

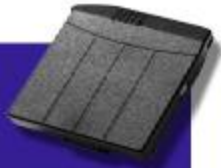
PPM in Baltimore



Baltimore PPM

July 09 Pre-Currency PPM Data

Jenny Tsao
PPM Implementation Market Manager
August 14, 2009



BALTIMORE

How do I ask a question during the WebEx session?

You may:

- 1) **Chat in the bottom right hand corner**
- 2) **Email me directly, and I will reply to your questions once the session has ended**

You may send multiple questions.

My email is: Jenny.Tsao@Arbitron.com

Or Your Account Manager: Nicholas.Kinney@Arbitron.com

Or Your Trainer: Aly.Randolph@Arbitron.com

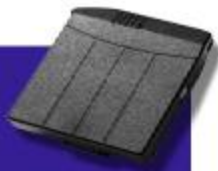
A copy of the presentation will be posted on the Baltimore website by COB today



Baltimore PPM

July 09 Pre-Currency PPM Data

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.



BALTIMORE

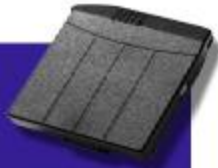
Findings

- § **The Baltimore sample is representative of all demos, ethnicities and counties.**
- § **Compliance is similar to other markets**
 - » On average 80% of panelists are carrying their meters for roughly 15 hours per day.
- § **Cume audiences on the weekly and daily levels are significantly higher than what has been seen in the diary.**
- § **PPM listening levels compared to diary are similar to other PPM commercialized markets.**
 - » Income is no longer a major factor in listening levels
 - » Employment and out-of-home listening continues to drive ratings
 - » Many different formats are represented in the Top 10
- § **Ratings are more compressed among the top stations than in the diary service.**
 - » Baltimore, based on July 09 PPM, seems to show slightly less compression than other PPM markets
- § **Granular data continues to provide insight into how consumers use radio.**



Sample

July 09 Pre-Currency PPM Data



BALTIMORE

Baltimore Metro Sample

July 09

Total Persons in Monthly Sample

Monthly Installed Persons	1,570
Monthly In-tab Persons	1,457
Monthly In-tab Rate	92.8%

Total Persons in Daily Sample

Avg Daily In-tab Persons	1,013
Avg Daily In-tab Rate	67.9%
Compliance-Capable*	1,300
Compliance Rate**	78.0%
Installed Cell-Phone-Only Persons	173
Avg. Cell-Phone-Only In-Tab Persons	122

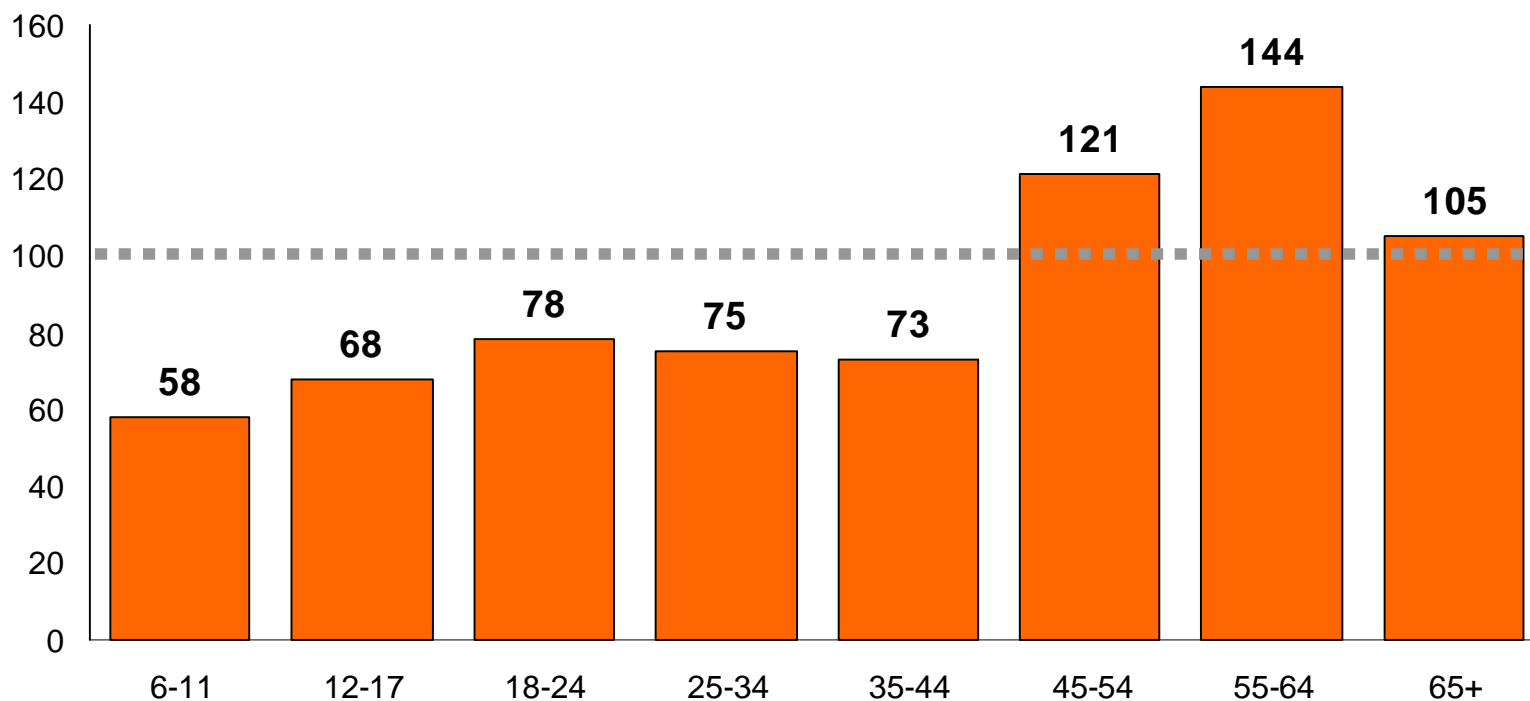
*Compliance-Capable Persons excludes panelists who are known to be away from home and panelists who experienced technical issues that prevented them from achieving in-tab.

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

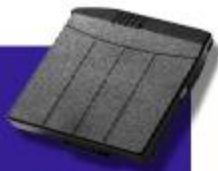


BALTIMORE

Baltimore Sample Performance by Age Cell July 09



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



BALTIMORE

Baltimore In-Tab Sample Size, by Demo and Race/Ethnicity

	Baltimore			
July 09	Avg. Daily In-tab Target	Avg. Daily In-tab Actual	DDI*	Total Month In-Tab
P6+	1,080	1,013	94	1,457
P18+	892	894	100	1,229
P18-54	606	538	89	775
Black 6+	316	321	102	473
Other 6+	764	692	91	984

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



BALTIMORE

Baltimore In-Tab Sample Size, 18-34 DDI Performance

	Baltimore			
July 09	Avg. Daily In-tab Target	Avg. Daily In-tab Actual	DDI*	Total Month In-Tab
Persons 18-34	259	198	76	315
Men 18-34	128	105	82	164
Women 18-34	131	93	71	151
Black 18-34	84	69	82	109
Other 18-34	175	129	74	206

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



BALTIMORE

Baltimore In-Tab Sample Size, 25-54 DDI Performance

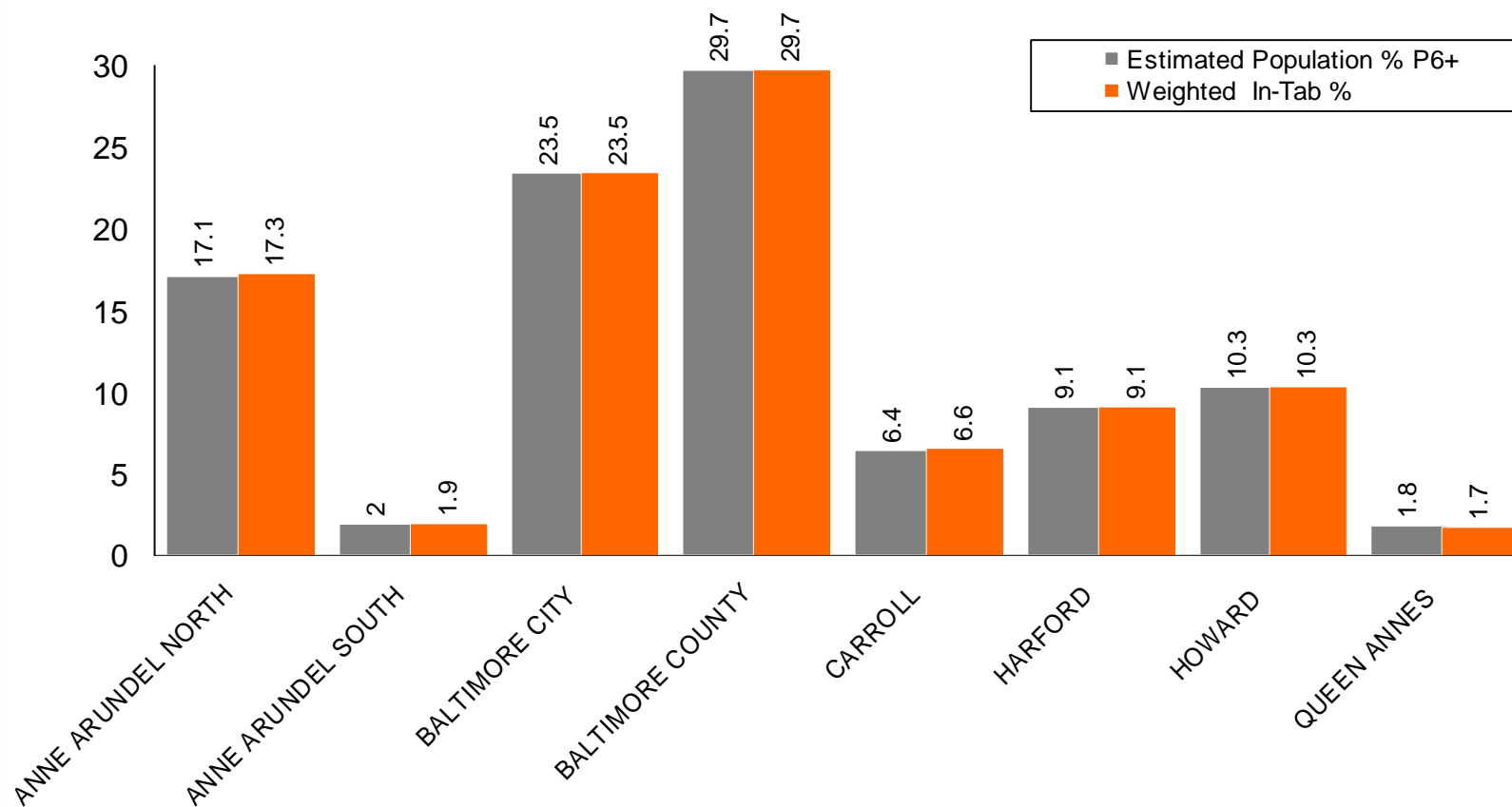
	Baltimore			
July 09	Avg. Daily In-tab Target	Avg. Daily In-tab Actual	DDI*	Total Month In-Tab
Persons 25-54	493	451	91	634
Men 25-54	238	203	85	284
Women 25-54	255	248	97	350
Black 25-54	146	150	103	215
Other 25-54	332	301	91	419

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



BALTIMORE

Baltimore PPM County Sample



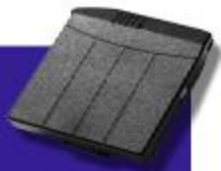
Source: Baltimore Metro, PPM July 09, Persons 6+





