



The Arbitron Away-from-Home Television Viewing Study

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Overview

TV viewers have become harder to reach now that they have more choices to watch in more locations than ever before. Television sets, once relegated to a single, small set in living rooms of individual homes have become nearly ubiquitous. They are now found in places such as airports, health clubs, waiting rooms, tailgate parties and office lunchrooms. Accordingly, advertisers are increasingly interested in connecting with “on-the-go” Americans wherever they watch. However, the size and value of this “away-from-home” TV audience has not been adequately quantified...until now.

For the past 15 years, Arbitron has worked to make portable, passive electronic measurement a reality in the United States and other countries with its Portable People Meter™ (PPM™) service. PPM is an audience measurement technology that can detect exposure to both TV and radio no matter where it occurs. PPM has proven its ability to quantify the away-from-home TV audience with the successful use of the technology in other countries and in two demonstration markets in the United States (Philadelphia and Houston). Arbitron will roll out its PPM service for radio in the Top 50 U.S. Metro markets by 2010. At the same time, Arbitron will offer the away-from-home measures of the TV audience in those same markets.

Arbitron conducted this study to provide a deeper understanding of the away-from-home TV audience in a *national* context rather than focus on data from only PPM demonstration markets. Plus, we explore the characteristics of away-from-home TV viewing in greater depth than what we have gathered to date with PPM. We take a closer look at television viewing behavior in locations besides people's own homes—that is, in places such as someone else's home, at work, at restaurants/bars, at hotels/motels or vacation homes, and other places TV viewing occurs away from the home. This study sheds light on the myriad locations away from one's own home in which TV is being viewed, including who is watching, how much time is being spent and when this viewing occurs. In addition, we examine which TV program types are most often viewed away-from-home.

The Arbitron Away-From-Home Viewing Study provides solid evidence about the value of the away-from-home audience for advertisers and dispels some commonly held beliefs that away-from-home viewing is mostly men watching sports in restaurants or bars.

This report includes significant highlights, key findings and implications. Further data tables may be found in the appendixes.

How the Study Was Conducted

A total of 2,506 people were interviewed to explore the way Americans watch television at locations other than in their own homes. From November 27, 2006, to December 19, 2006, telephone interviews were conducted with a random national sample of respondents age 12 and older.

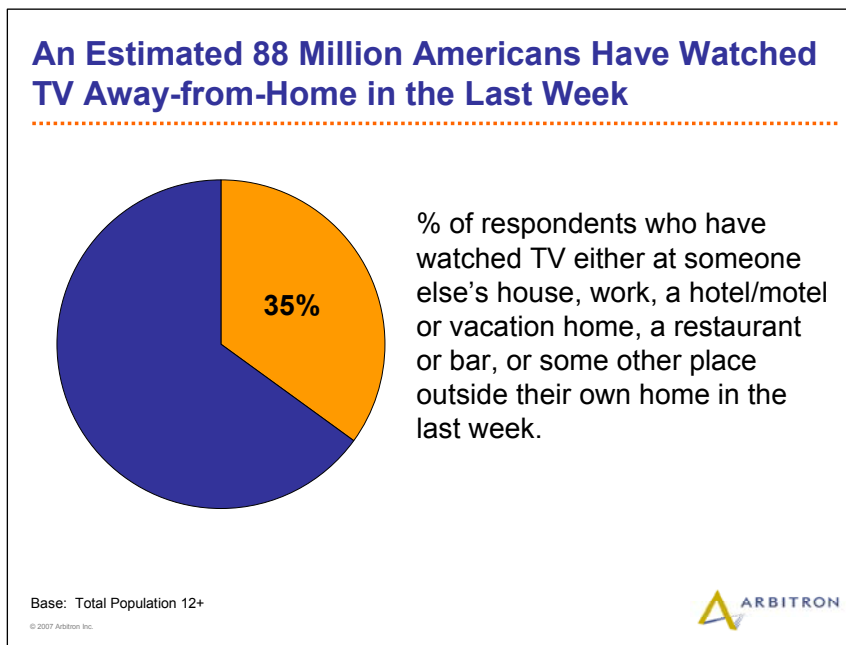
Significant Highlights

- **Many industry insiders mistakenly believe that the away-from-home TV audience is small.** The Arbitron online survey of agency and TV industry executives finds that the majority believe the weekly away-from-home TV viewing audience is only 15 percent of viewers.
- **More than one-third of Americans age 12 and older (approximately 88 million) have watched television away-from-home in the last week.** Thirty-five percent reported having watched TV at some place other than in their own home in the last week—that is, at someone else’s home, at work, at a hotel/motel or vacation home, at a restaurant or bar, or at any other place away from their own home.
- **The location with the highest percentage of away-from-home TV viewing in the last week is “someone else’s home.”** Twenty-five percent have watched TV at someone else’s home in the last week, followed by viewing at a restaurant/bar (11 percent), at work (7 percent), and at a hotel/motel or vacation home (5 percent); 12 percent have watched at any other location away-from-home.
- **The Fringe/News and Access/Prime Time periods are the most popular for weekly away-from-home TV viewing.** Fifty-eight percent of last week away-from-home viewers watched during Fringe/News, while 55 percent watched during Access/Prime Time.
- **Those who watch TV away-from-home spend a lot of time doing so.** A significant amount of time is being spent among those watching TV away-from-home—reporting an average of two hours, seven minutes viewing away-from-home in the previous 24 hours. In the away-from-home viewing location with the largest percentage of viewers—someone else’s home—an average of two hours, two minutes was spent viewing in the previous 24 hours.
- **Sporting events are not the only types of programs watched on TV away-from-home in the last week; local news and episodes of television series are also popular.** Nearly equal percentages have watched a sporting event (20 percent), a local station’s news broadcast (19 percent) and an episode of a TV series (18 percent) in the last week away-from-home.
- **People pay different levels of attention to television based on the location from which they are watching.** More attention is paid when watching TV at a hotel/motel/vacation home, or at someone else’s home, as compared to watching TV at work or at a restaurant/bar.
- **Only a small percentage have watched recorded TV programming away-from-home in the last week.** In that only three percent of respondents have watched recorded TV programming away-from-home in the last week, ad-skipping appears currently to be of little concern for TV viewing done away from one’s own home.
- **DVR ownership and digital cable/satellite TV subscriptions do not appear to be a factor influencing away-from-home TV viewing.** Those who own DVRs and those who do not are equally as likely to have watched TV away-from-home in the last week. Those who have digital cable/satellite TV are only slightly more likely than nonsubscribers to have watched TV in a place other than their own homes.
- **Heavy TV viewers (those who report having watched 5+ hours of TV in the last 24 hours) are more likely to have watched television away-from-home in the last week.** This means that the source of many hours of television viewing also generates many hours of viewing away-from-home.

Key Findings

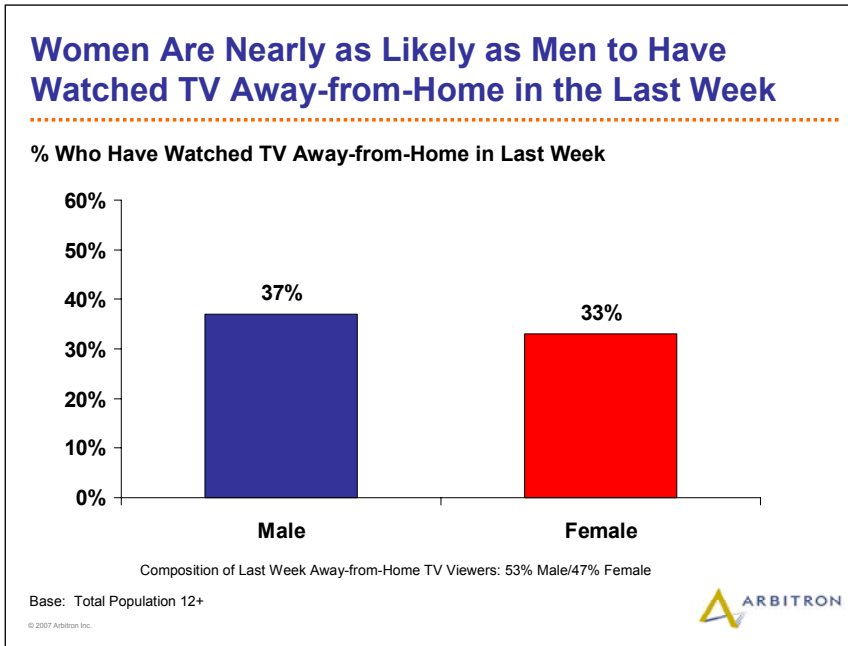
A. Away-From-Home Television Viewer Profile

1. **Many advertising decision makers mistakenly believe that the away-from-home TV audience is small.** The Arbitron online* survey of advertising decision makers finds that most believe the weekly away-from-home TV viewing audience is only 15 percent of viewers.
2. **More than one-third of Americans age 12 and older (approximately 88 million) have watched television away-from-home in the last week.** Thirty-five percent reported having watched TV at some place other than in their own home in the last week—that is, at someone else's home, at work, at a hotel/motel or vacation home, at a restaurant or bar, or at any other place away from their home. Nearly one in seven (13 percent) have watched TV away-from-home in the last 24 hours.

