their retail locations. Marketers must also consider the sizable group of consumers who shop near work.



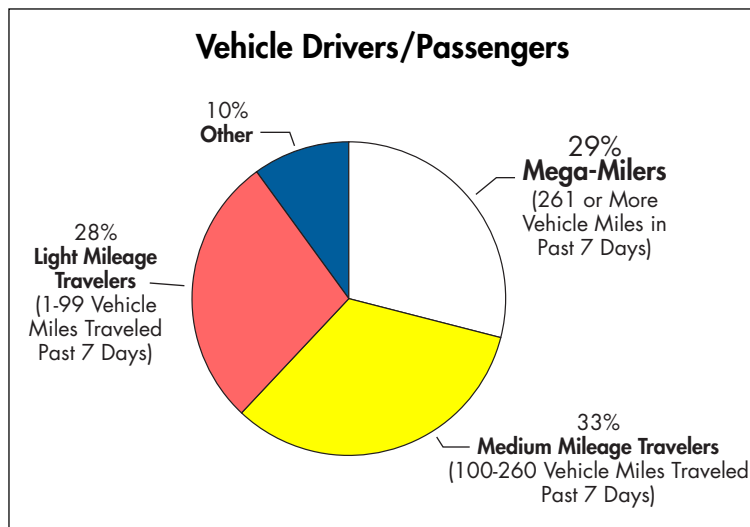
Vehicle Drivers/Passengers

Virtually every American travels in a vehicle each week. Ninety-six percent (96%) of Americans say they have traveled in a vehicle either as a driver or a passenger in the past week.

Americans report traveling an average of 302 miles in a vehicle in the past seven days. Americans were asked to estimate the number of miles they had traveled in a car, van, truck or bus either as a driver or a passenger in the past seven days. Men indicate traveling an average of 392 miles in the past seven days, compared to women, who say they travel 213 miles. In this study, we have segmented vehicle mileage into three categories: light, medium and heavy (Mega-Milers).



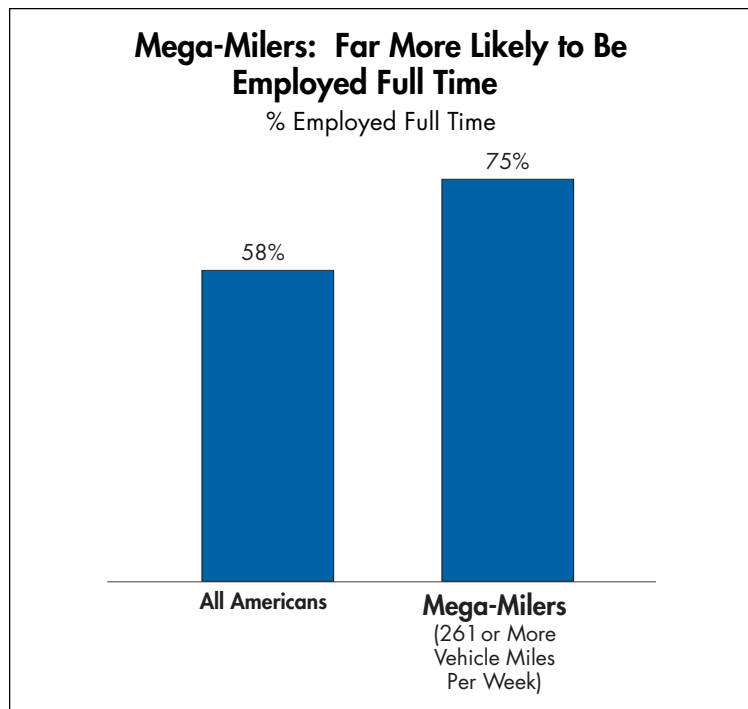
- Twenty-eight percent (28%) of all Americans fall into the light mileage category, consisting of 1 to 99 miles in the past seven days.
- Thirty-three percent (33%) of all Americans fall into the medium mileage category. Medium seven-day mileage is defined as 100 to 260 miles.
- Lastly, 29 percent of all Americans are labeled as Mega-Milers, heavy travelers with 261 or more miles traveled in the past seven days.



In the past four weeks, the average American has traveled 1,101 miles in a vehicle. People were asked to estimate the number of miles they had traveled in a car, van, truck or bus either as a driver or passenger in the past four weeks. The number of miles traveled in the vehicle in the past four weeks can be segmented into three categories: light (1-299 miles), medium (300-999) and heavy (1,000+ miles). Twenty-six percent (26%) of Americans have light four-week mileage, 31 percent have medium mileage and 35 percent indicate heavy mileage.

Men indicate their past four-week mileage to be 1,508 miles, compared to 704 miles for women. The greater the income, the higher the mileage. People with household incomes of less than \$25,000 averaged 669 miles in the past four weeks. People from households with \$75,000+ income traveled 1,404 miles in the past four weeks.

The greater the weekly vehicle mileage, the more likely a person is employed full time. Forty-nine percent (49%) of those with light weekly mileage indicate they are employed full time. Seventy-four percent (74%) of those clocking heavy mileage, the Mega-Milers, are employed full time. On average, 58 percent of all Americans are employed full time. Additionally, the greater the mileage, the more likely a person is to fall into the age 25-54 demographic.



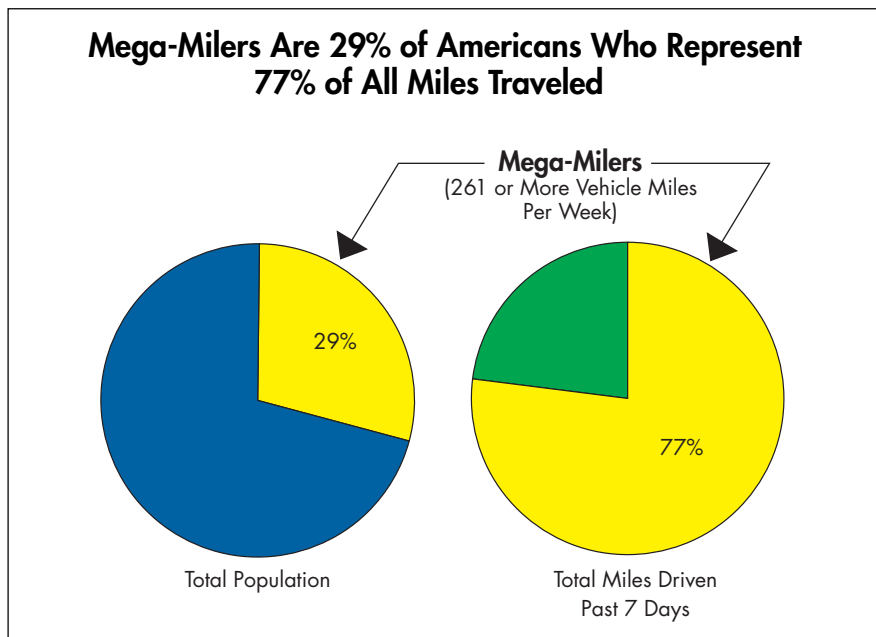
Mega-Milers have an attractive socioeconomic profile. The 29 percent of Americans with the heaviest vehicle mileage (261 or more miles in the past seven days) are more educated, have higher incomes, and are more likely to be married, to have children, to own a home and to use the Internet.

