

PPM in Tampa-St. Petersburg-Clearwater



Tampa-St. Petersburg- Clearwater PPM

July 09 Pre-Currency Data

Kevin Wolfson
Senior Account Manager
August 13, 2009



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Disclaimer...

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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How do I ask a question during the WebEx session?

Email me directly and I will reply to your questions once the session has ended.

– You may send multiple questions.

My email is : Kevin.Wolfson@arbitron.com



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Findings

The Tampa-St. Petersburg-Clearwater sample for is representative of all demos, ethnicities, counties and language preferences.

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 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.

§ Compression shows more choices in the top rank positions than the diary

Granular data continues to provide insight into how consumers use radio.

PPM in Tampa-St. Petersburg-Clearwater



Sample

July 09 Pre-Currency Data



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Tampa-St. Petersburg-Clearwater Metro Sample

Total Persons in Monthly Sample

Monthly Installed Persons	1,396
Monthly In-tab Persons	1,319
Monthly In-tab Rate	94.5%

Total Persons in Daily Sample

Avg Daily In-tab Persons	972
Avg Daily In-tab Rate	74.8%
Compliance-Capable*	1,179
Compliance Rate**	82.5%
Installed Cell-Phone-Only Persons	157
Avg. Cell-Phone-Only In-Tab Persons	106

*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.

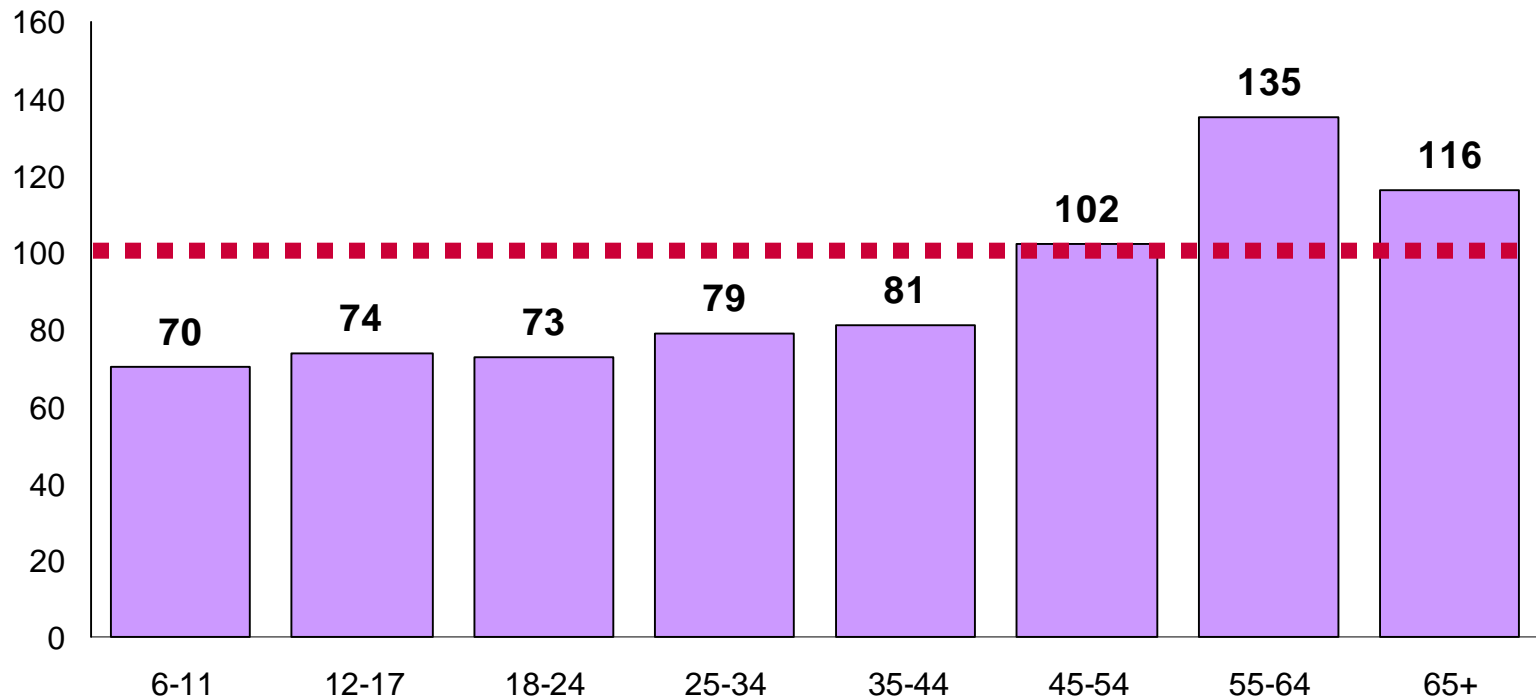
**Compliance rate is calculated as follows: Daily In-Tab Persons/Compliance-Capable Persons