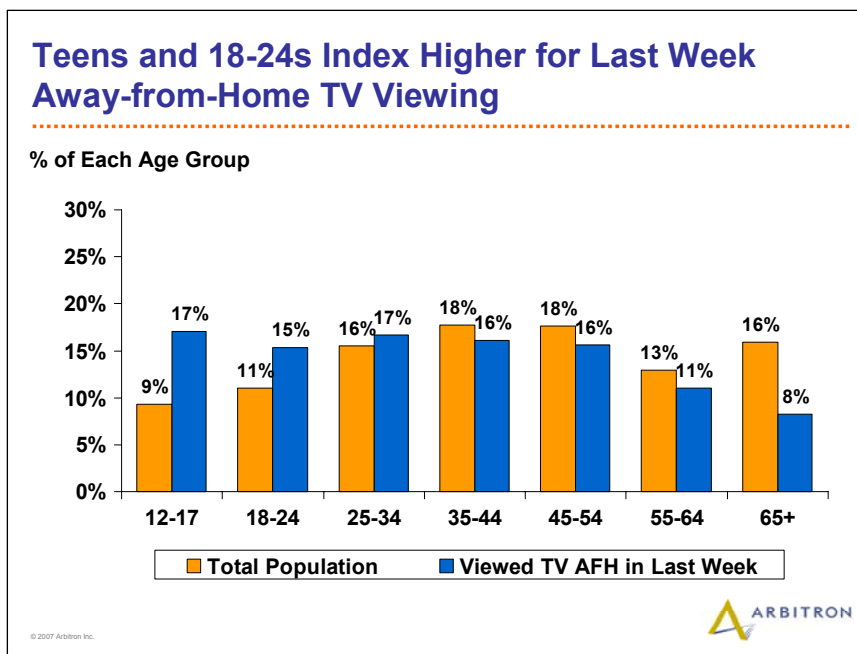


* A brief online survey of advertising decision makers was conducted March 12, 2007-March 16, 2007, gathering their current perceptions of away-from-home television viewing without the benefit of seeing the study results. Forty-nine advertising executives out of 64 responded to questions in our online survey.

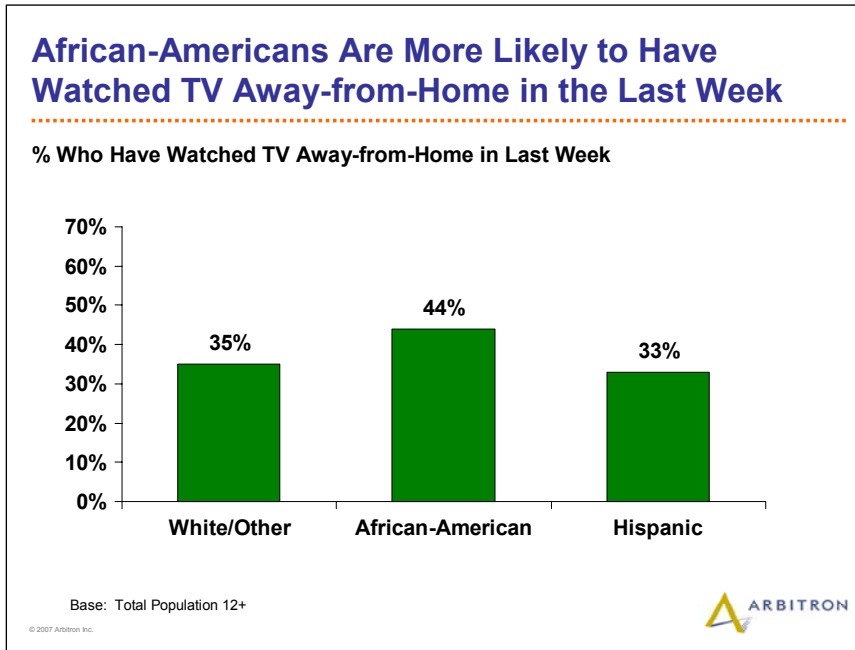
3. **Men and women are almost equally as likely to have watched TV away-from-home in the last week.** This is counter to a commonly held belief that the overwhelming majority of TV viewing away-from-home is done by men watching sports.



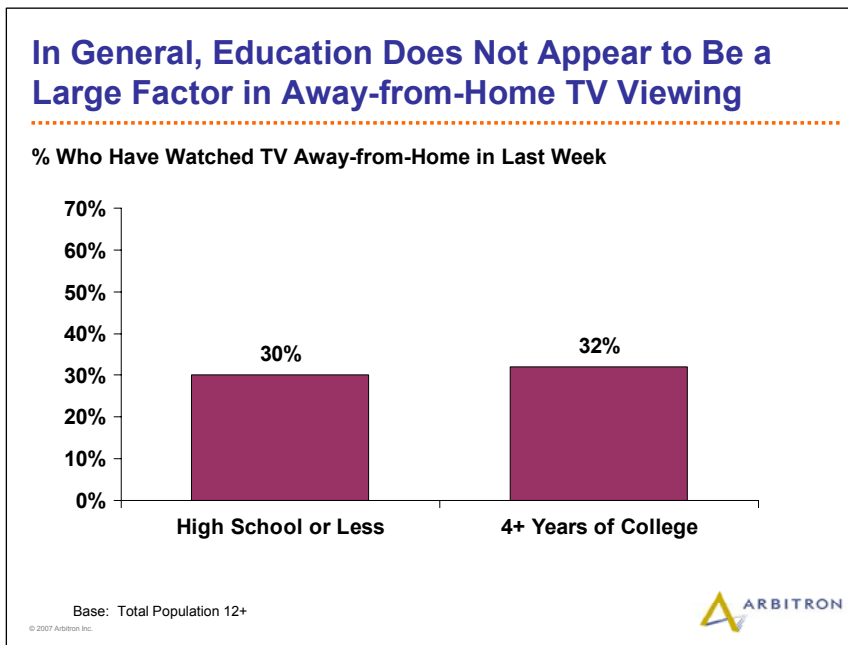
4. **Teens and 18-24s are much more likely than those in older demos to have watched TV away-from-home in the last week.** The younger the respondent, the more likely he or she was to have watched TV away-from-home in the last week. Nearly two-thirds of those aged 12-17 (64 percent) have watched TV away-from-home in the last week, compared to only 18 percent of those aged 65 and older.



5. **African-Americans are more likely to have watched TV away-from-home.** Forty-four percent of African-Americans and 33 percent of Hispanics have watched TV away-from-home in the last week.



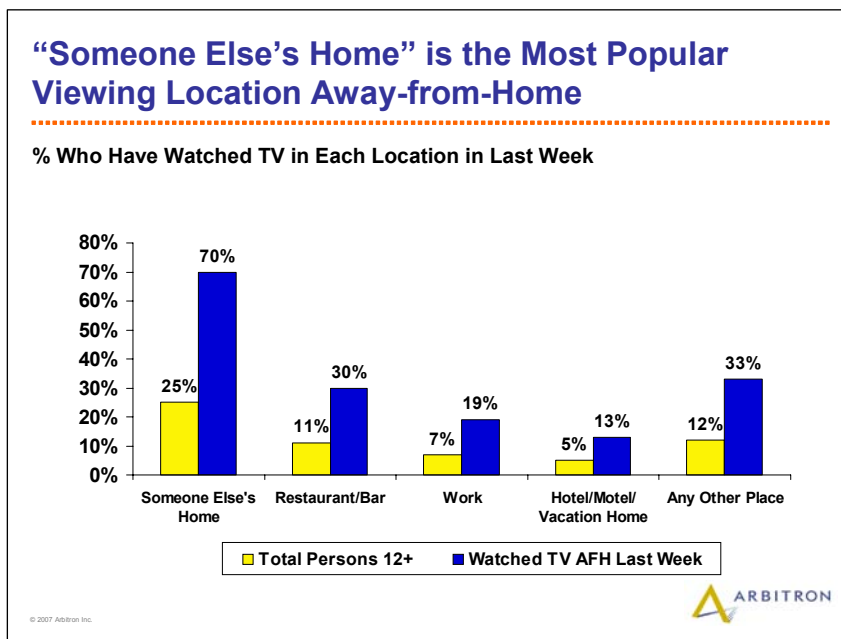
6. **Education does not appear to be much of a factor in away-from-home TV viewing.** Those with a high school education or less are nearly as likely to have watched TV away-from-home in the last week (30 percent) as those with 4+ years of college education (32 percent).