Some key attributes of the heavy Mega-Milers consumer group:

- Mega-Milers are more likely to be men (61 percent) than women (39 percent).
- Seventy percent (70%) are aged 25-54, compared to 61 percent for the U.S. population overall.
- Thirty-four percent (34%) of Mega-Milers have household incomes over \$75,000, compared to only 15 percent for those with the lightest weekly vehicle mileage.
- Sixty-four percent (64%) of Mega-Milers are married, and 45 percent have children in the household—far above national norms.
- Eight out of 10 Mega-Milers have Internet access, and 70 percent own their own home.

(See Appendix B of this study for a complete profile of Americans segmented by their weekly vehicle mileage.)

Mega-Milers are the 29 percent of Americans who represent 77 percent of all miles traveled. Many might be familiar with the "80/20 Rule": A small percentage of people represent the majority of activity. In radio, so-called "core," or "P1 listeners," are the one-third of a radio station's total audience that represent 70 percent of all listening to that station. The same concept exists with Outdoor media consumers. Whether it's commuters, pedestrian traffic or vehicle drivers/passengers, about 20 percent to 30 percent of consumers represent the majority of the time spent with Outdoor media.

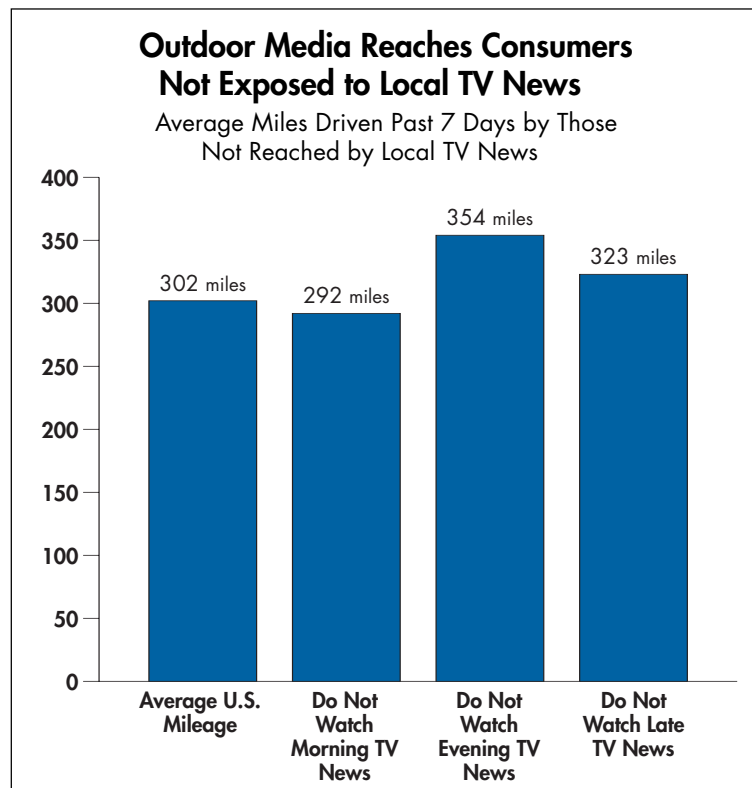


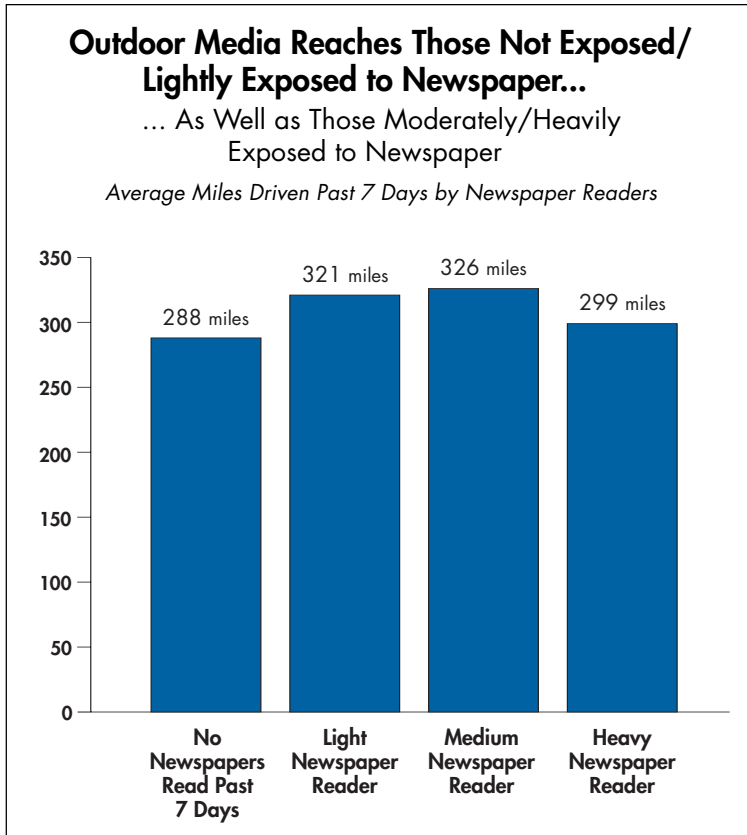
When we sum all vehicle miles traveled, those drivers/passengers with the highest weekly mileage represent 77 percent of all miles traveled. Outdoor media, long admired for its significant reach, also generates significant frequency of the advertiser's message.

Thirty percent (30%) of America's heaviest travelers (Mega-Milers) are not reached by newspaper. Those who do read spend 19 percent less time with newspaper. Almost one-third of Mega-Milers are not reached by newspaper. Consumers who drive the most vehicle miles in the past seven days spend 19 percent less time with newspaper (26 minutes) compared to the national average (32 minutes).

