



Arbitron Cell Phone Only Diary Service Update

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In addition, any forward-looking statements contained in this presentation represent our estimates only as of the date hereof and should not be relied upon as representing our estimates as of any subsequent date. While we may elect to update forward-looking statements at some point in the future, we specifically disclaim any obligation to do so, even if our estimates change.

Today's Agenda

- Arbitron's plans to include Cell Phone Only Sampling in Diary Markets
- Background on Measuring Cell Phone Only
- The State of Cell Phone Only
- Arbitron's Testing
- How Arbitron Will Measure Cell Phone Only
- What You Can Expect to See
- Your Questions

Plans to Include Cell Phone Only Sampling in Diary Markets

- 151 diary markets scheduled to begin with Spring 2009 survey
- Remainder of markets in the continental US, Alaska and Hawaii are scheduled for Fall 2009
- To see when your market is scheduled to receive Cell Phone Only Sampling go to:
 - www.arbitron.com/home/cell_phone_markets.htm

Background on Cell Phone Only in the Diary

- Federal law: Telephone Consumer Protection Act
 - Cannot use “automatic dialing equipment” to call known cell phone numbers unless we have a business relationship
- In PPM to date, we have dialed all numbers by hand
- This is not practical for the diary service

Background on Cell Phone Only in the Diary (2)

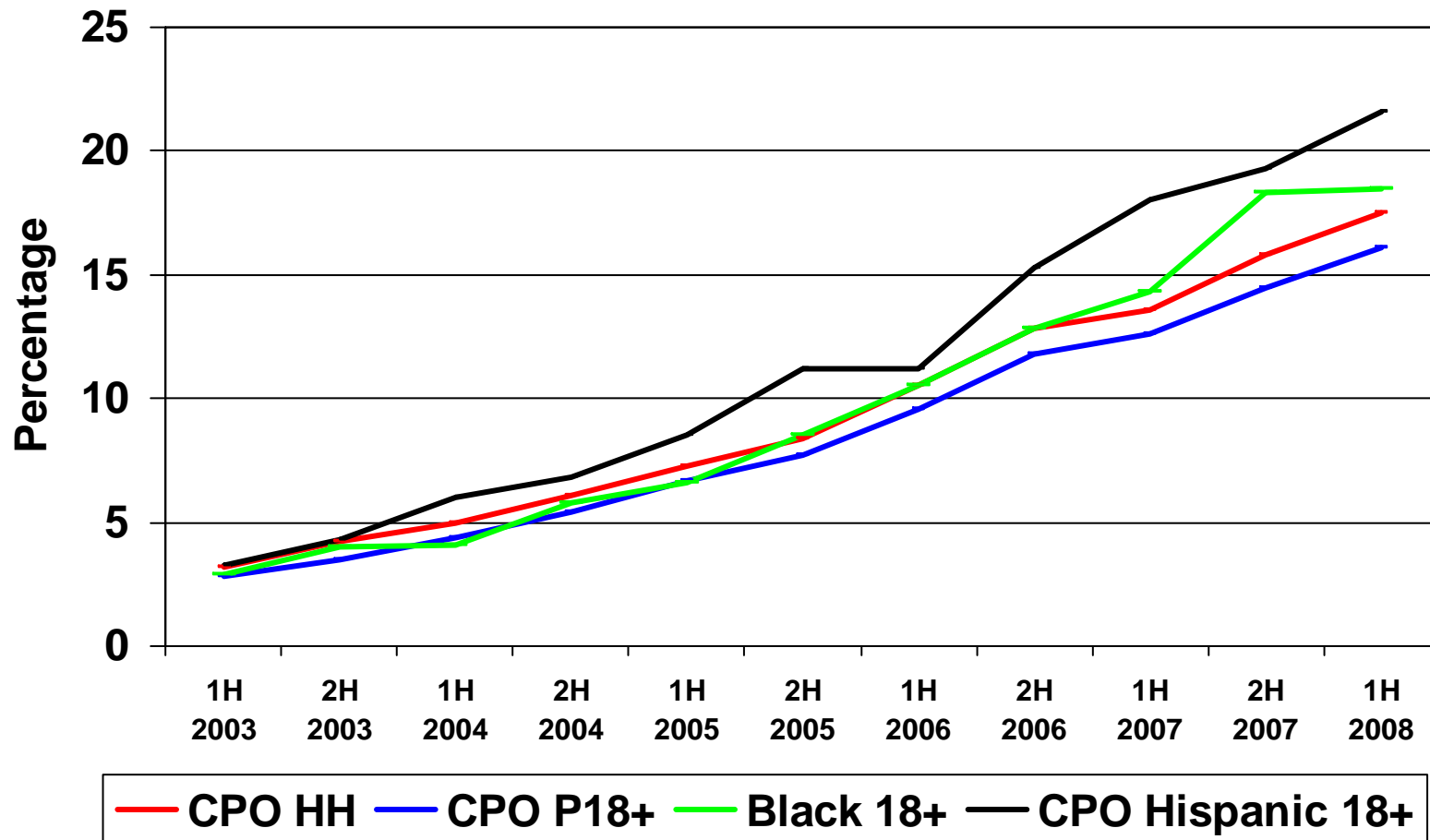
- Cell phone numbers are tough to match to an address
 - Unlike landline numbers
 - Directories do not exist; databases are not as robust
- Cell phone numbers are generally personal
 - Landline numbers generally belong to a household
- Population estimates for individual markets do not exist

