

PPM in Phoenix



Welcome to the Phoenix PPM Breakfast

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Radio Station Services

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Phoenix Sample Metrics and Performance

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VP Research Policy and Communication
Arbitron, Inc – Columbia, MD



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Findings

The Phoenix sample for April is representative of all demos, ethnicities and language preferences.

For the first time, Cell Phone Only Households will be in the panel

Compliance is similar to all other PPM markets.

§ More than 75% of panelists are carrying their meters for roughly 15 hours per day.

Cume audiences on the weekly and daily levels are higher than what has been seen in the diary.

Radio's qualitative audience has changed.

§ Income is no longer a major factor in listening levels

§ Employment and out-of-home listening continues to drive ratings

PPM listening levels compared to diary are similar to 15 other PPM commercialized markets.

§ Some dayparts and demos will see higher ratings in PPM than in Diary

Ratings are more compressed among the top stations than in the diary service.

Online streaming will be reported in the data (0.495 Cume Rating or higher)

PPM ratings are based on audience estimates and are the opinion of Arbitron and should not be relied on for precise accuracy or precise representativeness of a demographic or radio market.



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Phoenix PPM Scheduled Commercialization Plan

April 09	Winter 2009 Diary Book Releases
	4/2: April PPM Pre-Currency Survey Begins
May 09	Winter 2009 Diary Book Still Currency
	5/21: April PPM Pre-Currency Data Release
	5/27: First Release of PPM Weekly Data
June 09	Winter 2009 Diary Book Still Currency
	6/18 : May PPM Pre-Currency Data Release
July 09	Winter 2009 Diary Book <i>NO</i> Longer Currency
	7/16: June PPM Currency Release

- Only one currency in use at a time
- Full three month value of Winter 09 Diary book
- Two months of PPM demonstration data prior to Currency



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Phoenix Converts to Currency



PPM Data Are Scheduled to Become Currency in Phoenix on July 16, 2009

Arbitron PPM™ data will not be the official ratings currency in Phoenix before July 16, 2009. All Arbitron clients who conduct business in Phoenix are contractually required to use Diary data for their transactions until the PPM data are commercialized. Arbitron clients may not use PPM data for transactional business until that date.

Phoenix PPM Pre-Currency Data

The Phoenix radio Metro is currently being measured with the Arbitron Portable People Meter™; this measurement period is called "Pre-Currency." The June 2009 survey represents the official release of PPM "Currency" data.

PPM "Pre-Currency" data may not be used for media planning, buying and/or selling purposes until PPM results become the official currency, which is scheduled to occur on July 16, 2009.

Arbitron clients are not permitted to create multimonth averages by mixing Diary and PPM data. However, they are welcome to create multimonth averages using April and May 2009 PPM data, after the PPM data are commercialized.

For more details about the Phoenix PPM launch, go to www.arbitron.com/ppm or contact your Arbitron account manager.

PPM ratings are based on audience estimates and are the opinion of Arbitron and should not be relied on for precise accuracy or precise representativeness of a demographic or radio market.

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www.arbitron.com/ppm • www.ArbitronMarketing.com • 24/7 PPM Support (866) 776-8300

PPM data will be the **ONLY** form of currency scheduled to begin July 16th

Arbitron's license agreements prohibit the use of DIARY data for any transactional purpose after a market's official conversion to PPM currency



PPM in Phoenix



Sample

Phoenix PPM April 2009



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Phoenix Metro Sample

April 2009

Total Persons in Monthly Sample

Monthly Installed Persons	1,511
Monthly In-tab Persons	1,471
Monthly In-tab Rate	97.4%

Total Persons in Daily Sample

Panel Target Size	1,001
Avg Daily In-tab Persons	1,139
Avg Daily In-tab Rate	77.4%
Compliance-Capable*	1,370
Compliance Rate**	83.1%
Installed Cell-Phone-Only Persons	123
Avg. Daily Cell-Phone-Only In-Tab Persons	97

*Compliance-Capable Persons excludes panelists who are known to be away from home and panelists who experienced technical issues that prevented them from achieving in-tab.

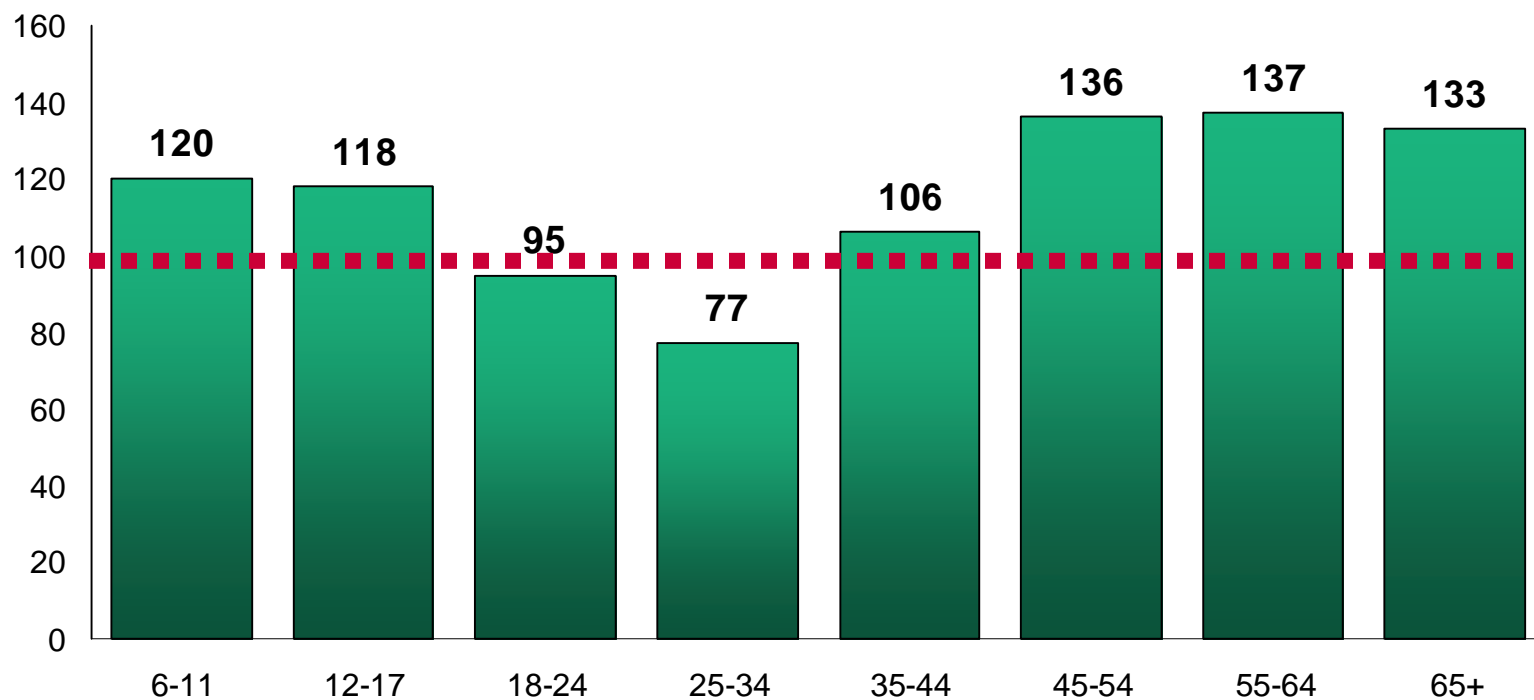
**Compliance rate is calculated as follows: Daily In-Tab Persons/Compliance-Capable Persons



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Sample Performance by Age Cell

April 2009



*Designated Delivery Index: $DDI = (\text{actual}/\text{target}) * 100$



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In-Tab Size Demo and Race/Ethnicity

	Phoenix			
April 2009	Avg. Daily In-tab Target	Avg. Daily In-tab Actual	DDI*	Unique Monthly In-Tab
P6+	1001	1,139	114	1471
P18+	807	908	112	1143
P18-54	571	589	103	769
P25-54	479	493	105	629
Hispanic 6+	297	354	119	454
Other 6+	704	785	112	1017

*Designated Delivery Index: $DDI = (\text{actual}/\text{target}) * 100$



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In-Tab Size 18-34 DDI Performance

	Phoenix			
April 2009	Avg. Daily In-tab Target	Avg. Daily In-tab Actual	DDI*	Unique Monthly In-Tab
Persons 18-34	266	223	84	320
Men 18-34	140	116	83	162
Women 18-34	126	107	85	158
Hispanic 18-34	110	89	84	126
Other 18-34	156	134	86	194

*Designated Delivery Index: $DDI = (\text{actual}/\text{target}) * 100$



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In-Tab Size 25-54 Race/Ethnicity

	Phoenix			
April 2009	Avg. Daily In-tab Target	Avg. Daily In-tab Actual	DDI*	Unique Monthly In-Tab
Persons 25-54	469	493	105	629
Men 25-54	242	226	93	287
Women 25-54	227	267	117	342
Hispanic 25-54	139	161	116	203
Other 25-54	330	332	101	426

*Designated Delivery Index: $DDI = (actual/target)*100$



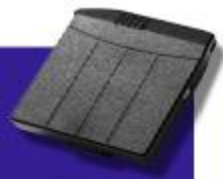


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Phoenix In-Tab Rates

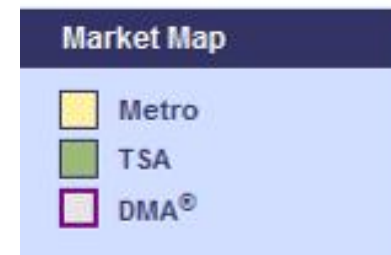
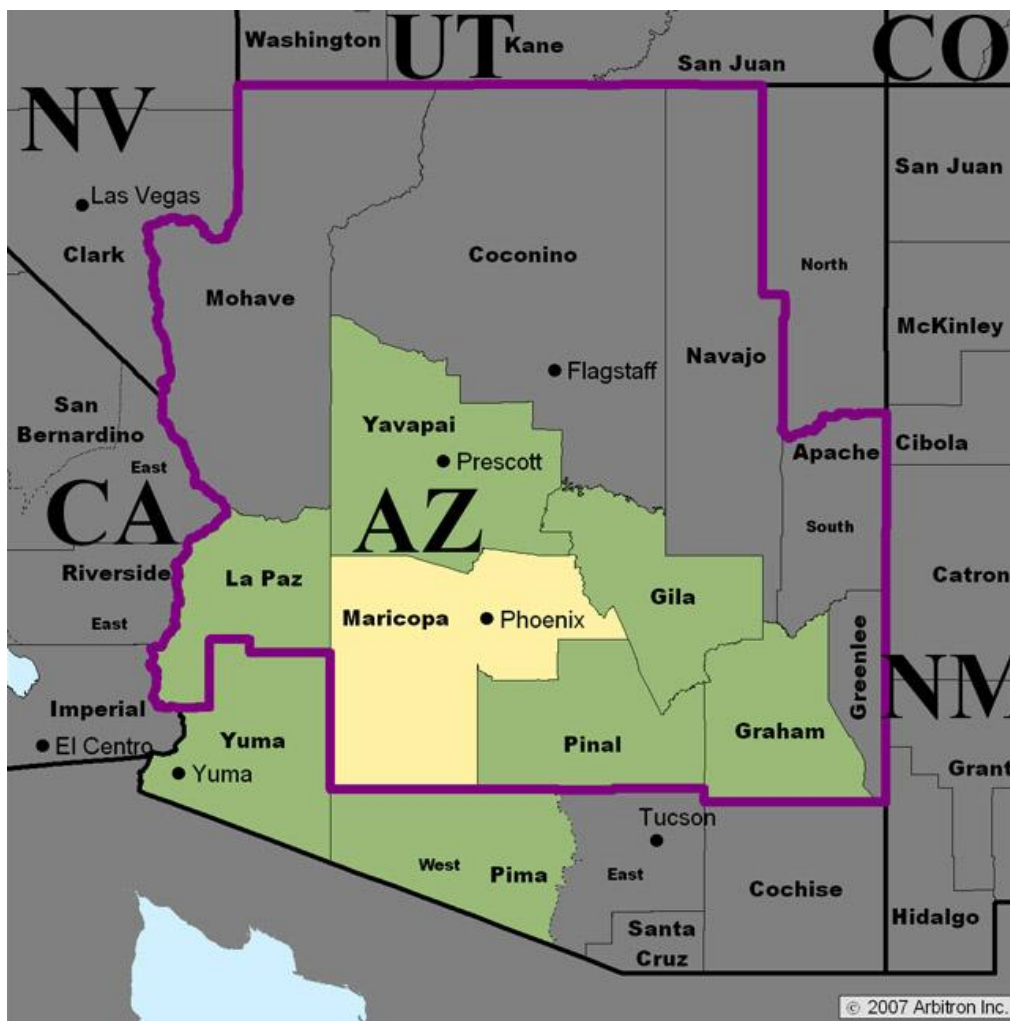
April 2009

	Persons 6+	Persons 18-34	Men 18-34	Women 18-34	Hispanic 18-34	Other 18-34
BENCHMARK	75%	70%	60%	60%	60%	60%
Phoenix April 2009	77.4%	68.7%	70.6%	66.8%	70.6%	67.6%



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Phoenix DMA: Which counties are PPM and which are not?