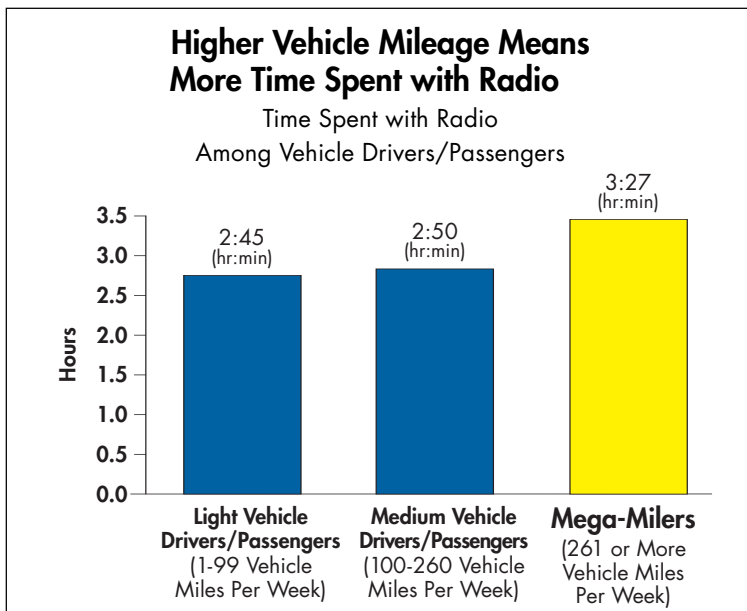
Mega-Milers are less likely to watch the local TV evening news. Mega-Milers simply do not make it back in time to catch the local TV evening news. Thirty-two percent (32%) have not watched the local evening news in the last seven days, compared to 25 percent of all Americans who don't watch.

Consumers not reached by local TV news or newspaper travel an average of 300 miles in the past seven days. Outdoor media can both complement and supplement print and television delivery in a media plan.





The more time spent traveling, the longer the time spent with radio. Throughout this study we find that Outdoor media and radio move in lock step with each other. The greater the time spent with Outdoor media, the greater the time spent with radio. Light vehicle drivers/passengers spend two hours and 45 minutes per day with radio. Medium vehicle drivers/passengers listen to radio two hours and 50 minutes a day. Mega-Milers spend a whopping three hours and 27 minutes a day with radio.





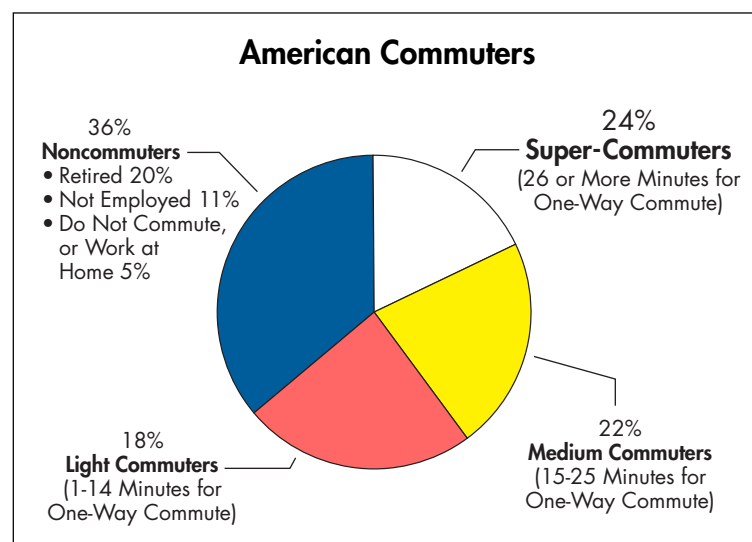
American Commuters

An important and critical segment of pedestrian traffic, public transportation users and vehicle drivers/passengers are those Americans who commute to their jobs. Seventy percent (70%) of Americans work full or part time, 20 percent are retired and 11 percent are not employed. It is these workers who commute daily and generate the significant frequency of exposure to Outdoor media in all its forms.

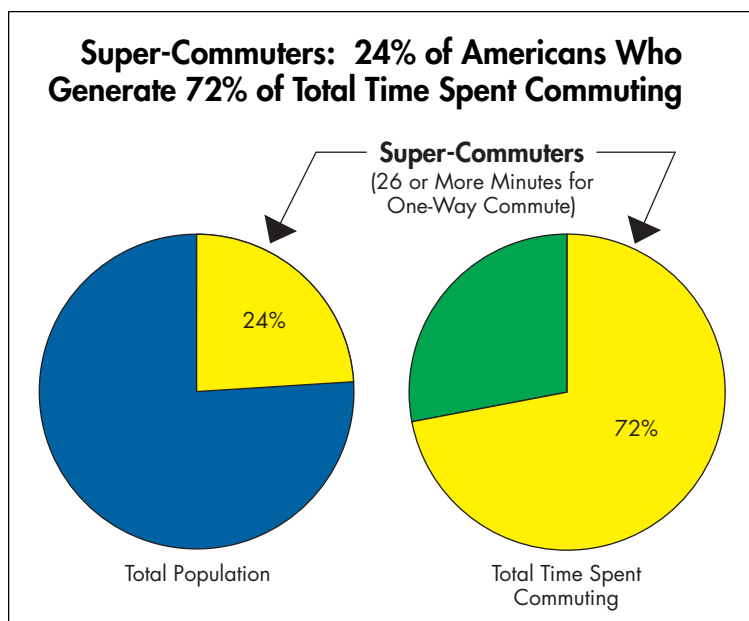
Despite all the media coverage of "telecommuters," few people work out of their homes. Only five percent of all Americans indicate they do not commute or they work from home. The vast majority of Americans (64 percent) commute to their jobs. By nature, commuters are an exceptional advertising target in terms of income and their consumption habits. We will find that those who must endure the longest commutes, the "Super-Commuters," represent a very powerful consumer group who receive significant exposure to Outdoor media.

The average one-way commute for the typical American is 27.4 minutes, or almost a one-hour daily round-trip commute. The duration of the American commute can be segmented into three simple categories: light, medium and very heavy (Super-Commuters).

- Eighteen percent (18%) of all Americans have a light commute, which typically takes one to 14 minutes one-way. The average daily one-way commute for those in the light category is seven minutes.
- Twenty-two percent (22%) of Americans have a medium one-way commute, normally taking 15 to 25 minutes. The average daily one-way commute for those in the medium category is 18 minutes.
- Twenty-four percent (24%) of Americans are the Super-Commuters, whose one-way commute normally takes 26 or more minutes. The average daily one-way commute for Super-Commuters is 54 minutes.



