



The Arbitron Bar Media Report

For more information, contact:

Diane Williams

Senior Analyst, Custom Research

Arbitron Inc.

142 West 57th Street

New York, NY 10019

(212) 887-1461

diane.williams@arbitron.com



Introduction

Welcome to the Arbitron Bar Media Report. Over the past several years, Arbitron has examined a number of advertising and marketing opportunities available in bars and lounges across America. Some of these bar-based media vehicles include digital signage, digital jukeboxes and networks supplying programming and content for in-bar television viewing.

In-bar advertising has traditionally conjured up images of neon-lit signs promoting beverages for sale. The new bar landscape features a wide range of nonendemic brand messages designed to take advantage of the young, upwardly mobile crowds these establishments attract.

Arbitron wanted to quantify the size and media characteristics of bar visitors. The goal is to help brands determine if the audience delivered by bars fulfills their campaign objectives and to assess how bar-based advertising fits into their current media plans.

Definition of Terms

Weekly bar visitor: A person who had been to a bar or lounge as a customer, including any restaurant with its own bar, in the past week.

Monthly bar visitor: A person who had been to a bar or lounge as a customer, including any restaurant with its own bar, in the past month.

Bar TV viewer: A person who has watched television in a bar in the past month.

Description of Methodology

Arbitron, in conjunction with Edison Media Research, interviewed a total of 1,573 people to investigate Americans' experiences with various forms of media and advertising. From January 18 to February 15, 2008, telephone interviews were conducted with respondents aged 21 and older who were chosen at random from a national sample of Arbitron's Fall 2007 survey diarykeepers. In certain geographic areas (representing 4% of the national population), a sample of Arbitron diarykeepers was not available for the survey and a supplemental sample was interviewed via random digit dialing. The verbatim survey questions corresponding to the findings in this report are found in the Appendix of this document.

Key Findings

A significant number of American consumers are exposed to bar-based media on a regular basis.

- More than one-half (52%) of U.S. residents aged 21 or older have been to a bar or lounge in the past month; 32% of adults have been to a bar in the past week.
- Nearly two-thirds (62%) of young adult men aged 21 to 34 have been to a bar in the past month; 43% have been to a bar in the past week.

Advertisers may have a challenge reaching bar visitors through traditional television and online campaigns.

- Bar visitors may be more difficult to reach through traditional TV ad campaigns because they are more likely than the average adult to watch TV shows on alternative platforms including DVD, Internet download, online (streaming) and VOD (video on demand). Bar visitors are also more likely to use a DVR (digital video recorder) when they do watch programs on their TV at home.
- A considerable amount of bar visitors also watch TV outside the home—while at the bar. More than 4 in 10 (43%) weekly bar visitors have watched TV in a bar in the past 30 days. Half of all young adult men aged 21 to 34 have watched television in a bar in the past month.
- Approximately 8 of 10 weekly bar visitors use software on their home (78%) and work (83%) computers to block interstitial (pop-up) advertising. Nearly 6 of 10 (58%) weekly bar visitors use technology to block Website banners, thus eluding advertisers wishing to use the Internet to communicate with these consumers.

Digital music and alternative radio platforms appeal to bar visitors.

Those exposed to bar media are more likely to listen regularly to online radio, subscribe to satellite radio and own an iPod® or other MP3 player. Subsequently, bar visitors spend more on digital music purchased through online retailers such as iTunes®; 19% of all adults aged 21 or older have purchased music for download, but more than one-quarter (27%) of weekly bar visitors have purchased songs and albums online.

Demographic Reach

Appendix Ref.	Topic	Persons 21+	Men 21+	Women 21+
Most recent visit to a bar or lounge				
Q1	Past week	32%	37%*	27%
Q1	Past month	52%	56%	48%
Among monthly bar visitors—Bar TV viewing				
Q2	Watched TV in a bar in the past month	38%	45%	30%

***How to read:** 37% of men over 21 years old had been to a bar in the past week compared to 27% of women.

Appendix Ref.	Topic	Persons 21-34	Men 21-44	Persons 21-54	Men 21-34
Most recent visit to a bar or lounge					
Q1	Past week	35%	33%	33%	43%
Q1	Past month	56%	53%	54%	62%
Among monthly bar visitors—Bar TV viewing					
Q2	Watched TV in a bar in the past month	43%	41%	41%	50%**

****How to read and interpret:** 50% of men aged 21 to 34 who have been in a bar in the past month watched TV during at least one of their visits.