Compliance and Carry Times

Phoenix PPM April 2009



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Median Undock/Dock Times

April 2009 Weekdays



Female 6+

Male 6+

7:09 AM

7:05 AM

10:29 PM

10:33 PM



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Median Undock/Dock Times

April 2009 Weekdays

Hispanic 6+

Other 6+

Undock Time



7:11 AM

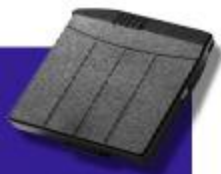
7:04 AM

11:09 PM

10:30 PM



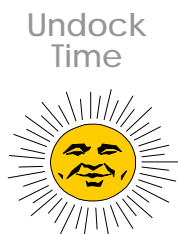
Dock Time



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Median Undock/Dock Times

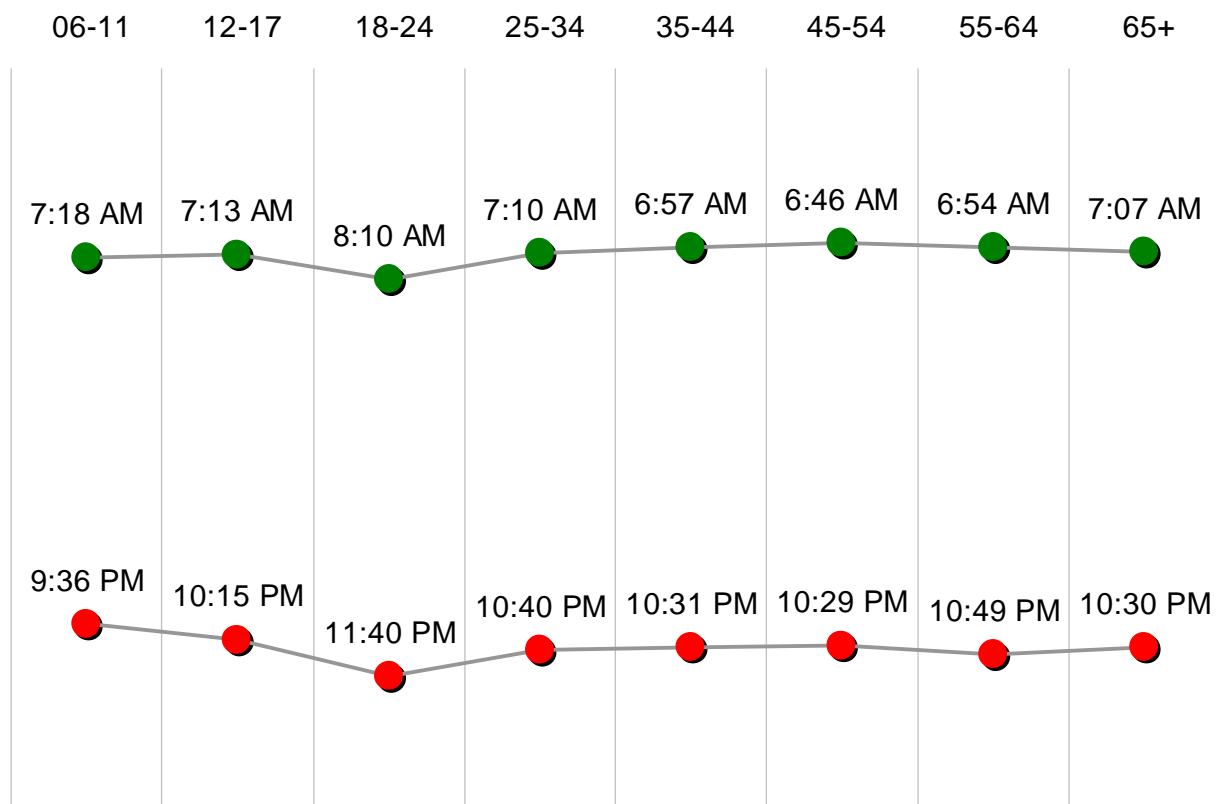
April 2009 Weekdays



Undock Time



Dock Time

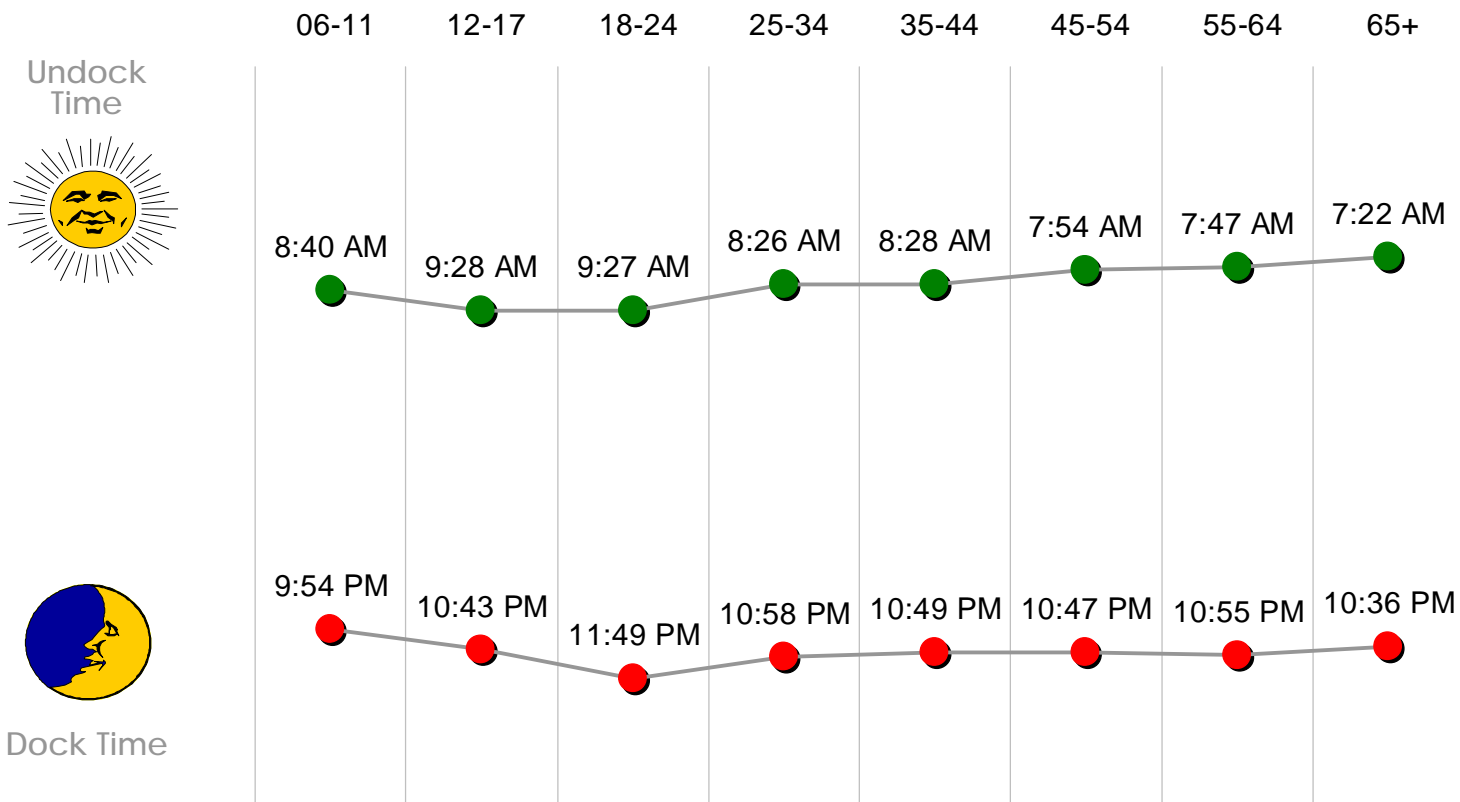




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Median Undock/Dock Times

April 2009 Weekends

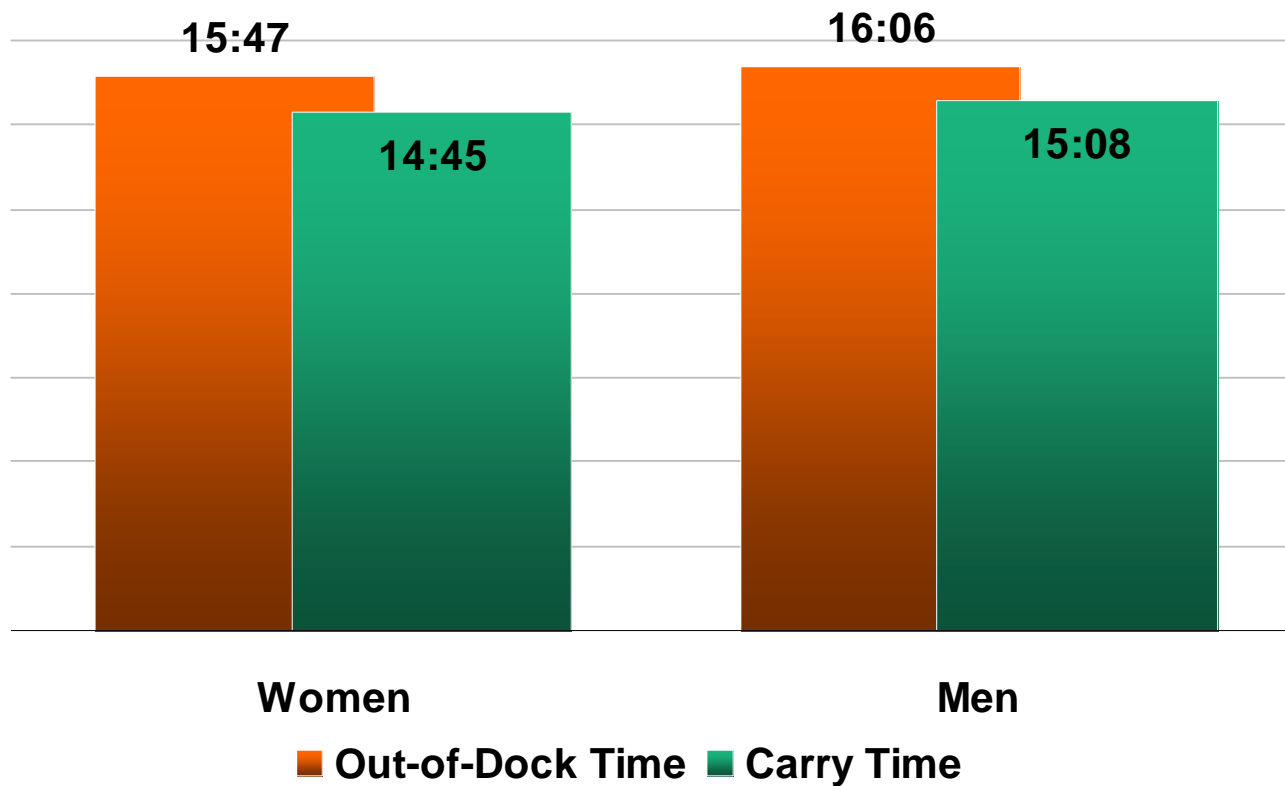




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Median Times by Gender

Out-of-Dock and Carry Times

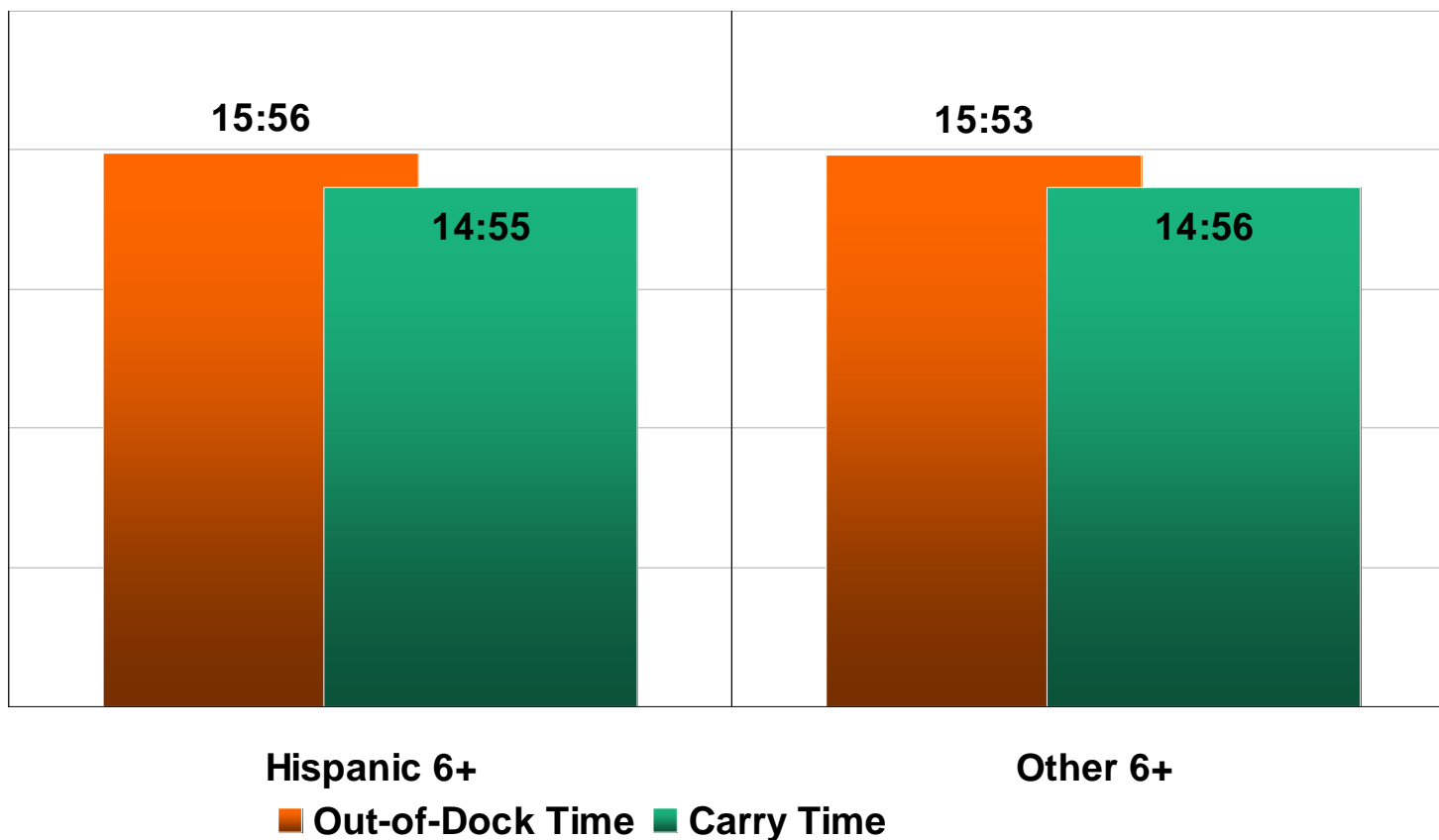




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Median Times by Race/Ethnicity

Out-of-Dock and Carry Times

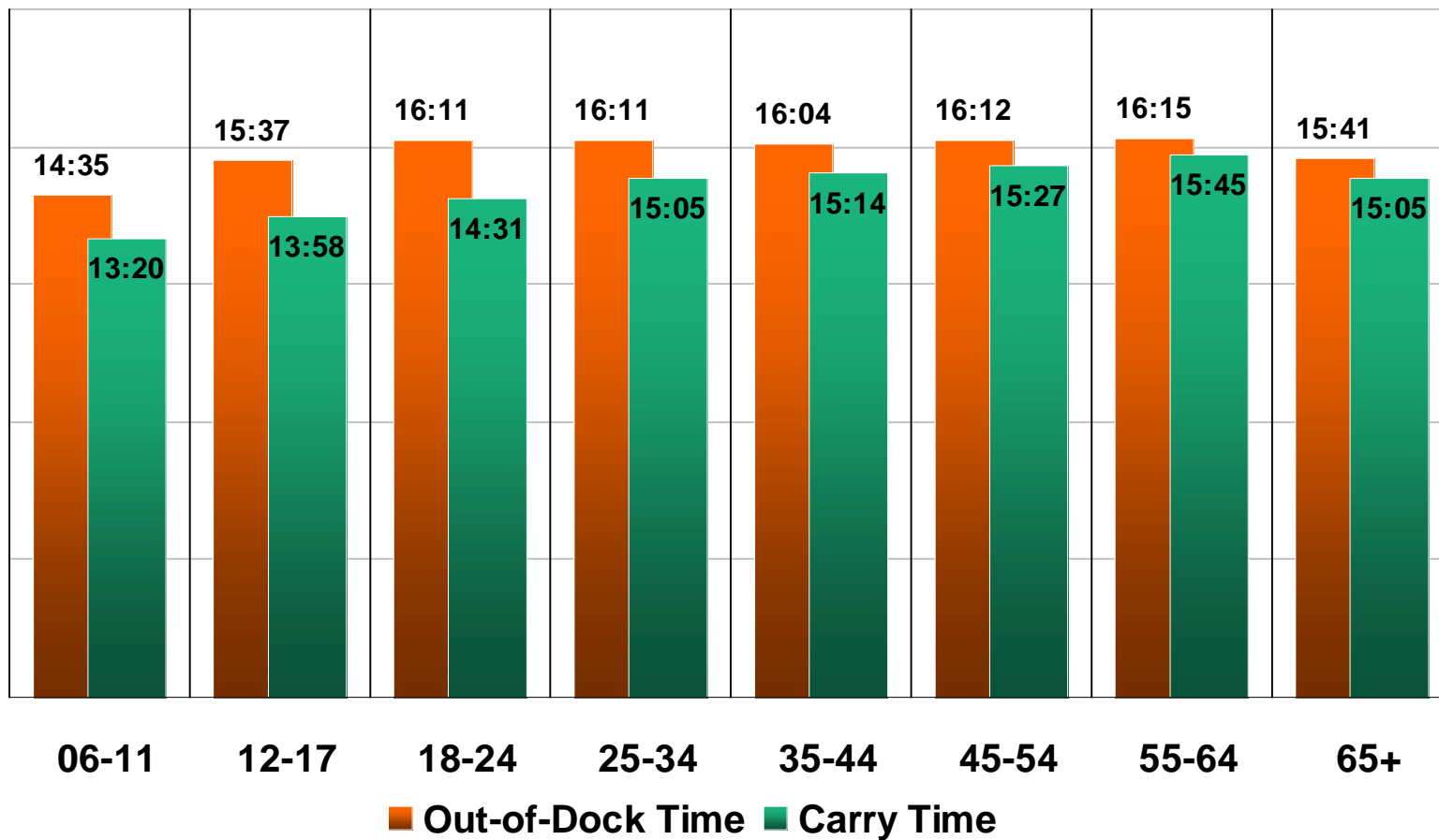




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Median Times by Age

Out-of-Dock and Carry Times





Phoenix Sample Metrics and Performance

Dr. Ed Cohen
VP Research Policy and Communication
Arbitron, Inc – Columbia, MD

PPM in Phoenix



Station Encoding

Phoenix PPM April 2009



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Who's Encoding* for PPM?