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Tampa-St. Petersburg-Clearwater Sample Performance by Age Cell

July 09



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



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Tampa-St. Petersburg-Clearwater In-Tab Sample Size, by Demo and Race/Ethnicity

Tampa-St. Petersburg-Clearwater				
July 09	Avg. Daily In-tab Target	Avg. Daily In-tab Actual	DDI*	Total Month In-Tab
P6+	1016	972	96	1319
P18+	858	858	100	1128
P18-54	529	451	85	632
P25-54	439	386	88	530
Black 6+	115	104	90	163
Hispanic 6+	146	155	106	210
Other 6+	755	713	94	946

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





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Tampa-St. Petersburg-Clearwater In-Tab Sample Size, 18-34 DDI Performance

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Tampa-St. Petersburg-Clearwater				
July 09	Avg. Daily In-tab Target	Avg. Daily In-tab Actual	DDI*	Total Month In-Tab
Persons 18-34	224	171	77	258
Men 18-34	113	79	70	120
Women 18-34	111	92	83	138
Black 18-34	31	20	64	37
Hispanic 18-34	46	34	74	50
Other 18-34	147	118	80	171

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

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Tampa-St. Petersburg-Clearwater In-Tab Sample Size, 25-54 Race/Ethnicity

Tampa-St. Petersburg-Clearwater				
July 09	Avg. Daily In-tab Target	Avg. Daily In-tab Actual	DDI*	Total Month In-Tab
Persons 25-54	439	386	88	530
Men 25-54	219	179	82	247
Women 25-54	221	207	94	336
Black 25-54	51	42	83	86
Hispanic 25-54	66	69	104	92
Other 25-54	323	275	85	380

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





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Tampa-St. Petersburg-Clearwater In-Tab Rates July 09

	Persons 6+	Persons 18-34	Men 18-34	Women 18-34	Black 18-34	Hispanic 18-34	Other 18-34
BENCHMARK	75%	70%	60%	60%	60%	60%	60%
Tampa-St. Petersburg- Clearwater July 09	75%	69%	70%	69%	58%	68%	72%