The State of CPO

- The National Health Interview Survey estimates 16.1% of persons 18+ are CPO
 - First half of 2008
- The percentages are higher for black and Hispanic persons
- The percentages are much higher for men and women 18-29

Cell Phone Only Trends

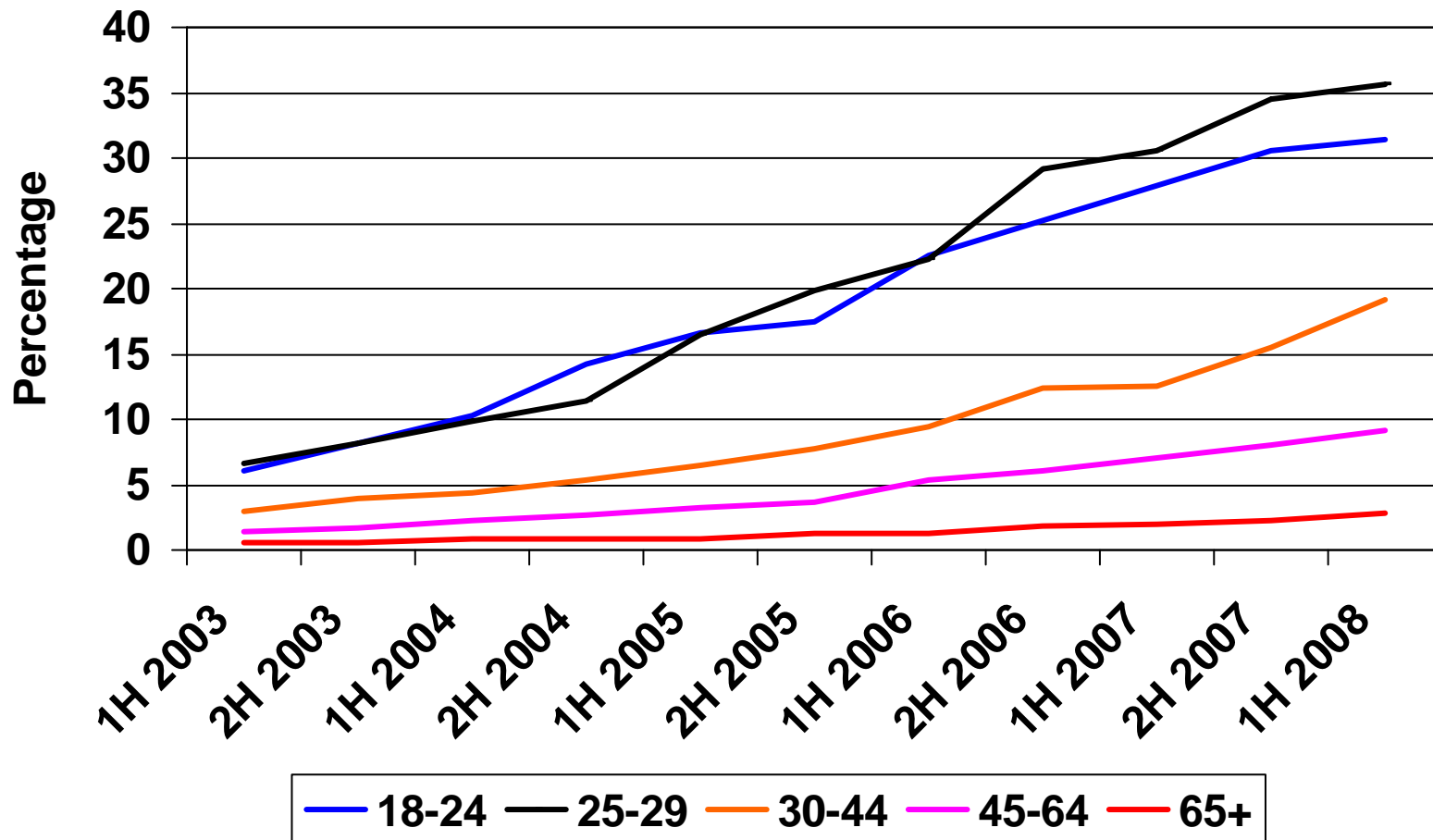
Households, P18+, Black 18+, and Hispanic 18+