Bonneville International Corp

Cameron Broadcasting Inc

CBS Radio

Circle S Broadcasting Co

Clear Channel

Continental Broadcasting

Country Mtn Airwaves

Educational Media Foundation

Entravision

Family Life Communications

Fiesta Radio

Grand Canyon Broadcasters

Guyann Corporation

Maricopa Community College

National Farm Workers Service Ctr

Premier Radio Stations

Prescott Valley Broadcasters

Riviera Broadcast Group

Route 66 Broadcasting

Salem Communications

Sandusky Radio

Sierra H. Broadcasting

Southwest Broadcasting

Sun City Communications

Sunburst Media Inc

Taylor, William

Trumper Communications

Yavapai Broadcasting

GREEN = PPM Subscriber



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How will stations that don't encode impact the PPM data?

- § Station AQH Persons/Ratings (%) will not change
- § AQH share (%) will be impacted
- § Market listening levels will adjust when stations encode
- § Rank position reflects encoded stations only
- § Note: Stations that do not encode will not appear in the data



Cume Estimates

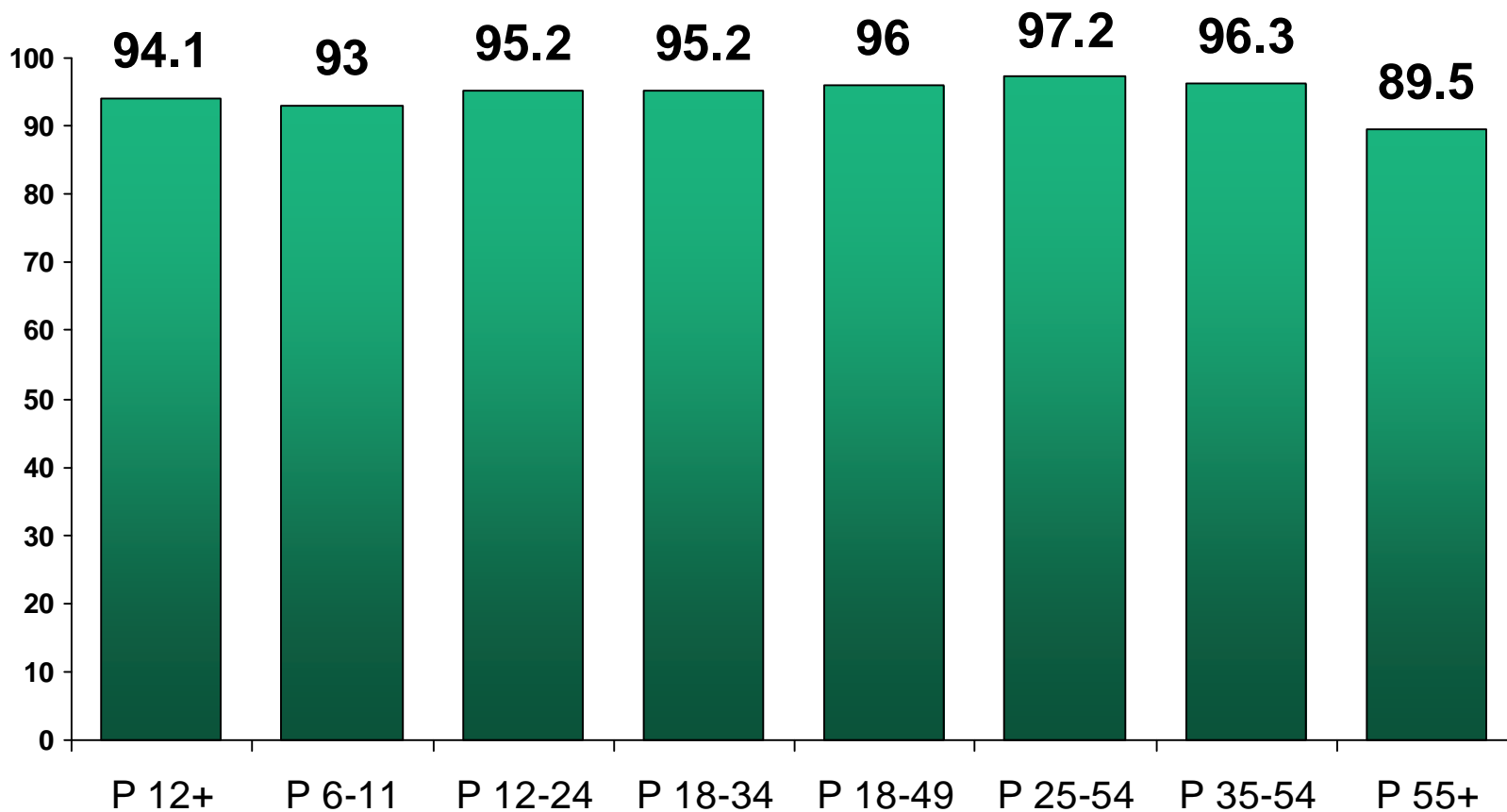
Phoenix PPM April 2009



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PPM Weekly Cume Rating

Mon-Fri 6a-12m

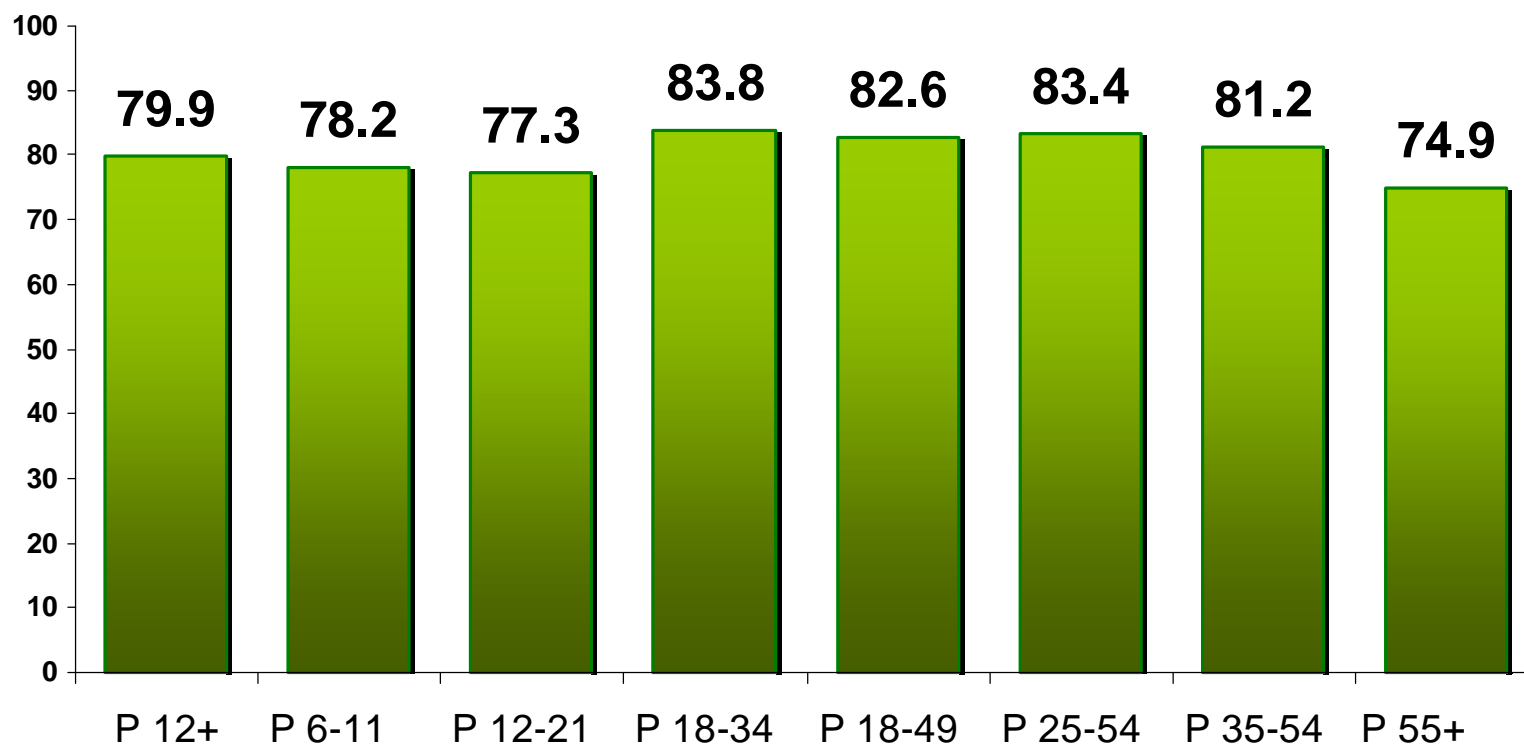




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PPM Weekend Cume Rating

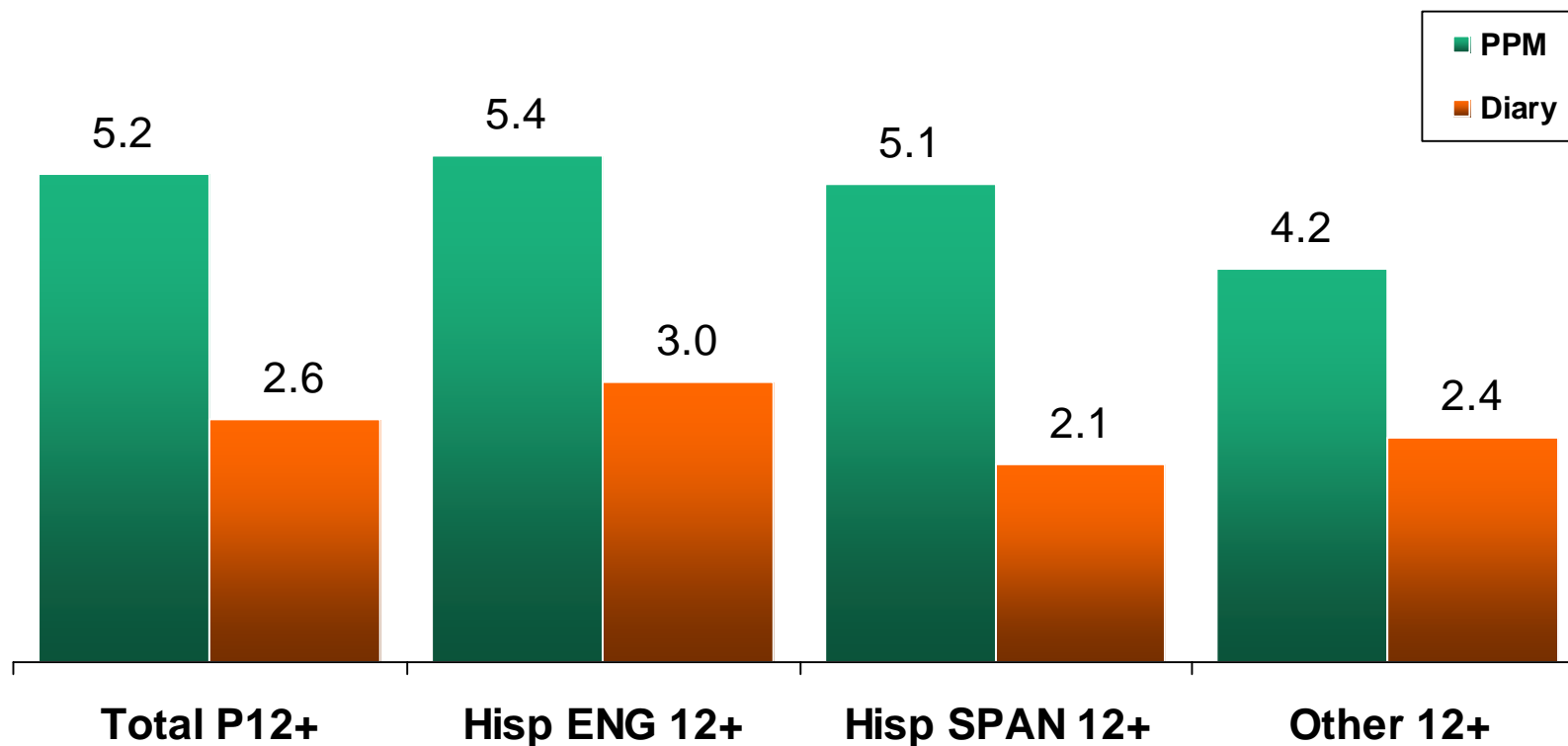
Sat-Sun 6a-12m





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Average Number Of Stations

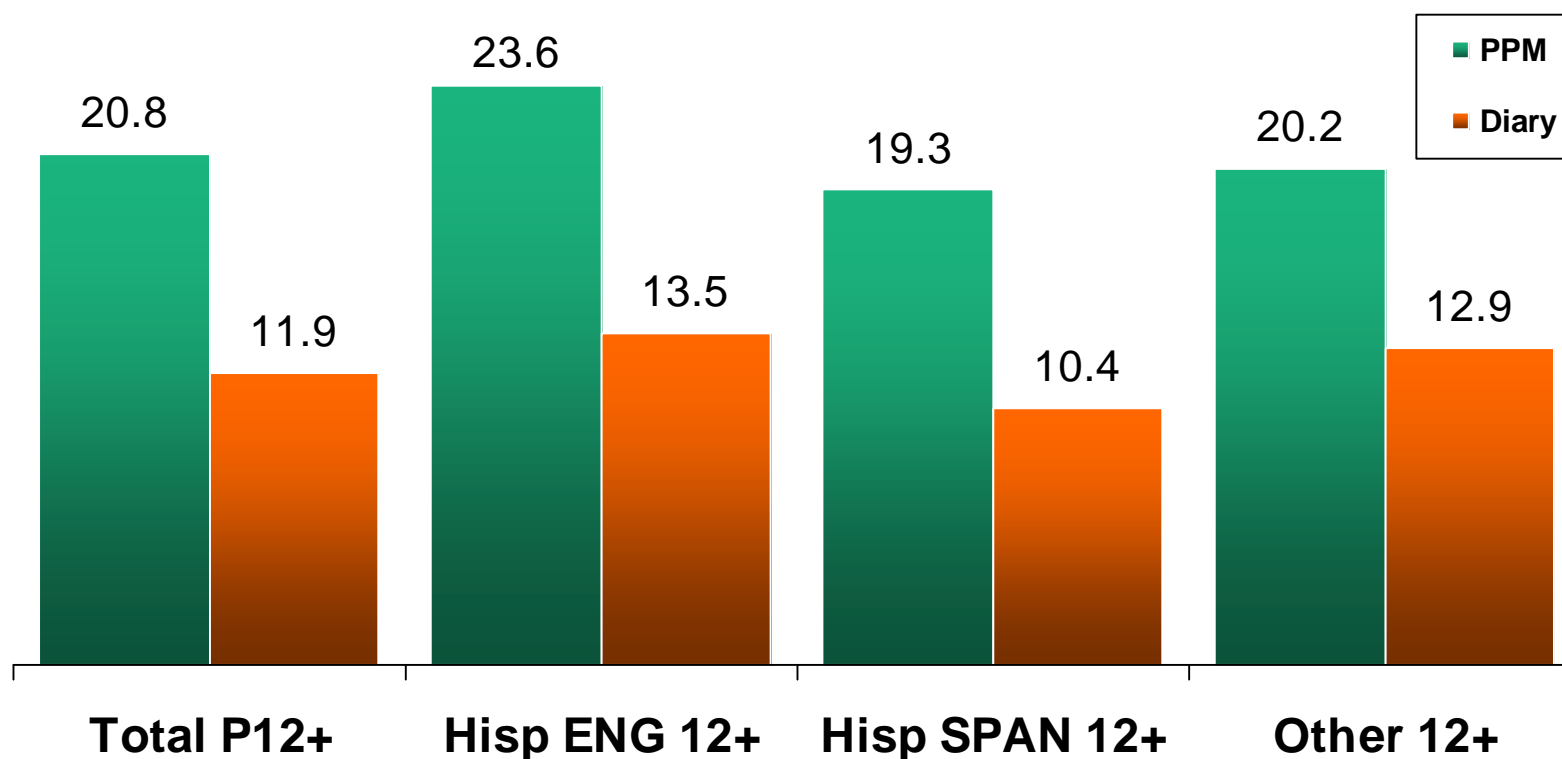


PPM, Phoenix Metro, April 2009, Mon-Sun 6AM-MID, Persons 12+ vs. Diary, Phoenix Metro, Winter 2009, Mon-Sun 6AM-MID, Persons 12+