Super-Commuters represent 24 percent of Americans who generate 72 percent of total time spent commuting in the U.S. Super-Commuters represent nearly three-fourths (72 percent) of all time spent commuting in America. While Outdoor has been recognized as a reach medium, these data demonstrate the value of Outdoor as a frequency medium. Advertising studies show that when consumers are exposed repeatedly to messages, they are more likely to recall the advertiser and purchase the advertiser's products/services. Heavy media consumers, such as the Super-Commuters, Power-Pedestrians or Mega-Milers, afford advertisers the opportunity to achieve strong frequency for their messages.



Super-Commuters, those Americans with the longest commutes, are ideal advertising targets. Super-Commuters represent one in four Americans who spend nearly two hours each day to and from work. Super-Commuters are the most exposed to Outdoor media.

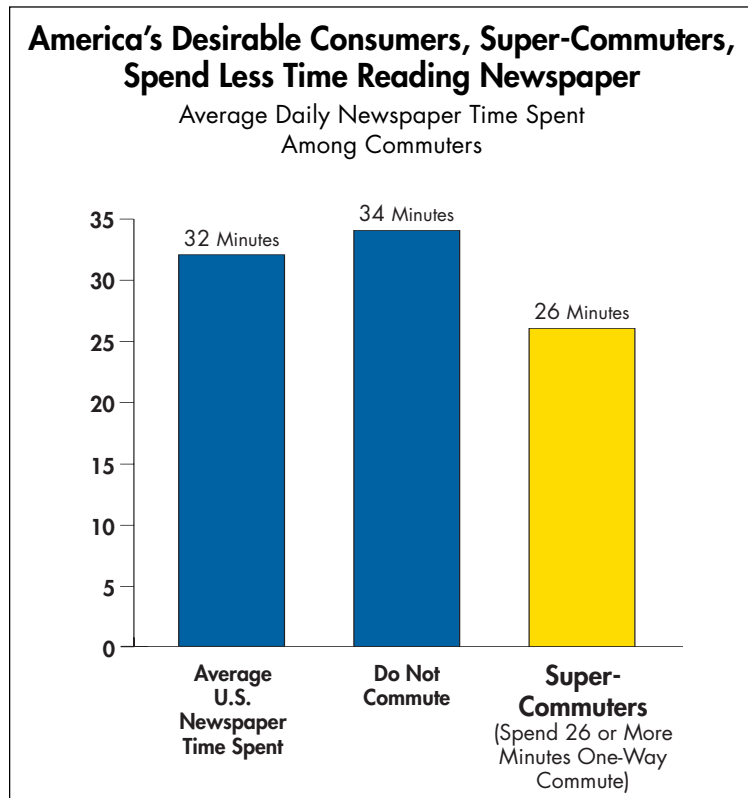
- Thirty-five percent (35%) of Super-Commuters come from households earning \$75,000+, compared to only 23 percent for the U.S. average income profile.
- Super-Commuters are more likely to have children in their households (50 percent), compared to the national average (40 percent).
- Super-Commuters are more likely to have graduated from college and have postgraduate degrees.
- Super-Commuters are more likely to be aged 25-54 (78 percent), compared to the U.S. average (61 percent).

- Super-Commuters are also far more likely to be Internet users (83 percent), compared to the national average (68 percent).

(See Appendix C for a complete profile of Americans segmented by time spent commuting.)

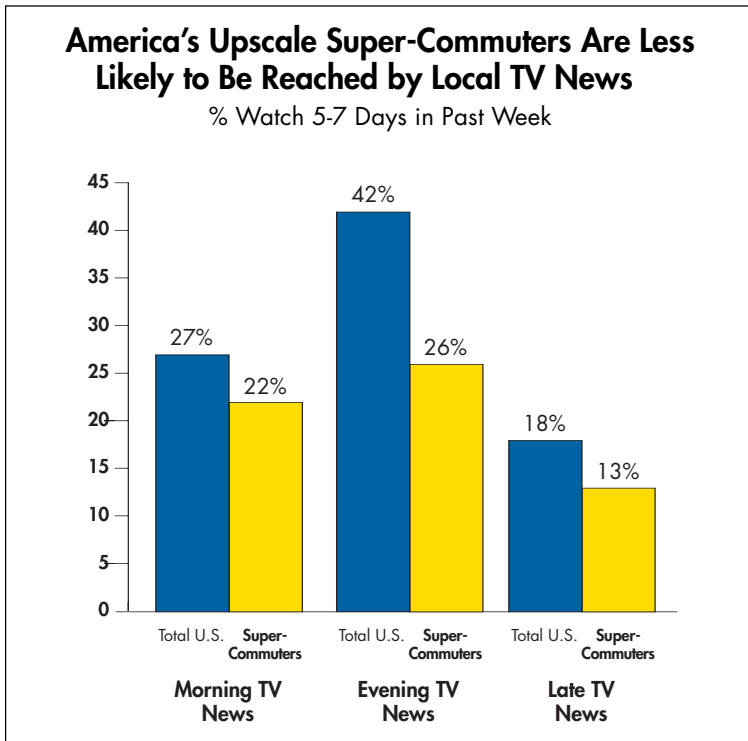
Twenty-seven percent (27%) of America's heaviest commuters, Super-Commuters, do not read a newspaper. Over one-quarter of Super-Commuters, the high-income, highly educated consumers, do not read the newspaper. Outdoor media are necessary to reach these important consumers missed by newspaper.

Super-Commuters spend 19 percent less time reading a newspaper. With nearly two hours of commuting each day, Super-Commuters spend less time reading a paper. Average daily time spent with a newspaper is 26 minutes among Super-Commuters, compared to 32 minutes for the total U.S. The longest time spent with the newspaper (34 minutes) is among those who do not commute, since they are retired or otherwise unemployed.