Audience Profile

Topic	Persons 21+	Weekly Bar Visitor	Monthly Bar Visitor	Watched TV in Bar
Gender				
Men	46%*	55%	50%	60%*
Women	54%	45%	50%	41%
Age				
21-24	7%	8%	7%	8%
25-34	19%	20%	21%	24%
35-44	22%	21%	21%	22%
45-54	21%	23%	22%	24%
55-64	14%	16%	15%	13%
65+	17%	13%	14%	9%
Ethnicity				
White	73%	81%	80%	80%
African-American	11%	7%	8%	7%
Hispanic or Latino	10%	7%	7%	7%
Asian	2%	2%	2%	1%
Other	3%	3%	3%	3%
Education				
High school or less	34%	25%	26%	28%
Some college	24%	25%	27%	30%
College degree (4 year)	19%	25%	23%	24%
Some graduate credits	6%	7%	7%	6%
Advanced degree	14%	17%	16%	11%
Income**				
Under \$25K	18%	11%	12%	10%
Between \$25K and \$50K	28%	25%	27%	27%
Between \$50K and \$75K	24%	26%	26%	25%
Between \$75K and \$100K	17%	18%	19%	23%
Over \$100K	14%	19%	18%	15%

***How to read and interpret:** 46% of adults aged 21 or older are men, but 60% of those who had watched TV in a bar in the past month are men. Therefore, bar-based TV networks reach a higher concentration of men compared to general market media.

** Results among those respondents who provided an income range—equal to approximately 70% of total sample aged 21+.

TV or Video

Appendix Ref.	Topic	Persons 21+	Weekly Bar Visitor	Monthly Bar Visitor	Watched TV in Bar
Digital Video Recorder (DVR)					
Q3	Own a DVR	27%*	34%	32%	32%*
Video on Demand (VOD)					
Q4a	Ever watched VOD	36%	42%	40%	44%
Q4b	Watched VOD in the past month	16%	19%	18%	19%
Q4b	Watched VOD in the past week	10%	11%	11%	12%
iPod/Portable video					
Q5	Ever watched video on an iPod or portable digital video player	5%	8%	7%	8%
Online video					
Q6a	Ever viewed any video over Internet	34%	43%	42%	46%
Q6b	Watched online video in the past month	23%	29%	29%	32%
Q6b	Watched online video in the past week	16%	21%	20%	23%
Ways to watch TV (ever)					
Q7	Purchase or rent series on DVD	24%	32%	31%	31%
Q7	Download from Internet (iTunes)	5%	8%	7%	7%
Q7	Watch over Internet (streaming)	14%	20%	18%	22%
Q7	Video On Demand (through cable or satellite TV)	23%	30%	28%	33%
Q7	Watch TV clips on cell phone	4%	6%	6%	9%
Q8	Watched TV show over Internet in the past month	6%	7%	8%	9%
Bar TV					
Q2	Watched TV in a bar in the past month	19%	42%	38%	—

***How to read and interpret:** 27% of adults aged 21 or older owns a digital video recorder, but 32% of those who have watched TV in a bar in the past month own a DVR. Therefore, advertising placed on Bar TV networks reach a higher concentration of DVR users compared to general market media.

Digital Radio or Music

Appendix Ref.	Topic	Persons 21+	Weekly Bar Visitor	Monthly Bar Visitor	Watched TV in Bar
Online radio					
Q9a	Ever listened to radio over Internet	44%	58%	54%	57%
Q9b	Listened to online radio in the past month	20%	28%	26%	29%
Q9b	Listened to online radio in the past week	12%	16%	16%	17%
Satellite radio					
Q10	Currently subscribe to XM or SIRIUS®	13%	22%	18%	19%
MP3 players					
Q11	Own an iPod or other MP3 player	32%	43%	39%	44%
Buying music online					
Q12	Purchase digital music online (iTunes)	19%*	27%	25%*	29%

***How to read and interpret:** 19% of adults aged 21 or older had purchased digital music downloads online compared to 25% of those who had visited a bar in the past month. Therefore, bar-based advertising reaches a higher concentration of online music consumers compared to general market media.

Mobile (Phone) Media

Appendix Ref.	Topic	Persons 21+	Weekly Bar Visitor	Monthly Bar Visitor	Watched TV in Bar
Cell phone penetration					
Q13	Own a cell phone	76%	86%	84%	87%
Among cell phone owners—Ever used cell phone to:					
Q14	Listen to music	12%	16%	14%	19%
Q14	Watch video clips (music videos, sports)	6%	8%	7%	10%
Q14	Play games	25%	29%	29%	35%
Among cell phone owners—Texting					
Q15a	Ever sent a text message	48%	57%	55%	61%
Q15b	Sent a text message in the past month	36%	45%	43%	48%
Q15b	Sent a text message in the past week	30%*	39%*	36%	40%
Q17	Ever sent a text to a company to get product info or a coupon	4%	5%	5%	6%

***How to read and interpret:** 30% of adults aged 21 or older have sent a text message through their cell phones in the past week, but 39% of weekly bar visitors have texted in the past week. Therefore, bar-based advertising reaches more heavy texters compared to general market media.