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Number Of Listening Occasions

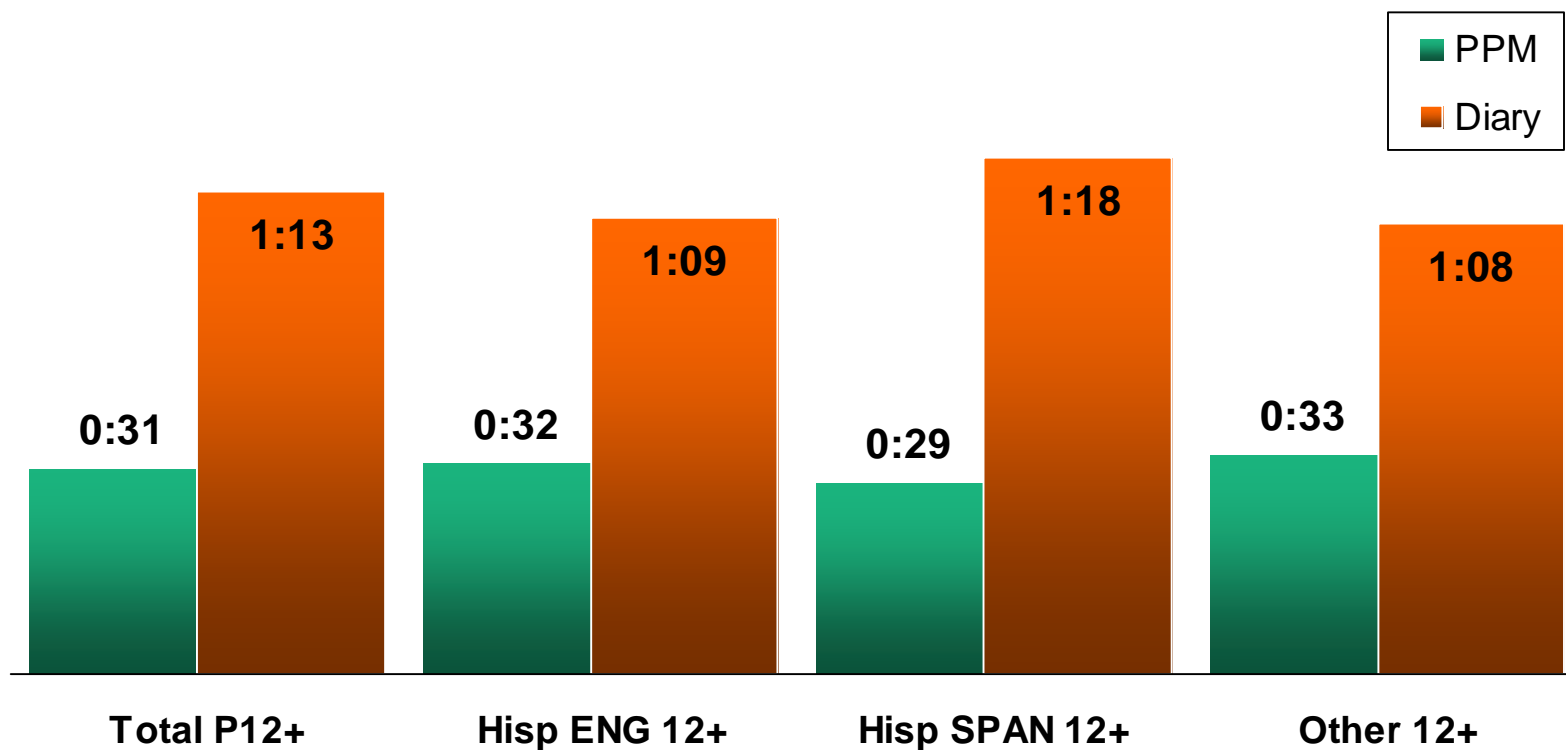


PPM, Phoenix Metro, April 2009, Mon-Sun 6AM-MID, Persons 12+ vs. Diary, Phoenix Metro, Winter 2009, Mon-Sun 6AM-MID, Persons 12+



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Average Time Spent Per Tune-in



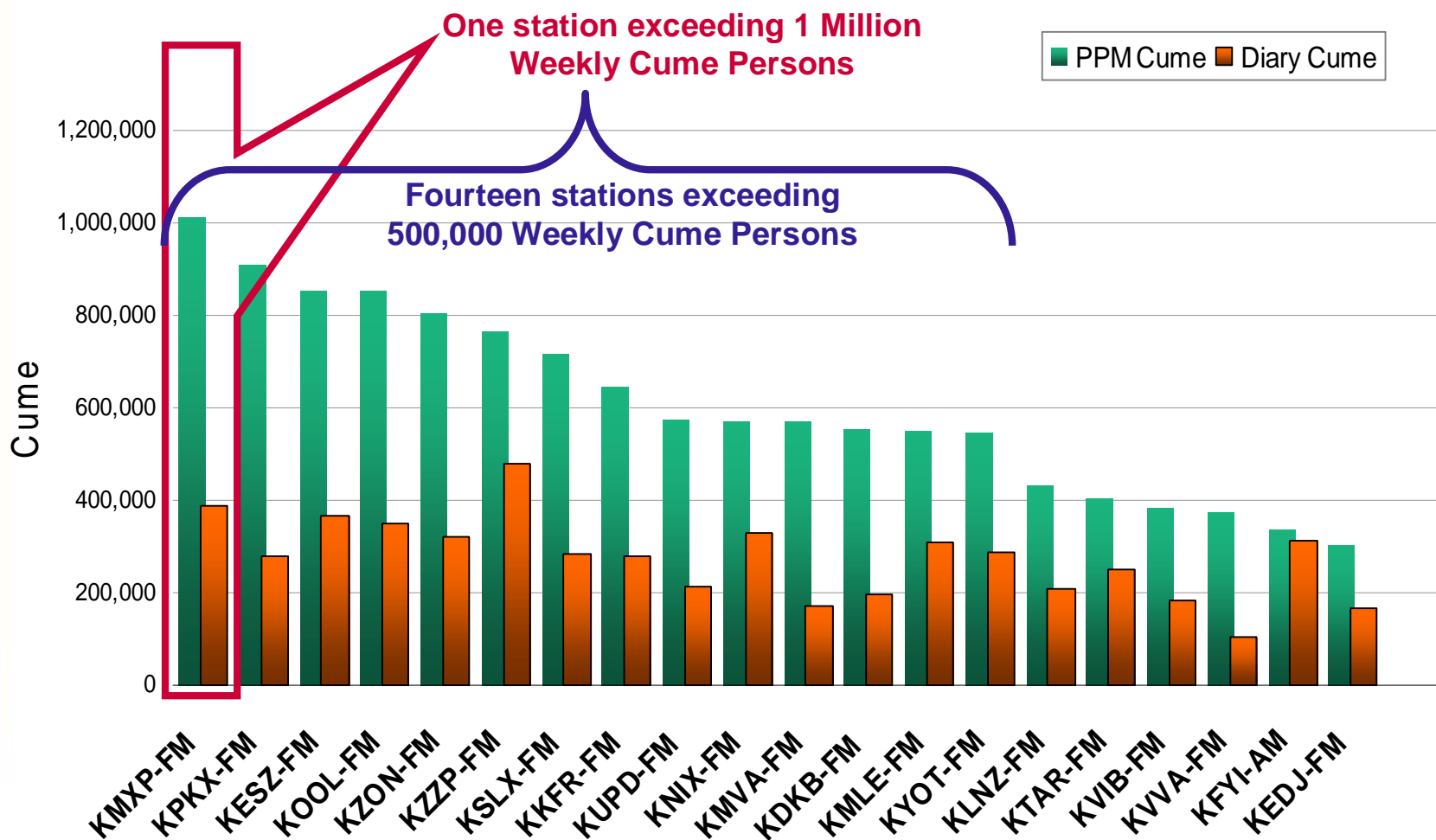
PPM, Phoenix Metro, April 2009, Mon-Sun 6AM-MID, Persons 12+ vs. Diary, Phoenix Metro, Winter 2009, Mon-Sun 6AM-MID, Persons 12+



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Avg Weekly Cume Comparison

Phoenix April 2009 PPM



PPM, Phoenix PPM, April 2009, Mon-Sun 6AM-MID, Persons 12+ vs.
 Diary, Phoenix Metro, Winter 2009, Mon-Sun 6AM-MID, Persons 12+
 Note: Same stations are being used for comparison from Diary to PPM

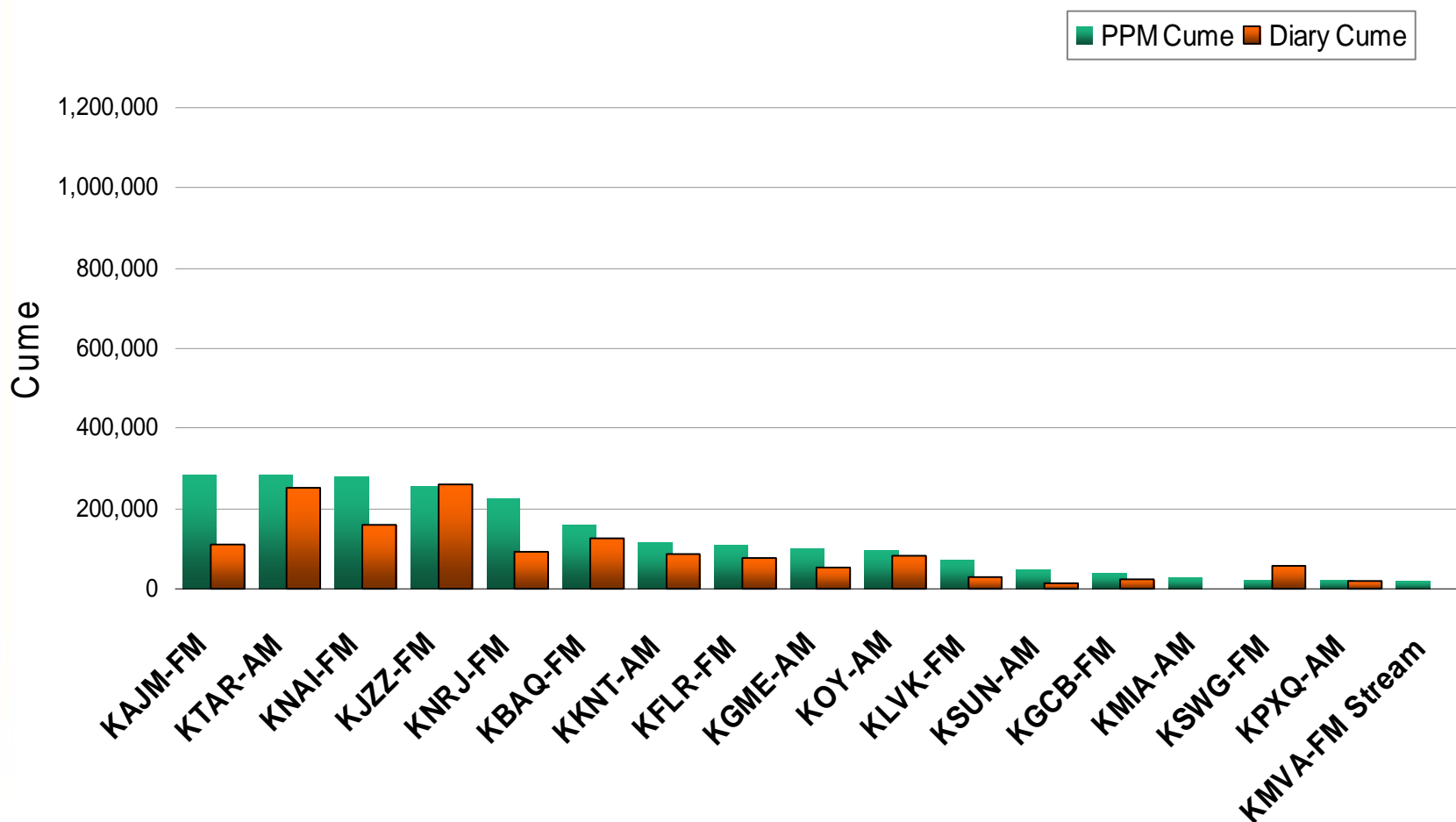




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Avg Weekly Cume Comparison

Phoenix April 2009 PPM



PPM, Phoenix PPM, April 2009, Mon-Sun 6AM-MID, Persons 12+ vs.
 Diary, Phoenix Metro, Winter 2009, Mon-Sun 6AM-MID, Persons 12+
 Note: Same stations are being used for comparison from Diary to PPM