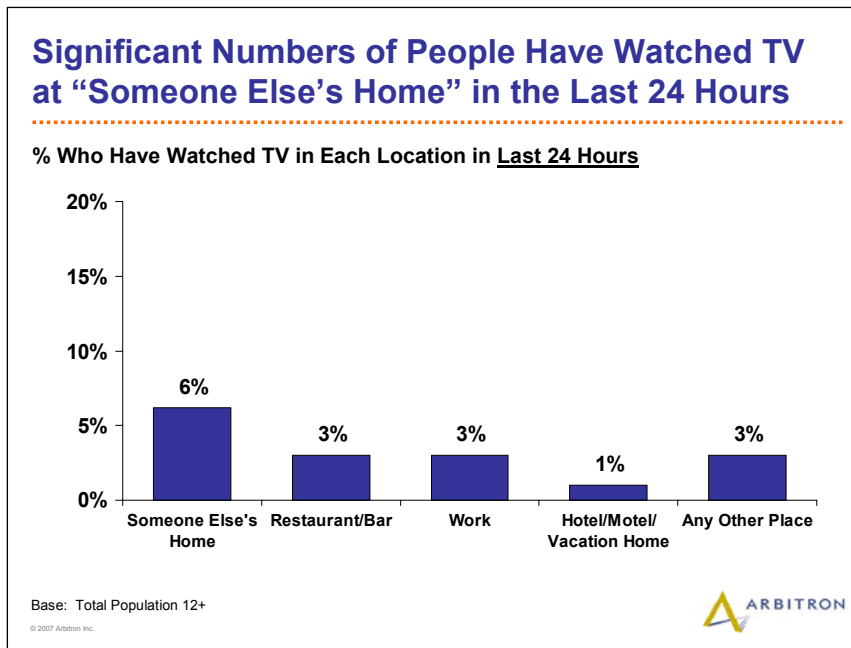
B. Away-from-Home Television Viewing Locations

7. **“Someone else’s home” is the most popular away-from-home viewing location.** This contrasts with the widely held perception that the most popular away-from-home viewing location is a restaurant or bar. In our online survey of advertising decision makers, the majority guessed that, indeed, a restaurant or bar was the top spot for viewing away-from-home. According to the study, one in four have watched TV at “someone else’s home” in the last week, which is more than double the number who have watched in a restaurant/bar (11 percent). Seven percent have watched TV at work in the last week, five percent have watched at a hotel/motel or vacation home, and 12 percent have watched at any other location away-from-home.

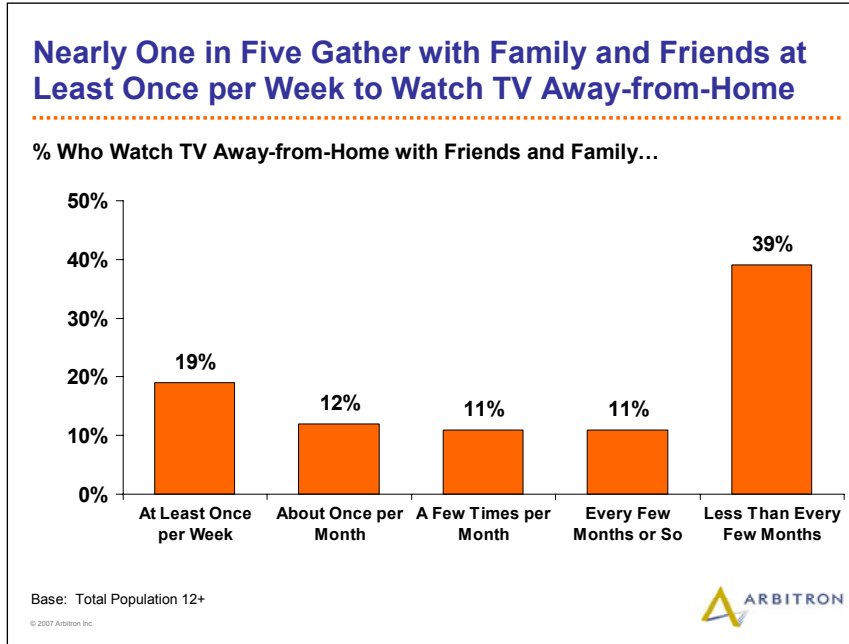
Of those who have watched television away-from-home in the last week, 70 percent have watched at someone else’s home compared to 30 percent having watched in a restaurant or bar, 19 percent at work, and only 13 percent watched from a hotel/motel or vacation home.



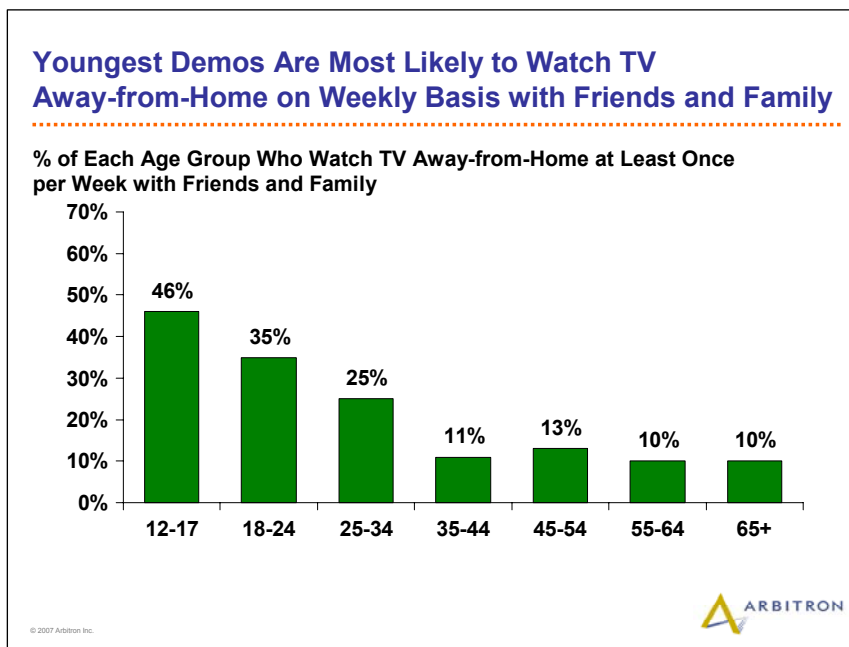
In addition, in the last 24 hours, six percent have watched TV at someone else's home, three percent have watched in a restaurant/bar, three percent have watched at work, one percent have watched at a hotel/motel or vacation home, and three percent have watched at any other location away-from-home.



8. **Nineteen percent of those age 12 and older gather with friends and family at least once per week to watch TV away-from-home.** Nearly one in five (19 percent) gather at least once a week with friends and family to watch TV away-from-home. This is significantly greater than the perception held by advertising decision makers in the Web poll, who guessed that only eight percent of respondents gathered with family and friends once per week.

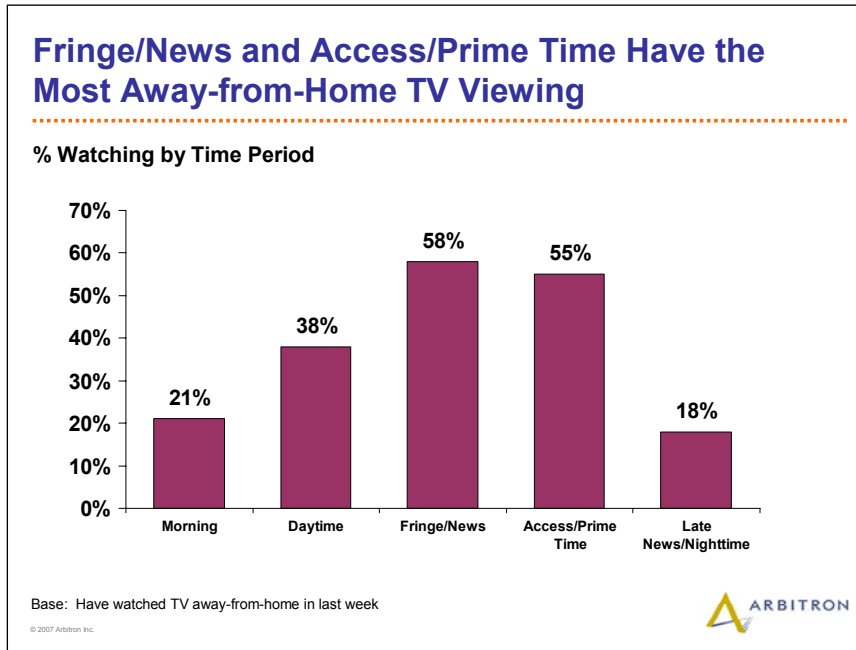


9. **The younger the respondent, the more frequently he or she gets together with family and friends to watch TV away-from-home.** Nearly half of those aged 12 to 17 (46 percent) watch TV away-from-home with friends and family at least once per week; more than one-third of 18-24s (35 percent) reported doing so. Just over 10 percent of those age 35+ get together at least once per week with friends and family to watch TV away-from-home.