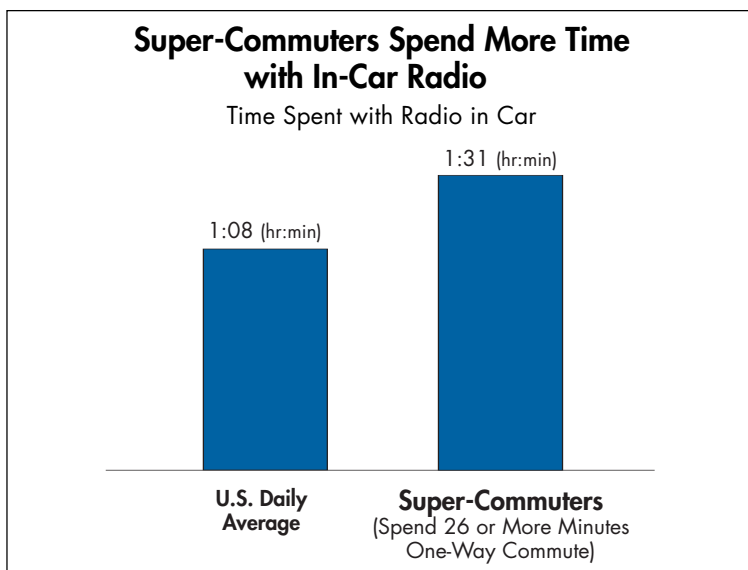


Super-Commuters spend less time each week with local TV news, especially the local evening TV news. Evening news sees the steepest decline in regular viewership among Super-Commuters. Forty-two percent (42%) of Americans watch the local evening TV news five to seven days a week, compared to only 26 percent among Super-Commuters. Eighteen percent (18%) of Americans watch late-night news five to seven days a week,

compared to 13 percent of Super-Commuters. Twenty-seven percent (27%) of all Americans spend five to seven days with morning news compared to 22 percent for Super-Commuters.



The longer the commute, the longer the time spent with radio in car. Not surprisingly, there is a strong correlation between time spent commuting and time spent listening to in-car radio. Compared to those who don't work or commute, overall time spent with radio is higher among commuters. On average, Americans say they spend about one hour and eight minutes listening to radio in car in a typical day. Among America's heaviest commuters, daily time spent with in-car radio is one hour and 31 minutes.

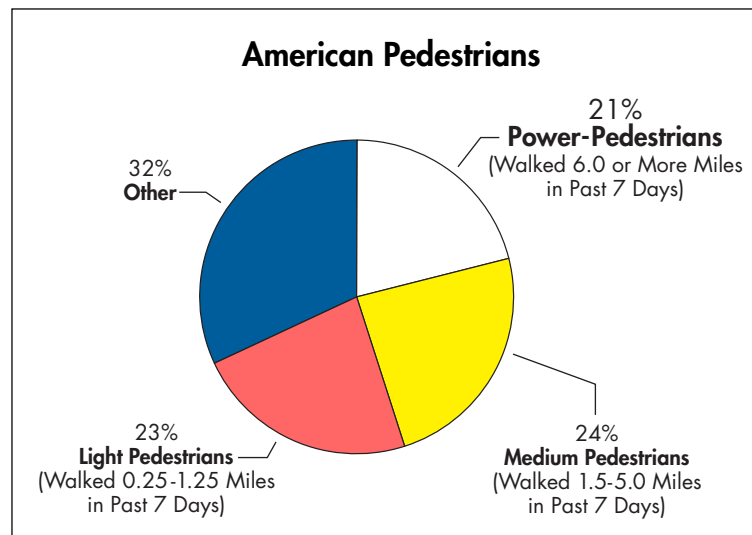




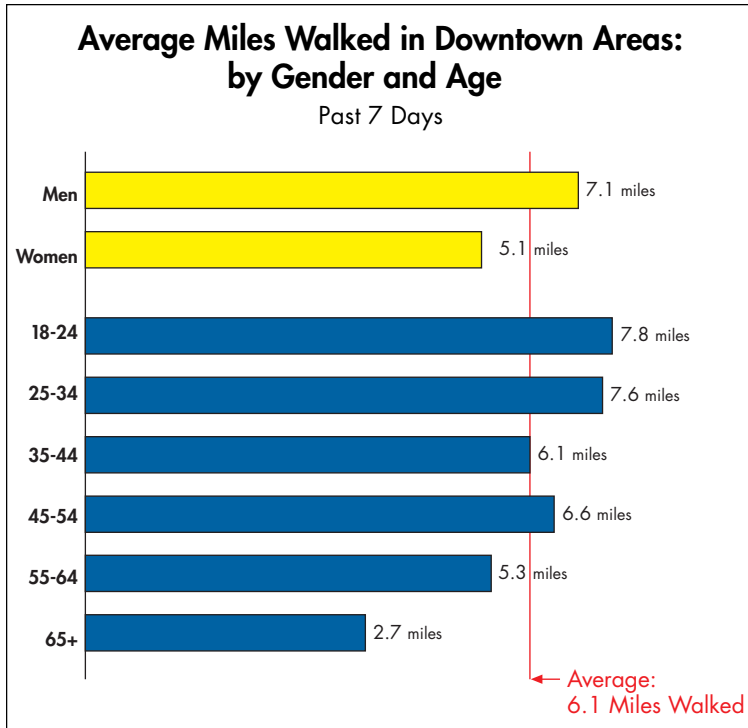
Pedestrian Traffic

Eight out of 10 Americans report they have walked in downtown areas. Pedestrians report walking an average of 6.1 miles in the past seven days. Pedestrian traffic represents a significant reach opportunity for advertisers. Seventy-nine percent (79%) of Americans say they have walked in any town, city or downtown area in the past seven days. Pedestrians can be segmented into three groups: light, medium and heavy (Power-Pedestrians). Eleven percent (11%) of Americans indicate they have walked in downtown areas in the past seven days, but could not provide an exact mileage.

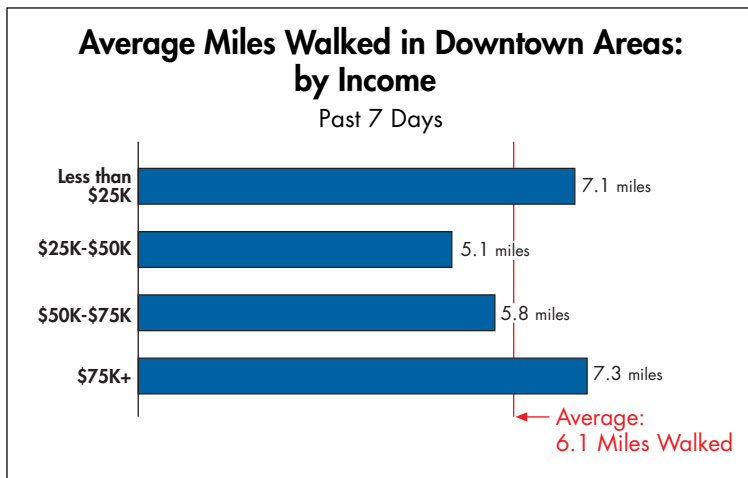
- Twenty-three percent (23%) of the U.S. fall into the light pedestrian traffic category, having walked 0.25 to 1.25 miles downtown in the past seven days.
- The medium category consists of 24 percent of the U.S. who walked 1.5 to five miles.
- Power-Pedestrians, or heavy pedestrian traffic (21 percent of the U.S.), are consumers who have walked six or more miles in the past seven days.