Compliance and Carry Times

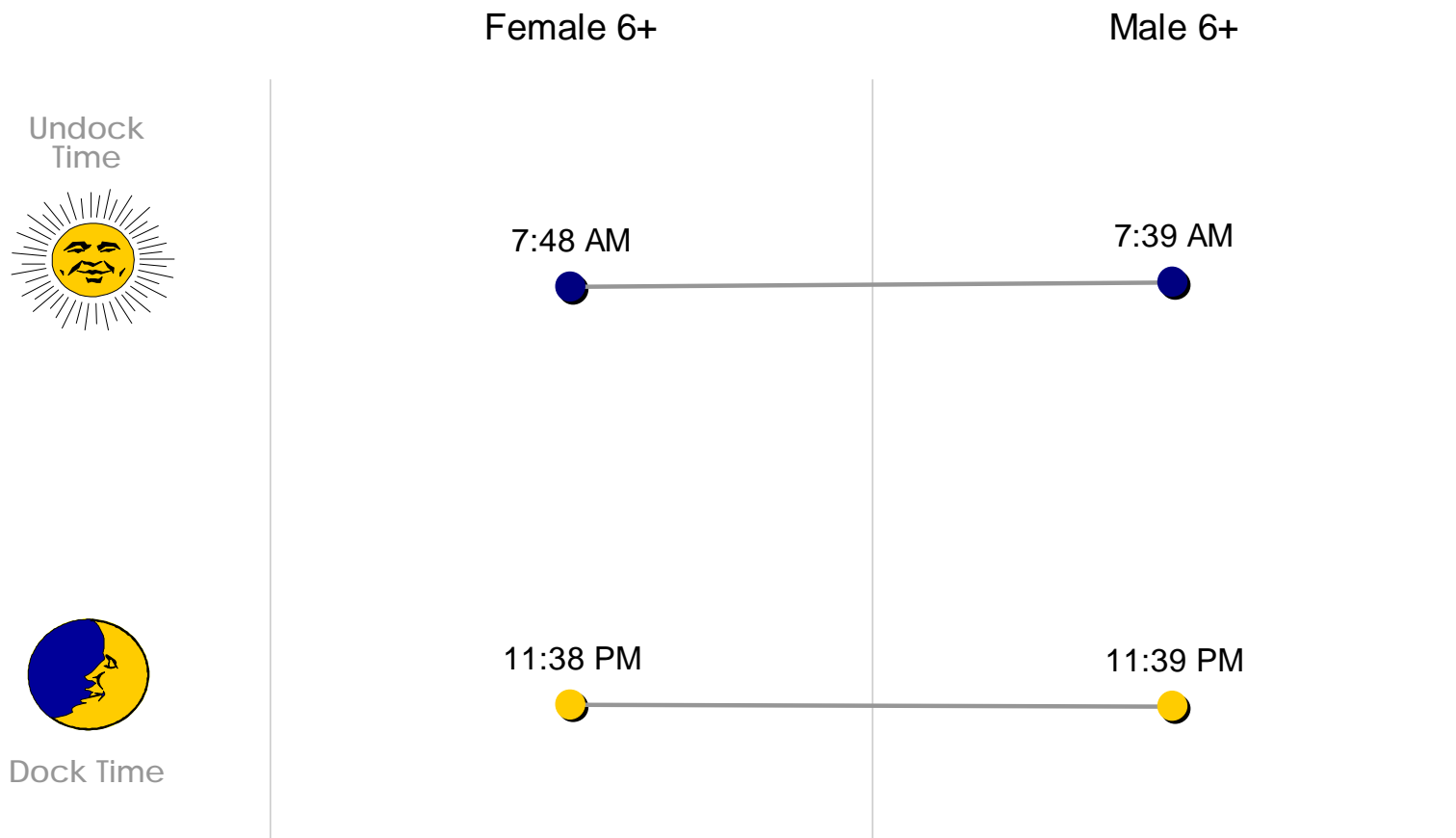
July 09 Pre-Currency PPM Data



BALTIMORE

Median Undock/Dock Times

July 09 Weekdays

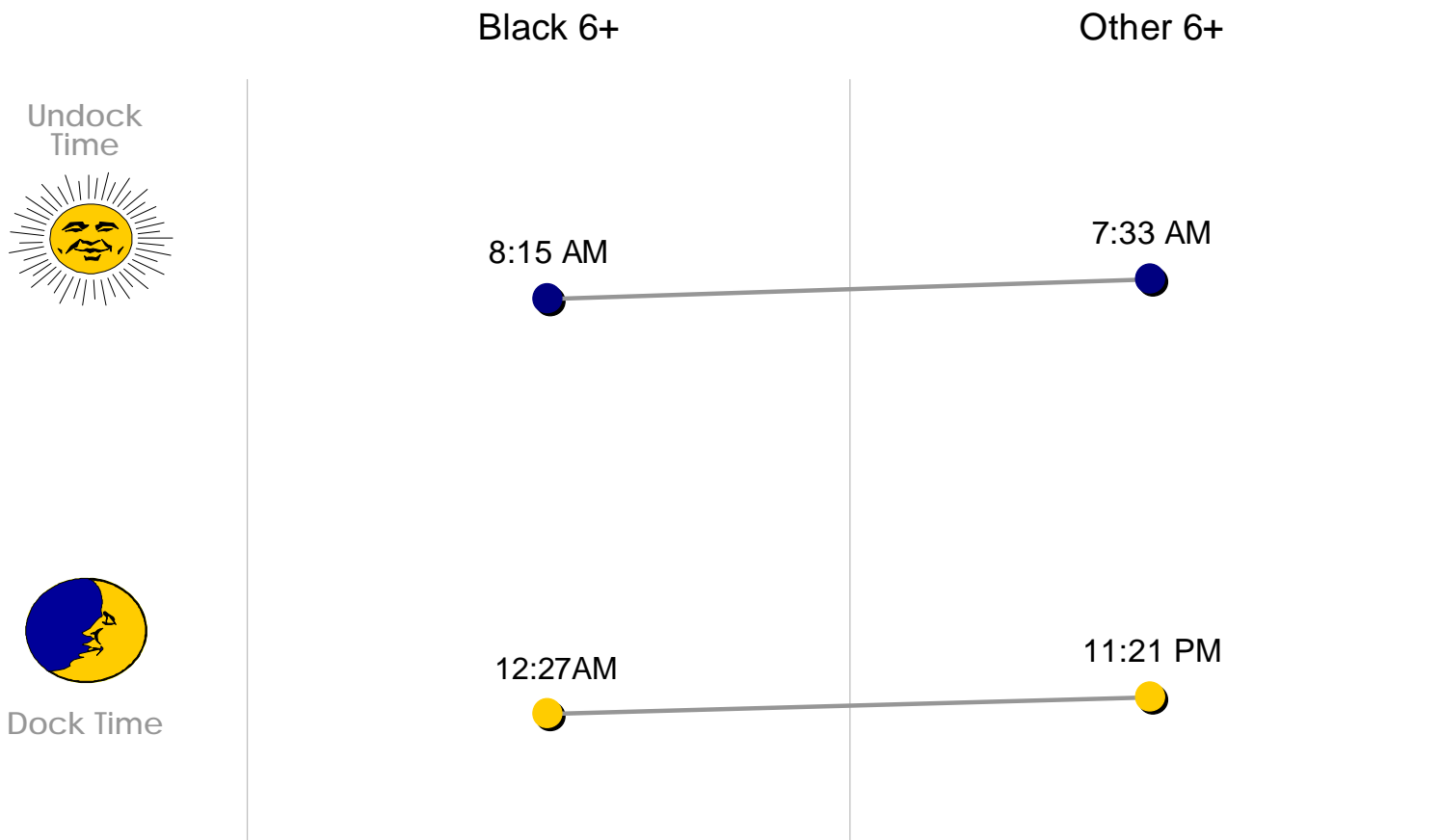




BALTIMORE

Median Undock/Dock Times

July 09 Weekdays





BALTIMORE

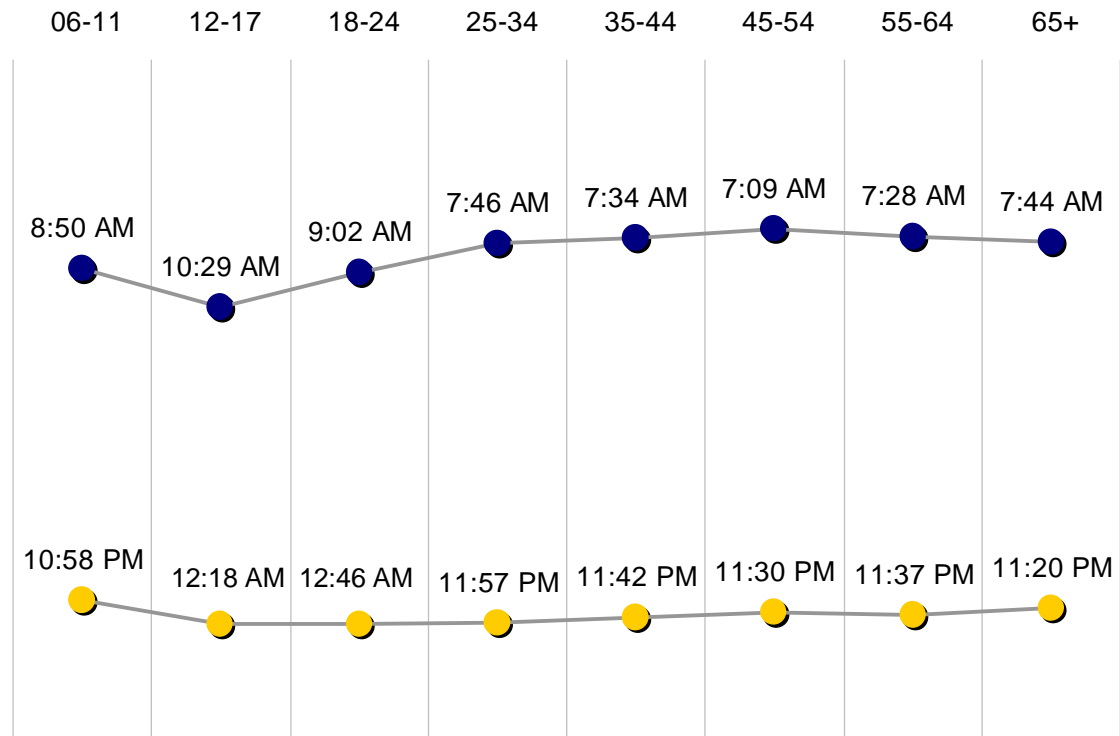
Median Undock/Dock Times

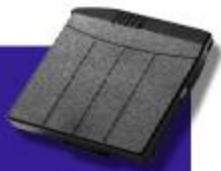
July 09 Weekdays

Undock Time



Dock Time





BALTIMORE

Median Undock/Dock Times

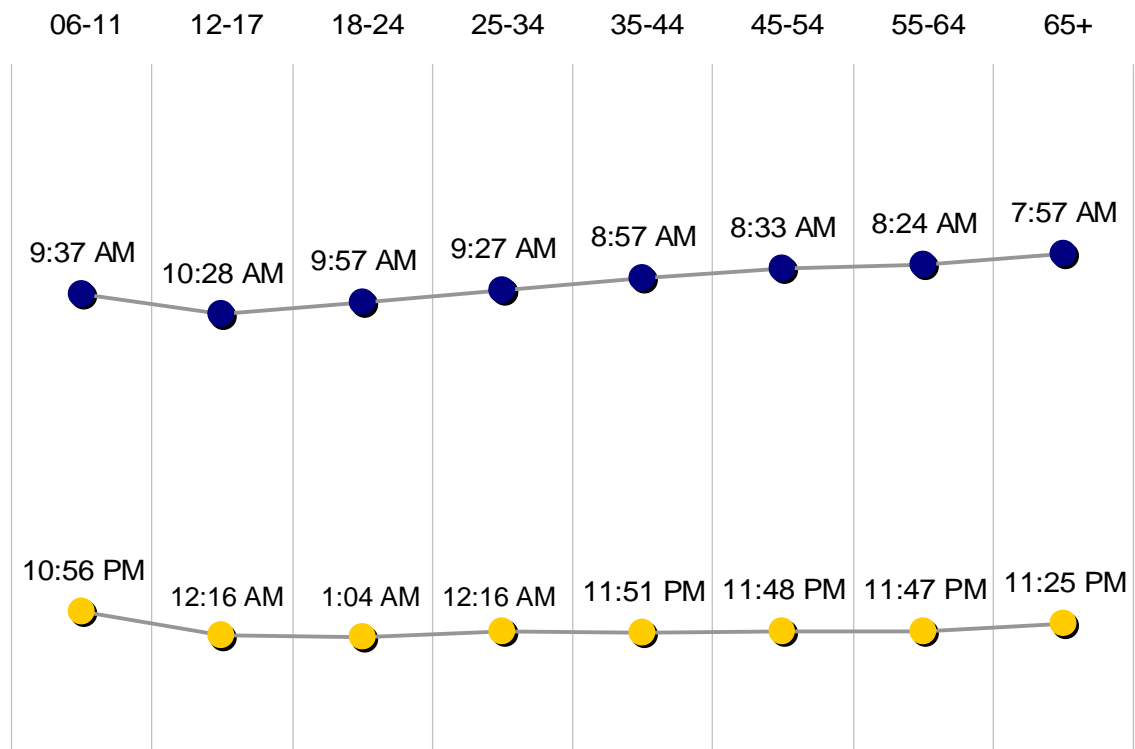
July 09 Weekends



Undock Time



Dock Time

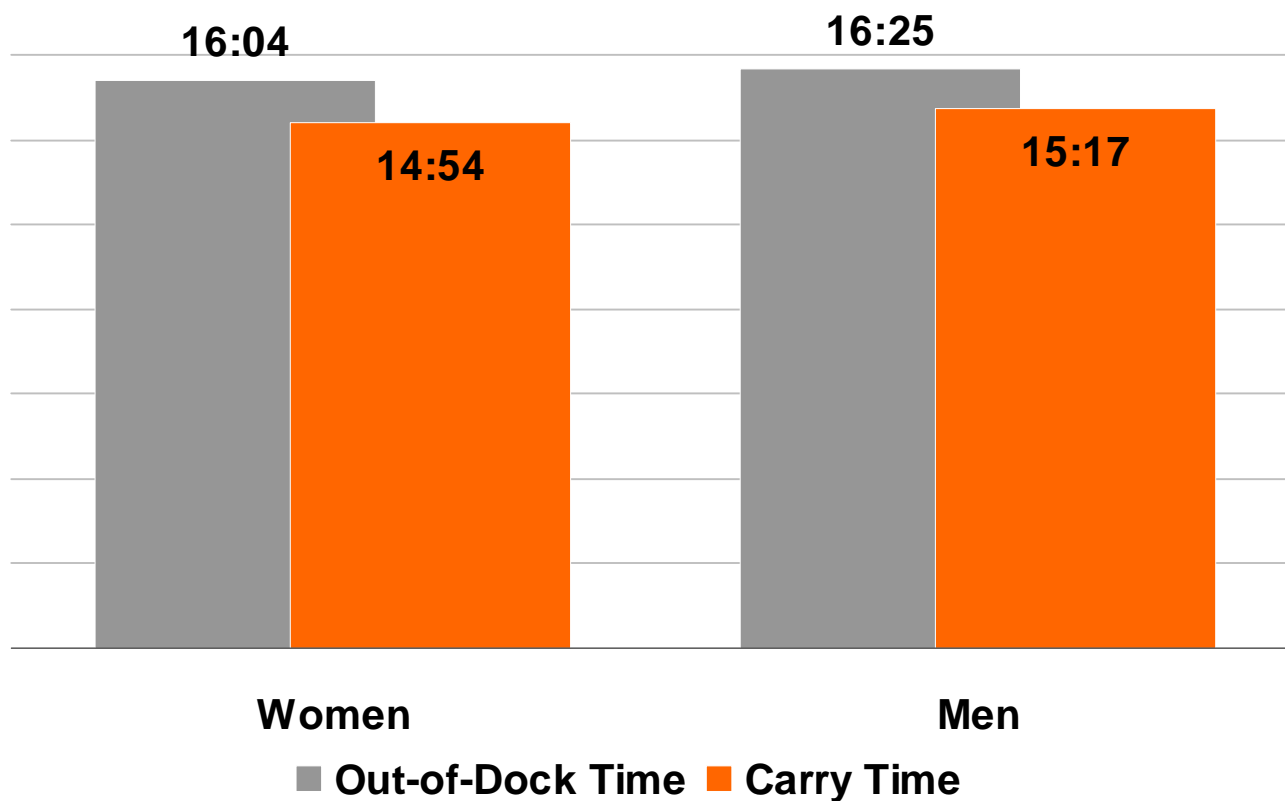




BALTIMORE

Median Carry Times by Gender

Out-of-Dock and Carry Times

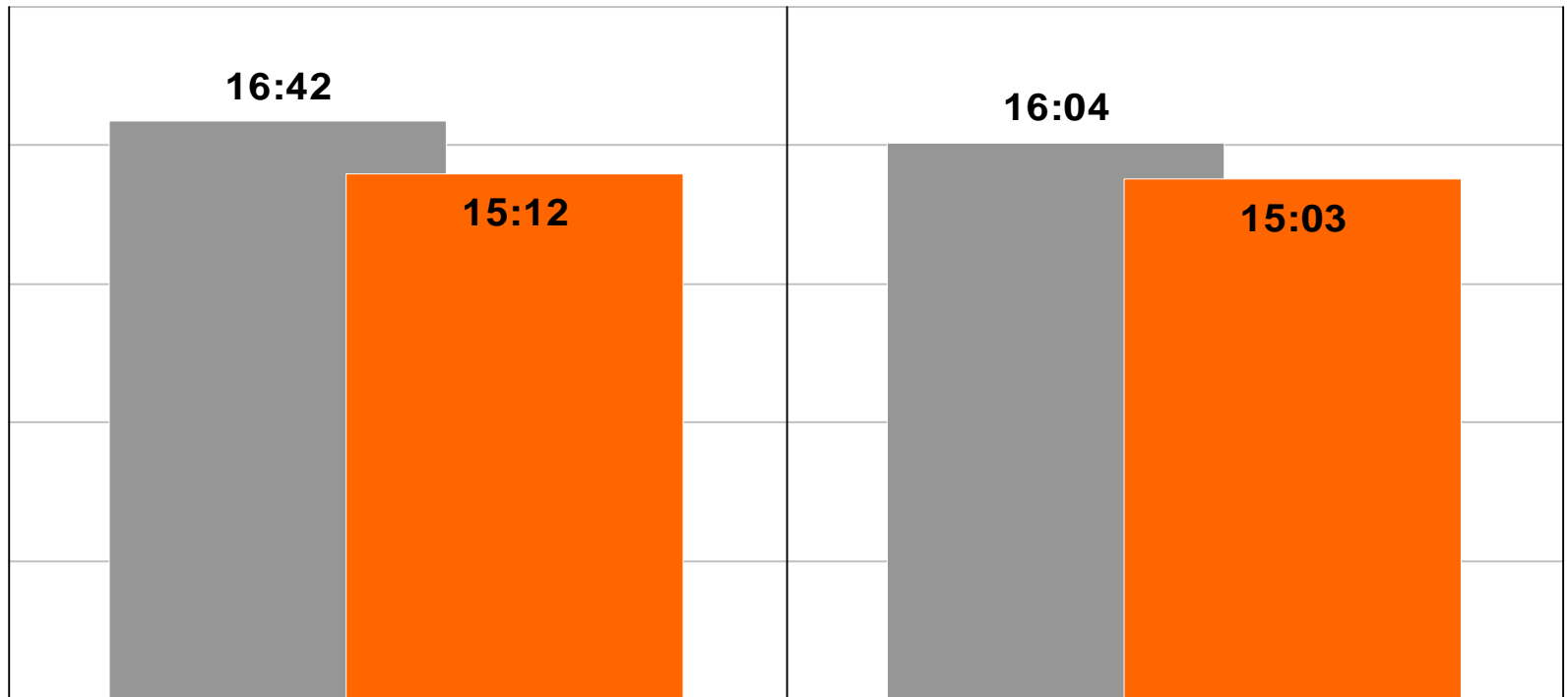




BALTIMORE