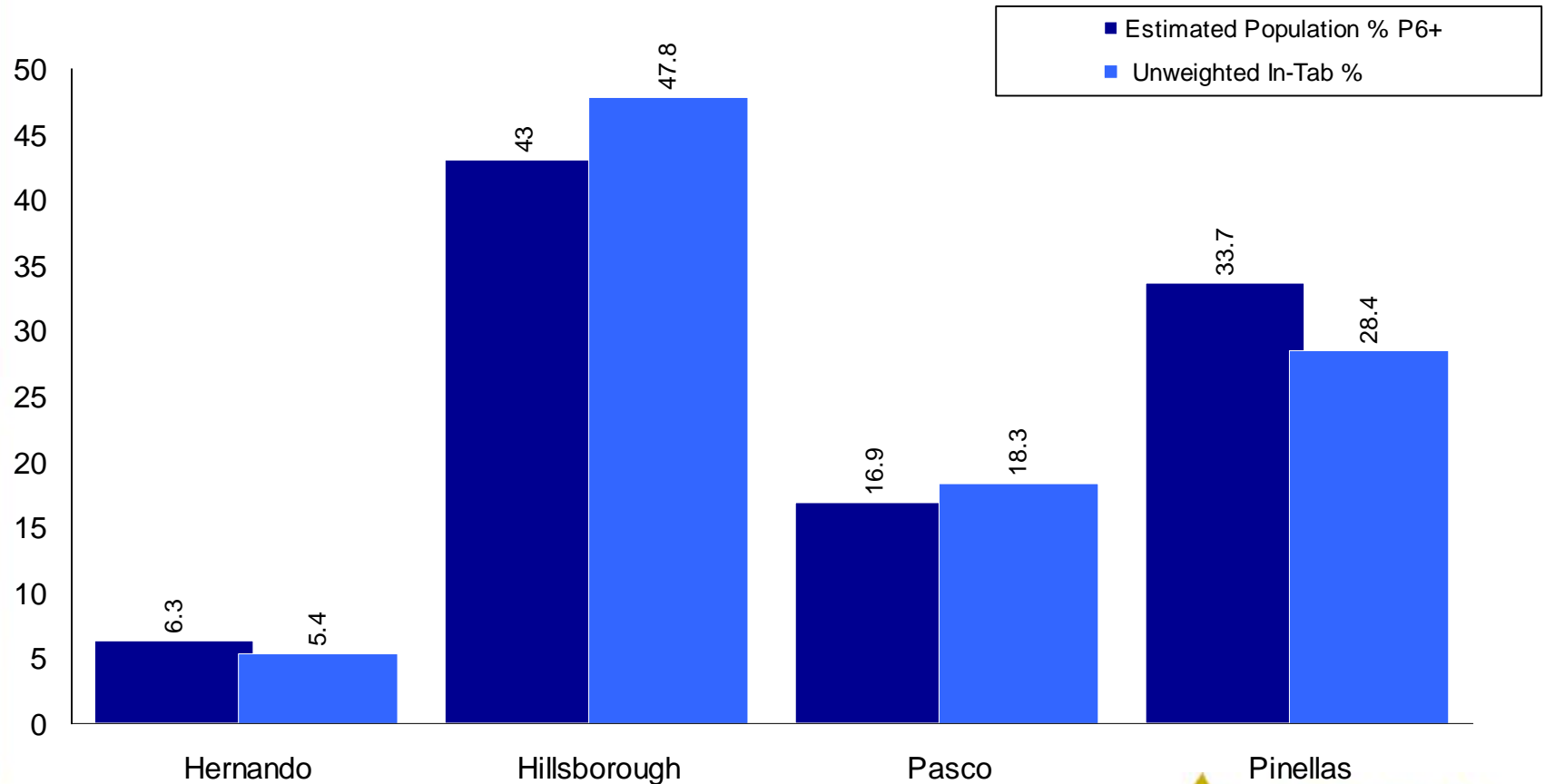




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Tampa-St. Petersburg- Clearwater PPM County Sample

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Tampa-St. Petersburg-Clearwater, PPM July 09 Estimated Pop % 6+;
Unweighted In-tab % 6+

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Tampa-St. Petersburg-Clearwater Compliance and Carry Times