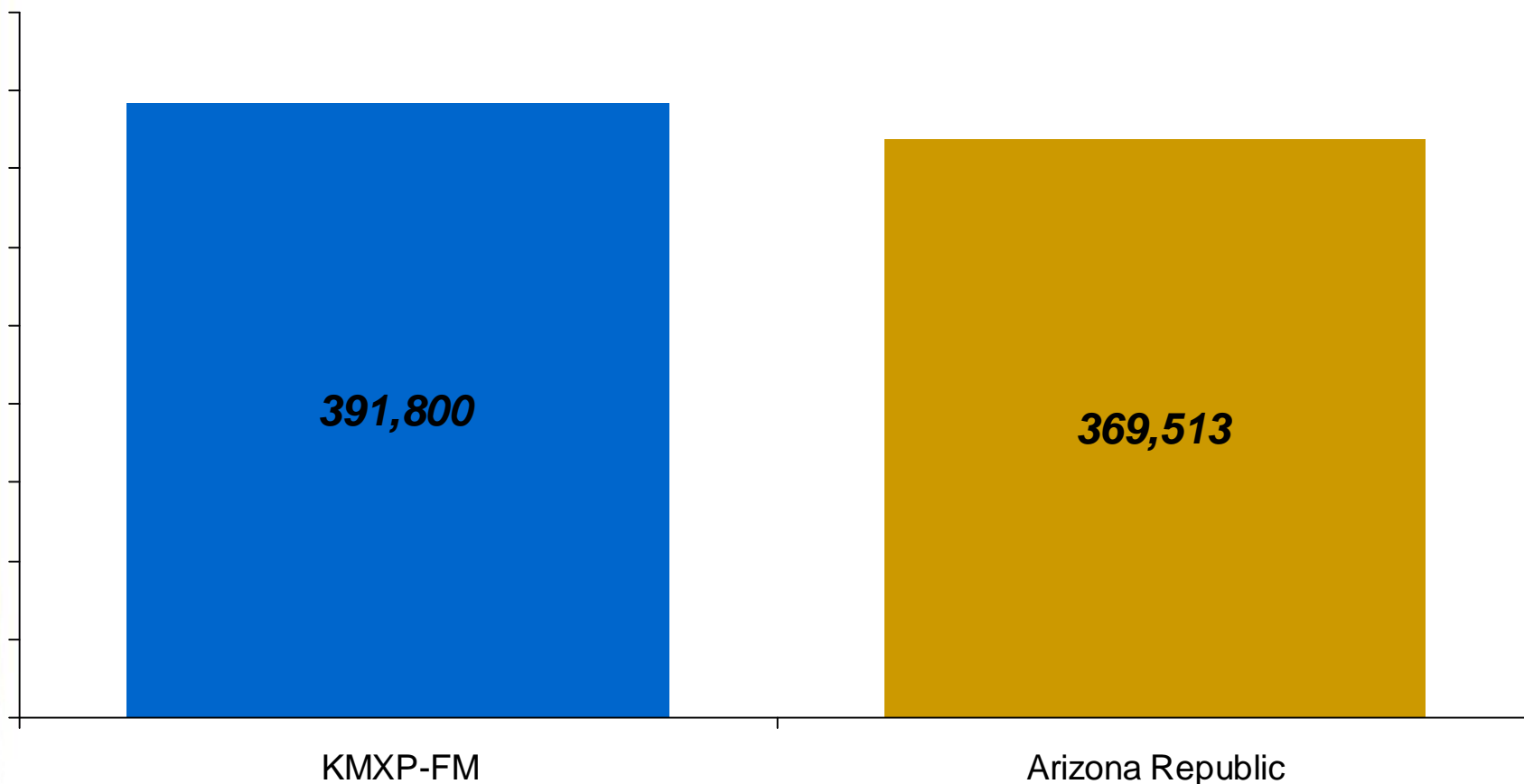




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How Big Are These Cumes?

Daily Cume Vs. Circulation in Phoenix



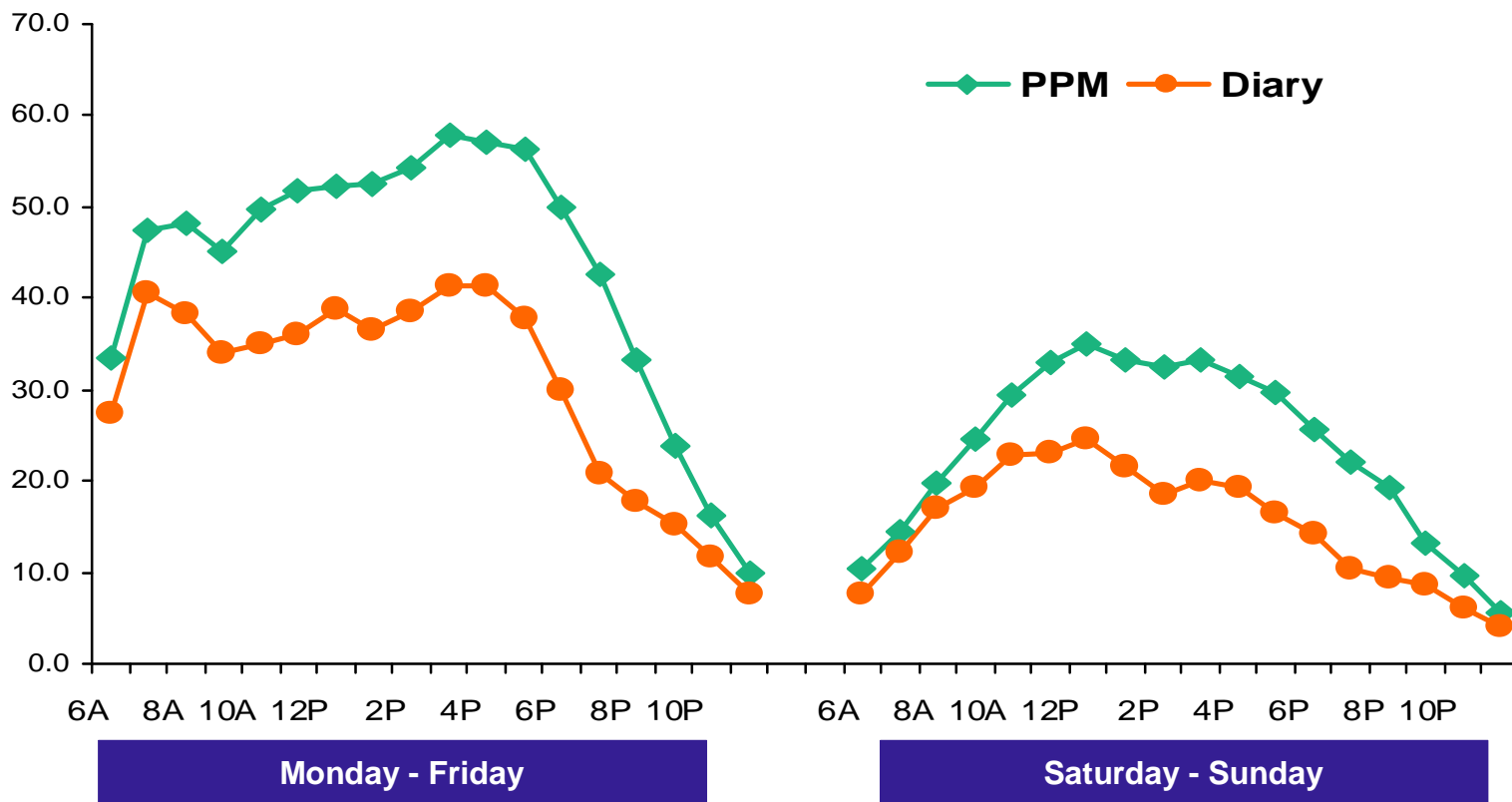
*PPM, Phoenix Metro Daily Cume April 2009 Pre Currency Data, Mon-Fri 6AM-12Mid, P6+
Daily Newspaper Circulation from ABC*





PPM Vs. Diary Hour-by-Hour Cume Rating Comparison

April 2009



PPM, Phoenix PPM, April 2009, Mon-Sun 6AM-MID, Persons 12+ vs. Diary, Phoenix Metro, Winter 2009, Mon-Sun 6AM-MID, Persons 12+
Note: Same stations are being used for comparison from Diary to PPM

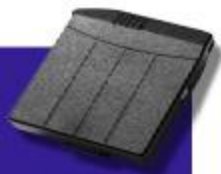
35 © 2009 Arbitron Inc.





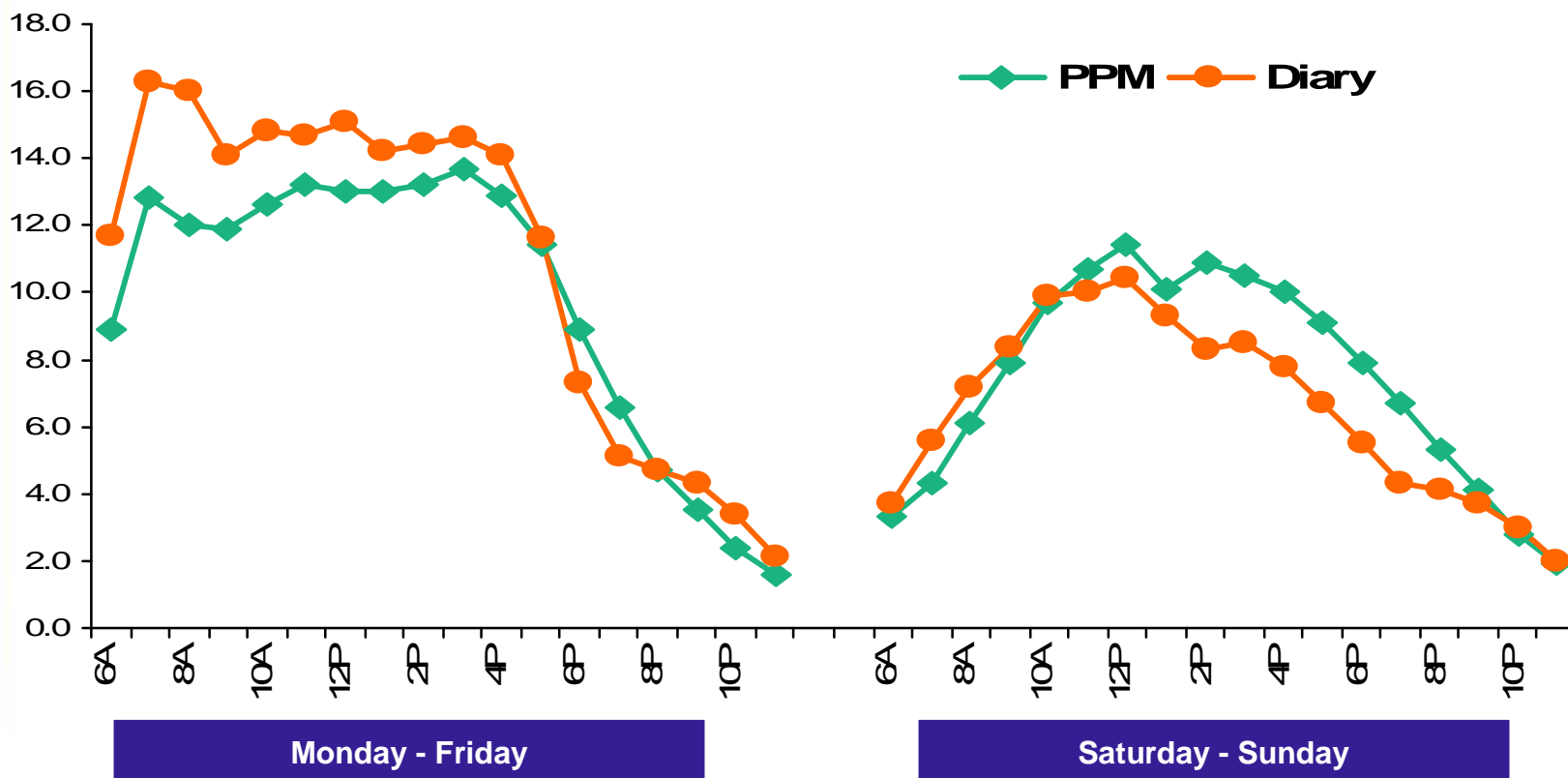
Rating Comparisons

Phoenix PPM April 2009



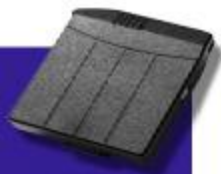
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PPM Vs. Diary Hour-by-Hour Persons 12+ AQH Rating Comparison



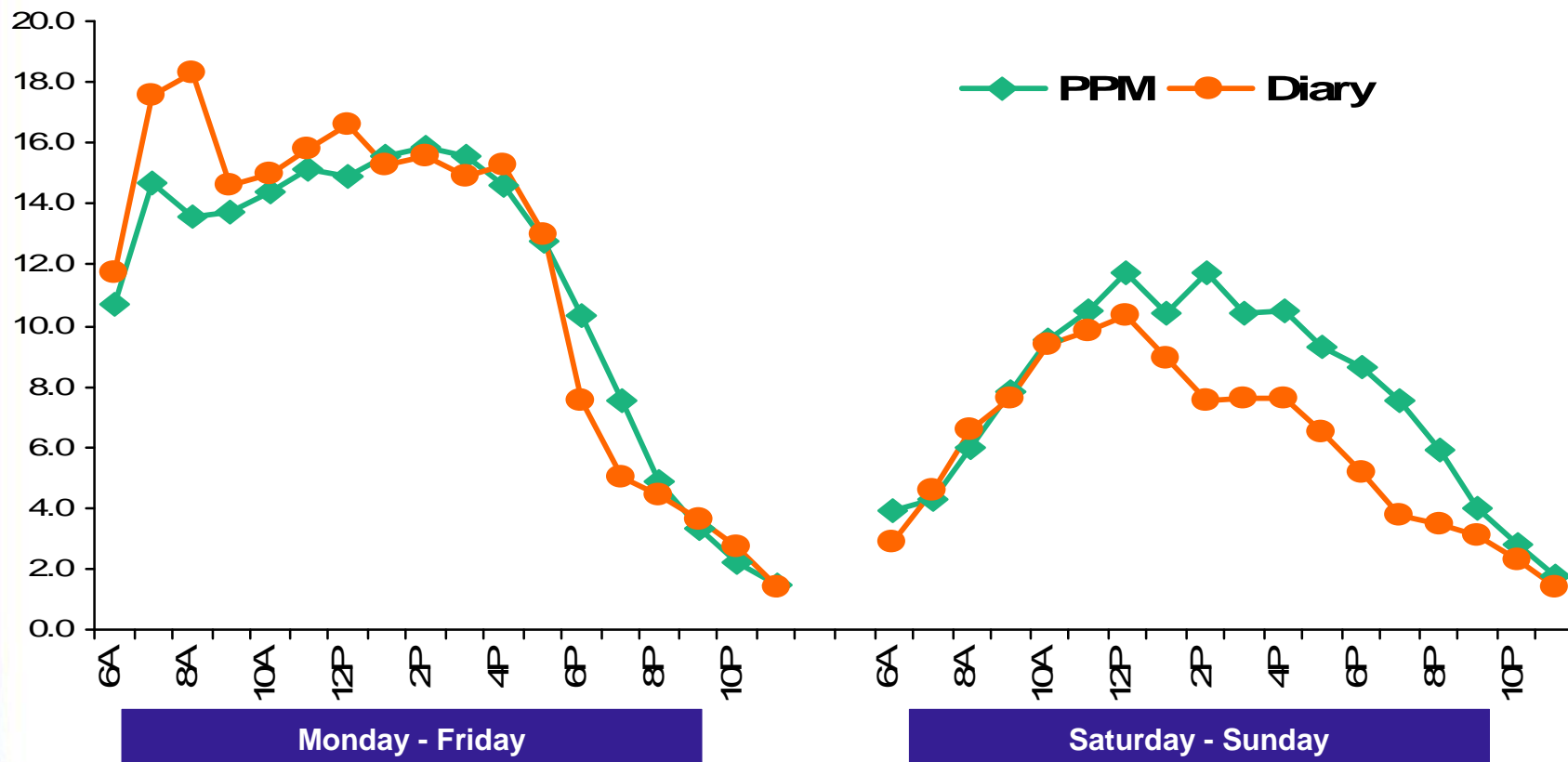
PPM, Phoenix PPM, April 2009, Mon-Sun 6AM-MID, Persons 12+ vs.
Diary, Phoenix Metro, Winter 2009, Mon-Sun 6AM-MID, Persons 12+
Note: Same stations are being used for comparison from Diary to PPM
37 © 2009 Arbitron Inc.