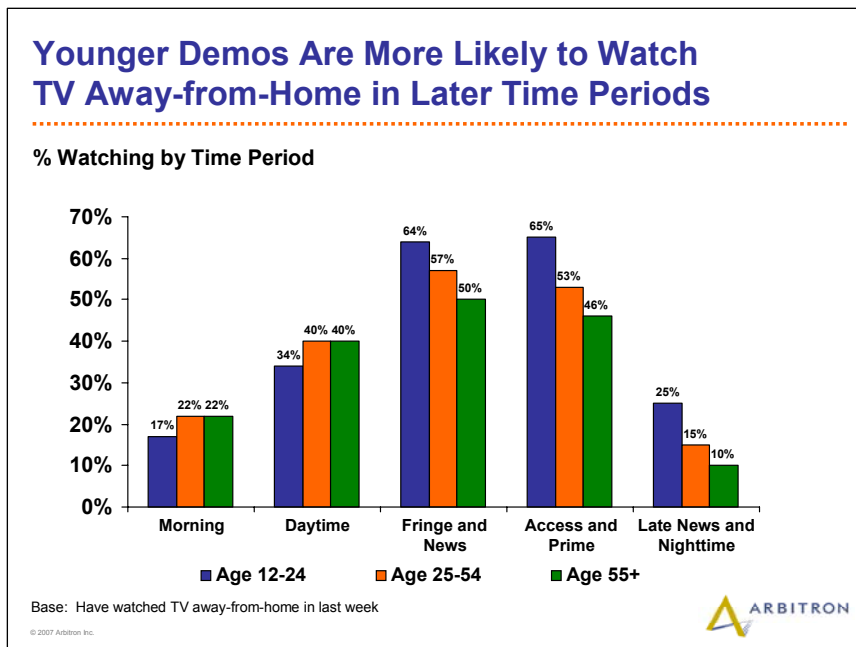


C. Away-from-Home Television Time Periods and Time Spent Viewing

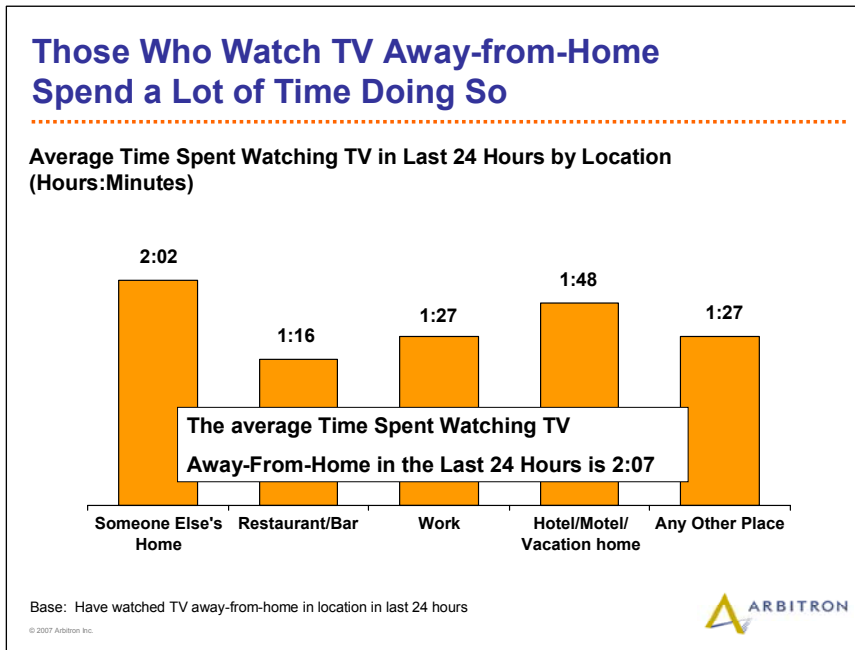
10. The most popular time period to watch TV away-from-home is Fringe/News, followed closely by Access/Prime Time. Fifty-eight percent of those who watched TV away-from-home in the last week watched during Fringe/News; 55 percent watched during Access/Prime Time.



11. Younger demos are more likely to watch TV away-from-home in the evening and late night hours. During the morning and daytime time periods, those aged 25-54 and 55+ are more likely to watch TV away-from-home. However, those under age 55, and specifically 12-24s, are more likely to watch TV away-from-home, beginning in the Fringe/News time period and continuing through Late News/Nighttime.

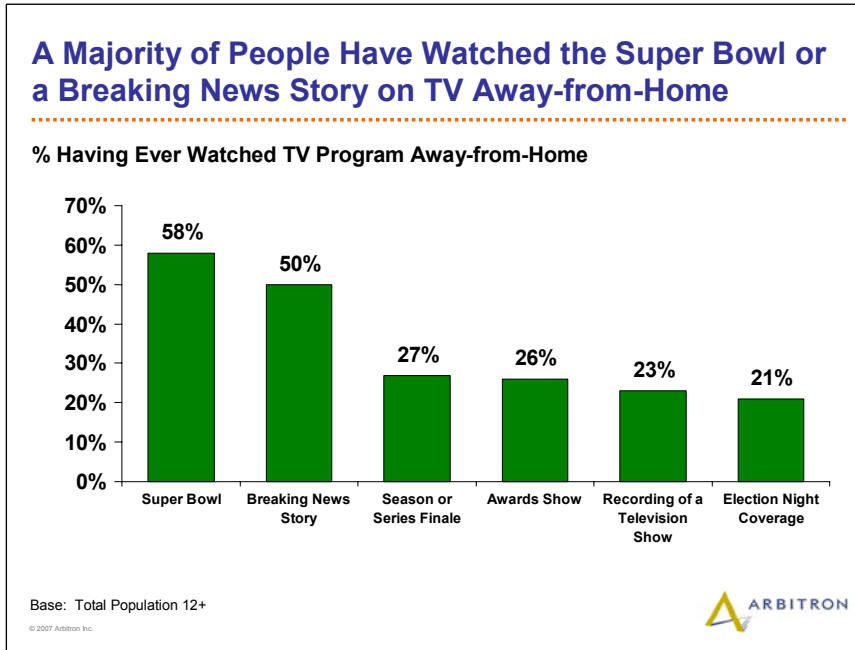


12. Those who watch TV away-from-home spend a lot of time doing so. A significant amount of time is being spent among those watching TV away-from-home—reporting an average of two hours, seven minutes viewing away-from-home in the previous 24 hours. In the away-from-home viewing location with the largest percentage of viewers—someone else’s home—an average of two hours, two minutes was spent viewing in the previous 24 hours. In addition, more than one hour of viewing, on average, was reported by those who watched TV in the previous 24 hours at each location examined: at a hotel/motel/vacation home (1:48), at work (1:27), at a restaurant/bar (1:16), and any other location away-from-home (1:27).