Median Carry Times by Race/Ethnicity

Median Out-of-Dock and Carry Times



Black 6+

Other 6+

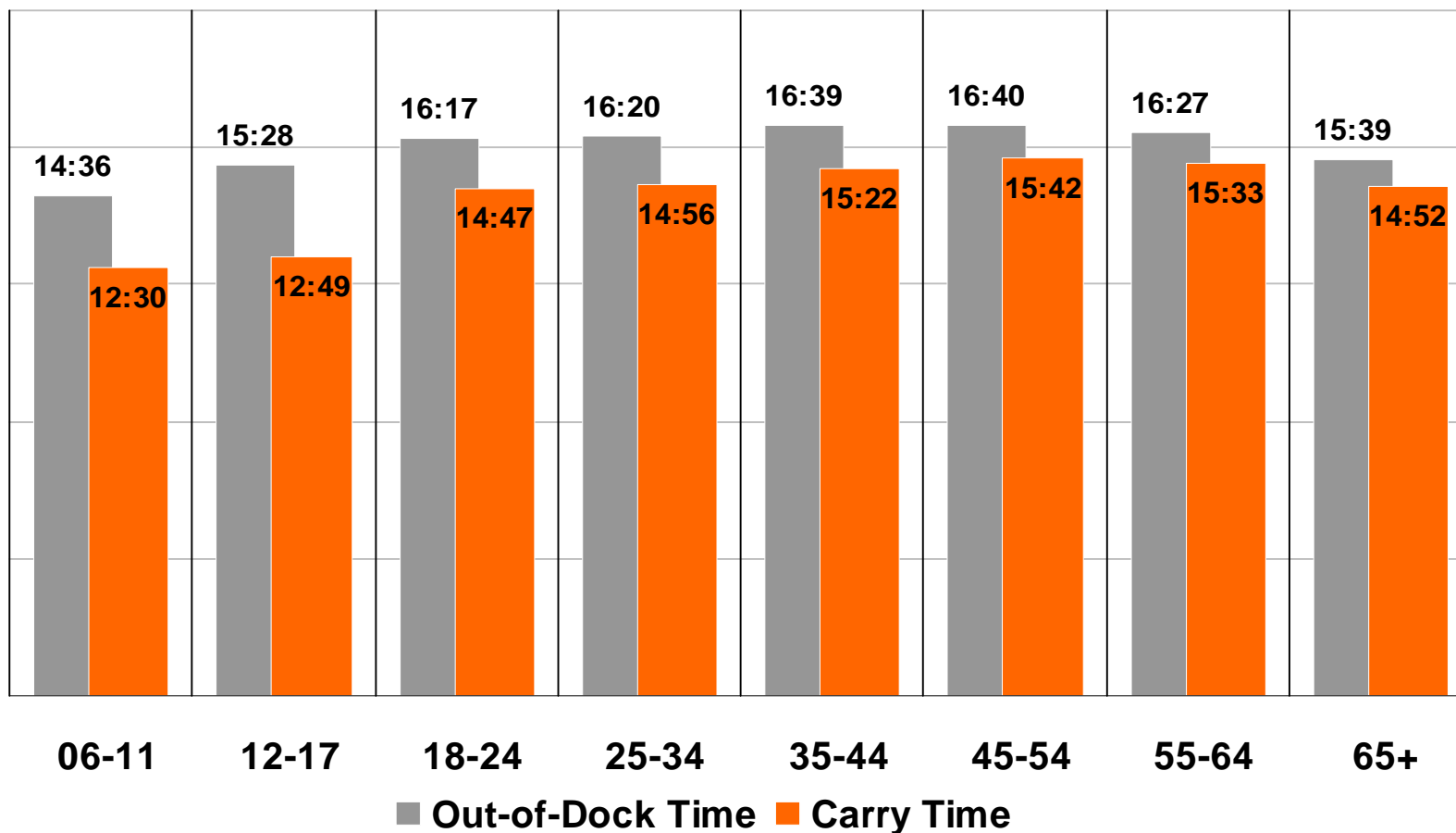
■ **Out-of-Dock Time** ■ **Carry Time**



BALTIMORE

Median Carry Times by Age

Median Out-of-Dock and Carry Times



PPM in Baltimore



PPM Cume Estimates

July 09 Pre-Currency PPM Data

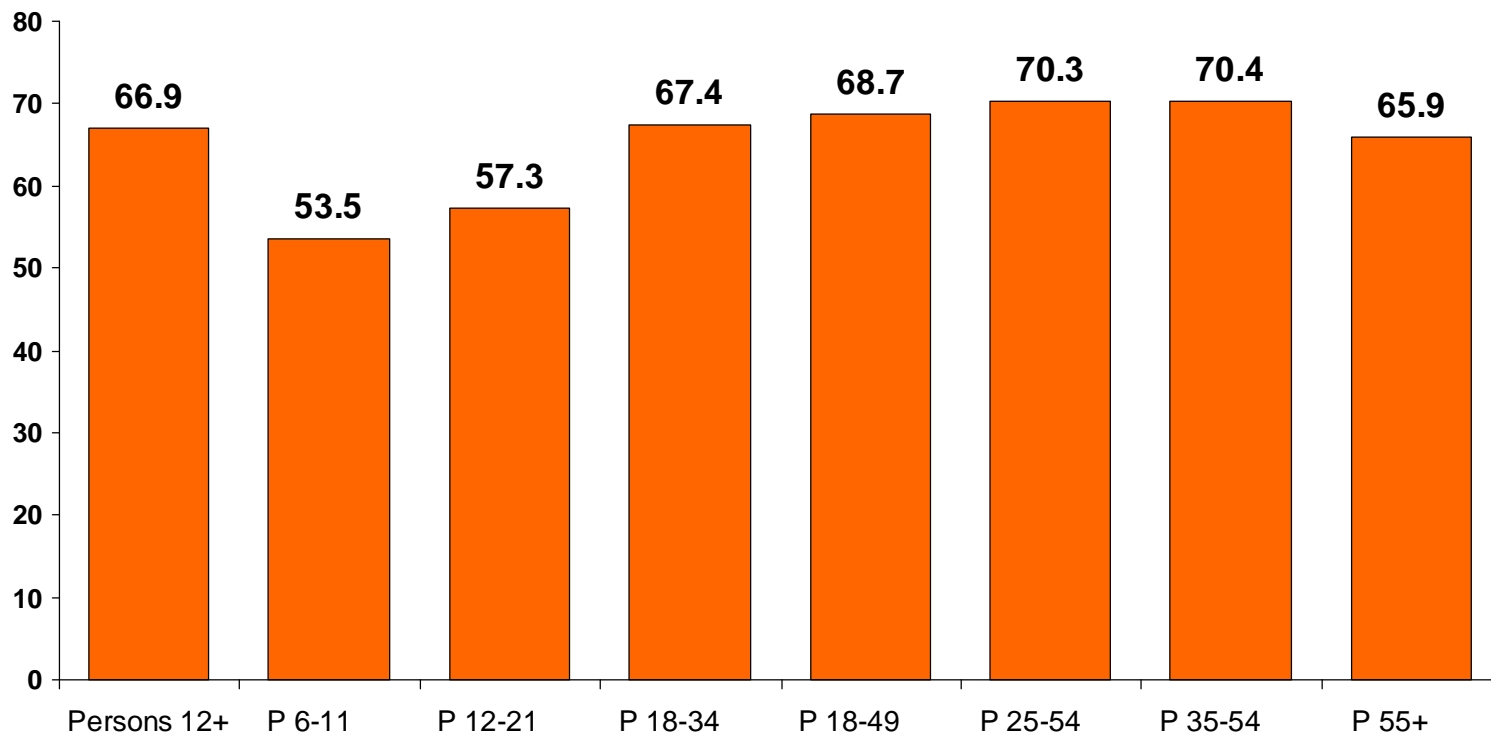


BALTIMORE

Baltimore PPM

Daily Cume Rating

Mon-Sun 6a-12m



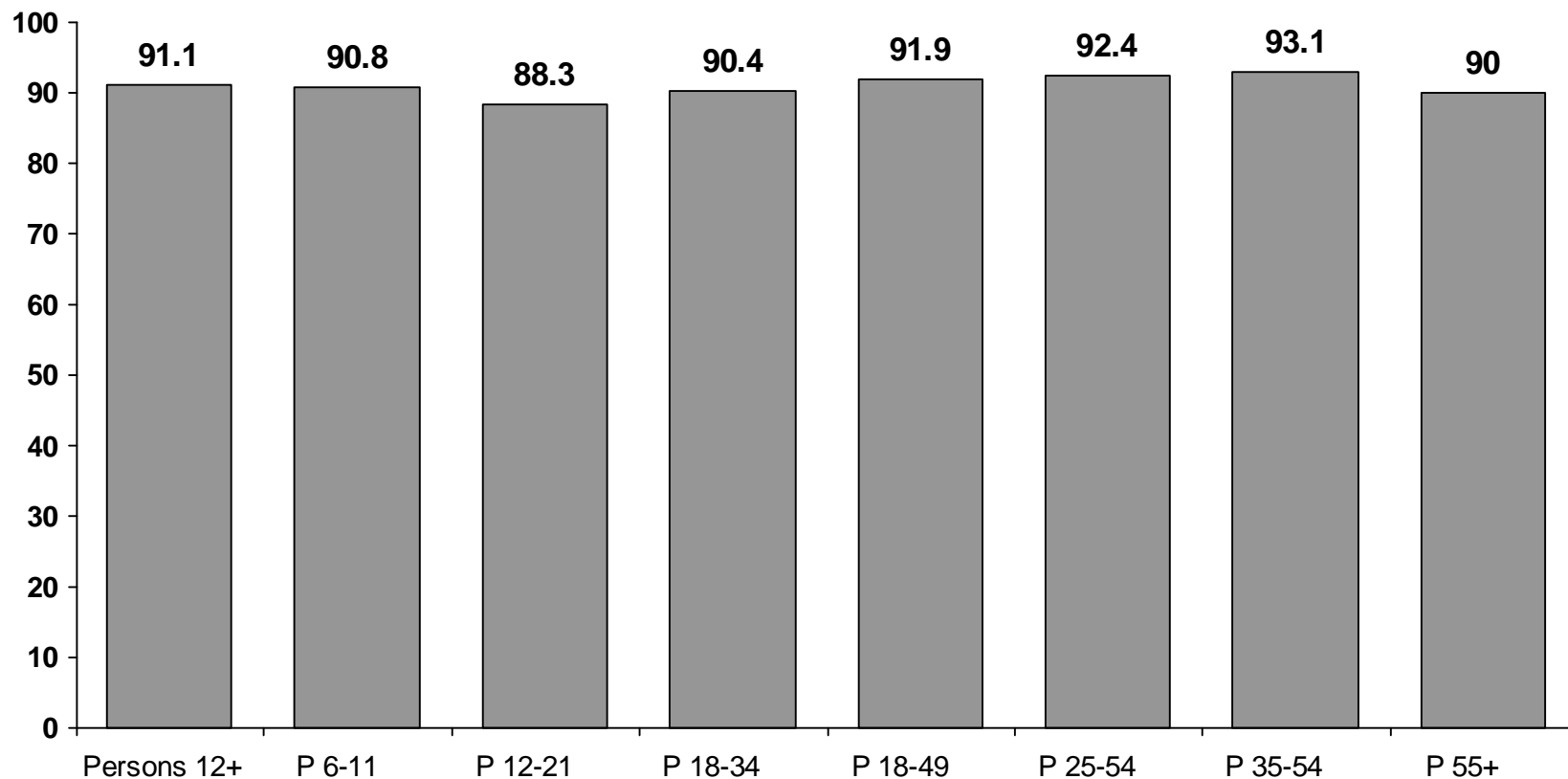


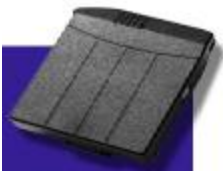
BALTIMORE

Baltimore PPM

Weekday Weekly Cume Rating

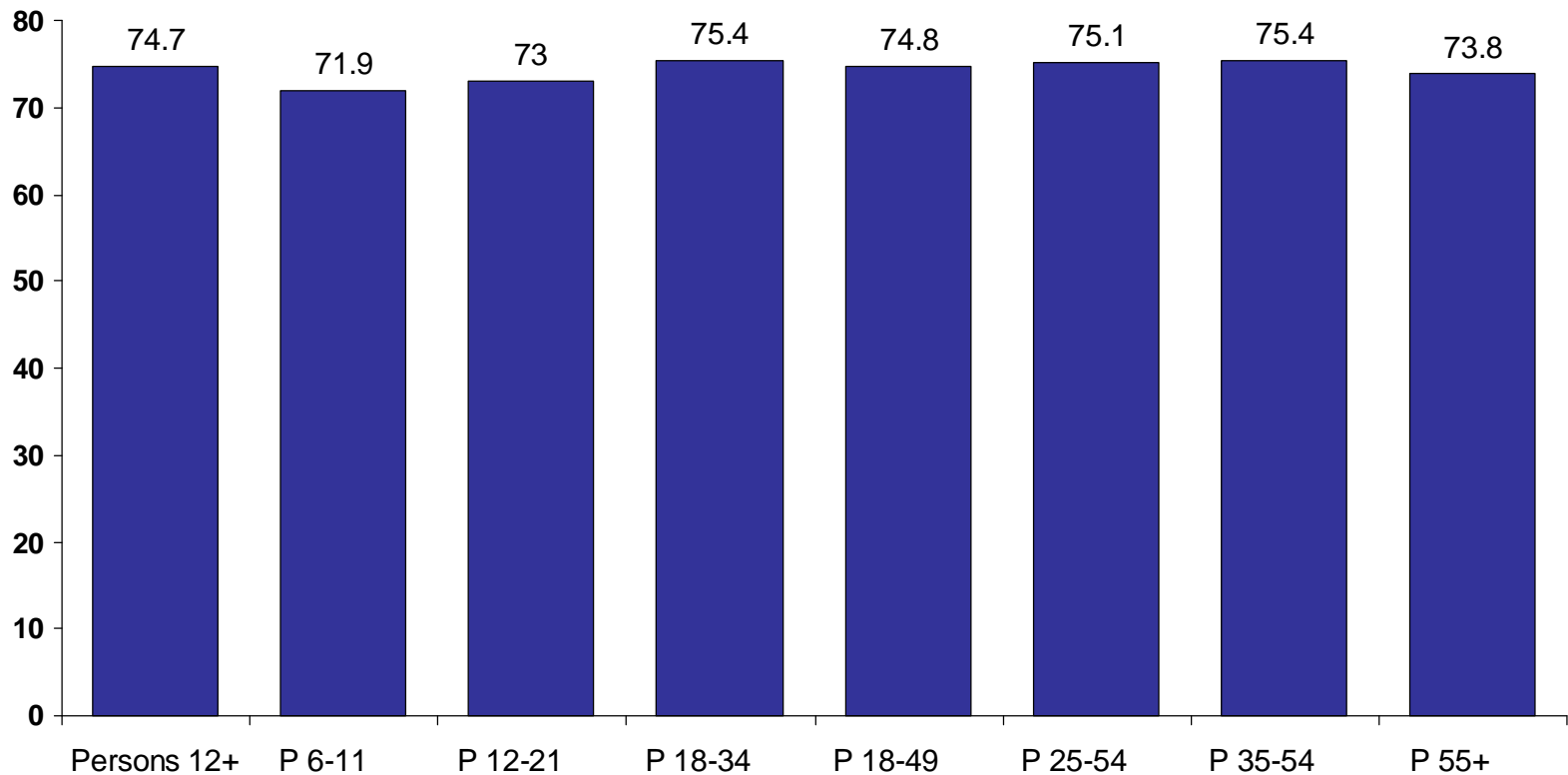
Mon-Fri 6a-12m





BALTIMORE

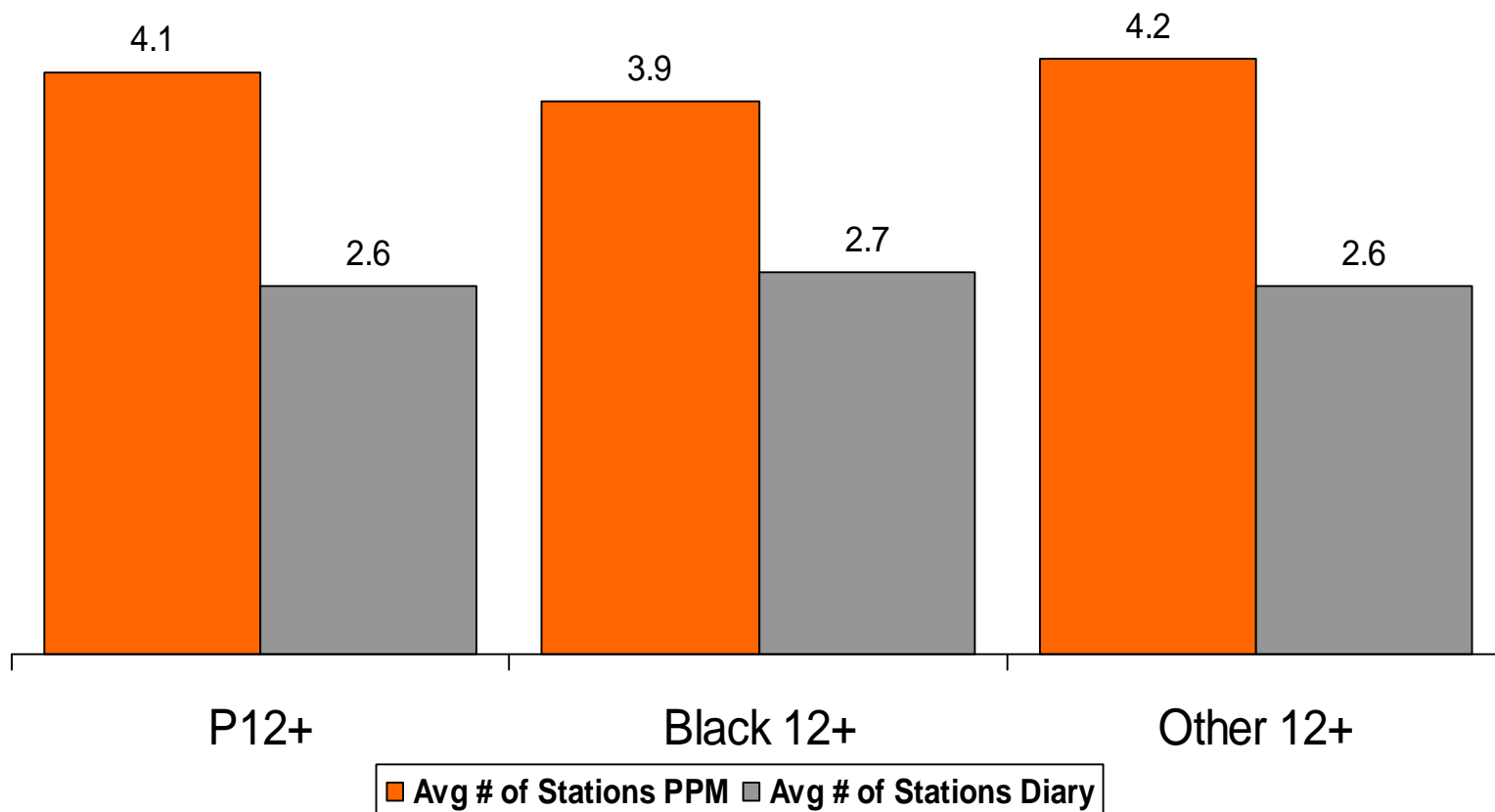
Baltimore PPM Weekend Weekly Cume Rating Sat-Sun 6a-12m