**Tampa-St. Petersburg-Clearwater PPM
July 09**



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Median Undock/Dock Times

July 09 Weekdays

Female 6+

Male 6+

Undock
Time



8:00 AM



7:46 AM



Dock Time

11:34 PM



11:33 PM





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Median Undock/Dock Times

July 09 Weekdays

Black 6+

Hispanic 6+

Other 6+

Undock
Time



8:05 AM

8:16 AM

7:49 AM



Dock Time

12:16AM

11:42 PM

11:28 PM





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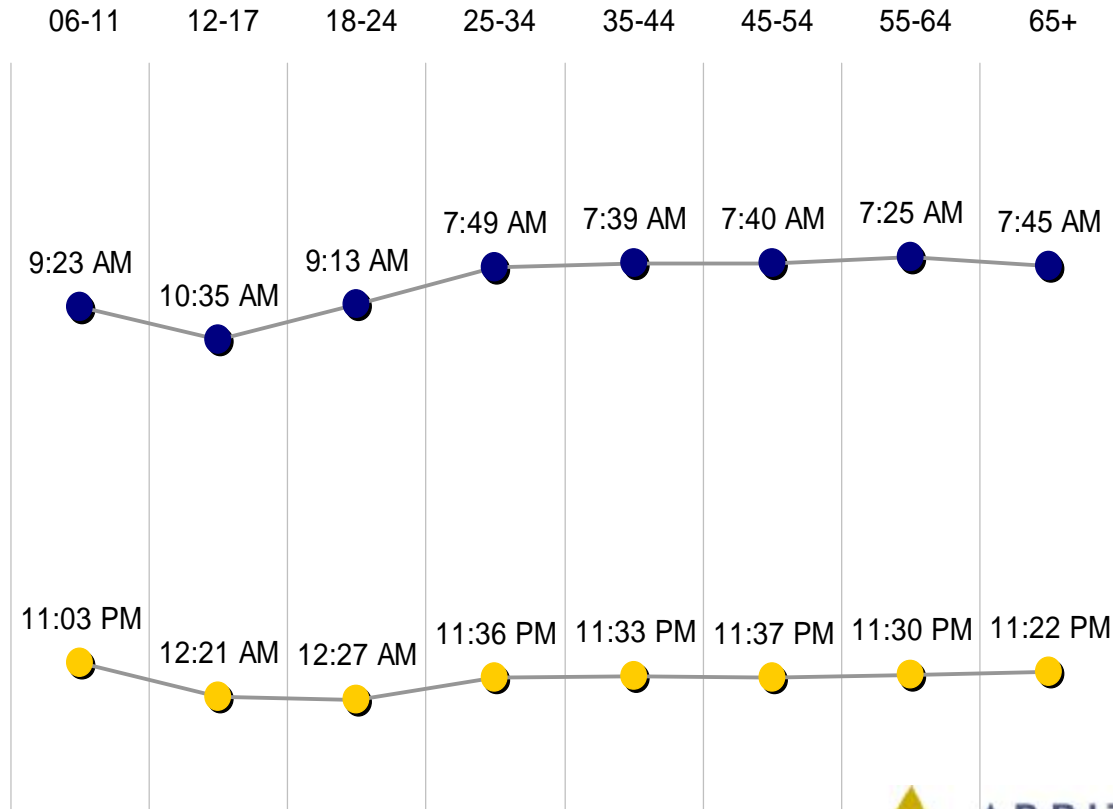
Tampa-St. Petersburg-Clearwater Median Undock/Dock Times