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PPM Vs. Diary Hour-by-Hour Persons 25-54 AQH Rating Comparison



PPM, Phoenix PPM, April 2009, Mon-Sun 6AM-MID, Persons 25-54 vs.
Diary, Phoenix Metro, Winter 2009, Mon-Sun 6AM-MID, Persons 25-54
Note: Same stations are being used for comparison from Diary to PPM

38 © 2009 Arbitron Inc.

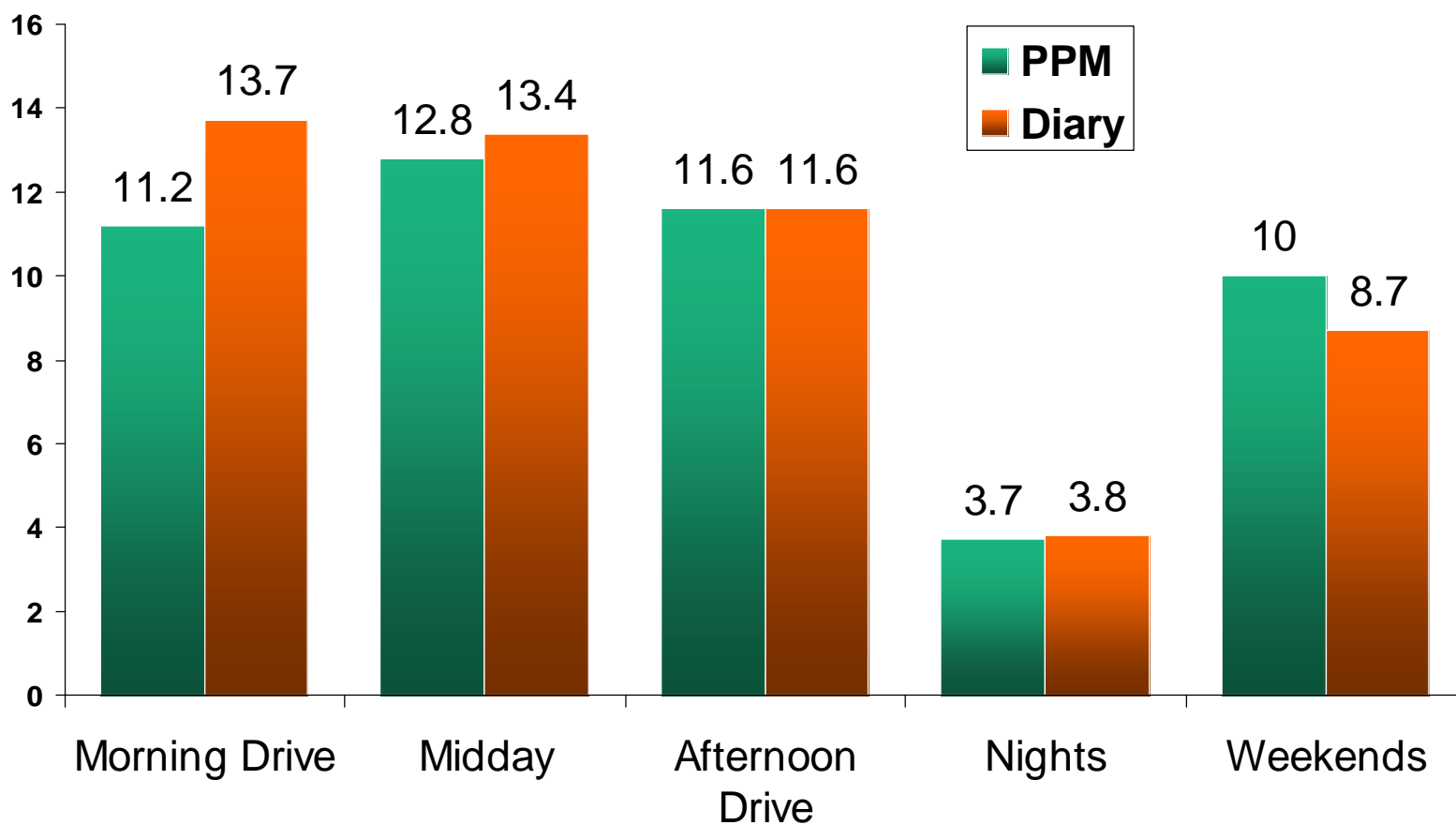




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PPM Vs. Diary

AQH Ratings By Daypart



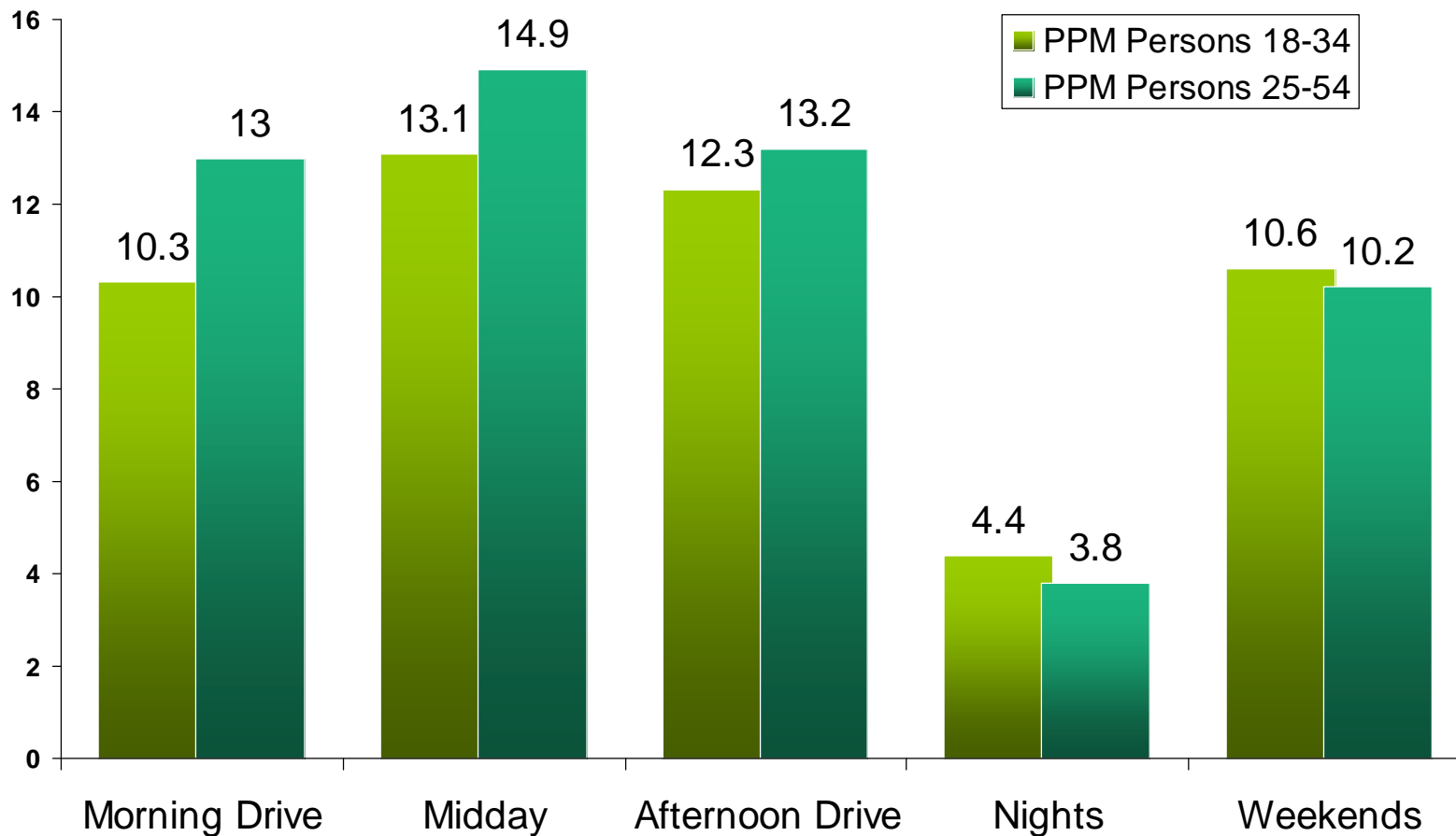
Phoenix AQH Ratings, April 2009 vs. Winter 2009, P12+ Market totals
Note: Same stations are being used for comparison from Diary to PPM



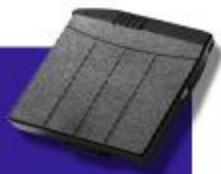
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PPM AQH Ratings By Demo and Daypart

April 2009



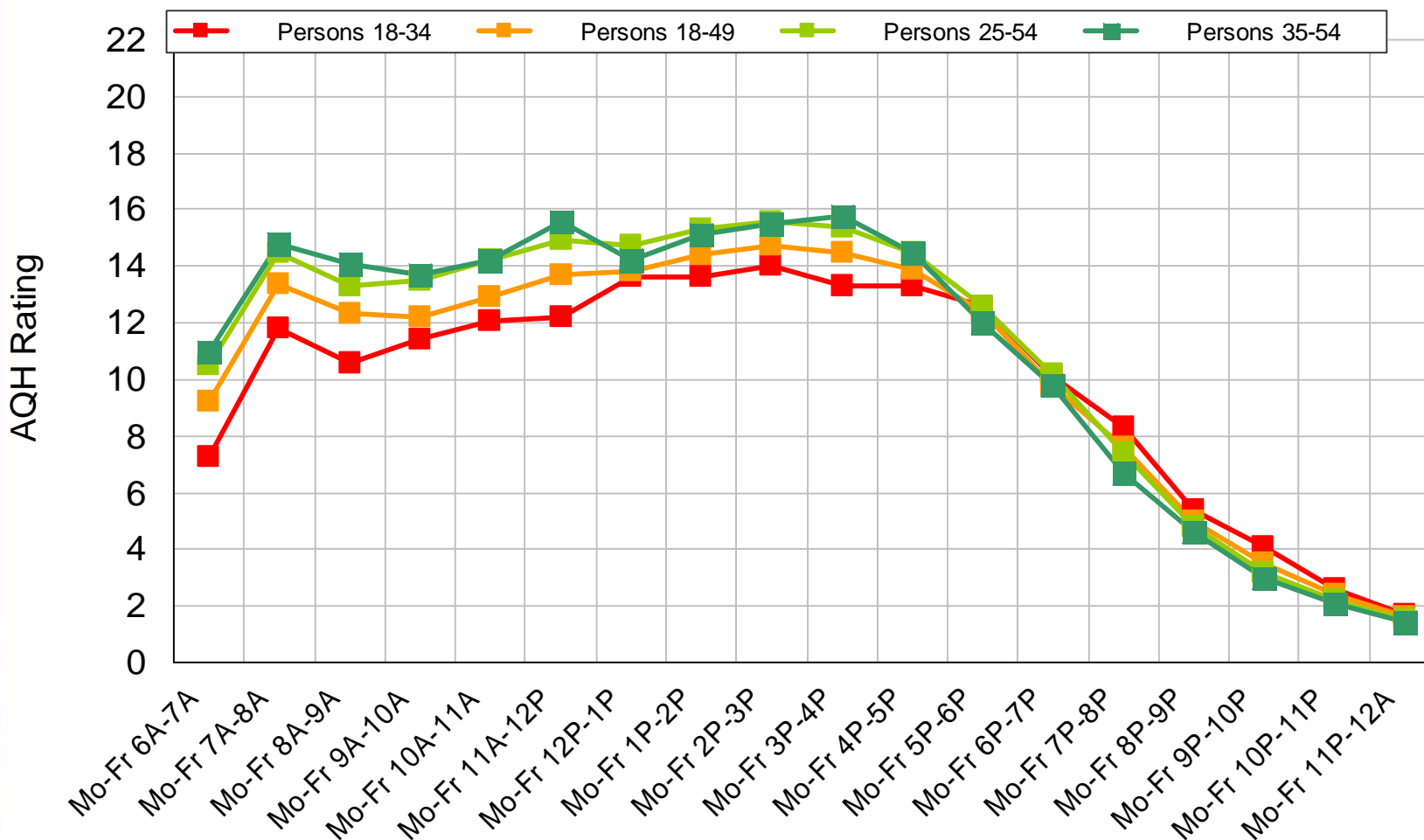
PPM Phoenix AQH Ratings, April 2009 Market totals.