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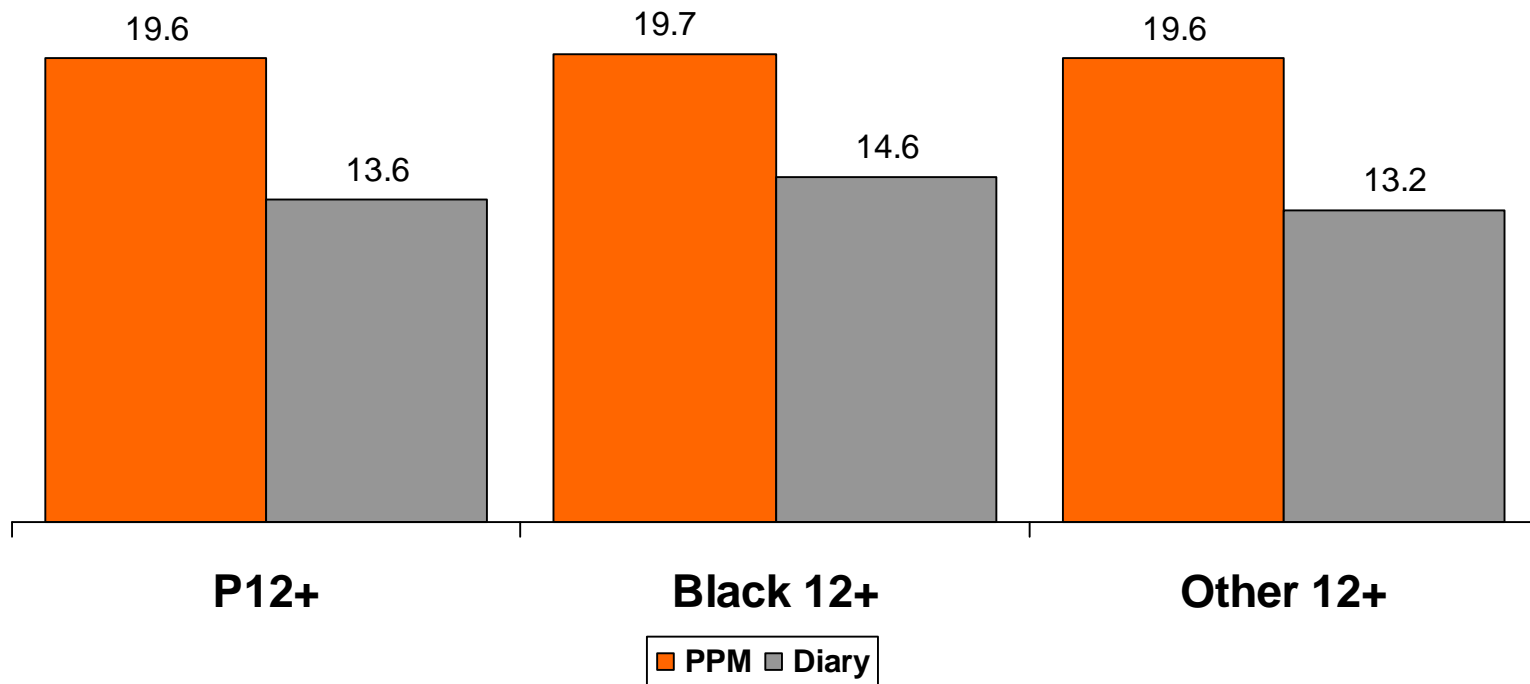
Baltimore Avg Number Of Stations

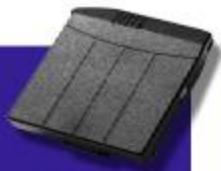




BALTIMORE

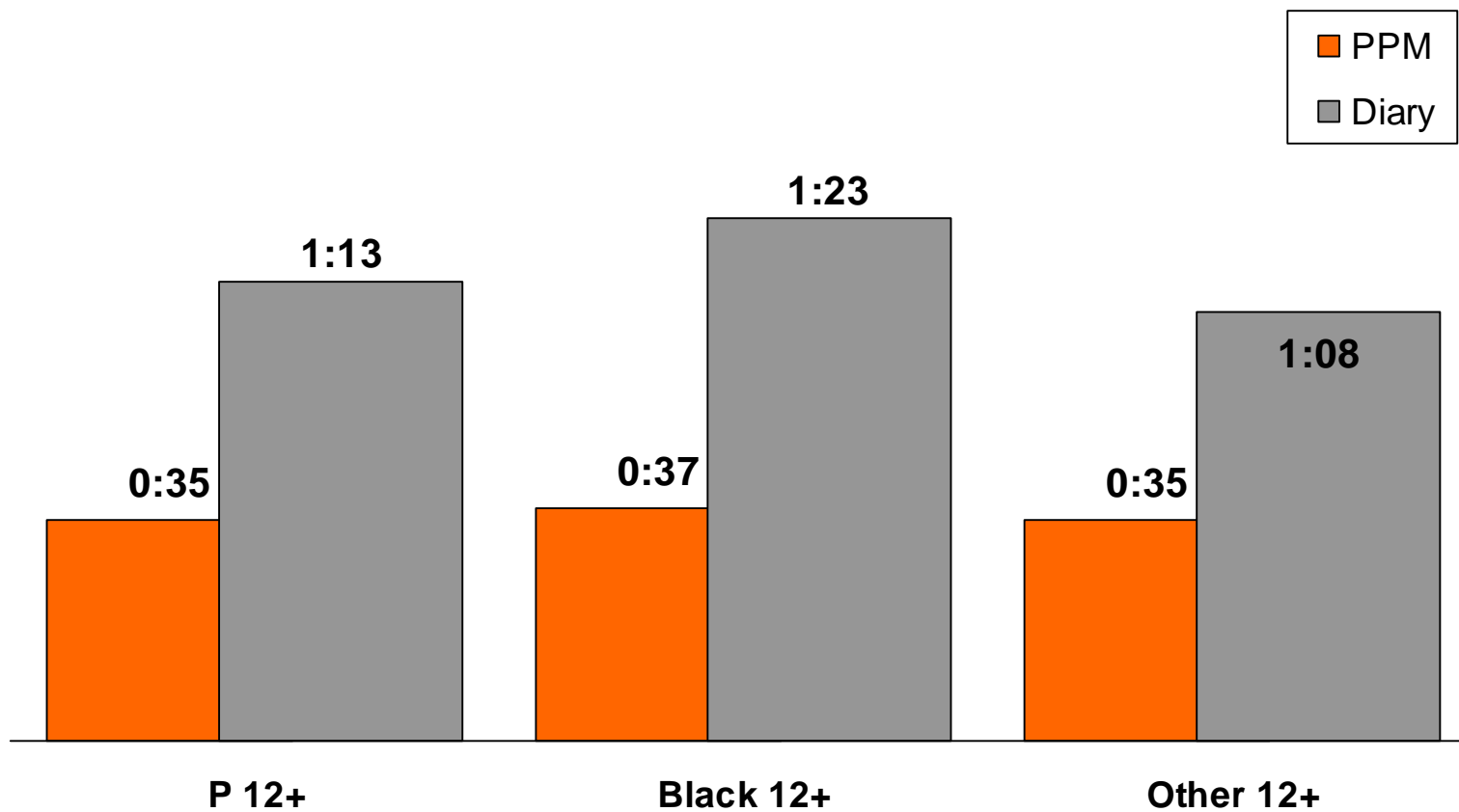
Number Of Listening Occasions





BALTIMORE

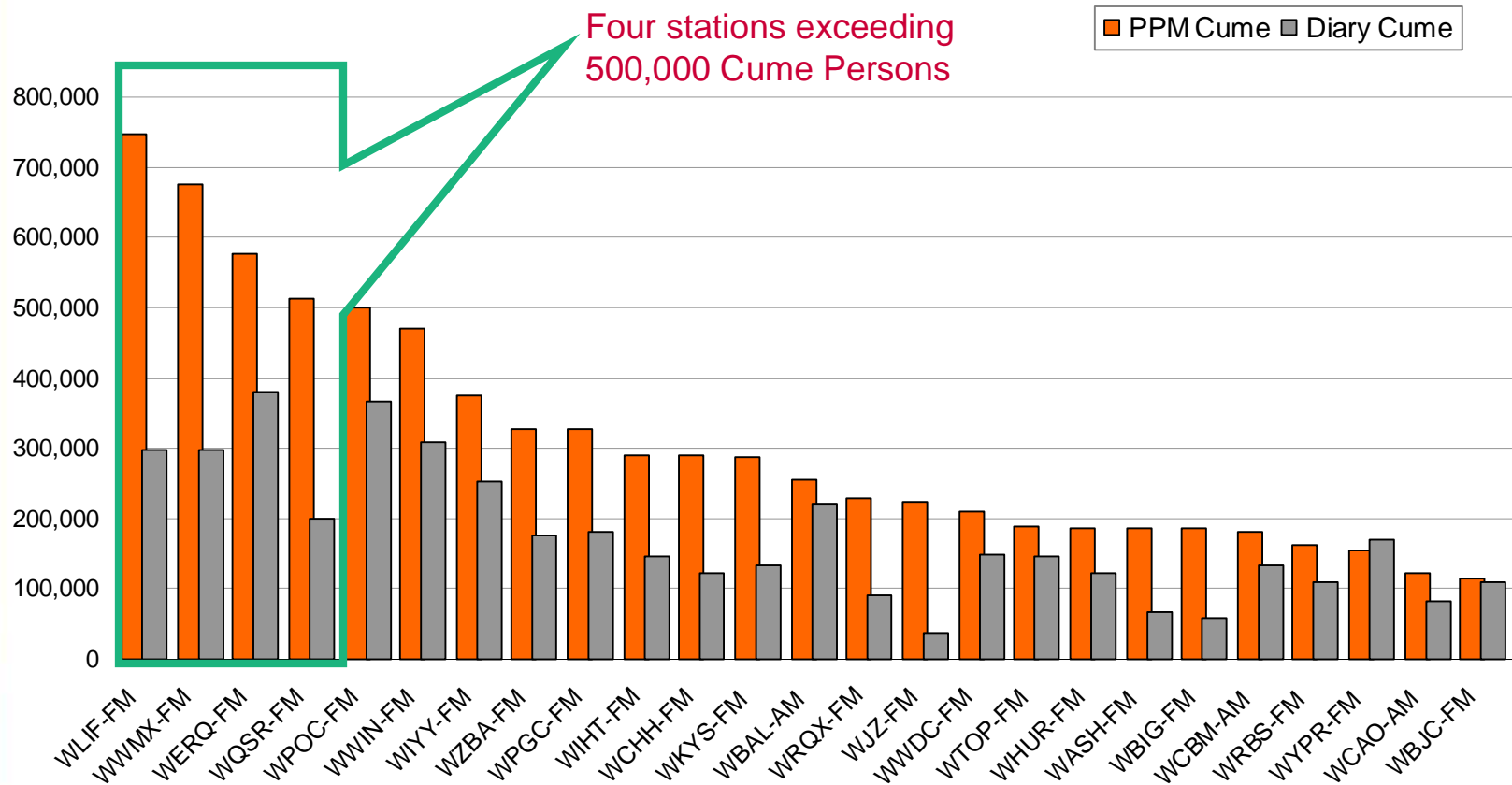
Average Time Spent Per Occasion





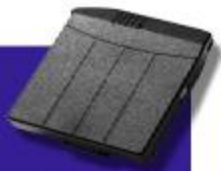
BALTIMORE

Avg Weekly Cume Comparison



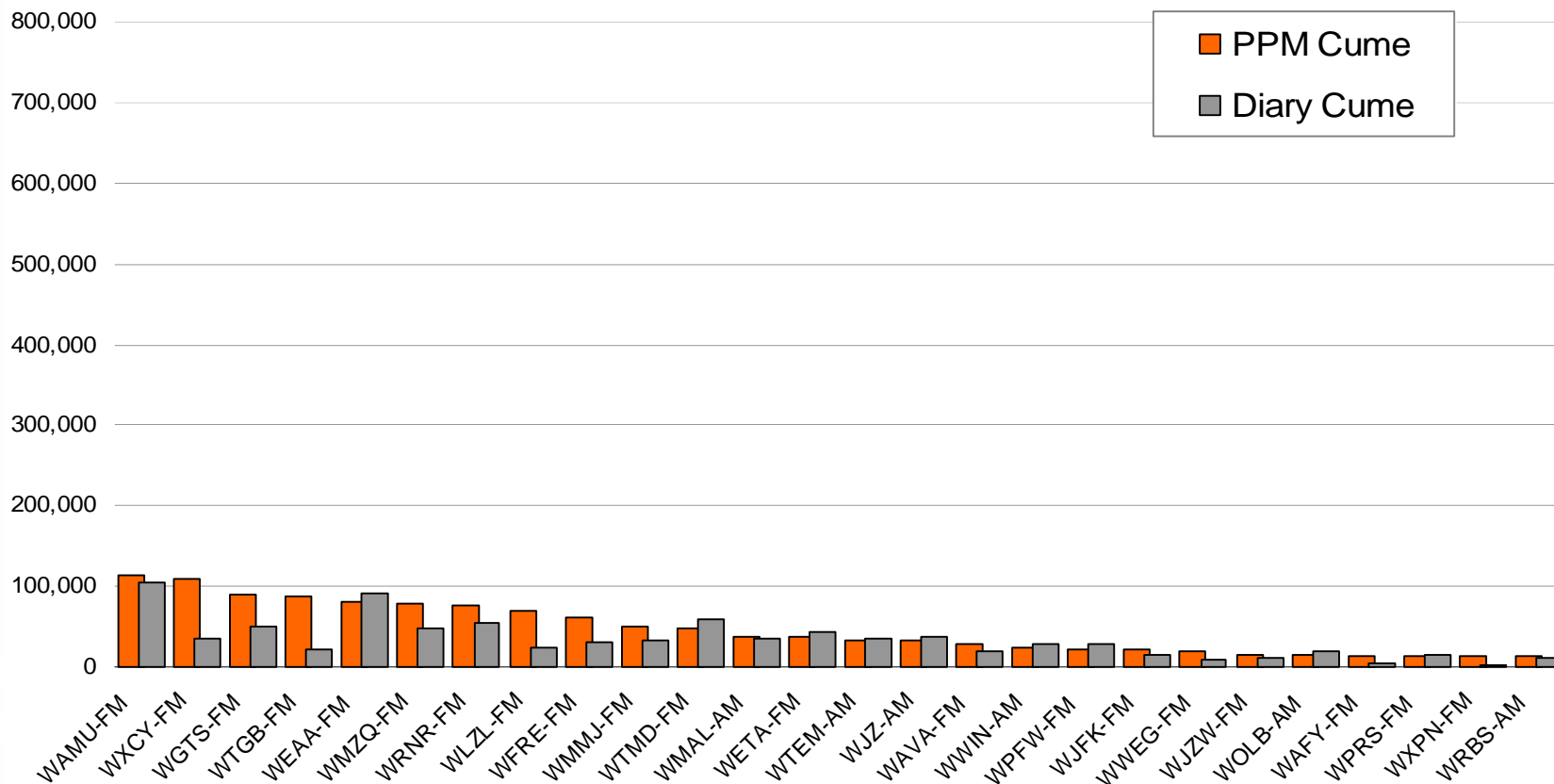
PPM, Baltimore Metro, July 2009, Mon-Sun 6AM-MID, Persons 12+ vs. Diary, Baltimore Metro, Spring 2009, Mon-Sun 6AM-MID, Persons 12+





BALTIMORE

Avg Weekly Cume Comparison



PPM, Baltimore Metro, July 2009, Mon-Sun 6AM-MID, Persons 12+ vs. Diary, Baltimore Metro, Spring 2009, Mon-Sun 6AM-MID, Persons 12+

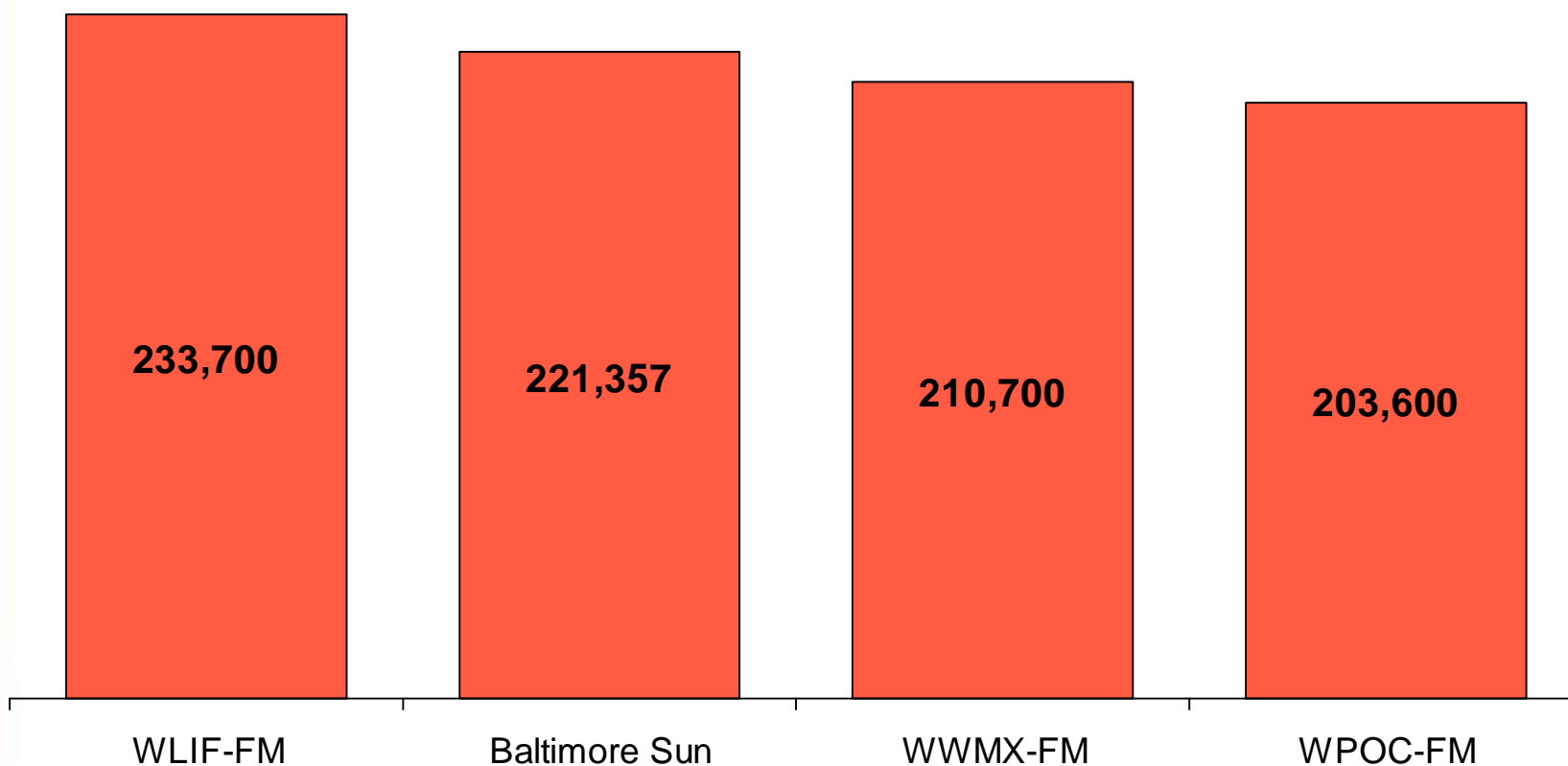




BALTIMORE

How Big Are These Cumes?