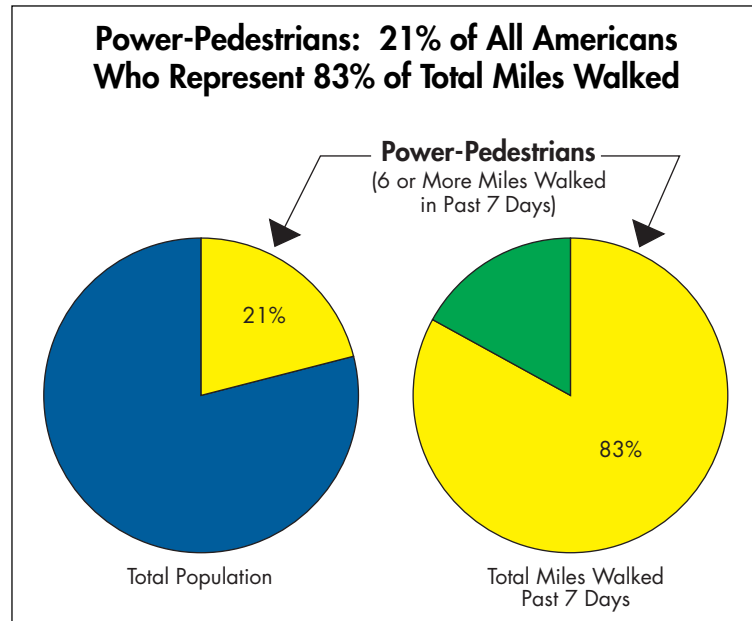
The younger the person, the more miles walked. The average number of miles walked past seven days is highest among 18- to 24-year-olds (7.8 miles) and drops gradually with age. Outdoor media geared to pedestrians will have strong frequency with younger, more active demographics due to their longer time spent walking. Men walk more average miles than women.



Those with the highest and lowest incomes walk the most in downtown areas. Outdoor media geared to pedestrian traffic reach a broad array of consumers, from lower incomes to those with highest incomes. The two groups with the heaviest pedestrian traffic are at the opposite ends of the income spectrum. When we examine average miles walked in the past seven days by income group, people with the lowest incomes (7.1 miles) and highest incomes (7.3 miles) have the highest mileage compared to those with middle incomes (\$25-\$50K 5.1 miles and \$50-\$75K 5.8 miles).



Power-Pedestrians are the 21 percent of Americans who represent 83 percent of total miles walked. The heaviest group of pedestrians, the Power-Pedestrians, represent 21 percent of all Americans. In terms of total miles walked, Power-Pedestrians represent 83 percent of all miles walked. This new finding about the significant traffic among Power-Pedestrians indicates excellent frequency opportunities for advertisers.



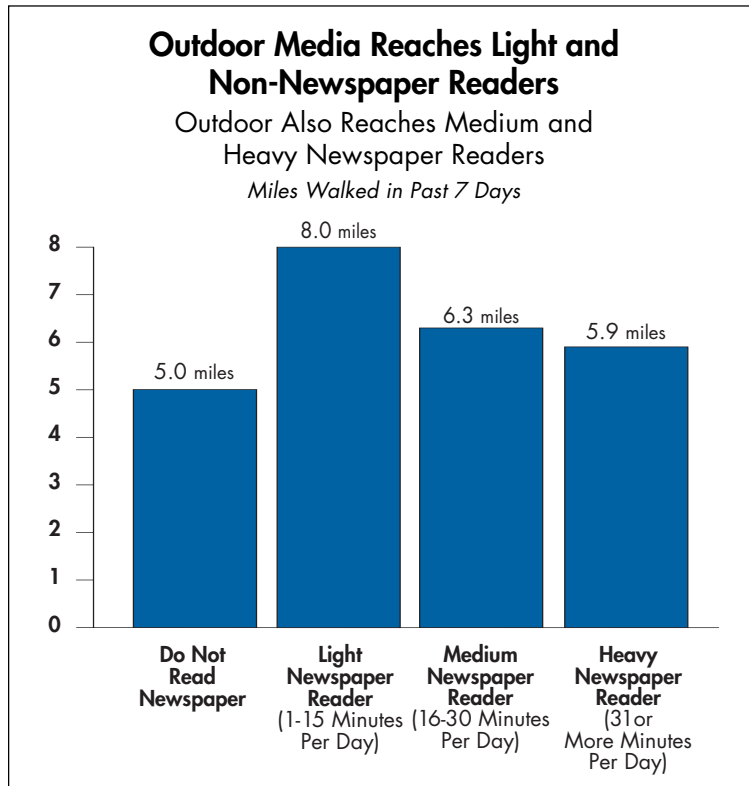
Power-Pedestrians tend to be somewhat younger, slightly more upscale and educated, Internet oriented, and less likely to be married. Compared to the U.S. average....

- Thirty-eight percent (38%) of Power-Pedestrians are aged 18-34, compared to the U.S. average (30 percent).
- Forty-seven percent (47%) of Power-Pedestrians have household incomes of \$50K+ versus 39 percent of the U.S. average.
- Sixty-three percent (63%) of Power-Pedestrians have attended some college or more, compared to 57 percent for the national average.
- Nearly eight out of 10 Power-Pedestrians (78 percent) use the Internet versus 70 percent for the U.S. average.
- Not as many Power-Pedestrians are married (48 percent), compared to the national average (59 percent).

(For a complete profile of the light, medium and Power-Pedestrians, please refer to Appendix A of this study.)

Outdoor media targeted to pedestrian traffic reach light newspaper readers.

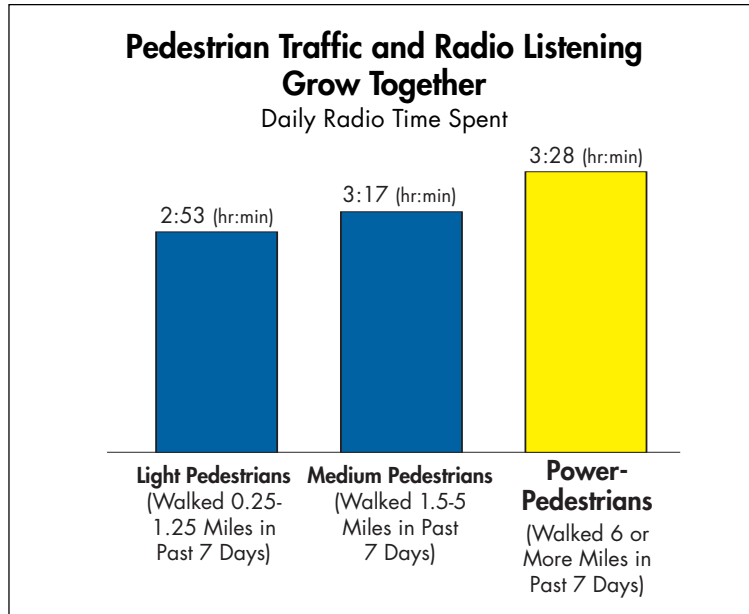
The less time spent with a newspaper, the higher the pedestrian miles walked. The heaviest newspaper readers walk an average of 5.9 miles in the past week. Medium newspaper readers walk 6.3 miles. Light newspaper readers walk 8.0 miles in the past week. Outdoor media geared to pedestrian traffic will build reach and frequency with light newspaper readers.