July 09 Weekdays

Undock
Time



Dock Time



Tampa-St. Petersburg-Clearwater Metro, In-Tab Persons 6+, July 09



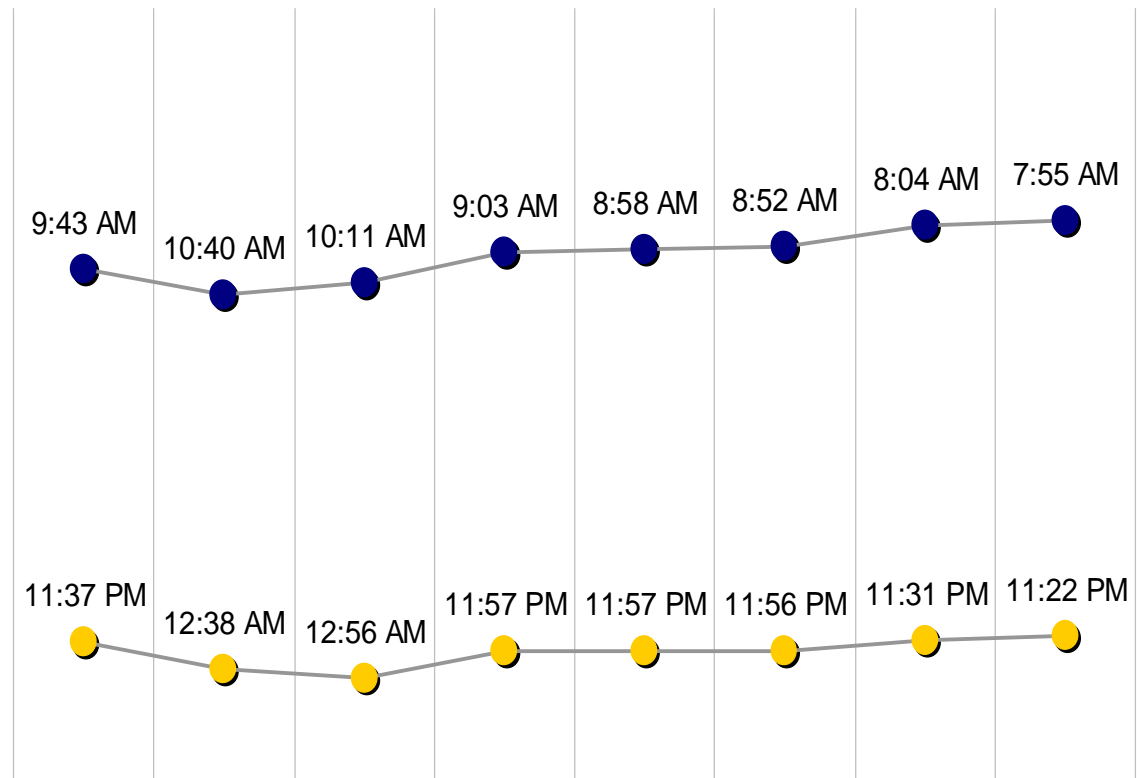


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Tampa-St. Petersburg-Clearwater Median Undock/Dock Times

July 09 Weekends

06-11 12-17 18-24 25-34 35-44 45-54 55-64 65+

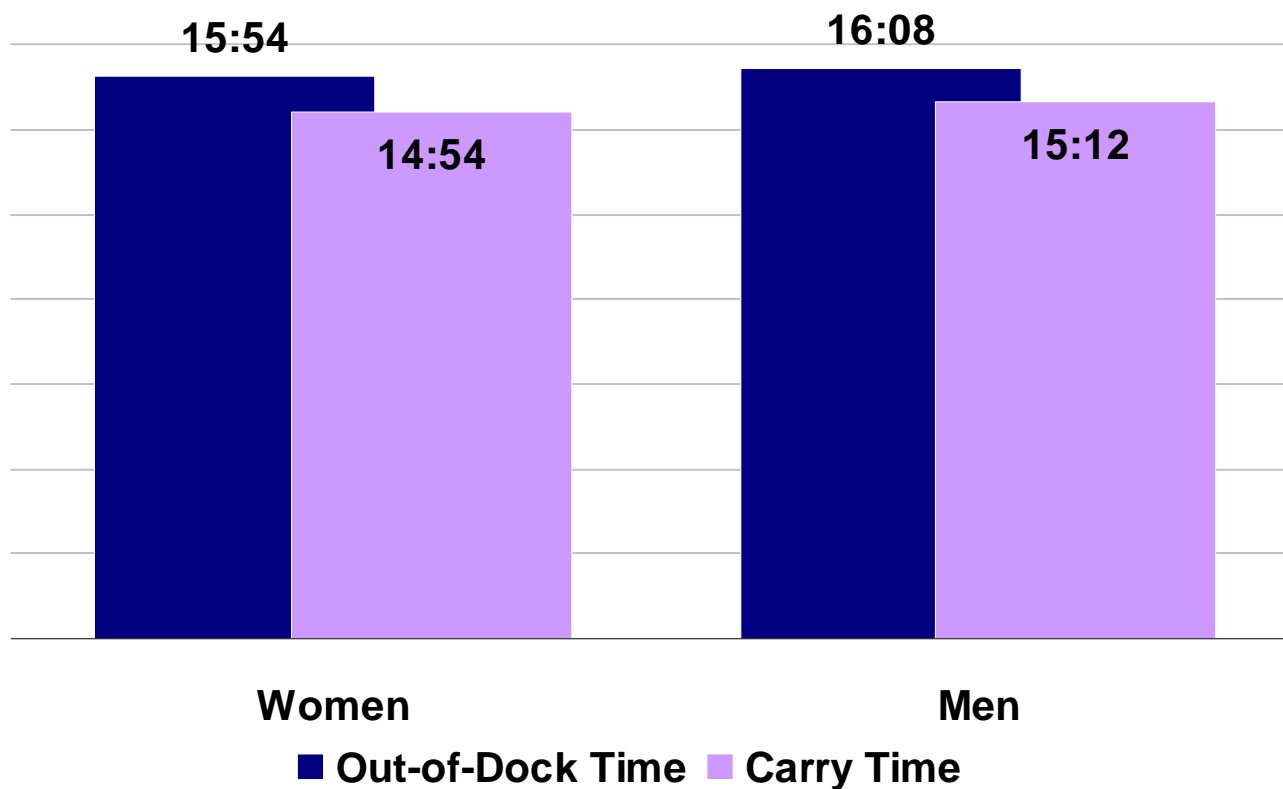




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Tampa-St. Petersburg- Clearwater Median Carry Times by Gender