Daily Cume Vs. Circulation in Baltimore

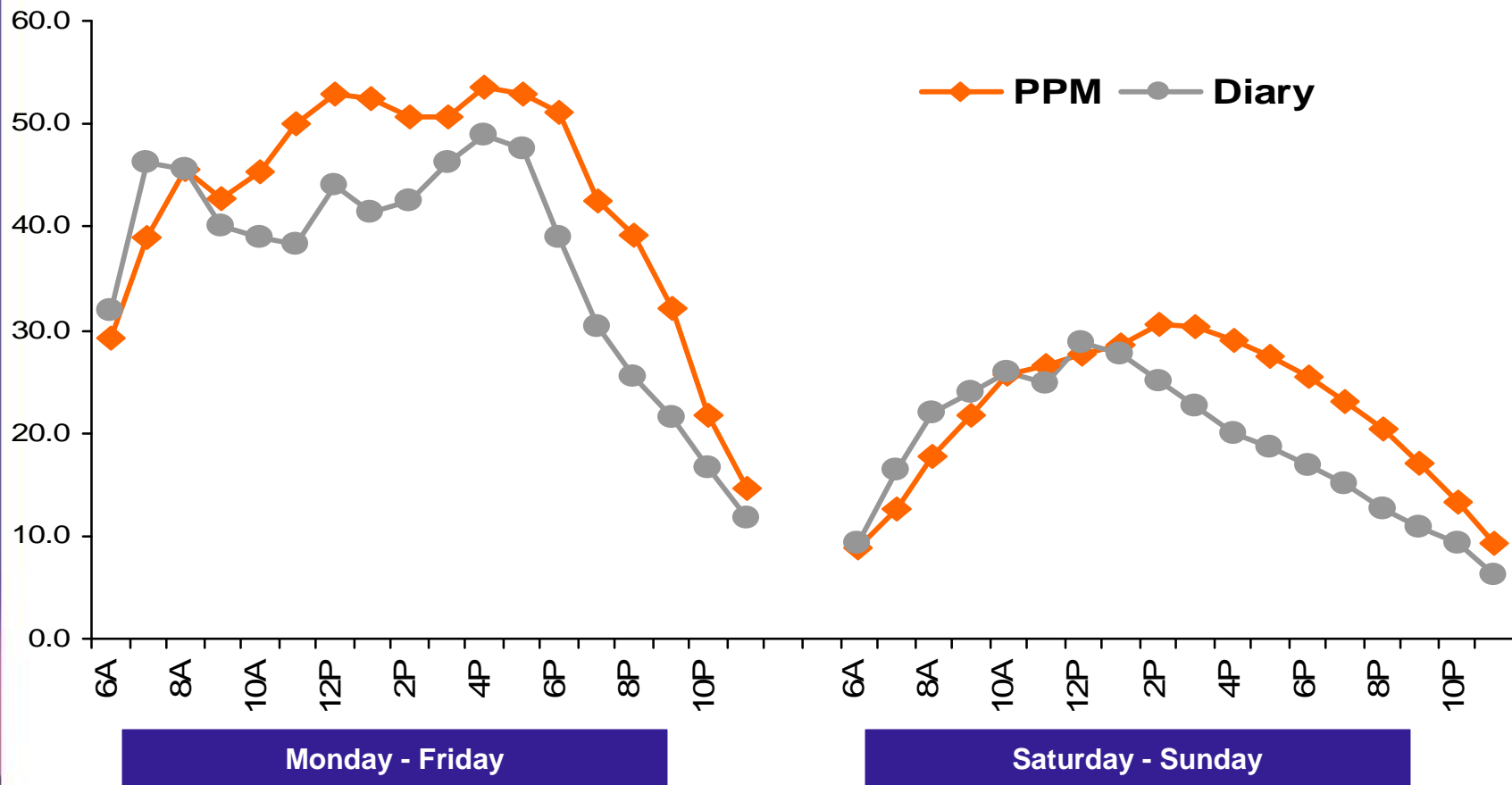


Source: Baltimore Metro PPM, July 09 Data, Mon-Fri 6AM-12Mid, P18, Avg Daily Cume and ABC Daily Newspaper Circulation; Persons 18+



BALTIMORE

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



PPM, Baltimore Metro, July 2009, Mon-Sun 6AM-MID, Persons 12+ vs.
Diary, Baltimore Metro, Spring 2009, Mon-Sun 6AM-MID, Persons 12+ Same stations





Rating Comparisons

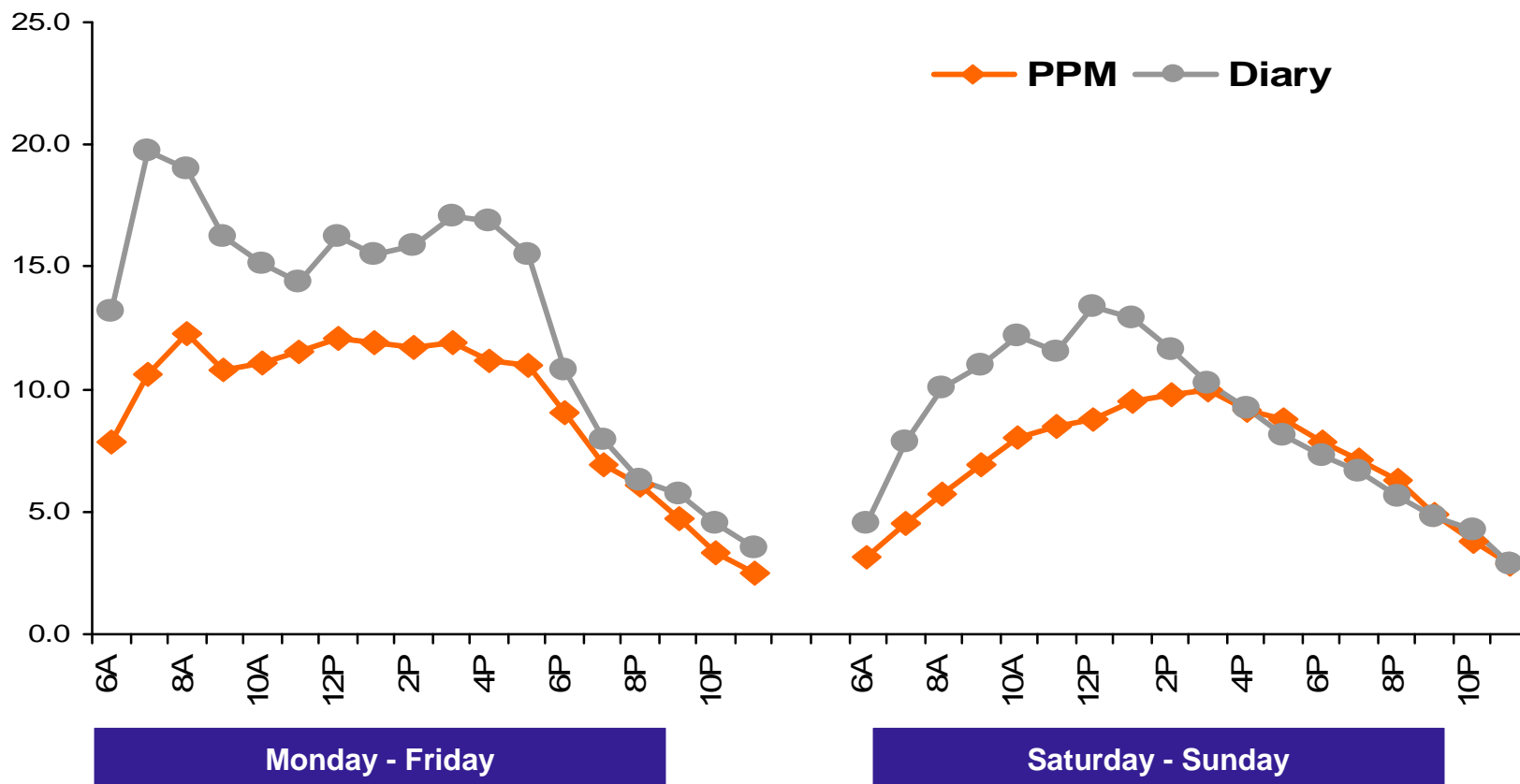
July 09 Pre-Currency PPM Data



BALTIMORE

PPM Vs. Diary Hour-by-Hour, AQH Rating Comparison

Persons 12+



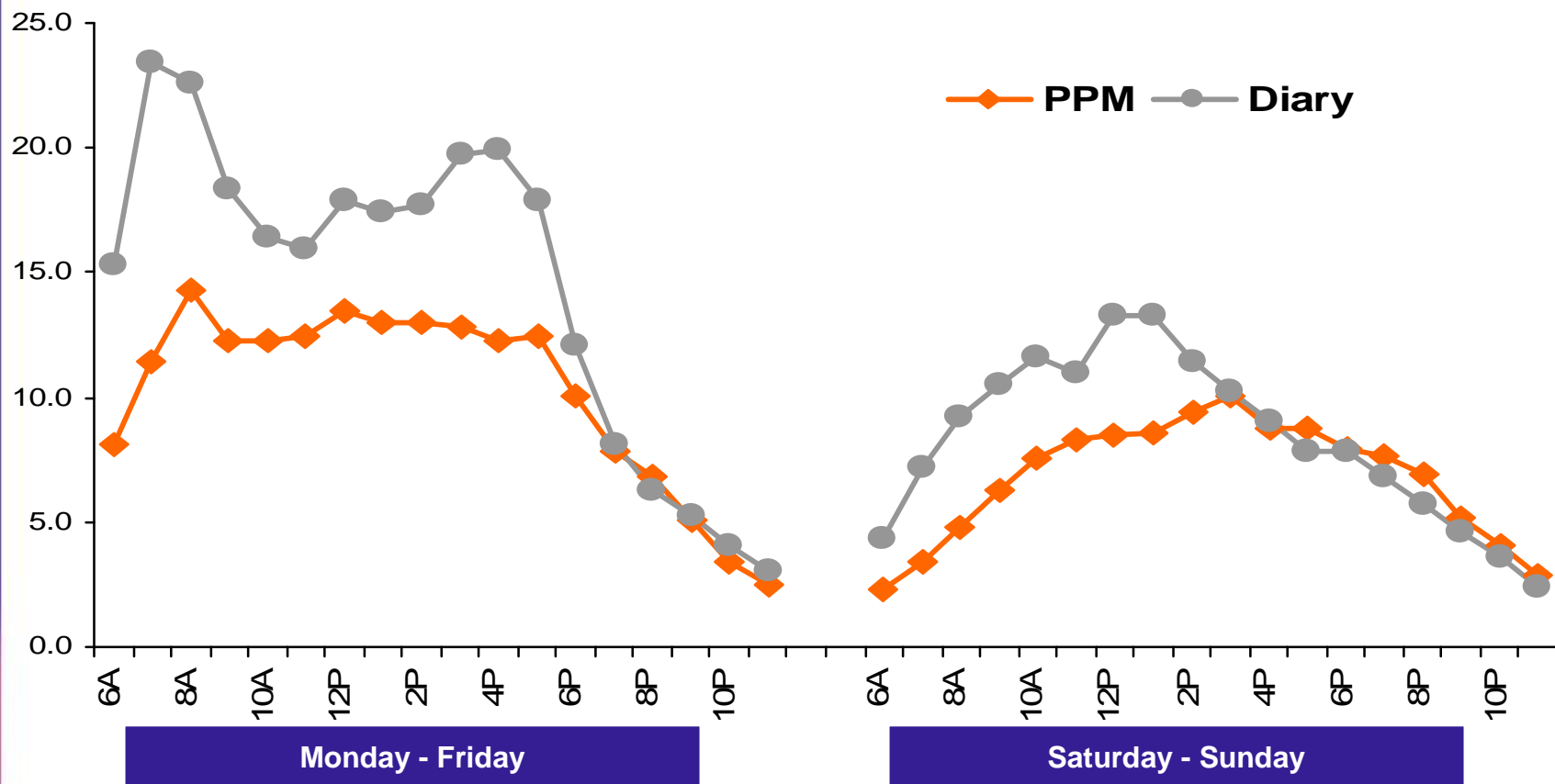
PPM, Baltimore Metro, July 2009, Mon-Sun 6AM-MID, Persons 12+ vs.
Diary, Baltimore Metro, Spring 2009, Mon-Sun 6AM-MID, Persons 12+, Same stations



BALTIMORE

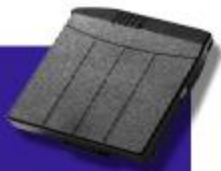
PPM Vs. Diary, Hour-by-Hour AQH Rating Comparison

Persons 25-54



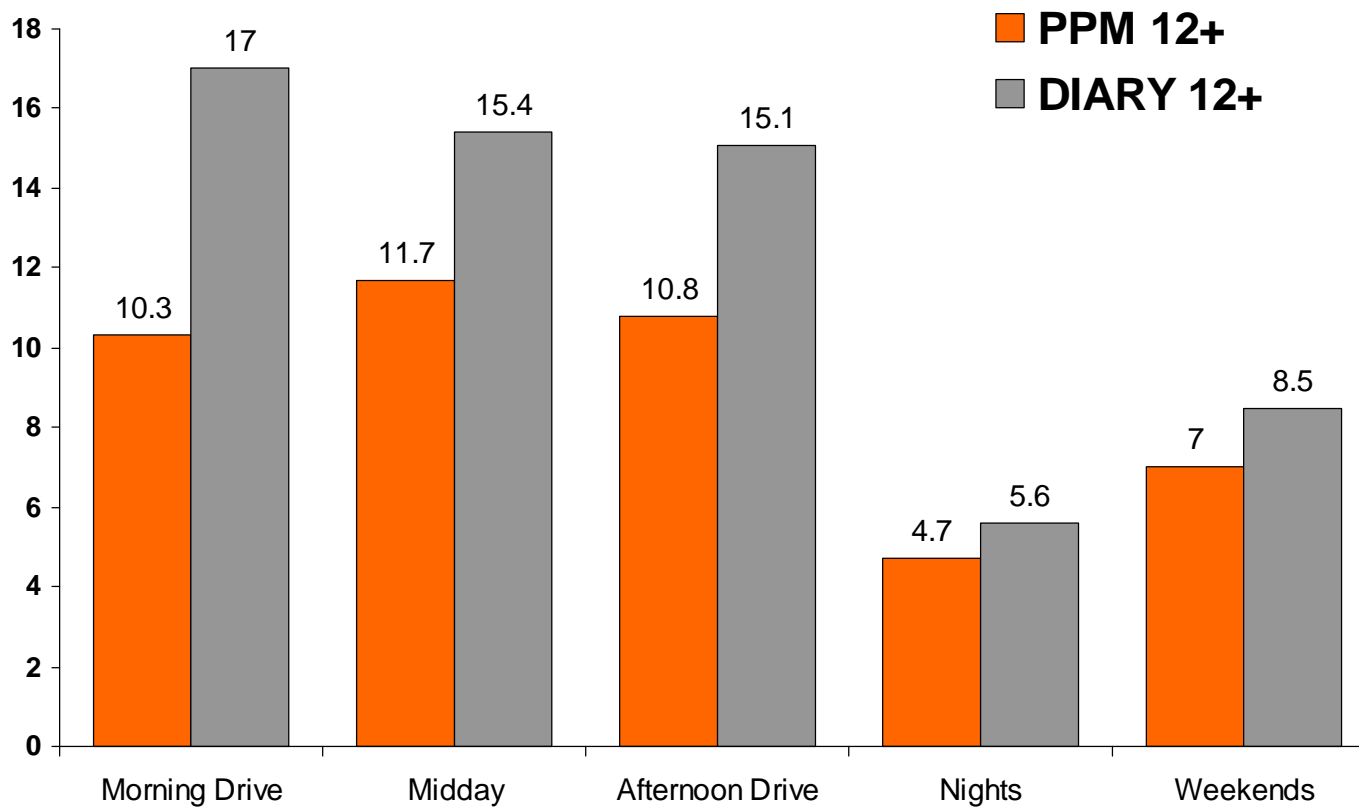
PPM, Baltimore Metro, July 2009, Mon-Sun 6AM-MID, Persons 25-54 vs. Diary, Baltimore Metro, Spring 2009, Mon-Sun 6AM-MID, Persons 25-54