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Listening By Demo

Monday-Friday 6AM-MID



Phoenix April 2009 PPM, Mon-Fri 6AM-MID

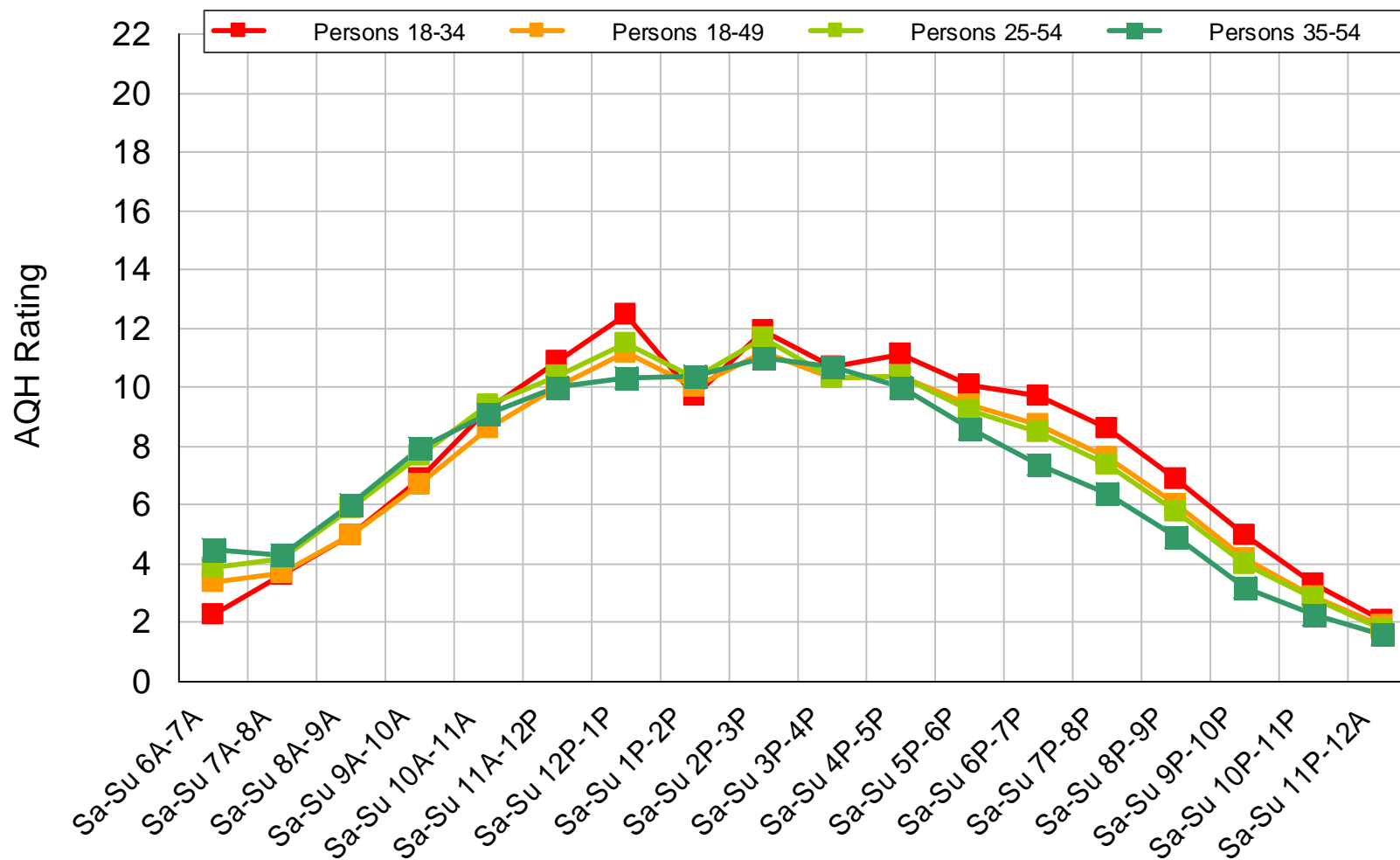




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Listening By Demo

Sat-Sun 6AM-MID



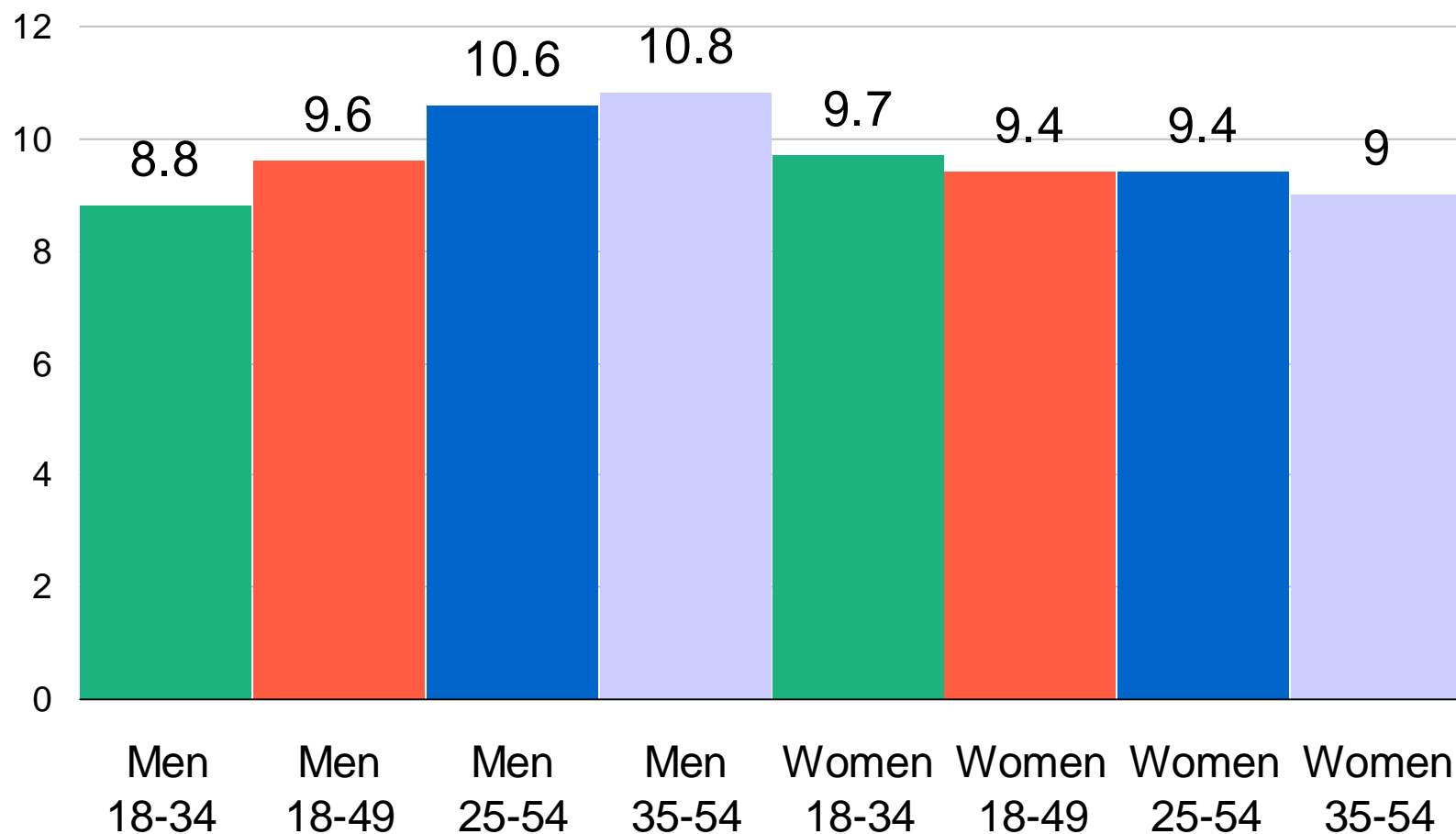
Phoenix April 2009 PPM, Sat-Sun 6AM-MID,





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PPM AQH Ratings by Age/Sex



Phoenix PPM, April 2009, Mon-Sun 6AM-MID, AQH Rating



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PPM Makes Us Rethink the Traditional Daypart Mix

Persons 18-34

Total market ratings by daypart

	LA	ATL	CHI	SF	DAL	NY	PHL	DC
AM Drive	3	3	3	3	3	3	3	2
Mid-Day	1	2	1	2	2	1	1	3
PM Drive	2	1	2	1	1	2	2	1
Evenings	5	5	5	5	5	5	5	5
Weekend	4	4	4	4	4	4	4	4

October 2008 PPM-AQH Rating

	BOS	MIA	MIN	PHX	SEA	SND
AM Drive	3	3	3	3	3	3
Mid-Day	2	1	2	1	2	1
PM Drive	1	2	1	2	1	2
Evenings	5	5	5	5	5	5
Weekend	4	4	4	4	4	4

BOS – Jan09, MIA/MIN/PHX/SEA/SND – Apr09



PPM Makes Us Rethink the Traditional Daypart Mix

Persons 25-54

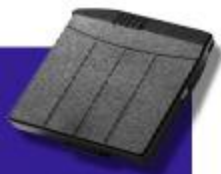
Total market ratings by daypart

	LA	ATL	CHI	SF	DAL	NY	PHL	DC
AM Drive	3	3	3	3	1	3	3	1
Mid-Day	1	1(t)	1	1(t)	3	1	1	3
PM Drive	2	1(t)	2	1(t)	2	2	2	2
Evenings	5	5	5	5	5	5	5	5
Weekend	4	4	4	4	4	4	4	4

PPM Markets October 08 PPM-AQH Rating

	BOS	MIA	MIN	PHX	SEA	SND
AM Drive	1	3	3	3	3	3
Mid-Day	3	1	2	1	2	1
PM Drive	2	2	1	2	1	2
Evenings	4	5	5	5	5	5
Weekend	5	4	4	4	4	4

BOS – Jan09, MIA/MIN/PHX/SEA/SND – Apr09



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Ratings by Employment Status

Persons 25-54



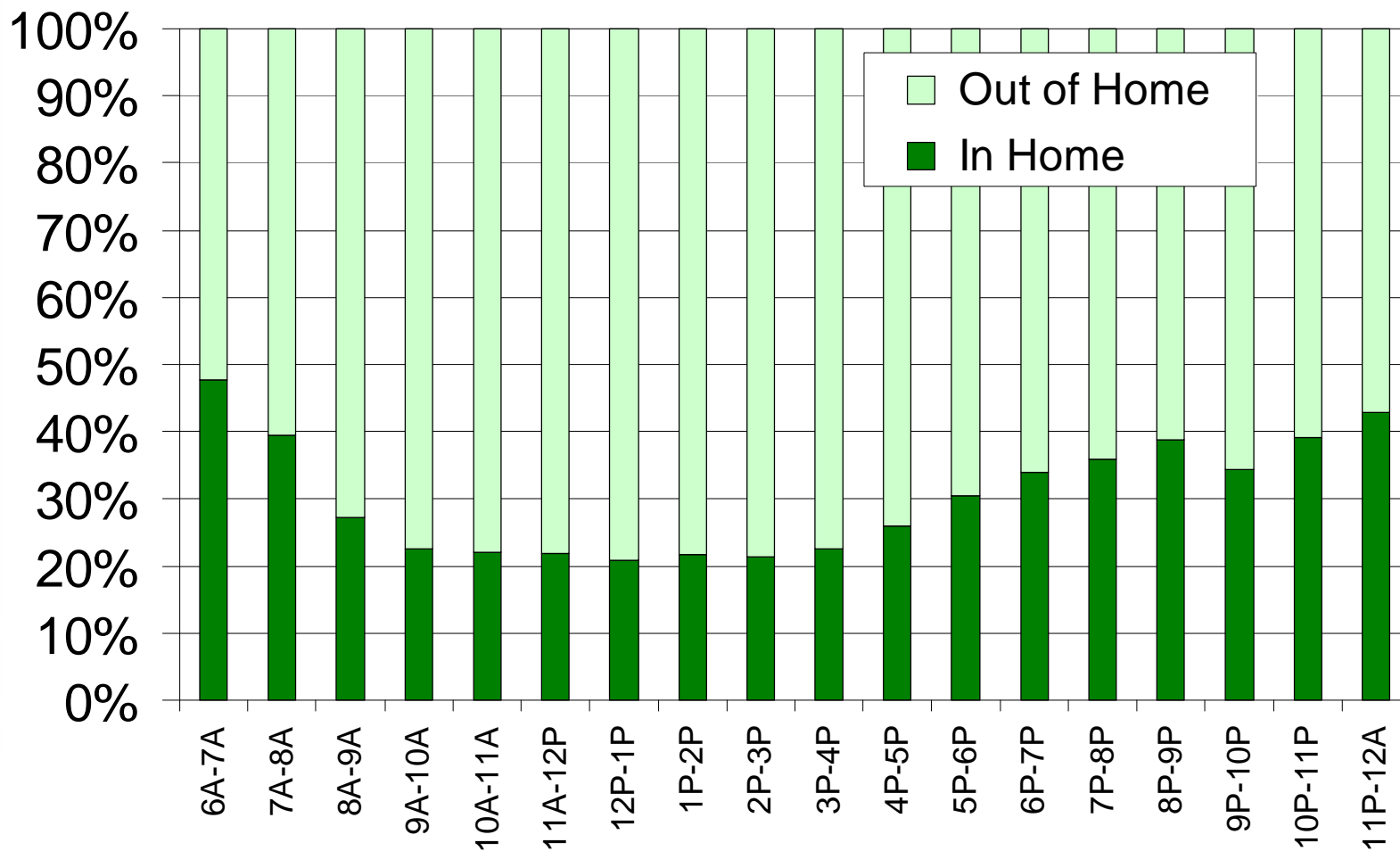
PPM, Phoenix, April 2009, Mon-Fri 6a-12m Persons 25-54 full-time/part-time vs. not employed, A/QH Rating



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Ratings by In/Out of Home Listening

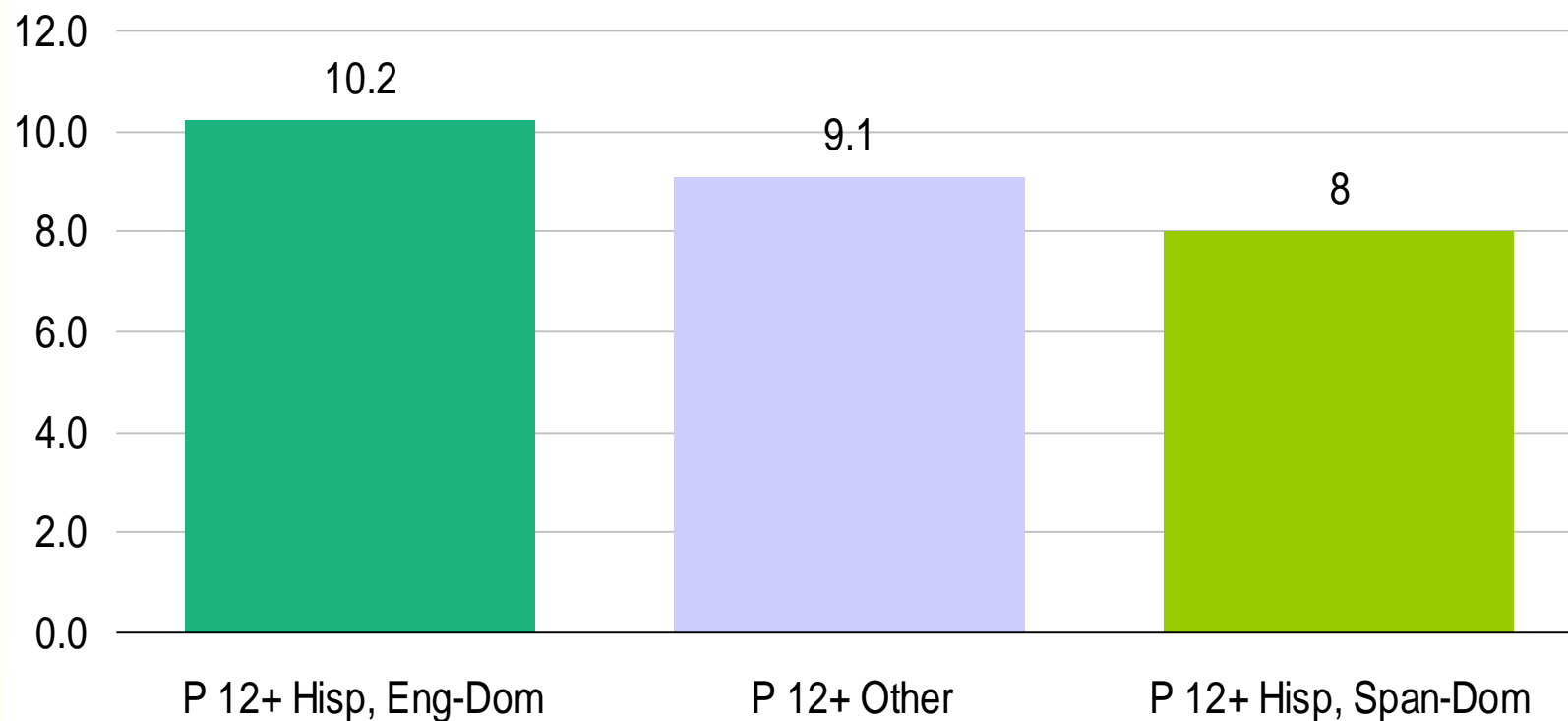
Persons 25-54





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Listening Levels by Race and Ethnicity