Source: National Health Interview Survey from the National Center for Health Statistics

Cell Phone Only Trends

Demographic Age Cell



Source: National Health Interview Survey from the National Center for Health Statistics

Arbitron's Testing

- Arbitron has conducted seven different tests since 2002
- Including the first survey in the US to call cell phones
- Let's cover our most recent testing and the results

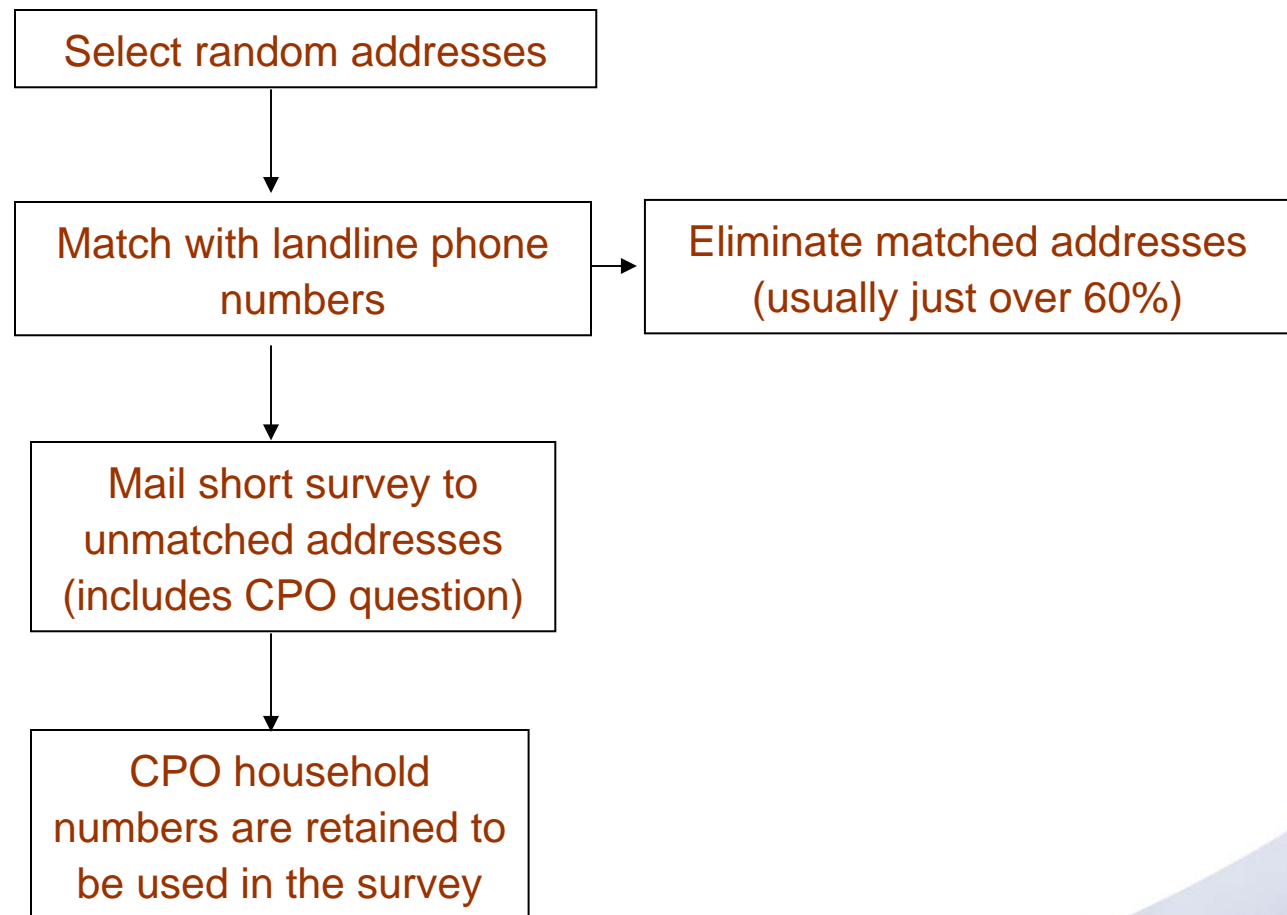
Delivering CPO in Compliance with the TCPA