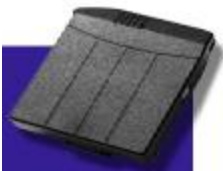


BALTIMORE

PPM Vs. Diary AQH Ratings By Daypart



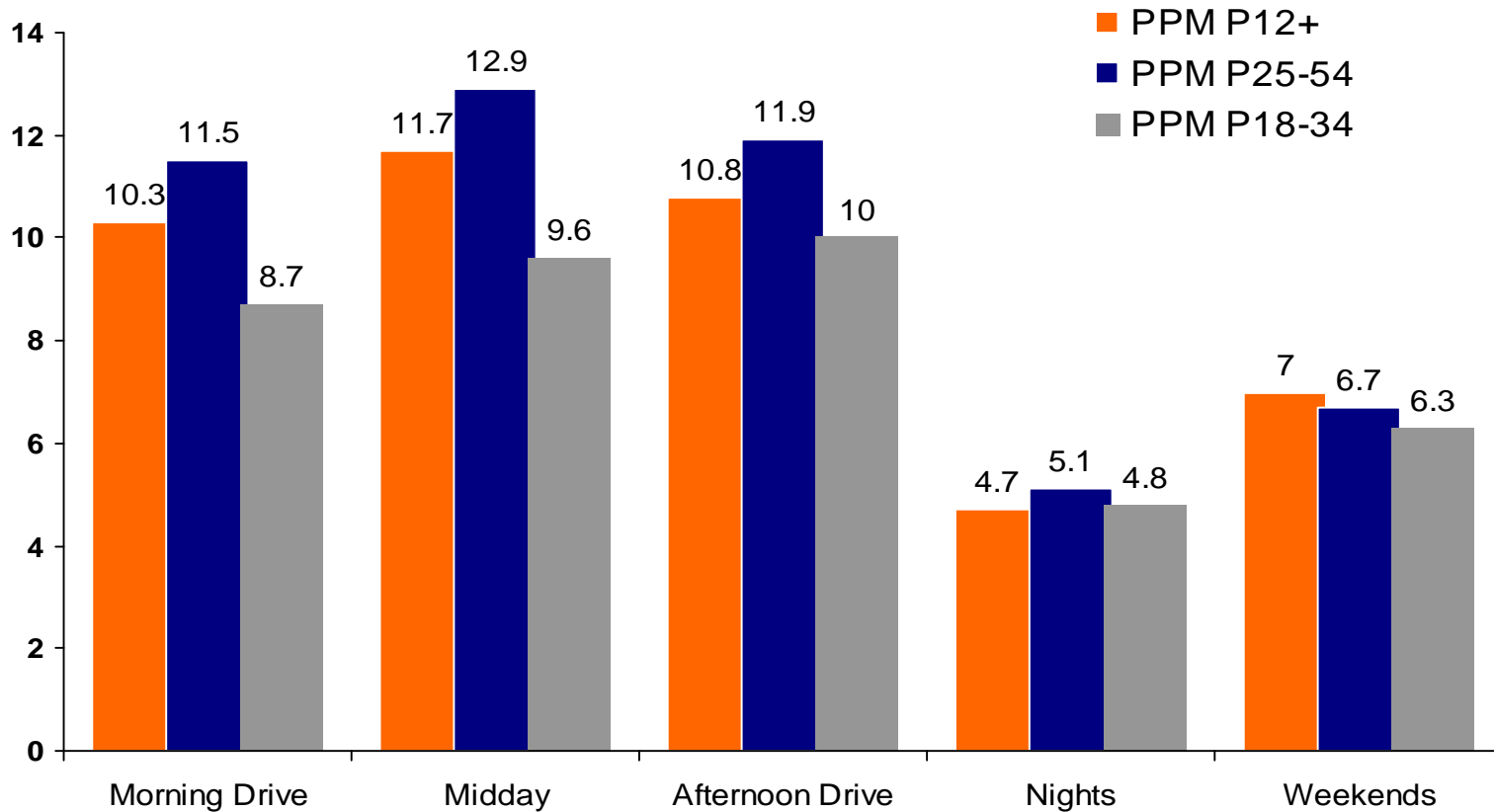
PPM, Baltimore Metro, July 2009, Mon-Sun 6AM-MID, Persons 12+ vs.
Diary, Baltimore Metro, Spring 2009, Mon-Sun 6AM-MID, Persons 12+



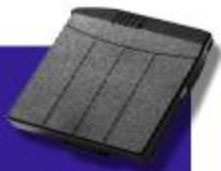
BALTIMORE

PPM AQH Ratings By Demo and Daypart

July 09



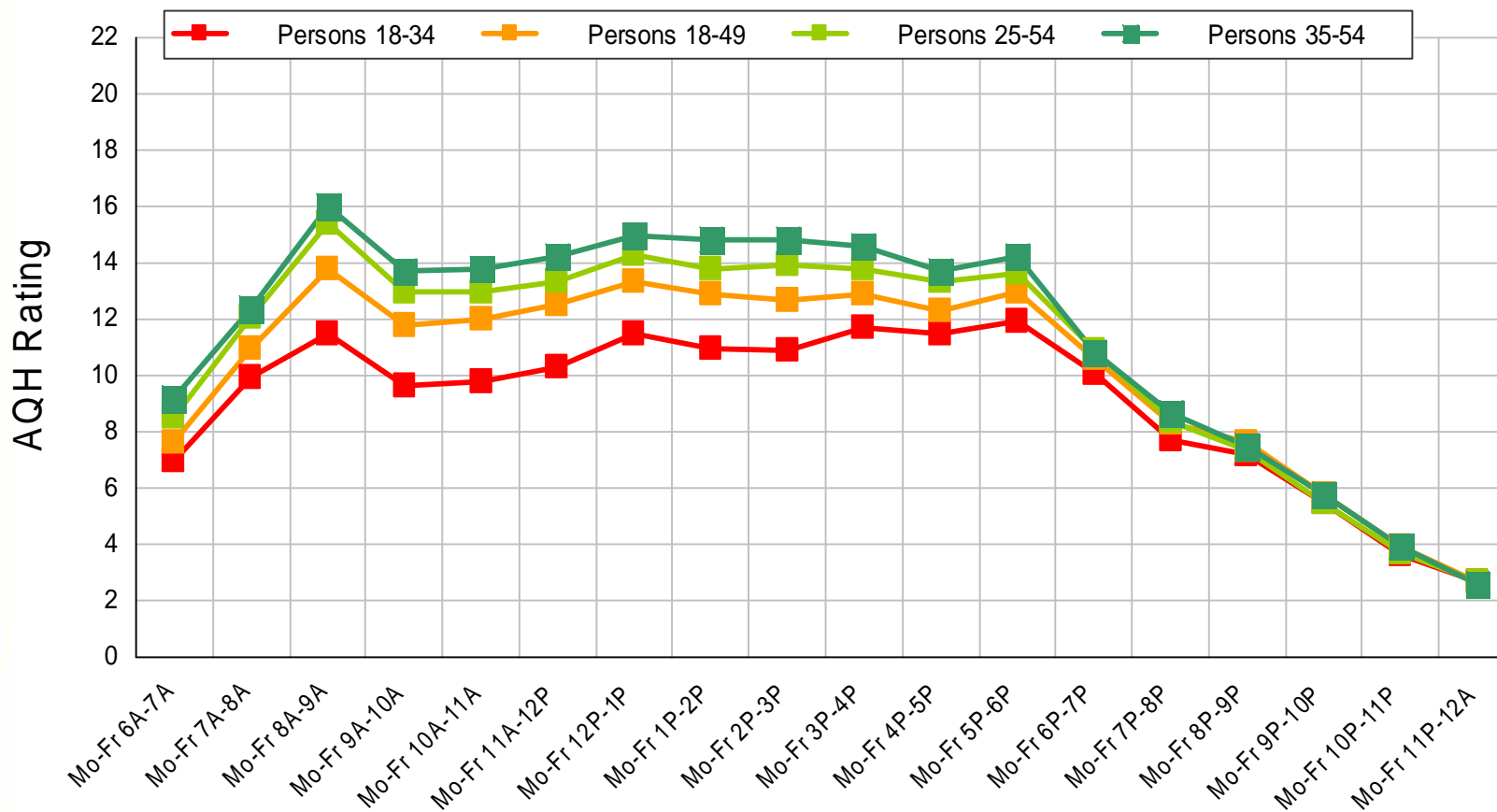
Source: Baltimore Metro PPM, July 09 AQH Ratings



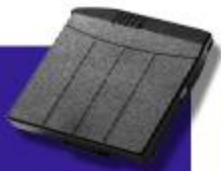
BALTIMORE

Baltimore Listening By Demo

Monday-Friday 6AM-MID



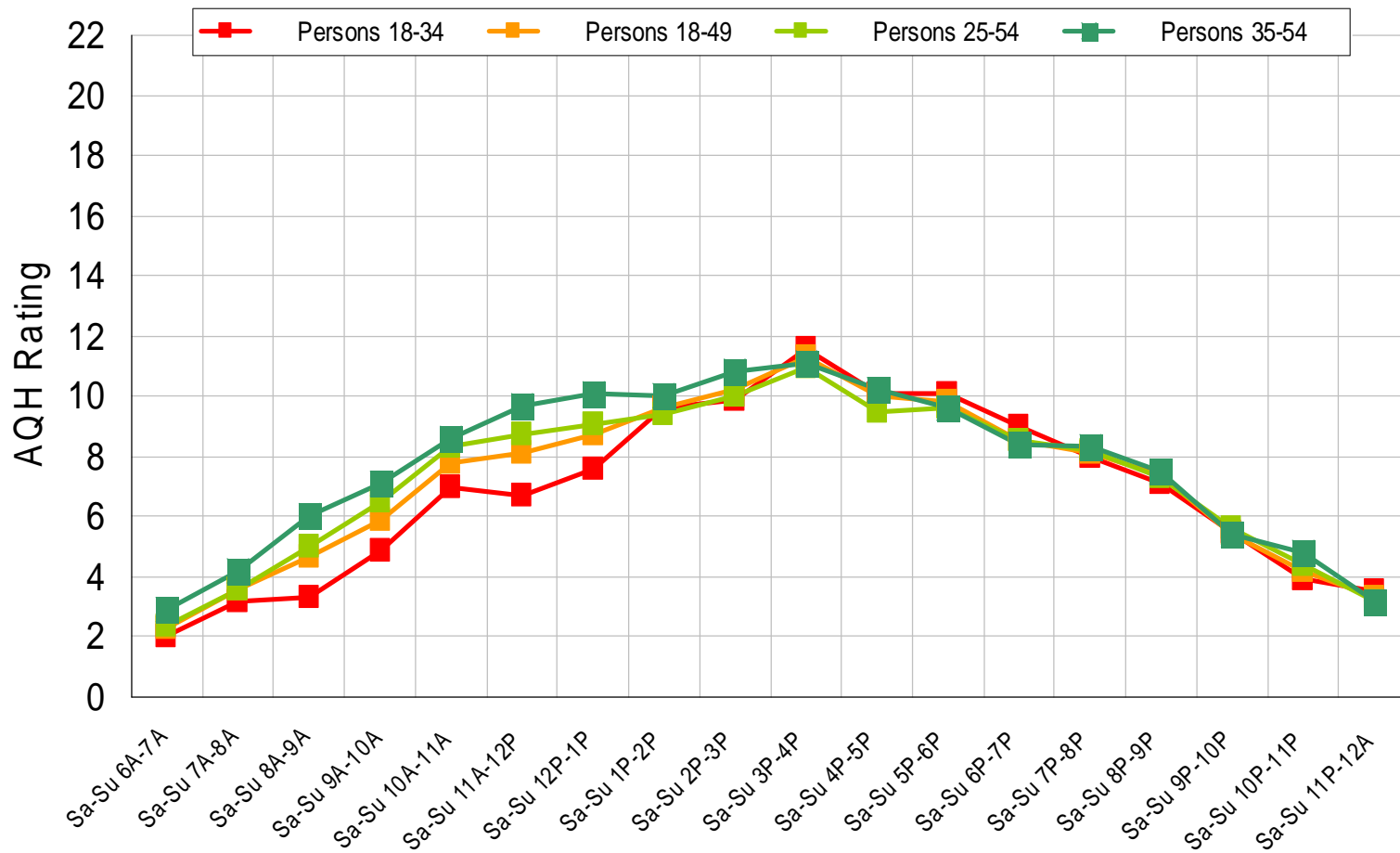
Source: Baltimore Metro PPM, July 09, Mon-Fri 6AM-MID, AQH Ratings



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Baltimore Listening By Demo

Sat-Sun 6AM-MID



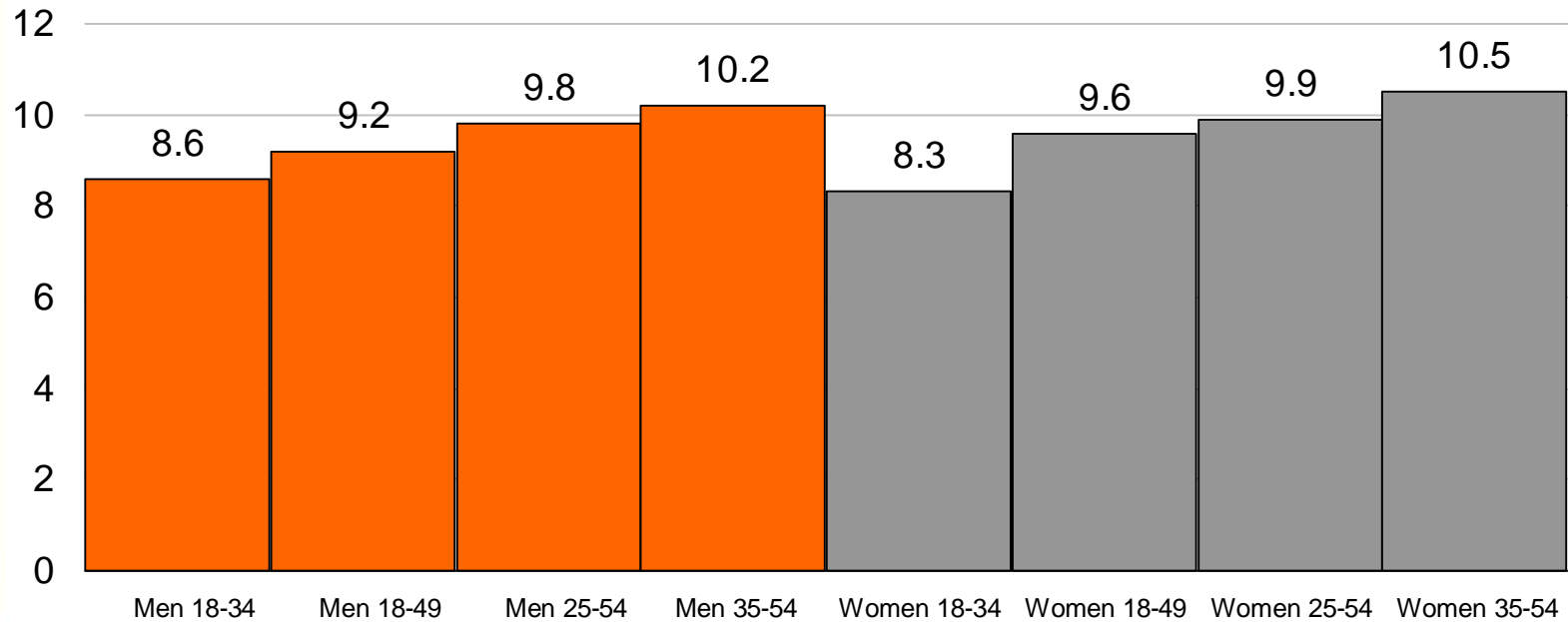
Source: Baltimore Metro PPM, July 09, Sat-Sun 6AM-MID, AQH Ratings





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Baltimore PPM AQH Ratings by Age/Sex