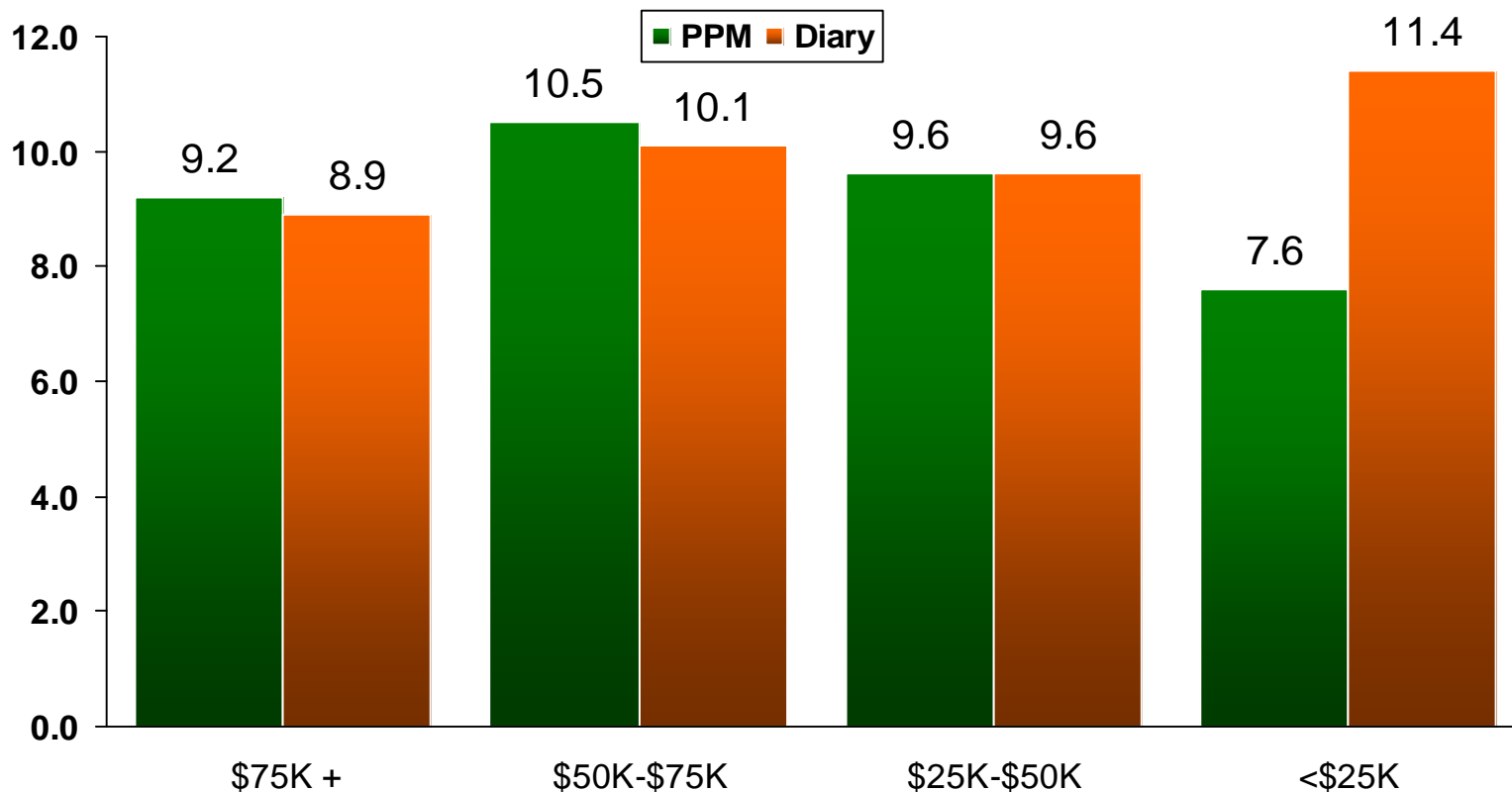


PPM, Phoenix, April 2009, Mon-Sun 6AM-MID, AQH Rating



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Listening Levels by Income Level



PPM, Phoenix PPM, April 2009, Mon-Sun 6AM-MID, Persons 18+ vs.
Diary, Phoenix Metro, Winter 2009, Mon-Sun 6AM-MID, Persons 18+, AQH Rating
Note: Same stations are being used for comparison from Diary to PPM



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PPM Ratings Are More Compressed

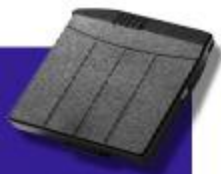
Difference in AQH rating points between the number 1 station and the number 10 station

	Phoenix 18-34		Phoenix 18-49		Phoenix 25-54		Phoenix 35-54	
	Diary	PPM	Diary	PPM	Diary	PPM	Diary	PPM
M-F 6a-10a	1.9	1.0	1.2	0.8	0.7	0.8	0.9	0.4
M-F 10a-3p	0.9	1.0	0.5	0.8	1.1	0.6	1.5	0.6
M-F 3p-7p	0.7	0.7	0.4	0.6	0.4	0.5	0.5	0.3
M-F 7p-12m	0.6	0.3	0.2	0.2	0.2	0.2	0.4	0.2
Sa-Su 6a-7p	0.6	0.5	0.2	0.4	0.1	0.3	0.3	0.3

Diary data based on Winter 2009

PPM data based on April 2009 data

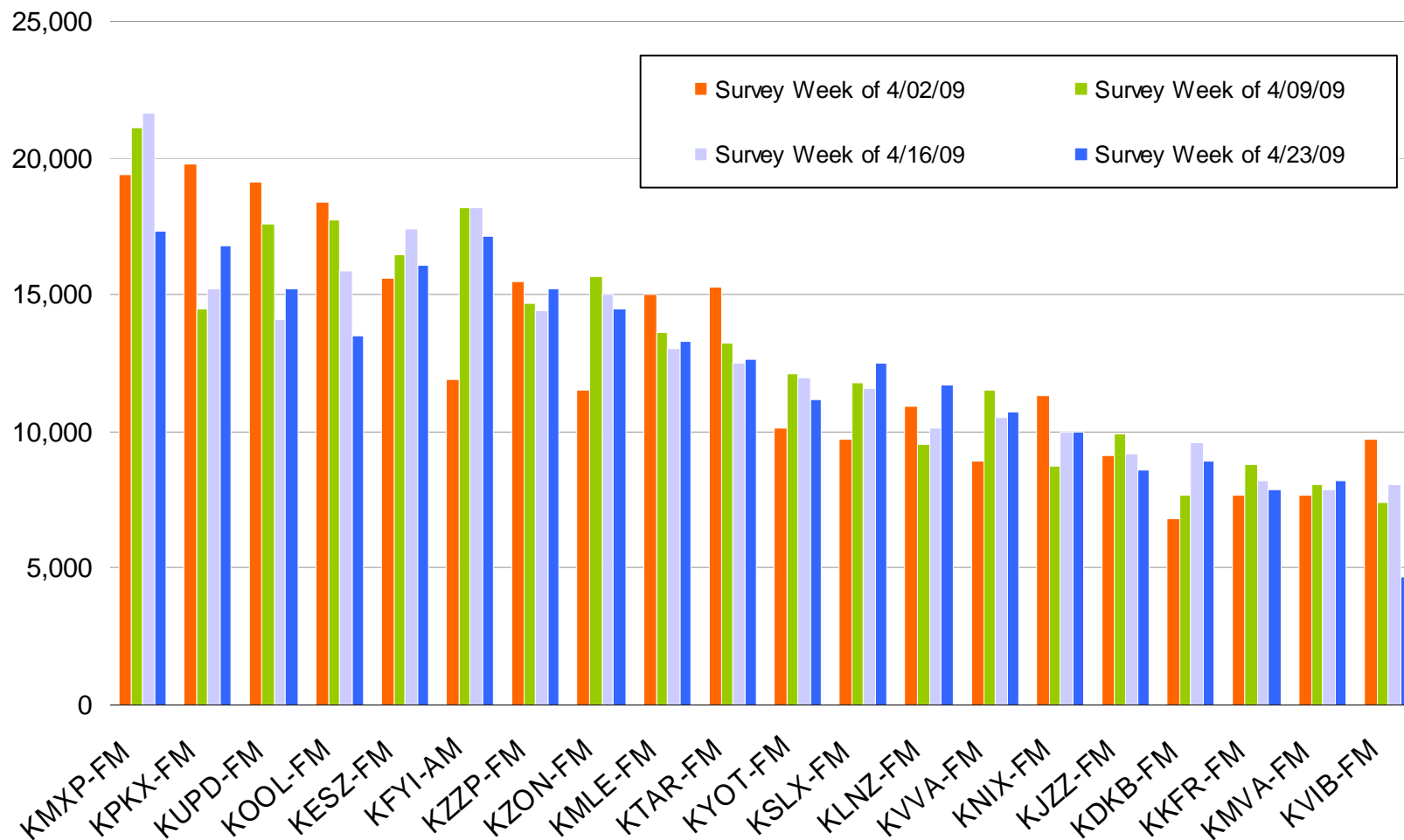
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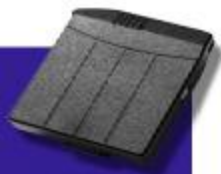
AQH Persons Estimates

Persons 6+, AQH Persons



Phoenix PPM, April 2009, Mon-Sun 6AM-MID

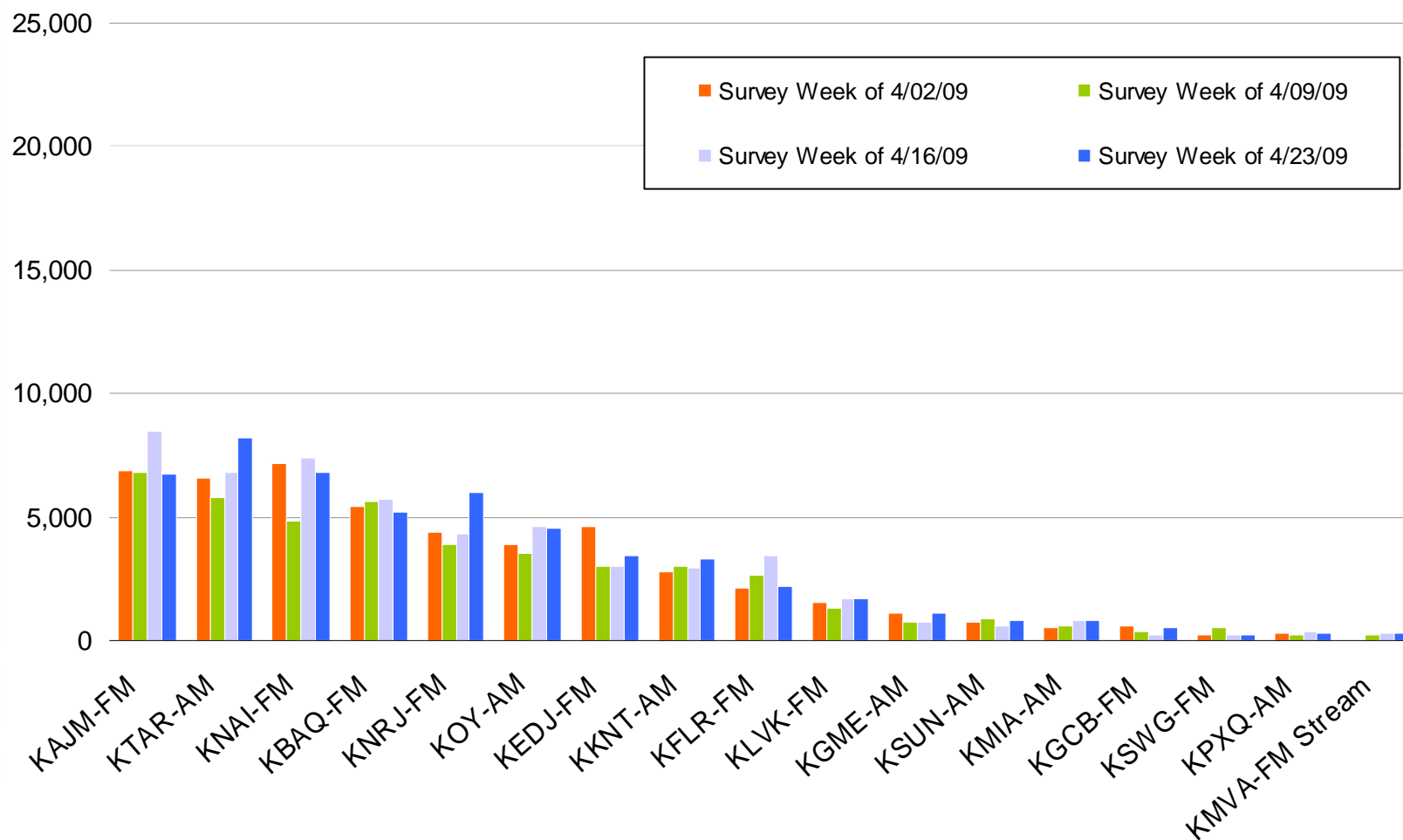




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AQH Persons Estimates

Persons 6+, AQH Persons



Phoenix PPM, April 2009, Mon-Sun 6AM-MID





PHOENIX

Digital Reporting in April 09

Eighteen Stations Reported – Weekly Cume Rtg

Atlanta

§ WWWQ-HD2 1.0

Detroit

§ WJR-IA .5

§ WXYT-IF .6

Houston

§ KTBZ-IF .6

Los Angeles

§ KOST-IF .8

Middlesex-Somerset-Union

§ WHTZ-IF .9

§ WKTU-IF .7

§ WPLJ-IF 1.0

Nassau-Suffolk

§ WBLI-IF .7

§ WLTW-IF .6

§ WHTZ-IF .6

New York

§ WKTU-IF .6

§ WLTW-IF .6

§ WWFS-IF .5

San Francisco

§ KSFO-IA .5

San Jose

§ KSFO-IA .7

Washington DC

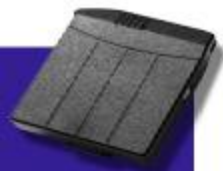
§ WRQX-IF .6

Phoenix

§ KMVA-IF .5

PPM April 2009 PPM, Mon-Sun 6AM-MID, P6+, Weekly Cume Rating





PHOENIX

Summary

The Phoenix sample for April is representative of all demos, ethnicities and language preferences.

For the first time, Cell Phone Only households will be in the panel

Compliance is similar to all other PPM markets.

§ More than 75% of panelists are carrying their meters for roughly 15 hours per day.

Cume audiences on the weekly and daily levels are higher than what has been seen in the diary.

Radio's qualitative audience has changed.

§ Income is no longer a major factor in listening levels

§ Employment and out-of-home listening continues to drive ratings

PPM listening levels compared to diary are similar to 15 other PPM commercialized markets.

§ Some dayparts and demos will see higher ratings in PPM than in Diary

Ratings are more compressed among the top stations than in the diary service.

Online streaming will be reported in the data (0.495 Cume Rating or higher)



PHOENIX

Phoenix PPM Web Site

www.arbitron.com/ppmphoenix

A copy of this presentation will be available here

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Tuesday, May 19th, 2009

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 NEXT GENERATION ELECTRONIC RATINGSSM

PPM in Phoenix

Monthly Updates
 Latest Monthly PPM Client Update

New to the PPM?

- New Age for Radio – Electronic Audience Measurement with the PPM System (*Start here for an overview of the Arbitron PPM® service*)
- PPM Pre-Currency Data Usage and Posting Guidelines 9.19.08
- Get a Technical Briefing of the PPM
- PPM Agencies/Advertisers Subscriber List

Frequently Asked Questions

- General PPM FAQs (PDF) 2.3.09
- FAQs About Scarborough and the PPM (PDF) 2.3.09

PPM Studies & Reports

- Spanish-Language Radio in a PPM™ World 6.5.08
- Urban Radio in the PPM™ World 10.07

58 days until PPM currency data!

Phoenix PPM Status:
 Average Daily In-Tab Target: **1,001**

Market-Specific Links

- Important Notice Regarding Currency Ratings in Phoenix (PDF) 5.19.09
- FAQs for Ad Agencies (PDF) 2.3.09
- FAQs for Radio Stations (PDF) 2.3.09
- Release Schedule for Radio (PDF) 2.4.09
- Release Schedule for Ad Agencies (PDF) 2.4.09

You Can't Spell RADIO Without R.O.I.