- The traditional random digit dial (RDD) telephone frame still works fine
 - For landline phone numbers
- New system is needed for cell phone numbers
- The address-based frame
 - Originally designed by Arbitron for PPM in Houston

What is a “Sample Frame?”

- A collection of all the possible points that we can reach persons
 - Telephone numbers
 - Addresses
- Address frames are now viable thanks to new entrants and changes in 911 service

How The Arbitron Address Frame Works

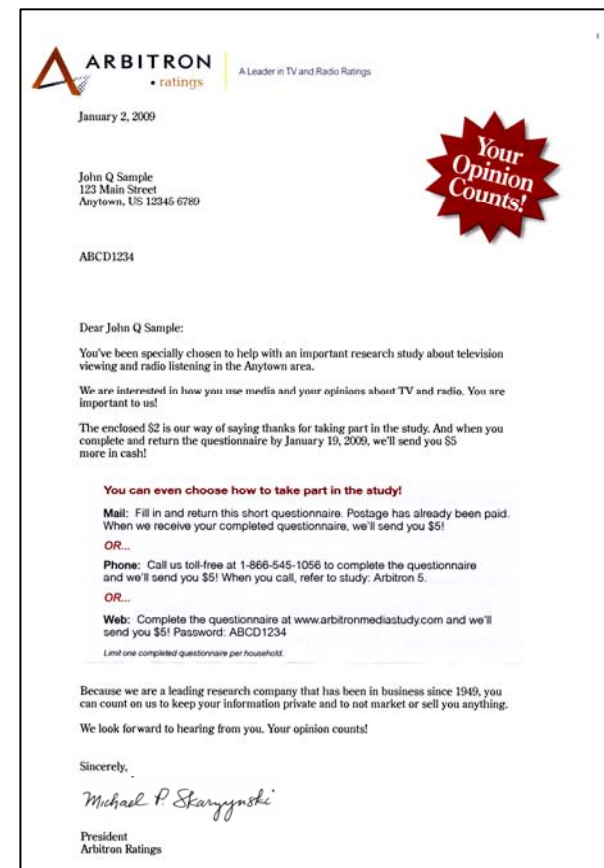


Screening the Addresses

- “Probability of selection”
 - Attempt to keep the number of chances that a household might be selected as close to equal as possible
- Eliminate households that will show up in the RDD frame from the address frame

The Survey Itself

- One page survey
- Short questions about radio and TV
- Household composition, phone status, etc.
- Can be answered by...
 - Mail
 - Phone (IVR)
 - Web
- Includes a premium
- Promised incentive given for responding



Going Forward in CPO Markets

- The “best of both worlds”
- Tried and tested RDD sampling for landline homes
- Address frame to find CPO homes and comply with Federal law

Testing the Address Frame

- Used in Houston PPM for a number of years
- Tested twice in seven diary markets
 - In late '07 and early '08
- Proved to be successful

High Yield of Cell Phone Numbers

- 30% questionnaire return rate
- 47% indicated that they were cell phone only
- Nearly 90% of the CPO persons gave us a phone number

NOTE: This does not mean 47% of households are CPO! It means that 47% of households that we could not match to a landline indicated they were CPO.