Pedestrian traffic reaches those consumers not exposed to local television news. Average weekly miles walked is high among those who do not watch local evening news (6.3 miles) or the late-night local television news (6.9 miles).

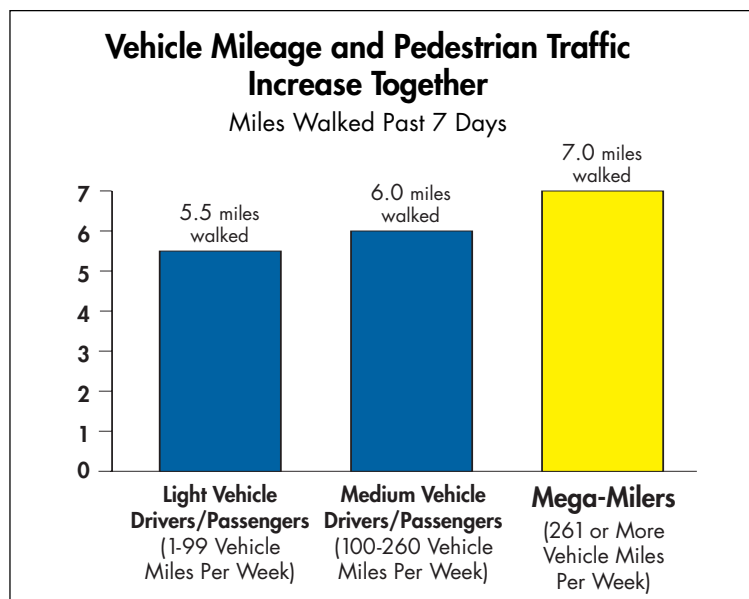
The greater the pedestrian traffic, the longer the time spent with radio.

Time spent with radio increases with pedestrian mileage. Light pedestrians spend two hours and 53 minutes a day with radio; medium pedestrians spend three hours and 17 minutes with radio daily. Power-Pedestrians spend three hours and 28 minutes a day with radio. Outdoor media and radio are very complementary.



The greater the pedestrian mileage, the longer the commute and the higher the vehicle mileage. The more consumers are exposed to one type of Outdoor media, the more they are exposed to other forms. The more miles traveled in a vehicle, the more weekly miles walked. Those who fall into the lightest vehicle mileage category walk 5.5 miles in the past week. Medium-vehicle-mile travelers walk 6.0 miles a week. Mega-Milers, those who fall into the heaviest group of vehicle drivers/passengers, have the highest pedestrian mileage average of 7.0 miles.

The same pattern occurs with time spent commuting and miles walked. The longer the commute, the higher the pedestrian mileage. Thus, Outdoor advertising targeted to both pedestrians and those in vehicles will result in higher overall message frequency.



Recommendations

- 1. Outdoor media advertising should be considered to complement and supplement newspaper and local TV news delivery.** Throughout this study, we find that Outdoor media reaches those not exposed by newspaper and local television news. For example, Outdoor exposure is heavy (288 miles driven past seven days) among the 29 percent of Americans who did not read a newspaper in the past seven days. Miles driven in the past seven days is strong among light newspaper readers (321 miles) as well as medium (326 miles) and heavy (299 miles) newspaper readers.

Outdoor media geared to pedestrians also does an excellent job of reaching those not exposed or lightly exposed to newspaper. Outdoor media exposure is also strong with those not reached or lightly reached by local television news. This is strong evidence that Outdoor can play a crucial role in the media plan to cover significant aspects of the market not reached by newspaper and local TV news.

- 2. Advertisers, agencies and Outdoor media should consider “time spent” in the analysis of Outdoor media.** Other media, such as television and radio, use time spent as a dimension in media analysis. Consumers who spend more time with a medium are more valuable, as they are exposed more often to commercial messages. Consumers who are reached repeatedly with a message show higher advertiser awareness, brand recall and purchase behavior. Outdoor is long acknowledged as a reach medium, and the data from this study confirm this.

This research also reveals the value of the heavy Outdoor media consumer. About 20 percent to 30 percent of Americans clock heavy vehicle miles, pedestrian miles and heavy commutes. Power-Pedestrians, Super-Commuters and Mega-Milers represent a large amount of time spent walking, commuting and vehicle miles. The long time spent with Outdoor media generates high frequency for the advertiser message.

- 3. Advertisers wishing to target upscale consumers should consider Outdoor media.** Due to Outdoor media’s strong reach, all types of consumers with a wide range of profiles are reached. This study indicates that heavy commuters (Super-Commuters) and people who drive a lot of miles (Mega-Milers) have attractive socioeconomic profiles, including higher incomes, higher education and high presence of children. Those who drive a lot of miles and have long commutes are significant consumers of Outdoor media. These consumers are harder to reach with such media as local TV news and newspaper.
- 4. The Outdoor industry should consider exploring research about core Outdoor media consumers—Americans who are heavily exposed to Outdoor media (representing 20 percent to 30 percent of all Americans).** Studies could examine the impact of varying types of Outdoor media frequency on recall and brand image among those with heavy, medium and light miles traveled, walked and commuted. Studies have

shown that heavy media consumers are the people who are exposed to a medium long enough for effective frequency to occur. Some advertisers have found greater results in impacting heavy media consumers with a concentrated schedule of high frequency versus longer schedules with lower frequency.

- 5. Outdoor media should consider the value of targeting consumers using the morning daypart, since morning TV news and newspaper have less impact on consumers with high pedestrian and vehicle mileage and long commutes.** There has been a significant body of research conducted about the concept of "recency." This means reaching consumers during the day when they are close to considering the purchase of specific products and services. The research indicates that brand image, recall and better results occur when media can reach consumers close to the time of purchase consideration. Outdoor media can help advertisers to target consumers by impacting morning and daytime purchase decisions.