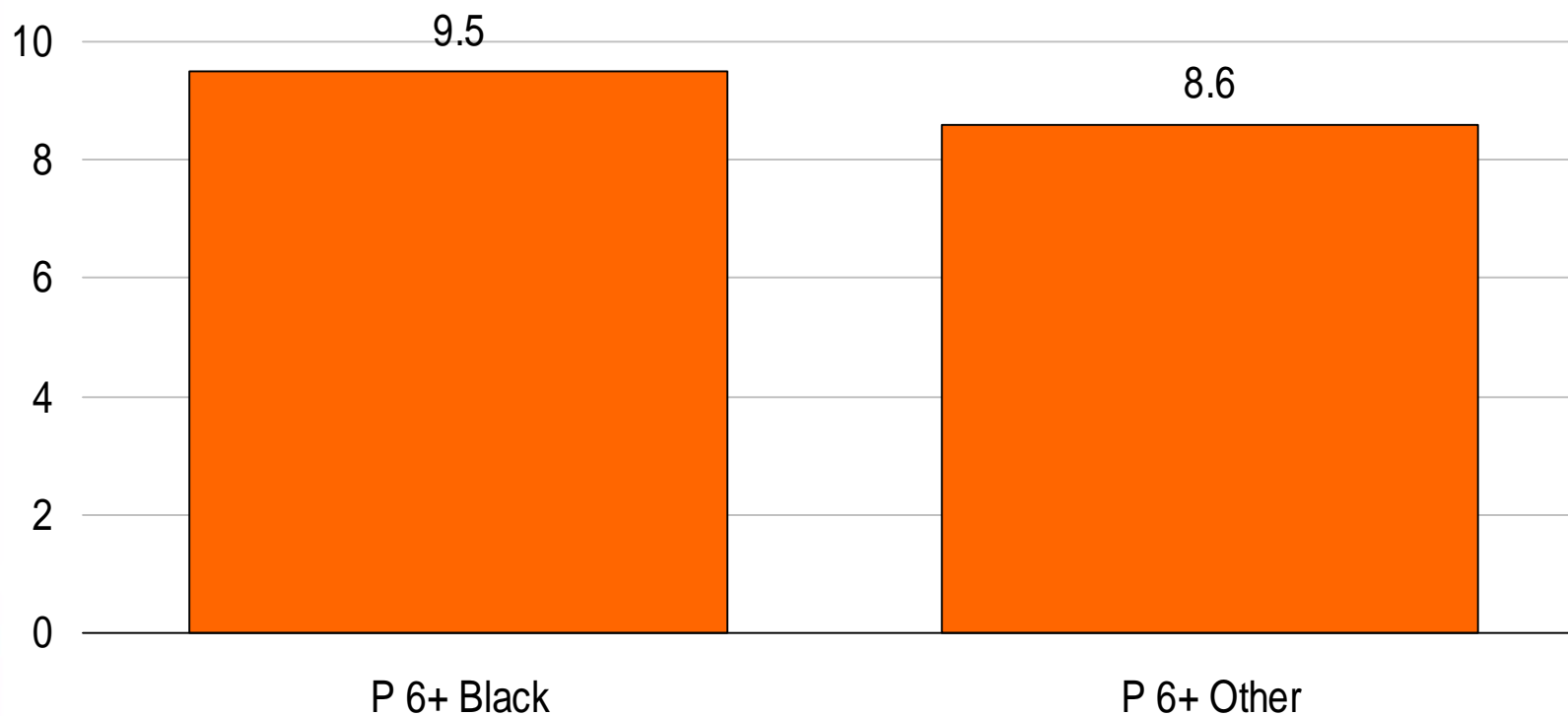


Source: Baltimore Metro PPM, July 09 Data, Mon-Sun 6AM-MID



BALTIMORE

Baltimore Listening Levels by Race and Ethnicity



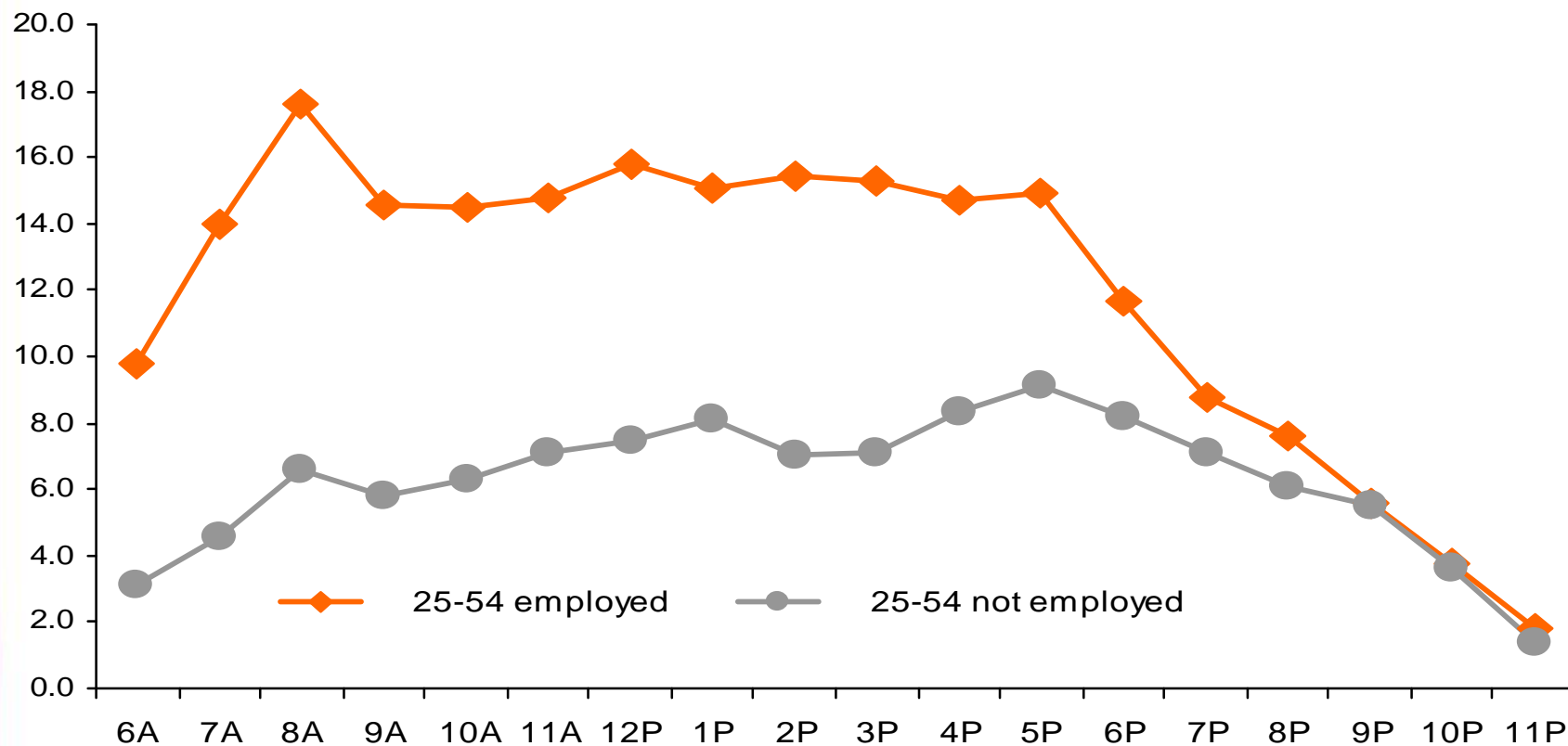
Source: Baltimore Metro, PPM July 09 data, Mon-Sun 6AM-MID, AQH Rating



BALTIMORE

Ratings by Employment Status

Persons 25-54



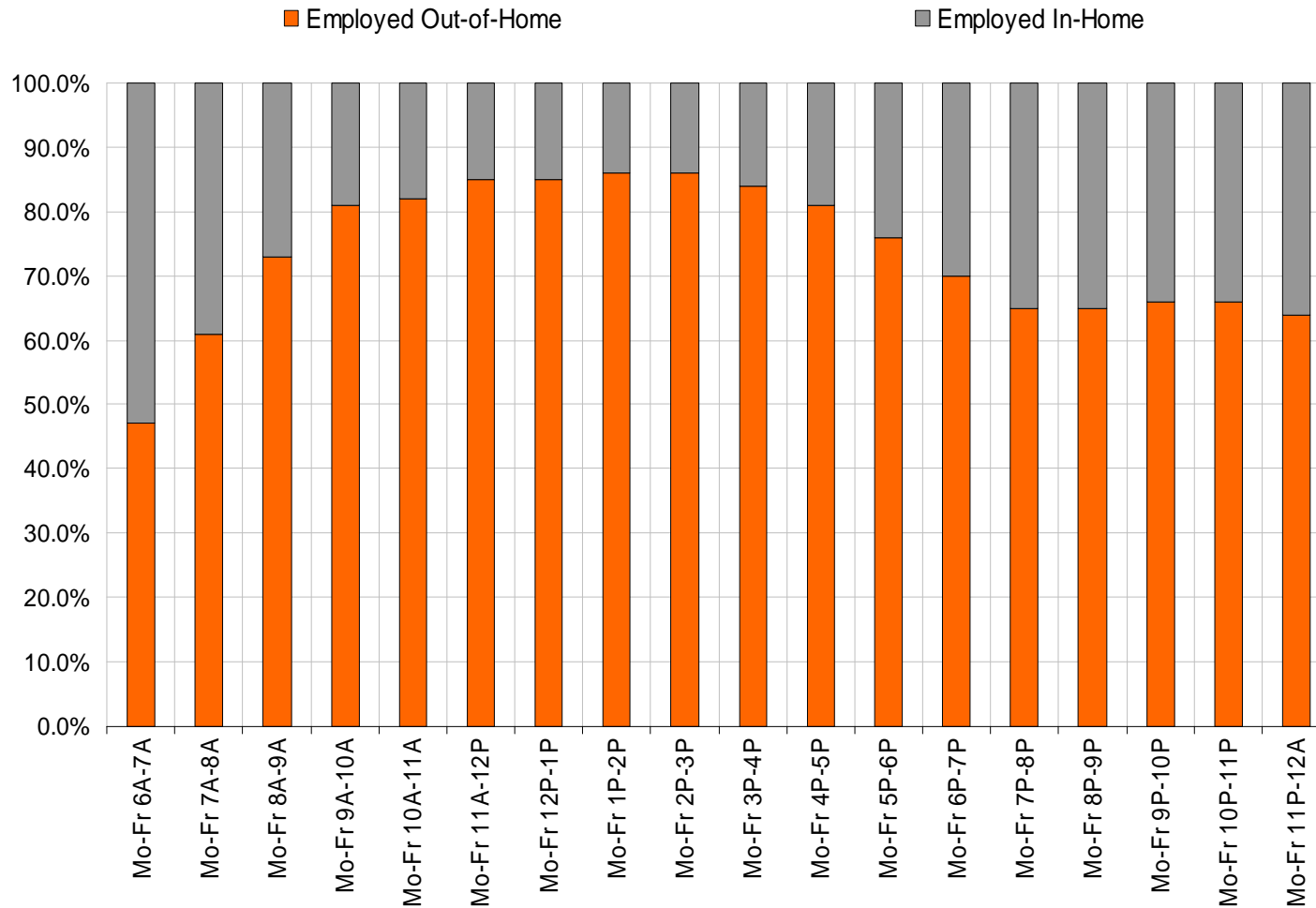
Source: Baltimore Metro PPM July 09, P 25-54, Mo-Fr 6a-12m; A/QH Ratings



BALTIMORE

Out-of-Home Listening By Employment

Hour-by-Hour Persons 25-54, Mon-Fri 6a-12m

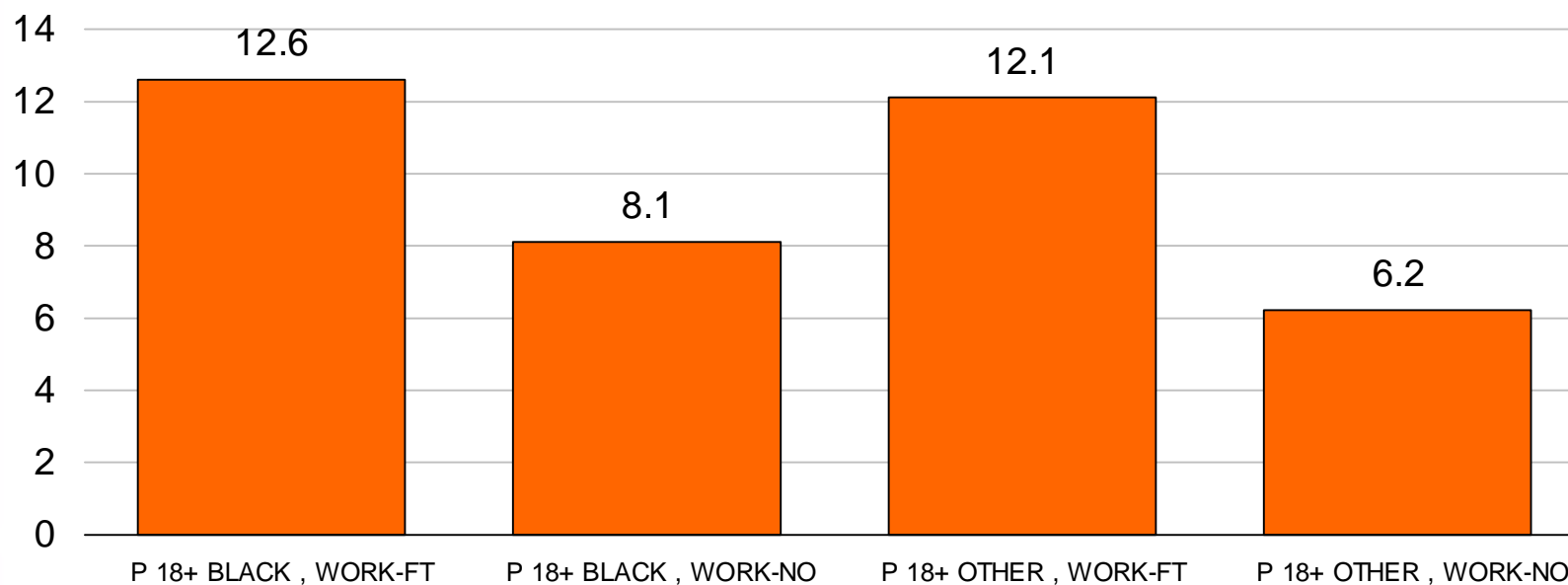


Source: Baltimore Metro PPM July 09, P 25-54, Mon-Fri 6a-12m, Avg AQH Comp%

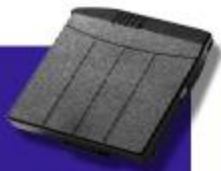


BALTIMORE

Listening Levels by Race/Ethnicity and Employment Status

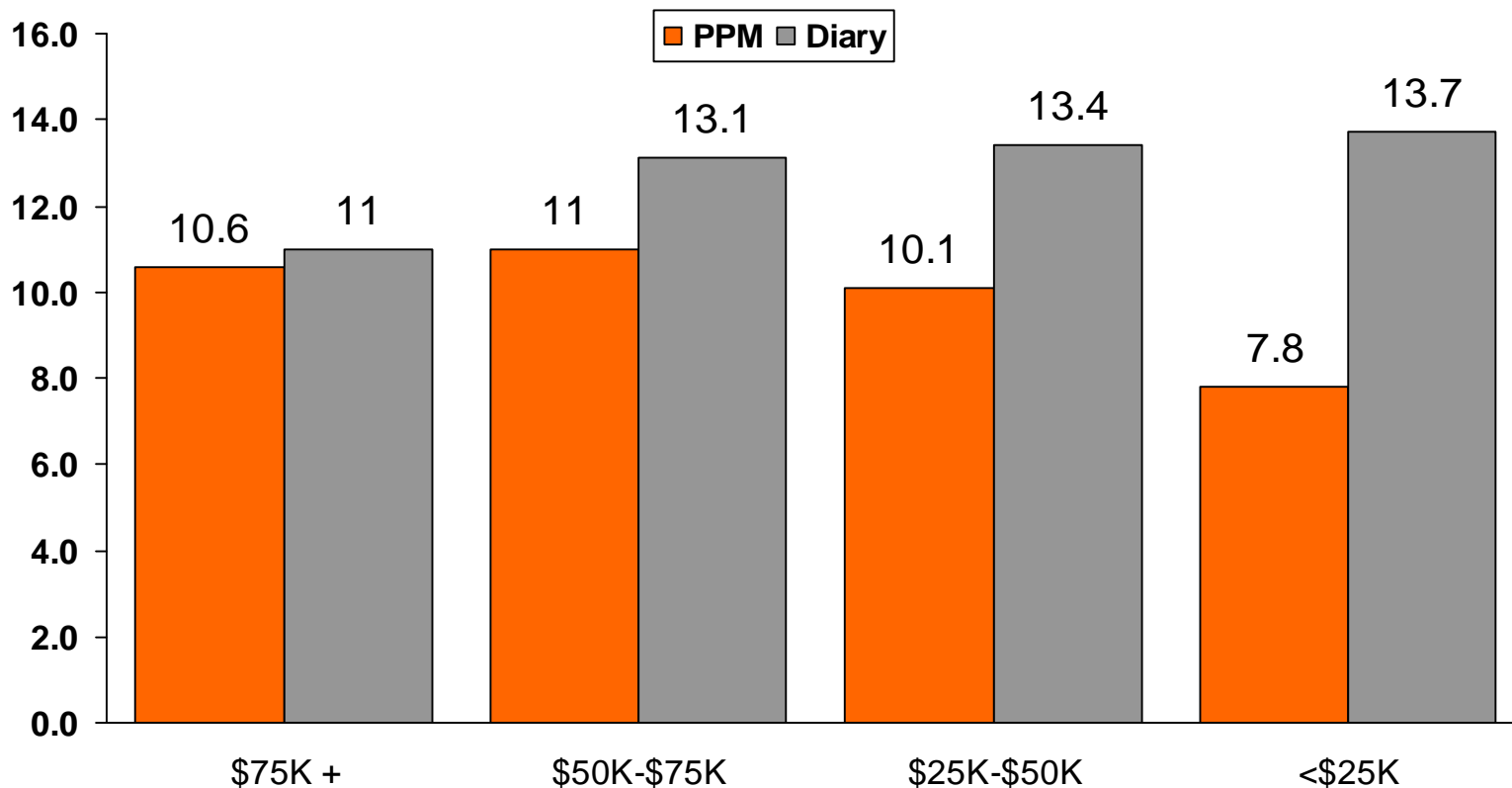


Source: Baltimore Metro, PPM July 09, Mon-Sun 6AM-MID, Persons 18+, AQH Rating



BALTIMORE

Listening Levels by Income Level PPM Vs. Diary



PPM, Baltimore PPM, July 09, Mon-Sun 6AM-MID, Persons 18+ vs.
Diary, Baltimore Metro, Spring 2009, Mon-Sun 6AM-MID, Persons 18+, AQH Rating



BALTIMORE

Top Five Stations Represent Many Formats

Mon-Sun 6a-12m

Persons 12+

Urban Adult Contemporary
Adult Contemporary
Country
Hot Adult Contemporary
Urban Contemporary

Persons 25-54

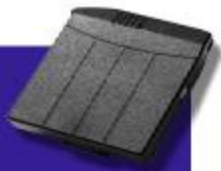
Urban Adult Contemporary
Hot Adult Contemporary
Adult Contemporary
Urban Contemporary
Country

Persons 18-34

Urban Contemporary
Hot Adult Contemporary
Urban Adult Contemporary
Active Rock
Alternative

Persons 35-54

Urban Adult Contemporary
Adult Contemporary
Country
Hot Adult Contemporary
Adult Hits



BALTIMORE

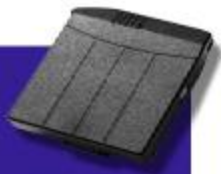
Ratings Are More Compressed In PPM

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

	Baltimore 18-34		Baltimore 18-49		Baltimore 25-54		Baltimore 35-54	
	Diary	PPM	Diary	PPM	Diary	PPM	Diary	PPM
M-F 6a-10a	2.7	1.2	1.8	1.0	1.5	0.7	2.0	1.1
M-F 10a-3p	2.4	1.3	1.6	1.2	1.2	1.3	1.3	1.6
M-F 3p-7p	2.5	1.1	1.4	0.9	1.1	0.7	1.4	0.9
M-F 7p-12m	2.1	0.7	1.2	0.6	0.9	0.6	0.7	0.7
Sa-Su 6a-12p	1.7	0.9	1.1	0.8	0.9	0.9	1.1	0.9