Internet and Ad Blockers

Appendix Ref.	Topic	Persons 21+	Weekly Bar Visitor	Monthly Bar Visitor	Watched TV in Bar
Have Internet access at:					
Q18	Home	71%	84%	81%	81%
Q18	Work	37%	48%	46%	50%
Q18	Home or work	75%	88%	85%	87%
Time spent online					
Q19	Past 24 hours	1 hr 31 min	1 hr 45 min	1 hr 39 min	1 hr 43 min
Among those with Internet access at home—Use software to block (at home):					
Q20	Banners ads	56%	58%*	56%	62%
Q20	Pop-up ads	74%	78%	76%	81%
Q20	SPAM or junk e-mail	73%	77%	75%	81%
Q20	Spy or adware	65%	70%	67%	72%
Among those with Internet access at work—Use software to block (at work):					
Q21	Pop-up ads	77%	83%	80%	82%

***How to read and interpret:** 58% of weekly bar visitors block Internet banner ads at home. Therefore, bar-based advertising reaches consumers that brands may be missing through their online ad campaigns.

Appendix: Verbatim Survey Questions

- Q1. Please tell me, when did you LAST visit any type of bar or lounge as a customer, including any restaurant that has its own bar? Was it within the past... week, month?
- Q2. Have you specifically watched television in any type of bar or lounge in the past month?
- Q3. Do you currently... Own a TiVo-branded Digital Video Recorder, or use a Digital Video Recorder supplied by a local cable company, or use a non-TiVo branded Digital Video Recorder from a satellite TV company?
- Q4. a. Have you ever watched Video On Demand programming from your cable or satellite TV provider?
b. Have you watched Video On Demand programming from your cable or satellite TV provider in the past... week, month?
- Q5. Do you ever use your MP3 player to watch portable video?
- Q6. a. Have you successfully connected and viewed video over the Internet?
b. Have you viewed video over the Internet in the past... week, month?
- Q7. Have you ever watched TV programming in this manner?
a. Download TV shows from the Internet, such as from iTunes.
b. Watch TV programming over the Internet without downloading, sometimes known as streaming.
c. Order Video on Demand TV shows through your cable or satellite TV provider.
d. Watch TV clips on a cell phone.
- Q8. In the past month have you watched an episode of a TV series such as a comedy, drama or reality TV over the Internet?
- Q9. a. Have you ever listened to any radio stations or online audio from Internet-only sources, that is, audio from sources other than traditional radio stations, over the Internet?
b. Have you listened to any radio stations or online audio from Internet-only sources, that is, audio from sources other than traditional radio stations over the Internet in the last... week, month?
- Q10. Do you currently subscribe to SIRIUS or XM?
- Q11. Do you currently own the Apple iPhone™ or the Apple iPod® or any portable MP3 audio players, other than the Apple iPod family of MP3 players?
- Q12. Have you ever purchased MP3s, or other digital audio, from an online download service such as iTunes?
- Q13. Do you personally own a cell phone?

- Q14. Have you ever...on a cell phone? (among those who own a cell phone)
- a. Listened to music
 - b. Watched video such as music videos or sport clips
 - c. Played games
- Q15. a. Have you ever sent a text message from your cell phone?
(among those who own a cell phone)
- b. Have you sent a text message from your cell phone in the past... week, month?
(among those who own a cell phone)
- Q16. Have you ever RECEIVED a text message from a company promoting a product or service?
(among those who have texted)
- Q17. Have you ever SENT a text message to a company to get product information or to receive a coupon? (among those who have texted)
- Q18. Do you currently have access to the Internet at...home, work?
- Q19. In the last 24 hours, approximately how much time did you spend...?
- Q20. Do you currently ever use a program on your primary HOME computer to block...? (among those who have Internet access at home)
- a. Web site advertising or banner ads
 - b. Internet pop-up advertising
 - c. SPAM or junk e-mail
 - d. Programs that track the Web sites you visit, also known as spyware or adware
- Q21. Do you currently ever use a program on your primary WORK computer to block Internet pop-up advertising? (among those who have Internet access at work)

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 in the United States. 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.

Through its Scarborough Research joint venture with The Nielsen Company, Arbitron provides additional media and marketing research services to the broadcast television, newspaper and online industries.

Arbitron’s marketing and business units are supported by a world-renowned research and technology organization located in Columbia, Maryland. Its executive offices are located in New York City.

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 Media Research

Edison Media 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 Media Research works with many of the largest American radio ownership groups, including Entercom, ABC Radio, CBS Radio, Bonneville and Westwood One; it 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 Media Research also conducts research for successful radio stations in South America, Africa, Asia, Canada and Europe. Edison Media Research currently conducts all exit polls and election projections for the six major news organizations: ABC, CBS, CNN, FOX, NBC and the Associated Press.

All of Edison Media Research’s industry studies can be found on the company’s Web site at www.edisonresearch.com and can be downloaded free of charge.

Portable People Meter™ is a mark of Arbitron Inc. iPhone™, iPod® and iTunes® are marks of Apple Inc. SIRIUS® Satellite Radio is a mark of SIRIUS Satellite Radio Inc. TiVo® is a registered trademark of TiVo Inc.



New York

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

Chicago

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

Atlanta

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

Los Angeles

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

Dallas

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

Washington/Baltimore

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

www.arbitron.com