Diary Placement Test

- Spring '08-Phase 2-Seven markets
- Diaries placed to CPO households using sample generated from the surveys
- Results were very positive

Results of Spring 2008 Test

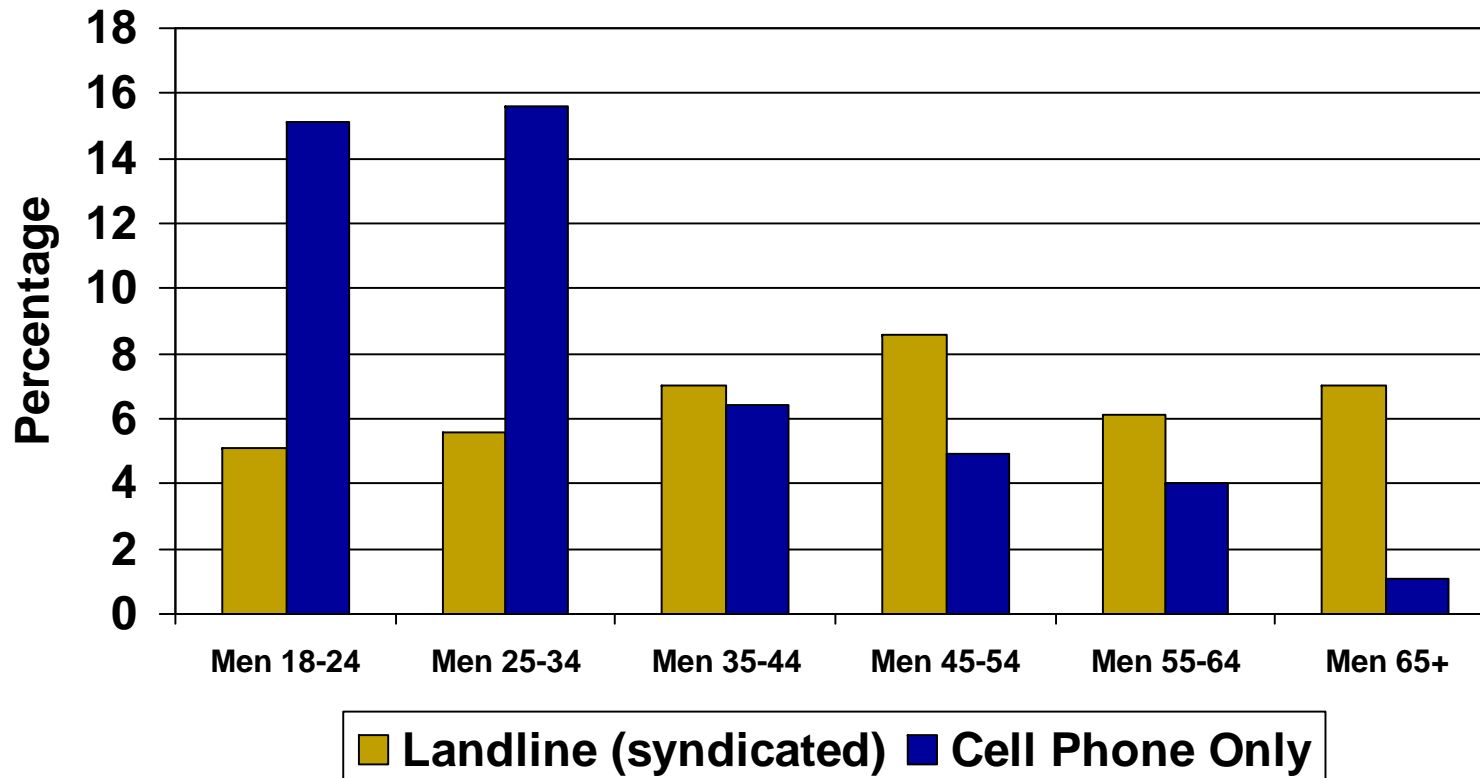
- Excellent cooperation rates
- 70% agreed to participate in diary survey
- 72% returned their diary

Results of Diary Placement Test

- Substantial proportionality gains
- Indexing in CPO sample is very different:
 - Men 18-24: 184
 - Men 25-34: 174
 - Women 18-24: 220
 - Women 25-34: 177