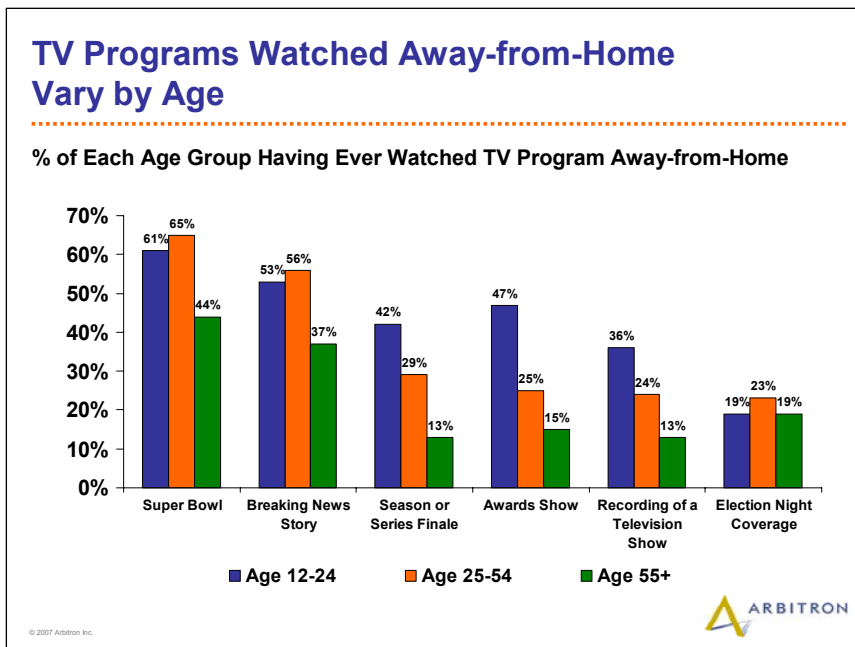


D. TV Programs Viewed Away-from-Home

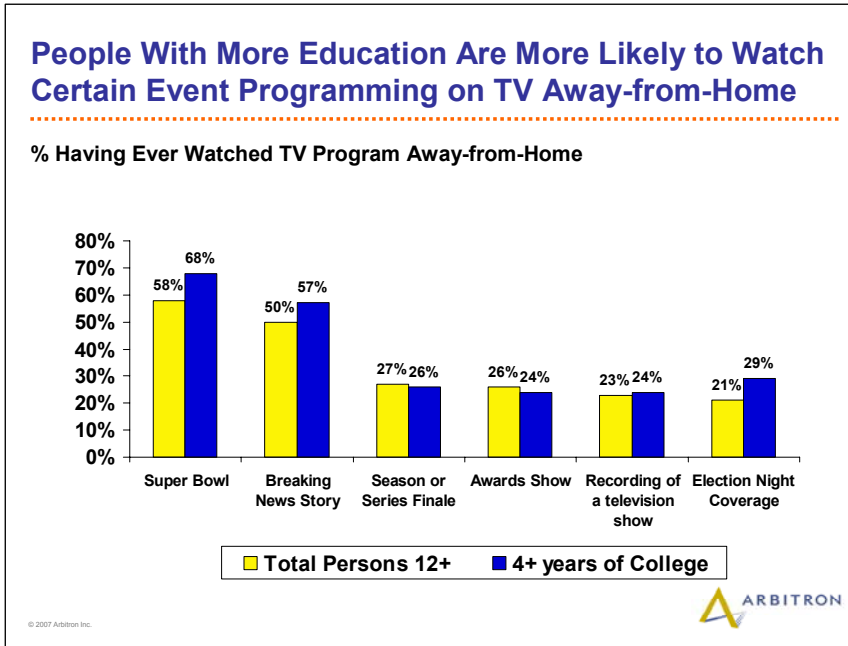
13. A majority of people have ever watched the Super Bowl or a breaking news story at a place other than their own home. Fifty-eight percent of respondents have watched the Super Bowl away-from-home, which is not surprising, as it is typically considered the biggest and most-anticipated TV group viewing event of the year. Half of respondents have ever watched a breaking news story on TV away-from-home. Half of respondents have ever watched a breaking news story on TV away-from-home.



Younger demos are far more likely than older demos to have ever watched an awards show, a season/series finale or a recording of a TV show away-from-home. Election night TV coverage is the one special event that is nearly equally viewed away-from-home by all demos.



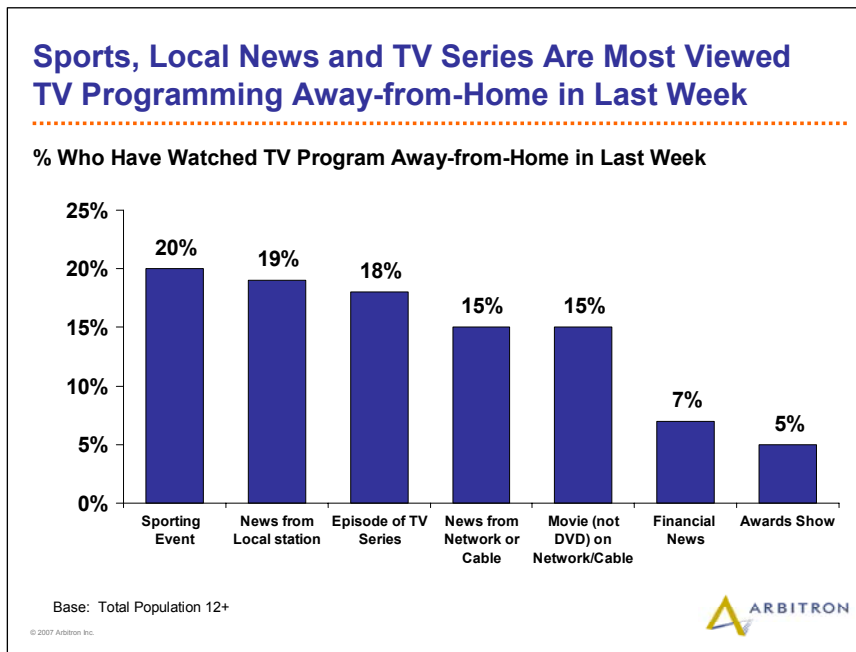
14. Certain types of event programming are more likely to be watched on TV away-from-home by those with more education. People with four or more years of college education are more likely to have ever watched the Super Bowl, a breaking news story or election night TV coverage away-from-home.



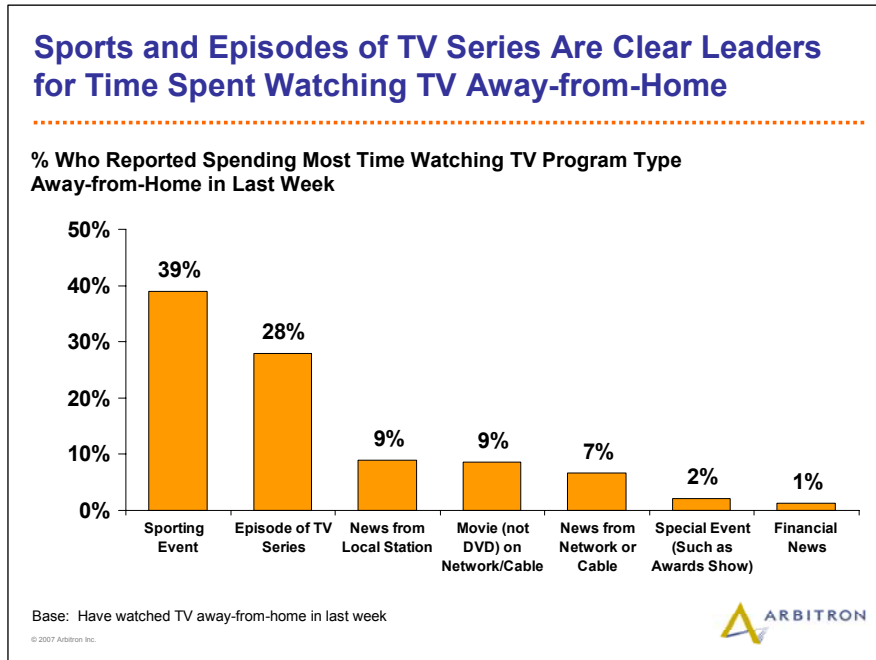
15. Sporting events are not the only types of programs watched on TV away-from-home in the last week; local news and episodes of television series are also popular. Although the Super Bowl broadcast comes once per year, and consistently dominates away-from-home viewing that day, it does not mean that sporting events consistently dominate TV viewing away-from-home. Twenty percent of respondents reported watching a sporting event on TV away-from-home in the last week, while similar percentages reported watching a local station’s news broadcast in the last week (19 percent), or watched an episode of a TV series in the last week (18 percent).

Substantial numbers of viewers watch episodes of TV programs while away-from-home (18 percent), but our web poll reveals that advertising decision makers may underestimate the extent of this type of viewing behavior. When asked what percentage of viewers had watched an episode of television away-from-home in the last week, the majority of advertising decision makers in the online survey guessed only eight percent.

Men are more likely to have watched sports in the last week away-from-home (68 percent vs. 43 percent of women). Women are more likely to have watched episodes of TV programs at a place other than their own home in the last week (61 percent of women vs. 44 percent of men).