Source: Baltimore Metro, PPM July09 vs Diary Spring 2009

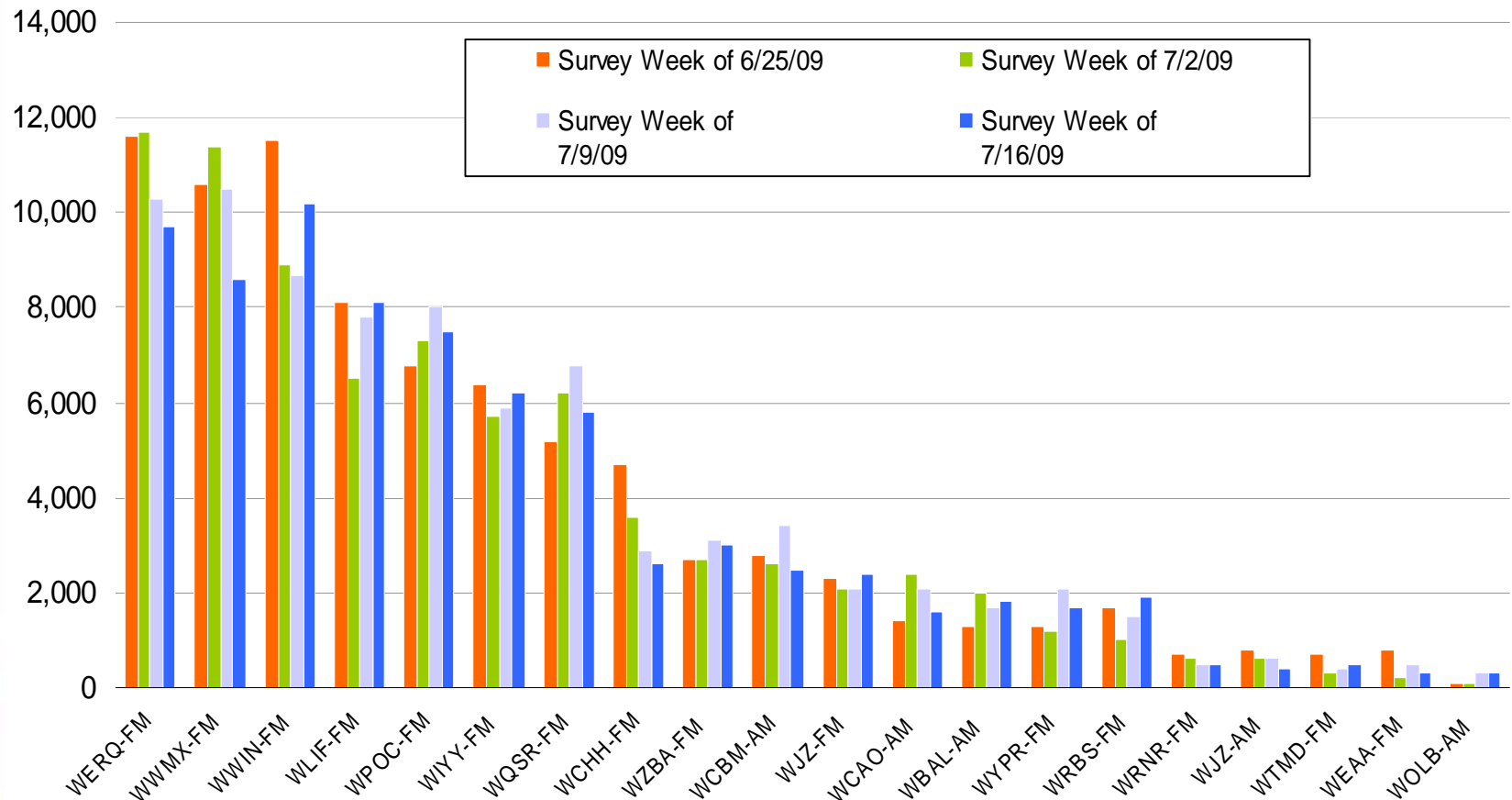




BALTIMORE

Weekly AQH Persons Estimates

Persons 18-49, AQH Persons, Mon-Sun 6a-12m, July 09



Source: Baltimore Metro, PPM July 09, Mon-Sun 6AM-MID





PPM provides Granularity and highlights Special Events

The King of Pop Died on June 25th, 2009.

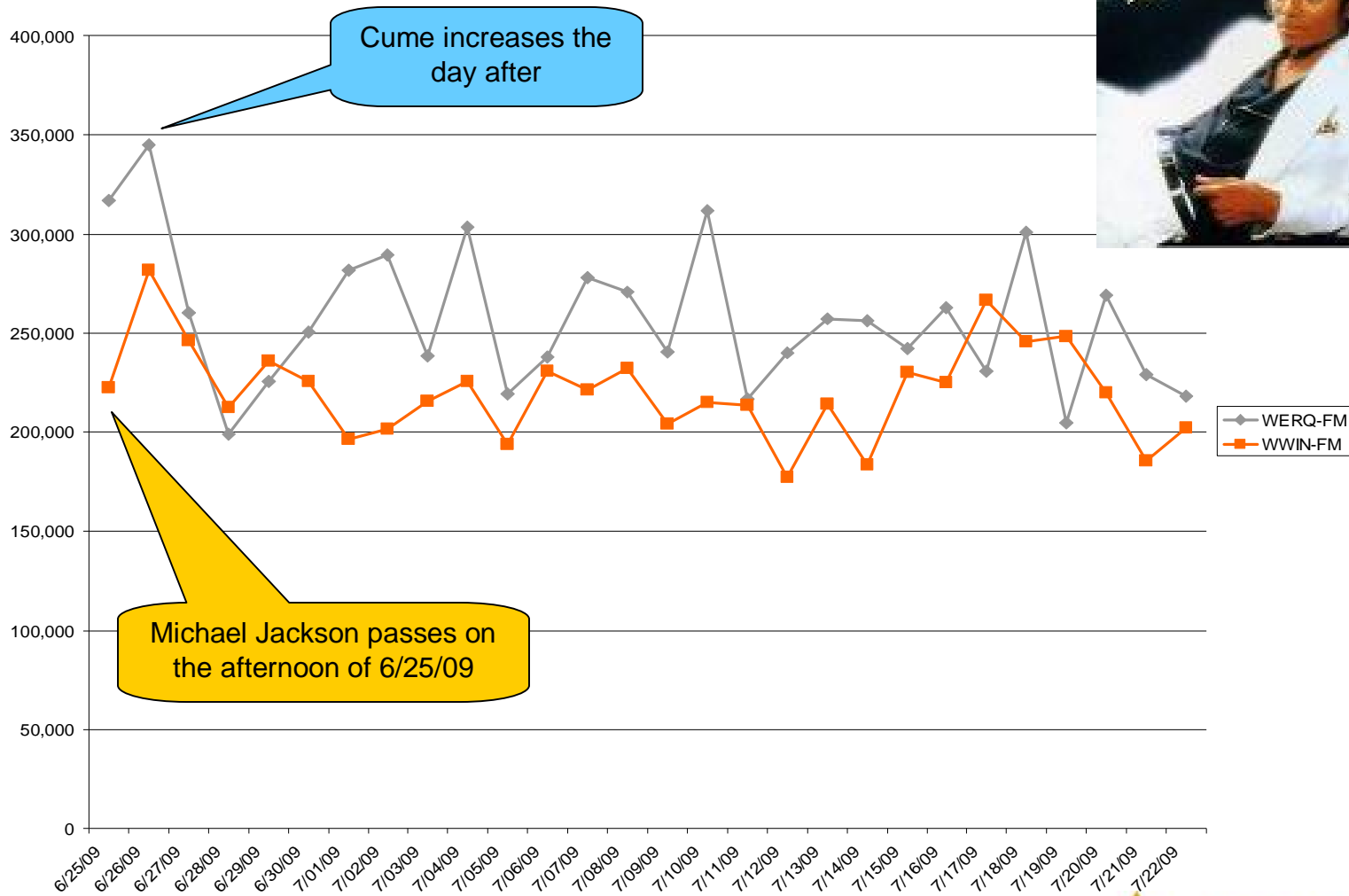
Did Baltimore's radio programmers make the right decision to meet the needs of his fans?

Sporting Events can be analyzed down to the game day



BALTIMORE

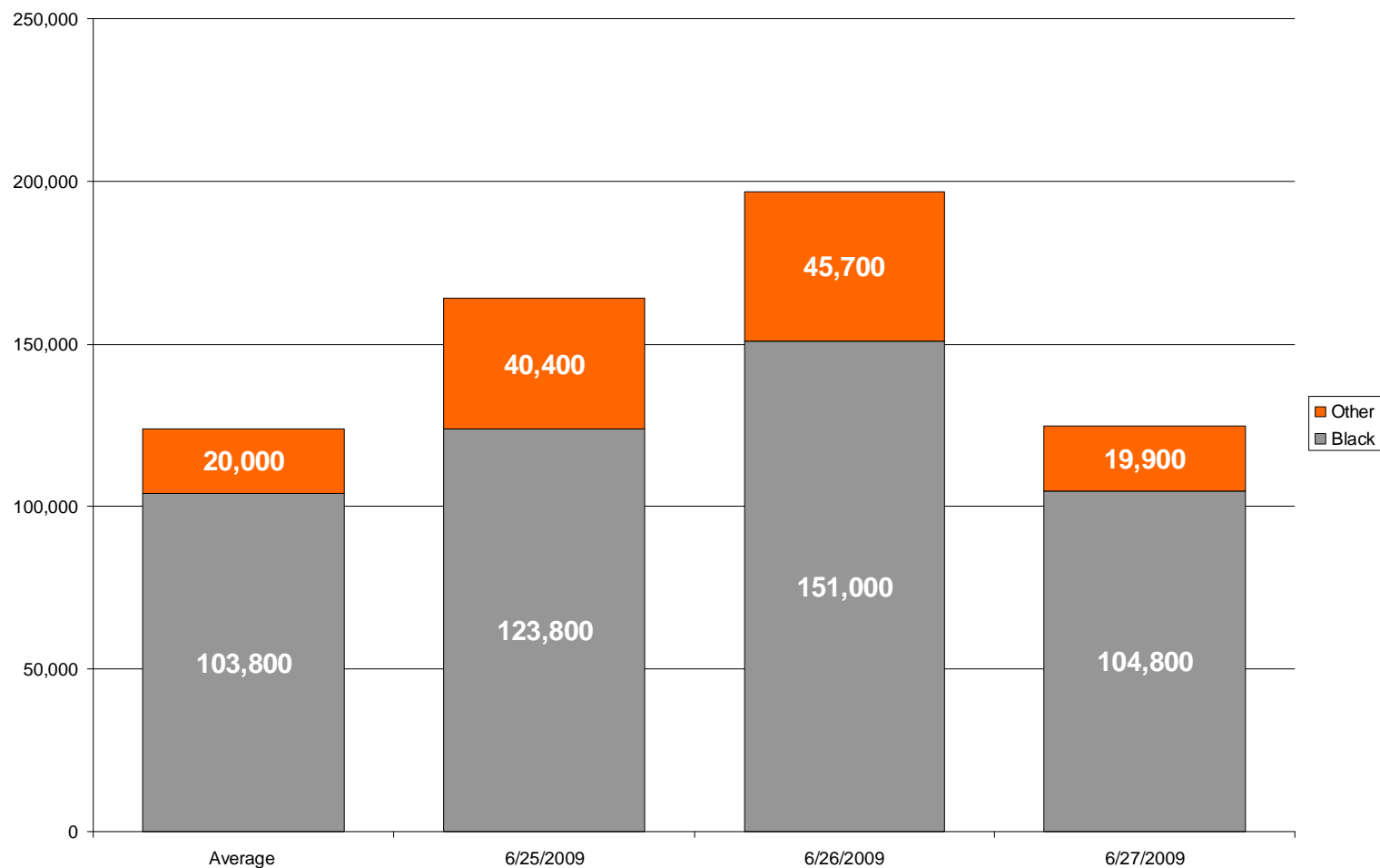
Michael Jackson's Death Caused a spike in Cume listening





BALTIMORE

WERQ-FM gained cume mostly from Black listeners

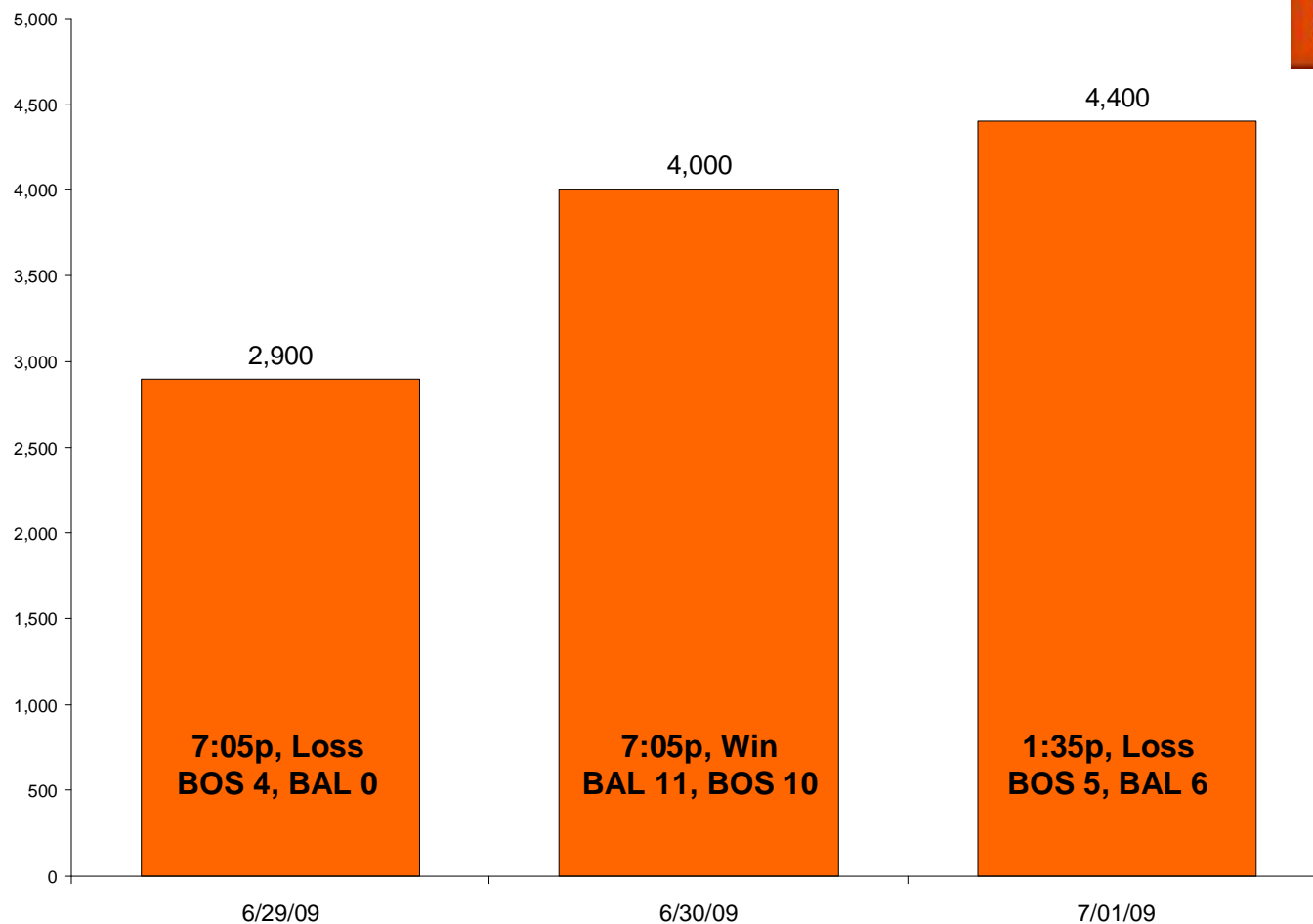


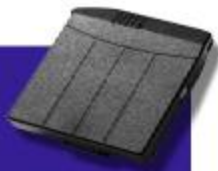


BALTIMORE

Orioles vs Red Sox Series

AQH Persons

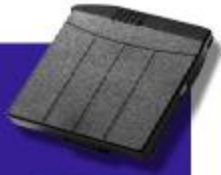




BALTIMORE

Summary

- § Compliance is similar to all other PPM markets
- § Listening levels continue to follow trends in other PPM markets
 - » **Employment, as well as out-of-home listening continues to be a major driver of ratings**
- § Listening levels on evenings and weekends are similar to that of the diary.
- § Radio's reach in Baltimore is approximately 93% of the metro each week (P 6+)
- § Ratings are now compressed among top tier stations.
- § Granularity of PPM will allow programmers to improve the product in ways not possible with diary



BALTIMORE

Thank You For Joining

- § A copy of this presentation will be available this afternoon at the Baltimore PPM website:
http://www.arbitron.com/ppm_Baltimore.htm
- § Data will also be available via Arbitron's Downloader & within Tapscan Web at 12p ET.
- § On Wednesday, August 19th at 12p ET, you will be able to access your first Weeklies data (August Week 1)
- § New versions of the PPM Analysis Tool & PPM Weeklies were released on July 24th
 - » **Analysis Tool version is: 12.1.9 Weeklies version is: 9.1.3**



PPM in Baltimore



Baltimore

July 09 Pre-Currency PPM Data