Spring 2008 Test

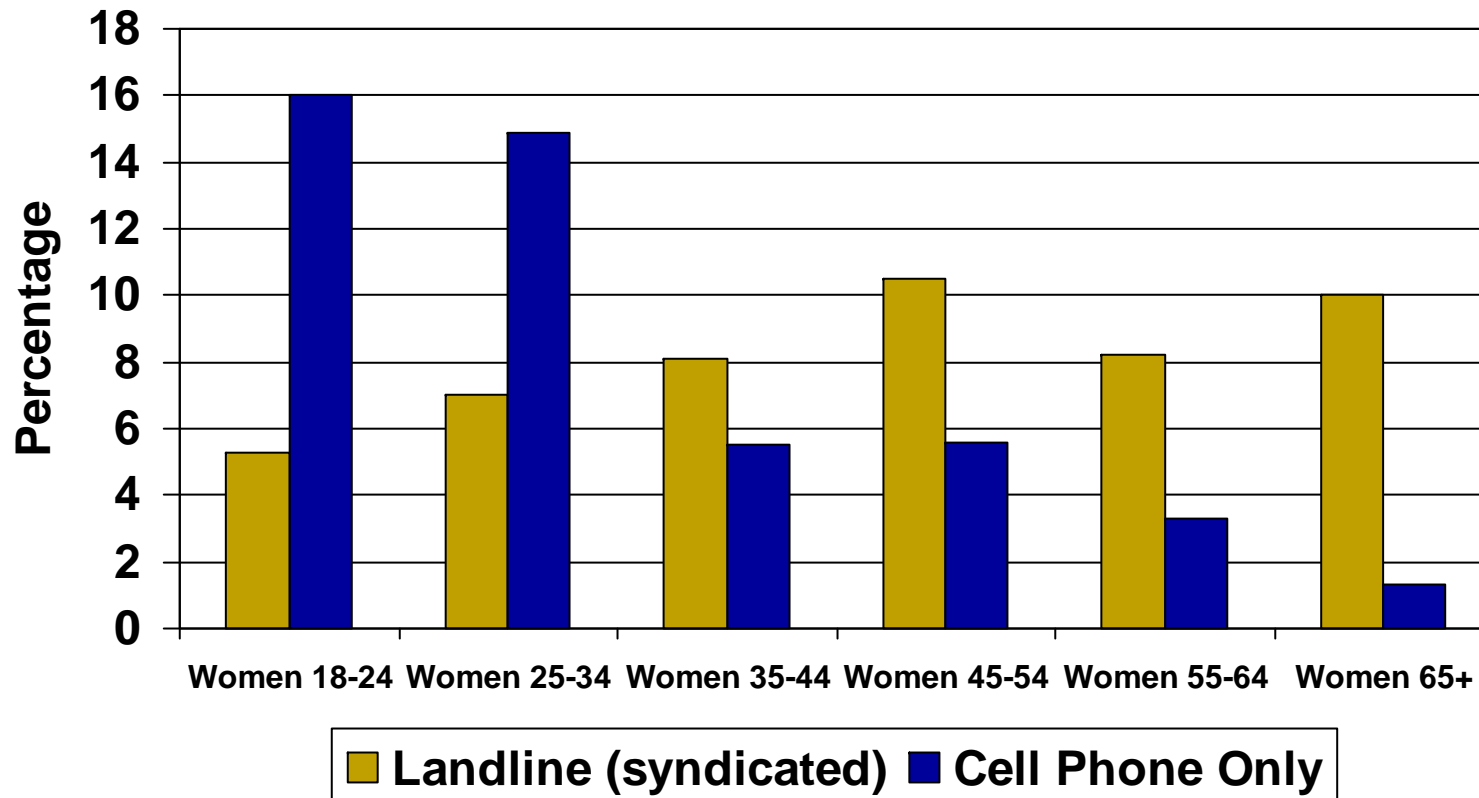
31% of CPO In-tab Was M18-34



Source: Spring 2008 CPO Diary Placement Tests

Spring 2008 Test

31% of CPO In-tab Was W18-34



Source: Spring 2008 CPO Diary Placement Tests

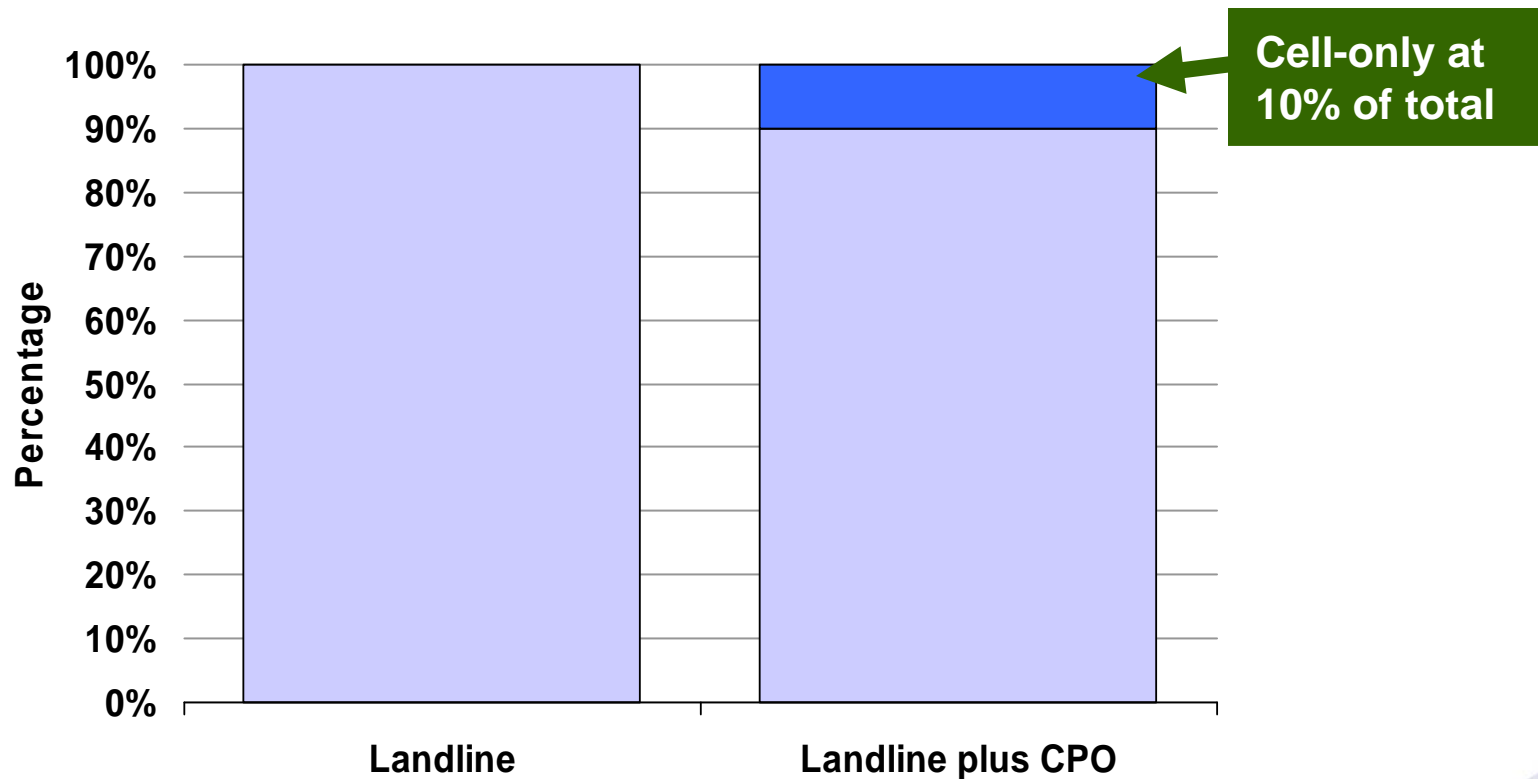
18-34 CPO In-tab Forecast to be 20%+ Based on Spring 2008 Test

	Landline un-weighted in-tab	CPO un-weighted in-tab	CPO in-tab as % of demo in-tab
18-24 yrs old	11%	31%	25%
25-34 yrs old	13%	31%	22%
Everyone else	76%	38%	5%

Results by Format

- The seven test markets were rolled up and a simulation was performed
- The simulation was run because we had many more CPO diaries than would occur in regular production
- CPO diaries were randomly chosen to approximate ten percent of the sample
- If numerous simulations were run, results could differ

The Effect of Cell Phones: Assume 10% Cell-Only Sample



Landline vs. CPO: PUR Rating by Daypart

Persons 12+

Daypart	Landline#	Landline + CPO#	CPO
M-SU 6A-Mid	14.1	14.3	16.0*
M-F 6A-10A	21.6	21.8	22.6
M-F 10A-3P	19.6	20.0	22.7*
M-F 3P-7P	16.2	16.1	17.6*
M-F 7P-Mid	5.9	6.0	7.9*
SA-SU 6A-Mid	10.6	10.9	12.2*

* Unweighted comparison of landline vs. CPO at $p < .05$

Weighted to population estimates

Sample Sizes
 Landline: 2,018
 Landline plus cell- only: 2,246
 Cell-only: 1,937

AQH Rating by Race/Ethnicity

Persons 12+

Daypart	Landline#	Landline + CPO#	CPO
Black	10.2	11.2	15.3*
Hispanic	16.7	16.8	19.3
Other	12.2	12.6	14.5*