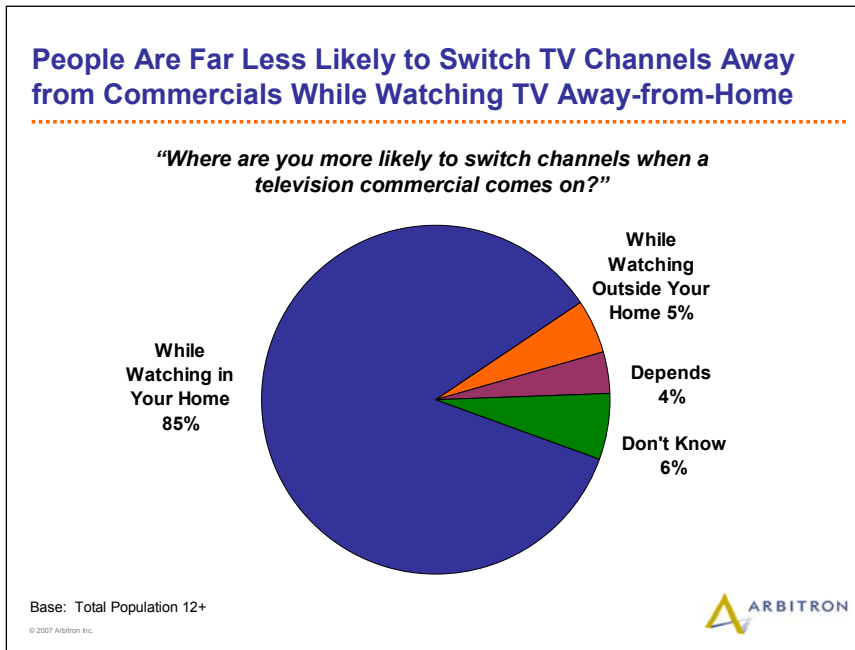


16. Weekly away-from-home TV viewers reported spending most time viewing sporting events and episodes of TV shows. Among those who watched TV while away-from-home last week, 39 percent spent the most time watching sporting events and 28 percent spent the most time with an episode of a TV show. This finding appears to be correlated with the length of these types of programs. Sporting events typically run for several hours, while episodes of TV programs are typically 30 minutes to one hour. No other program type is in double figures.

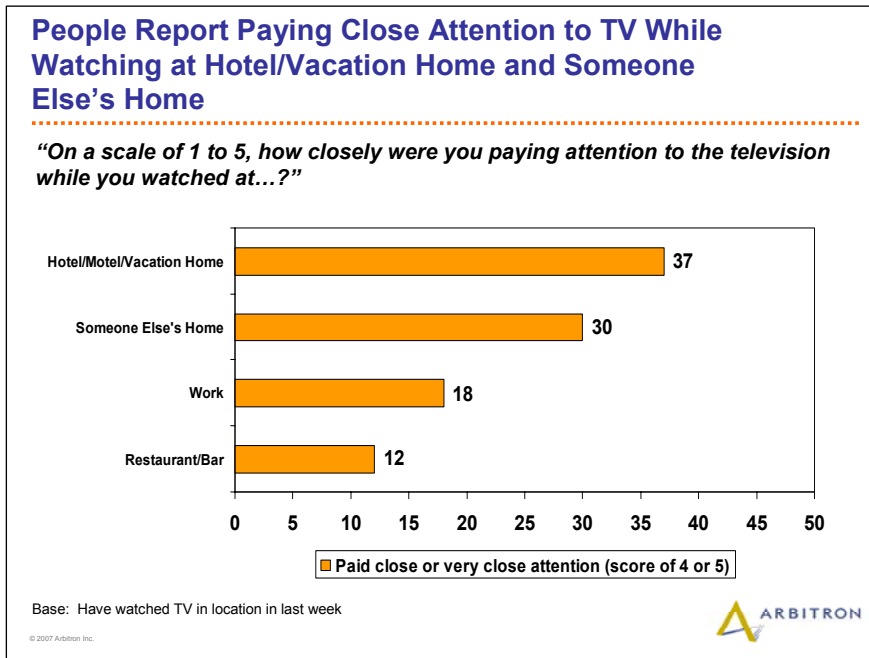


E. Attention to Away-from-Home Television

17. People are far less likely to switch TV channels away from commercials while watching TV away-from-home. Only five percent say they are more likely to switch TV channels while watching TV away-from-home, compared to 85 percent who are more likely to do so while watching TV in their own home. Away-from-home TV viewing frequently occurs in a group setting where channel switching occurs less frequently.



18. More attention is paid while watching TV at a hotel/motel/vacation home and at someone else's home than at a restaurant/bar. People who watched TV outside of the home in the last week were asked, "On a scale of 1 to 5, how closely were you paying attention to the television while you watch" at various locations. Thirty seven percent of those who watched TV away-from-home in the last week said they paid very close or close attention (score of 5 or 4) while watching TV in a hotel/motel/vacation home. Thirty percent said they paid very close/close attention while watching at someone else's home; and nearly one in eight (12 percent) said they paid very close/close attention while watching TV at a restaurant/bar.

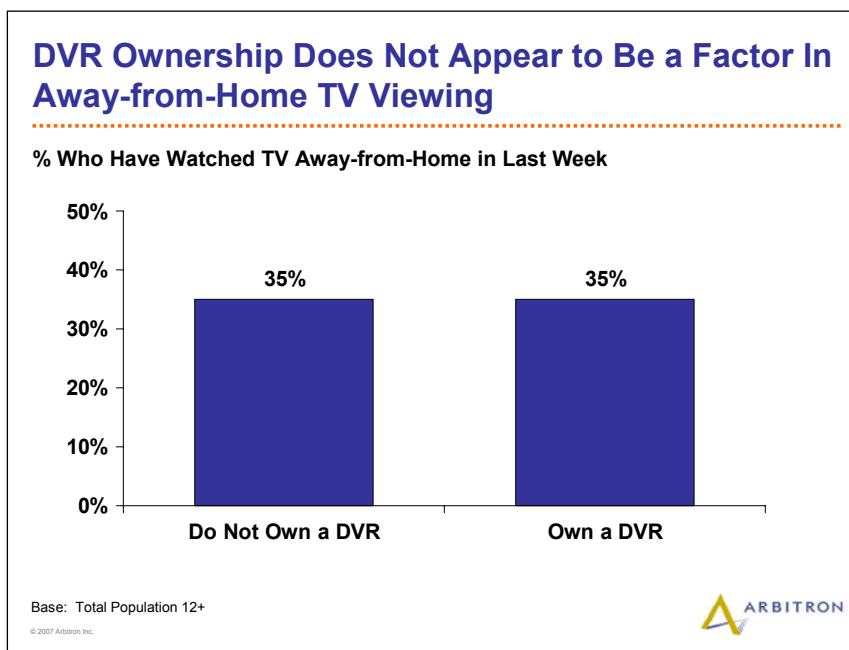


F. Effect of DVR Ownership and Cable Status

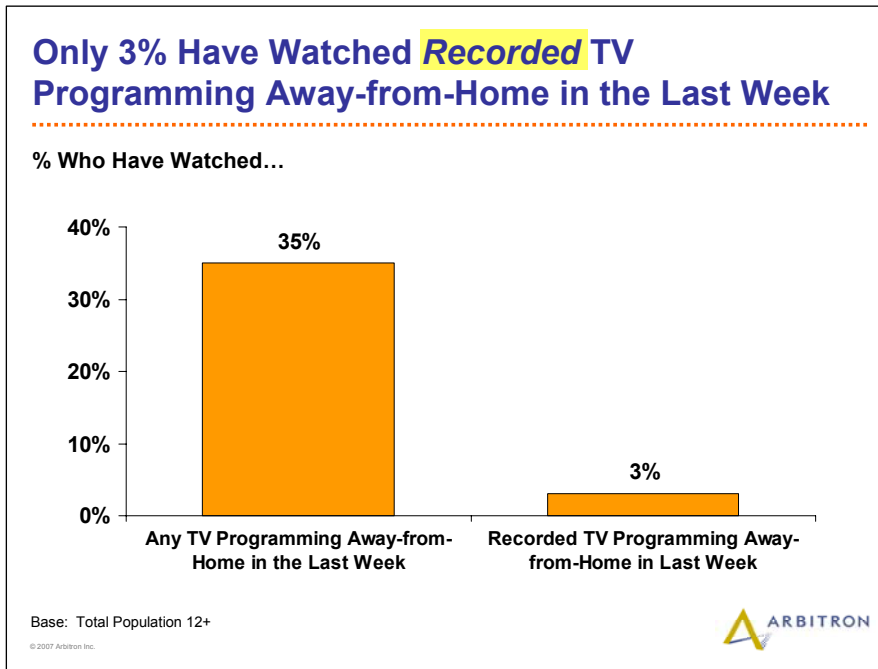
Today, viewers have the opportunity to add an array of “extras” to their television experience, including hundreds of channels and video-on-demand options from cable/satellite TV providers. Digital Video Recorders (DVRs) also give viewers the ability to record and watch TV programming at their convenience.