- 6. When developing geographic targeting, Outdoor media and advertisers should consider consumers who shop most near work.** One-third of Americans say they do most of their shopping close to their workplace. Historically, geographic targeting of consumers has focused on reaching consumers near their home. These new data suggest geographic targeting of consumers near their workplace should be strongly considered.

Appendix A

Profile of Pedestrian Traffic*Miles Walked in Past 7 Days*

	Total U.S. Population	Light (0.25-1.25 Miles) <i>(23% of Americans)</i>	Medium (1.5-5.0 Miles) <i>(25% of Americans)</i>	Power-Pedestrians (6.0+ Miles) <i>(21% of Americans)</i>
Avg. Miles Walked Past 7 Days	6.1	0.75	3.1	21.4
Sex:				
Male	48%	49%	53%	53%
Female	52%	51%	47%	47%
Age:				
18-24	11%	10%	12%	15%
25-34	19%	25%	15%	23%
35-44	23%	22%	29%	17%
45-54	19%	17%	20%	22%
55-64	10%	8%	12%	12%
65+	19%	18%	12%	9%
Income:				
Under \$25K	18%	17%	16%	18%
\$25K-\$50K	23%	32%	27%	20%
\$50K-\$75K	16%	18%	21%	18%
\$75K+	23%	24%	26%	29%
Married	59%	63%	60%	48%
Children in Household	40%	42%	44%	37%
Education:				
High School or Less	42%	42%	34%	37%
Some College/College Grad	43%	49%	55%	48%
Postgraduate	14%	10%	11%	15%
Employment Status:				
Full-Time Employed	58%	55%	61%	55%
Part-Time Employed	11%	9%	16%	9%
Retired	20%	22%	11%	16%
Not Employed	11%	15%	11%	16%
Internet Access	69%	73%	76%	78%
Own Home	70%	68%	68%	68%

Appendix B

Profile of Vehicle Drivers/Passengers

Miles Traveled in Past 7 Days

	Total U.S. Population	Light (1-99 Miles) <i>(28% of Americans)</i>	Medium (100-260 Miles) <i>(33% of Americans)</i>	Mega-Milers (261+ Miles) <i>(29% of Americans)</i>
Avg. Miles Traveled Past 7 Days	302	37	161	754
Sex:				
Male	48%	39%	50%	61%
Female	52%	61%	50%	39%
Age:				
18-24	11%	9%	12%	12%
25-34	19%	17%	18%	22%
35-44	23%	19%	26%	24%
45-54	19%	15%	21%	24%
55-64	10%	11%	10%	8%
65+	19%	28%	12%	11%
Income:				
Under \$25K	18%	28%	13%	10%
\$25K-\$50K	23%	25%	22%	26%
\$50K-\$75K	16%	13%	21%	18%
\$75K+	23%	15%	25%	34%
Married	59%	53%	63%	64%
Children in Household	40%	35%	41%	45%
Education:				
High School or Less	42%	51%	34%	35%
Some College/College Grad	43%	39%	49%	46%
Postgraduate	14%	10%	17%	19%
Employment Status:				
Full-Time Employed	58%	49%	62%	74%
Part-Time Employed	11%	8%	12%	9%
Retired	20%	30%	14%	12%
Not Employed	11%	13%	11%	5%
Internet Access	69%	54%	78%	80%
Own Home	70%	66%	71%	75%

Appendix C

Profile of U.S. Commuters

Length of One-Way Daily Commute

	Total U.S. Population	Do Not Commute	Light (1-14 Minutes)	Medium (15-25 Minutes)	Super-Commuters (26+ Minutes)
		<i>(36% of Americans)</i>	<i>(18% of Americans)</i>	<i>(22% of Americans)</i>	<i>(24% of Americans)</i>
Avg. One-Way Commute Time	27 Minutes	–	7 Minutes	18 Minutes	56 Minutes
Sex:					
Male	48%	41%	54%	47%	54%
Female	52%	59%	46%	53%	46%
Age:					
18-24	11%	9%	15%	11%	14%
25-34	19%	7%	24%	26%	25%
35-44	23%	10%	32%	28%	30%
45-54	19%	12%	18%	26%	23%
55-64	10%	16%	9%	7%	5%
65+	19%	47%	3%	2%	3%
Income:					
Under \$25K	18%	29%	14%	11%	11%
\$25K-\$50K	23%	18%	32%	24%	23%
\$50K-\$75K	16%	7%	26%	21%	19%
\$75K+	23%	14%	19%	29%	35%
Married	59%	60%	56%	60%	59%
Children in Household	40%	26%	46%	47%	50%
Education:					
High School or Less	42%	54%	43%	31%	34%
Some College/College Grad	43%	34%	39%	56%	48%
Postgraduate	14%	12%	18%	12%	17%
Employment Status:					
Full-Time Employed	58%	11%	81%	86%	86%
Part-Time Employed	11%	2%	19%	15%	14%
Retired	20%	56%	–	–	–
Not Employed	11%	31%	–	–	–
Internet Access	69%	48%	80%	78%	83%
Own Home	70%	74%	70%	68%	66%

About Arbitron

Arbitron Inc. (NYSE: ARB) is an international media and marketing research firm serving Outdoor media, radio broadcasters, cable companies, advertisers and advertising agencies in the United States and Europe. Arbitron's core businesses are measuring network and local market radio audiences across the United States; surveying the retail, media and product patterns of local market consumers; and providing application software used for analyzing media audience and marketing information data. Arbitron Webcast Services measures the audiences of audio and video content on the Internet, commonly known as webcasts. The Company is developing the Portable People Meter, a new technology for radio, TV and cable ratings.

Arbitron's marketing and business units are supported by a world-renowned research and technology organization located in Columbia, Maryland. Arbitron has approximately 750 full-time employees; its executive offices are located in New York City.

Scarborough Research is a joint venture of Arbitron Inc. and VNU Media Measurement & Information. Scarborough Research conducts syndicated surveys of consumers in both 75 local markets and nationwide, providing information to newspapers, Outdoor companies, television stations, radio stations, cable systems, Internet companies, advertisers and agencies. Scarborough tracks more than 1,200 products, services and retail shopping categories into each local database reporting consumer retail shopping behavior, product consumption, media usage, lifestyle and demographic characteristics.

To learn more about Arbitron's services for Outdoor media, contact Jacqueline Noel, director of Sales & Marketing, Arbitron Outdoor, (212) 887-1365, jacqueline.noel@arbitron.com.



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