* Unweighted comparison of landline vs. CPO at $p < .05$

Weighted to population estimates

Sample Sizes
 Landline: 2,018
 Landline plus cell- only: 2,246
 Cell-only: 1,937

AQH Rating by Format (1)

P12+ Total Week

Format	Landline#	Landline + CPO#	CPO*
AC	1.4	1.5	2.1
Alternative	0.2	0.2	0.6
AOR	1.0	1.0	1.4
CHR	1.4	1.5	1.7
Classical	0.2	0.2	0.1
Country	1.5	1.5	1.9

* Unweighted comparison of landline vs. CPO at $p < .05$

Weighted to population estimates

Sample Sizes
 Landline: 2,018
 Landline plus cell- only: 2,246
 Cell-only: 1,937

Source: Spring 2008 CPO Diary Placement Tests

AQH Rating by Format (2)

P12+ Total Week

Format	Landline	Landline + CPO#	CPO
News/Talk	0.4	0.4	1.2
Oldies	0.6	0.7	1.0
Religious	0.4	0.3	0.4
Spanish	4.1	3.8	3.4
Urban	0.6	0.6	0.9
Other	0.2	0.3	0.5

* Unweighted comparison of landline vs. CPO at $p < .05$

Weighted to population estimates

Sample Sizes
 Landline: 2,018
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Landline vs. CPO: PUR Rating by Daypart

Persons 18-34

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M-SU 6A-Mid	13.5	14.1
M-F 6A-10A	19.8	20.5
M-F 10A-3P	19.2	20.2
M-F 3P-7P	15.4	15.6
M-F 7P-Mid	6.1	6.3
SA-SU 6A-Mid	10.3	10.8

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Weighted to population estimates

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AQH Rating by Race/Ethnicity

Persons 18-34

Daypart	Landline#	Landline + CPO#
Black	7.8	11.3
Hispanic	17.5	17.5
Other	9.3	10.5

* Unweighted comparison of landline vs. CPO at $p < .05$

Weighted to population estimates

Sample Sizes
Landline: 2,018
Landline plus cell- only: 2,246
Cell-only: 1,937

AQH Rating by Format (1)

P18-34 Total Week

Format	Landline#	Landline + CPO#
AC	1.5	1.7
Alternative	0.3	0.4
AOR	1.5	1.6
CHR	2.1	2.3
Classical	0.0	0.0
Country	1.1	1.2

* Unweighted comparison of landline vs. CPO at $p < .05$

Weighted to population estimates

Sample Sizes
 Landline: 2,018
 Landline plus cell- only: 2,246
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AQH Rating by Format (2)

P18-34 Total Week

Format	Landline	Landline + CPO#
News/Talk	0.4	0.4
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Weighted to population estimates

Sample Sizes
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Source: Spring 2008 CPO Diary Placement Tests

Things to Know About CPO (1)

- Target for CPO in the diary markets will be ten percent of the sample objective
 - New government data shows CPO variation by state
 - Variation by market is to be expected
- Example: If your current 12+ diary target is 1,000, Arbitron will aim for 900 diaries from landline households and 100 diaries from CPO households
- As noted before, the CPO sample will very likely be far more than 10% of the 18-34 cells

Things to Know About CPO (2)

- We will not weight the data by cell phone status
 - Population estimates are very limited, at best
- Much of the differences are already covered by other variables
 - Age/gender
 - Race/ethnicity

Things to Know About CPO (3)

- 151 diary markets scheduled to begin with Spring 2009 survey
- Remainder of markets in the continental US, Alaska and Hawaii are scheduled for Fall 2009
- Surveys are in the field now building the sample pool

Things to Know About CPO (4)

- You will know how many CPO diaries were in your market
 - Check the sample distribution pages in E-Book
- CPO diaries will not be available separately
 - Either for viewing at Arbitron in Columbia or as part of Maximi\$er or PDAdvantage

Summary

- A major step forward for the Arbitron diary service
- A significant investment by Arbitron
- 18-34 proportionality should improve
 - Although not a “silver bullet”
- Potential changes in audience estimates
 - Each market will be different, but the information in this presentation is a good guide

Where to Go for Answers...

- About this presentation
 - Ed Cohen – ed.cohen@arbitron.com / 410-312-8592
- Contacts for service/training/questions
 - www.arbitron.com/who2call/map_radio.htm
- About the diary service in general
 - diaryquestions@arbitron.com

Thank You!