19. DVR ownership does not appear to be a factor influencing away-from-home TV viewing.

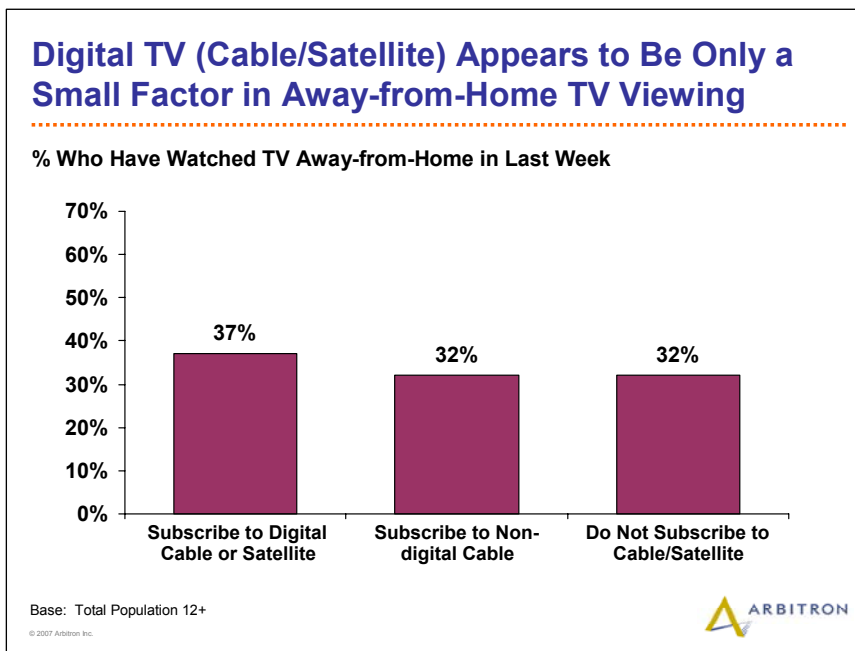
We asked advertising decision makers in the online survey if a TiVo/DVR owner would be more or less likely to watch television away-from-home. Sixty-five percent said TiVo/DVR owners would be less likely to watch TV while away-from-home. This study finds that TiVo/DVR ownership does not appear to influence out-of-home TV viewing. Equal numbers of viewers who own DVRs and those who don't own DVRs had watched TV while away-from-home in the last week (35 percent).



20. Only three percent of all respondents have watched recorded TV programming away-from-home in the last week. Ad-skipping behavior is less prevalent with away-from-home TV viewing. Only 3 percent of the population have watched recorded TV while away-from-home in the last week.

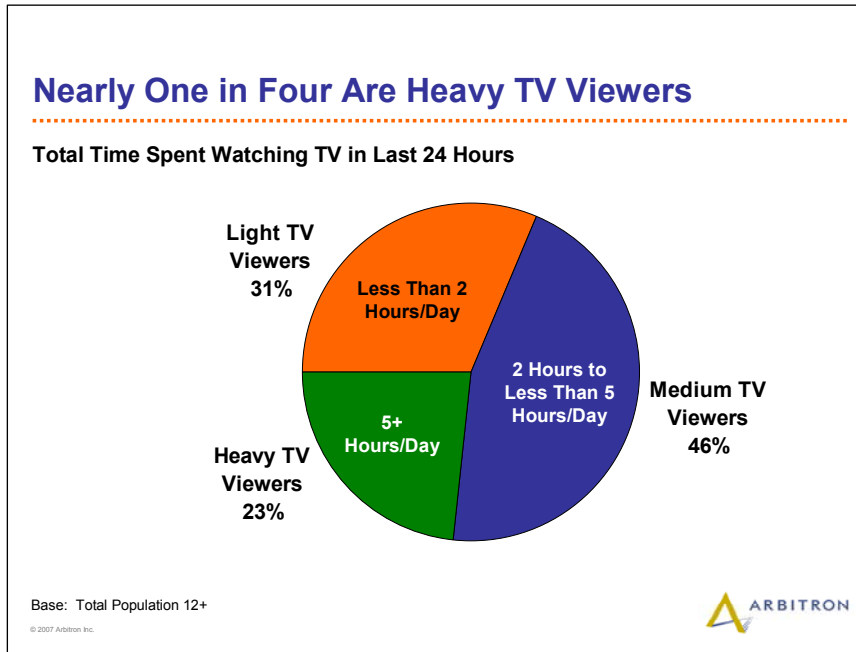


21. Cable/Satellite TV subscriptions appear to have only minimal impact on increased away-from-home TV viewing. Those who subscribe to nondigital cable and those who do not subscribe to cable or satellite were equally likely to have watched TV away-from-home in the last week (32 percent); 37 percent of subscribers to digital cable/satellite TV had done so.

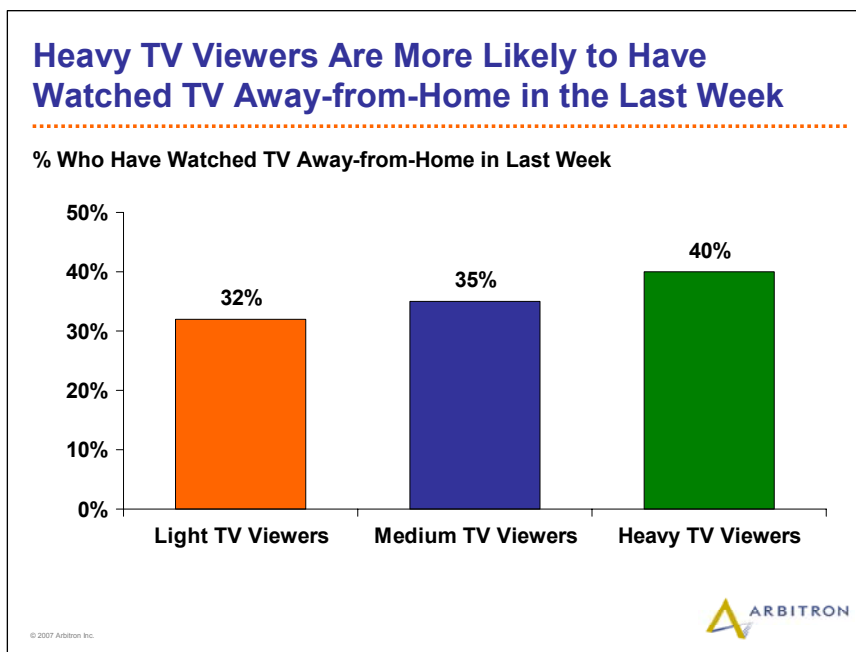


G. Heavy Television Viewers and Away-from-Home TV Viewing

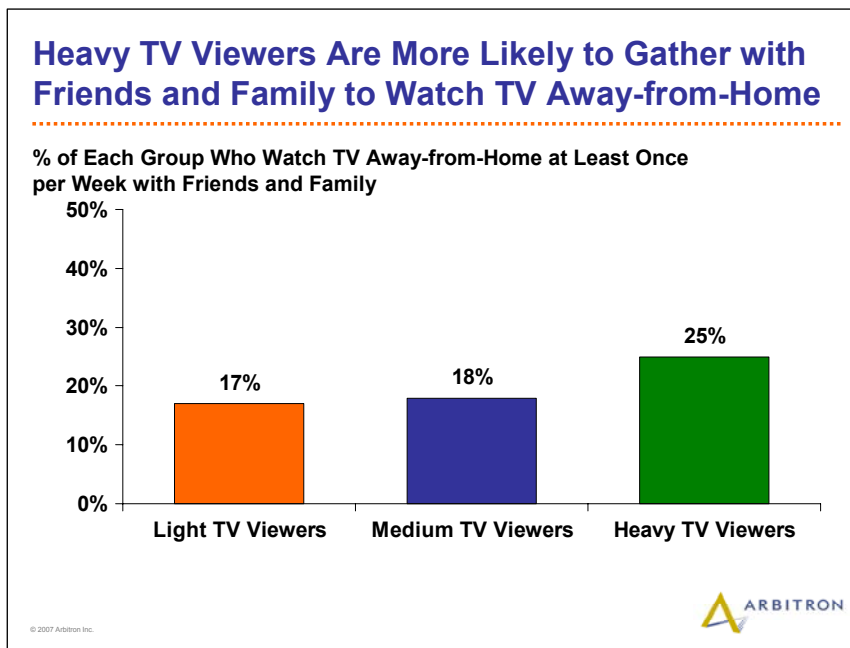
Respondents were asked how much time they had spent watching television in the previous 24 hours, and were then classified as Light (less than two hours/day), Medium (two hours to less than five hours/day) or Heavy (five hours or more/day) television viewers.



22. Heavy TV viewers are more likely to have watched television away-from-home in the last week. Heavy television viewers generate the most away-from-home viewing.



23. One-quarter of heavy TV viewers gather at least once per week with family and friends to watch television at a place other than their own home. By comparison, 17 percent of Light TV viewers gather weekly with family and friends to watch TV away-from-home.



H. How the Findings from This Study Compare with the PPM Data

This section compares some of the findings from this study with results from Arbitron's PPM viewing data.

- 24. Time spent viewing away-from-home in the last 24 hours is near two hours.** This study and PPM data both indicate that a significant amount of television viewing occurs away-from-home. The *Arbitron Away-from-Home Television Viewing Study* shows that respondents, on average, reported two hours, seven minutes of viewing television at some place other than their own homes in the previous 24 hours. PPM data from Houston-Galveston in September 2005 show that the average daily away-from-home time spent viewing is one hour, 45 minutes.
- 25. Away-from-home viewing is consistent for both genders.** This study shows that women are almost as likely as men to watch TV in some place other than their homes in the last week. The Houston-Galveston PPM data revealed that roughly the same percentage of away-from-home quarter-hours was generated by both men and women.
- 26. African-American television viewers are more likely to watch away-from-home.** The Houston-Galveston PPM data from April/May 2005 showed that African-American respondents generated a higher percentage of their viewing away-from-home than Hispanics. In this study, African-American viewers also report having watched more TV away-from-home in the last week than other races/nationalities.
- 27. Young men are more likely to watch in Prime Time than young women; women are more likely to watch in the afternoon.** PPM data revealed that men aged 18 to 49 watched more during Prime Time and women watched more in the afternoon. A similar pattern is found in *The Arbitron Away-from-Home Television Viewing Study*.
- 28. The most popular viewing location away-from-home is someone else's home.** In Arbitron's *Media Lifestyles Study* from Winter 2003, 57 percent of the away-from-home viewing minutes came from viewing at someone else's home, compared to 24 percent at work and only five percent at a restaurant/bar. *The Arbitron Away-from-Home Television Viewing Study* also shows someone else's home as the top away-from-home viewing location. Seventy percent of weekly away-from-home TV viewers watched from someone else's home compared to 30 percent who have watched at a restaurant/bar, and 19 percent who have watched at work. The *Media Lifestyles Study* found that more viewing is generated at work than at a restaurant or bar, and the most viewing occurs at someone else's home. These findings are mirrored in the Away-from-Home Study where the most time spent viewing TV away-from-home in the last 24 hours is at someone else's home, followed by work and a restaurant/bar.

Implications

- 1. Far more people watch TV away-from-home than industry decision makers believe.** The majority of advertising decision makers said the percent of away-from-home TV viewing is less than half of what this study indicates.
- 2. The amount of away-from-home television viewing is very significant.** Large numbers of people are viewing television away from their homes every week, and they are spending substantial time watching television at remote locations. Advertisers are not adequately learning about these audiences, and media companies are not getting credit for this audience delivery
- 3. The biggest portion of away-from-home viewing is not men watching sports in restaurants or bars (although that is significant as well).** The most popular location of away-from-home viewing is at someone else's home. When you think of away-from-home television viewing—think of the teenager watching music videos at a friend's house, rather than that of a group of men watching a football game at a sports bar.
- 4. Away-from-home television viewing is often “locked-in” viewing.** Whether it is a group watching a favorite television series together, viewing a sports or awards show, or simply someone watching television while at work or in any group setting away-from-home, channel surfing decreases. Respondents told us that they are less likely to tune away from commercials while engaging in away-from-home television viewing than when at home. As such, away-from-home TV viewing may well be more valuable to advertisers than at-home viewing.
- 5. Little away-from-home TV viewing is to recorded programming.** Because most away-from-home viewing is to “live” broadcasts, there is less opportunity for ad-skipping from DVRs or VCRs.
- 6. Advertisers, media planners and buyers should demand that away-from-home television be measured.** There is simply too much viewing going on in environments beyond what is currently being counted. Learning more about away-from-home viewership is good for advertisers and good for broadcasters.

Appendix A

Profile of the Away-from-Home TV Viewing Audience

	All Respondents (2,506 Persons 12+)	Watched TV Away-from-Home in Last Week (35% of 12+ population)
Demographics		
Men	49% ¹	53% ²
Women	51%	47%
12–17	9%	17%
18–24	11%	15%
25–34	16%	17%
35–44	18%	16%
45–54	18%	16%
55–64	13%	11%
65+	16%	8%
Employed Full Time	47%	50%
Employed Part Time	8%	7%
Student	13%	21%
Homemaker	6%	4%
Unemployed	4%	4%
\$75K+ HH Income	28%	29%
White	66%	64%
African-American	13%	16%
Hispanic/Latino	13%	12%
Asian	2%	2%
Education (Respondents Age 18+)		
High School or Less	36%	34%
1+ Years of College	54%	53%
4+ Years of College	31%	29%

How to read:

¹Forty-nine (49) percent of the population is male.

²Fifty-three (53) percent of those who have watched TV away-from-home in the last week are male.

Appendix B

Program Types and Programs Watched Away-from-Home by Gender and Buying Demo

	Men (49% of U.S. Pop.)	Women (51% of U.S. Pop.)	12-17 (9% of U.S. Pop.)	18-34 (27% of U.S. Pop.)	18-49 (53% of U.S. Pop.)	25-54 (51% of U.S. Pop.)	55+ (29% of U.S. Pop.)
TV Program Type Watched Away-from-Home in Last Week							
Sporting Event	25% ¹	14%	32%	25%	23%	21%	12%
News from a Local Station	19%	19%	25%	23%	21%	19%	14%
News from a Network or Cable	16%	15%	21%	14%	15%	16%	14%
Financial News	8%	6%	8%	6%	8%	7%	7%
Episode of TV Series	17%	20%	45%	25%	19%	16%	10%
Movie (Not DVD) on Network or Cable	15%	15%	40%	19%	15%	12%	8%
Special Event, Such as Awards Show	4%	6%	22%	5%	5%	4%	2%
TV Programs Ever Watched Away-from-Home							
Super Bowl	65% ²	51%	59%	65%	65%	65%	44%
Breaking News Story	52%	48%	55%	55%	55%	56%	37%
Season or Series Finale	26%	28%	48%	37%	32%	29%	13%
Awards Show	24%	29%	49%	36%	29%	25%	15%
Recording of TV Show	21%	25%	42%	30%	26%	24%	13%
Election Night Coverage	23%	19%	19%	22%	23%	22%	19%

How to read:

¹Twenty-five (25) percent of men age 12+ have watched a sporting event on TV away-from-home in the last week.

²Sixty-five (65) percent of men have ever watched the Super Bowl on TV away-from-home.

Appendix C

Profile of Program Types Watched Away-from-Home in the Last Week

	Sporting Event (20% of 12+ Population)	Local News (19% of U.S. Population)	Episode of TV Series (18% of U.S. Population)	Network/Cable News (15% of U.S. Population)	Movie from Network/Cable (15% of U.S. Population)
Demographics					
Men	64% ¹	49%	45%	51%	49%
Women	36%	51%	55%	49%	51%
12–17	15%	12%	23%	13%	25%
18–24	13%	16%	19%	9%	16%
25–34	21%	17%	17%	16%	18%
35–44	17%	17%	13%	17%	13%
45–54	16%	17%	13%	19%	12%
55–64	10%	11%	8%	14%	9%
65+	7%	10%	7%	11%	6%
Employed Full Time	55%	53%	45%	55%	43%
Employed Part Time	7%	6%	8%	5%	7%
Retired	10%	14%	10%	16%	9%
Student	21%	16%	27%	16%	30%
Homemaker	3%	4%	4%	4%	4%
Unemployed	3%	5%	5%	3%	5%
\$75K+ HH Income	35%	26%	23%	33%	26%
White	66%	65%	59%	65%	58%
African-American	15%	17%	21%	18%	21%
Hispanic/Latino	13%	12%	13%	12%	13%
Asian	2%	3%	2%	3%	2%
Education (Respondents Age 18+)					
High School or Less	32%	36%	39%	31%	40%
1+ Years of College	68%	65%	61%	69%	60%
4+ Years of College	37%	33%	28%	38%	30%

How to read:

¹Sixty-four (64) percent of those who watched a sporting event on TV away-from-home in the last week are men.

About Arbitron Inc.

Arbitron Inc. (NYSE: ARB) is an international 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 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. The company has developed the Portable People Meter, a new technology for media and marketing research.

Arbitron's marketing and business units are supported by a world-renowned research and technology organization located in Columbia, Maryland. Arbitron has approximately 1,900 employees; its executive offices are located in New York City.

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.



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