Median Out-of-Dock and Carry Times

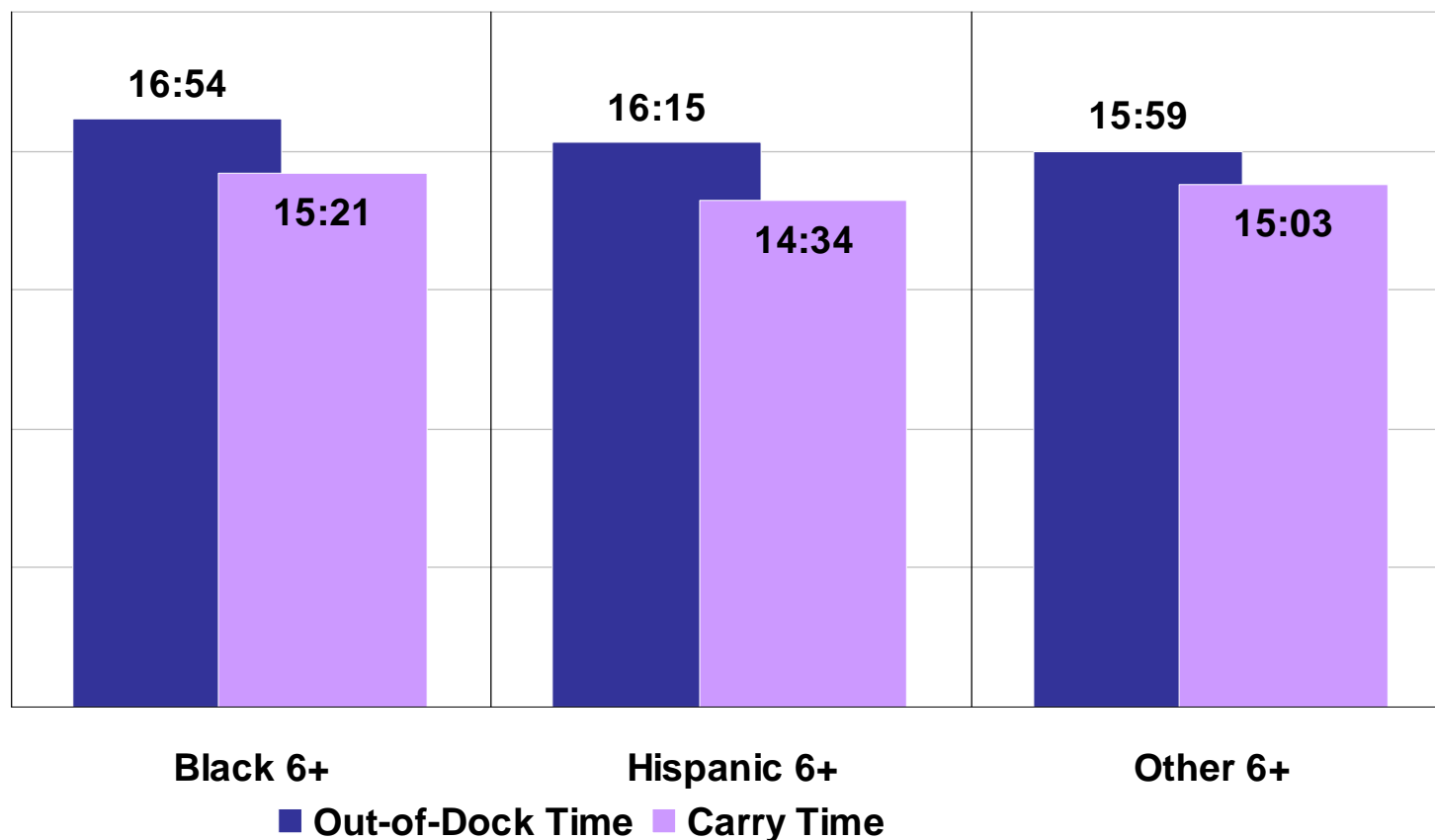




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Tampa-St. Petersburg-Clearwater Median Carry Times by Race/Ethnicity

Median Out-of-Dock and Carry Times

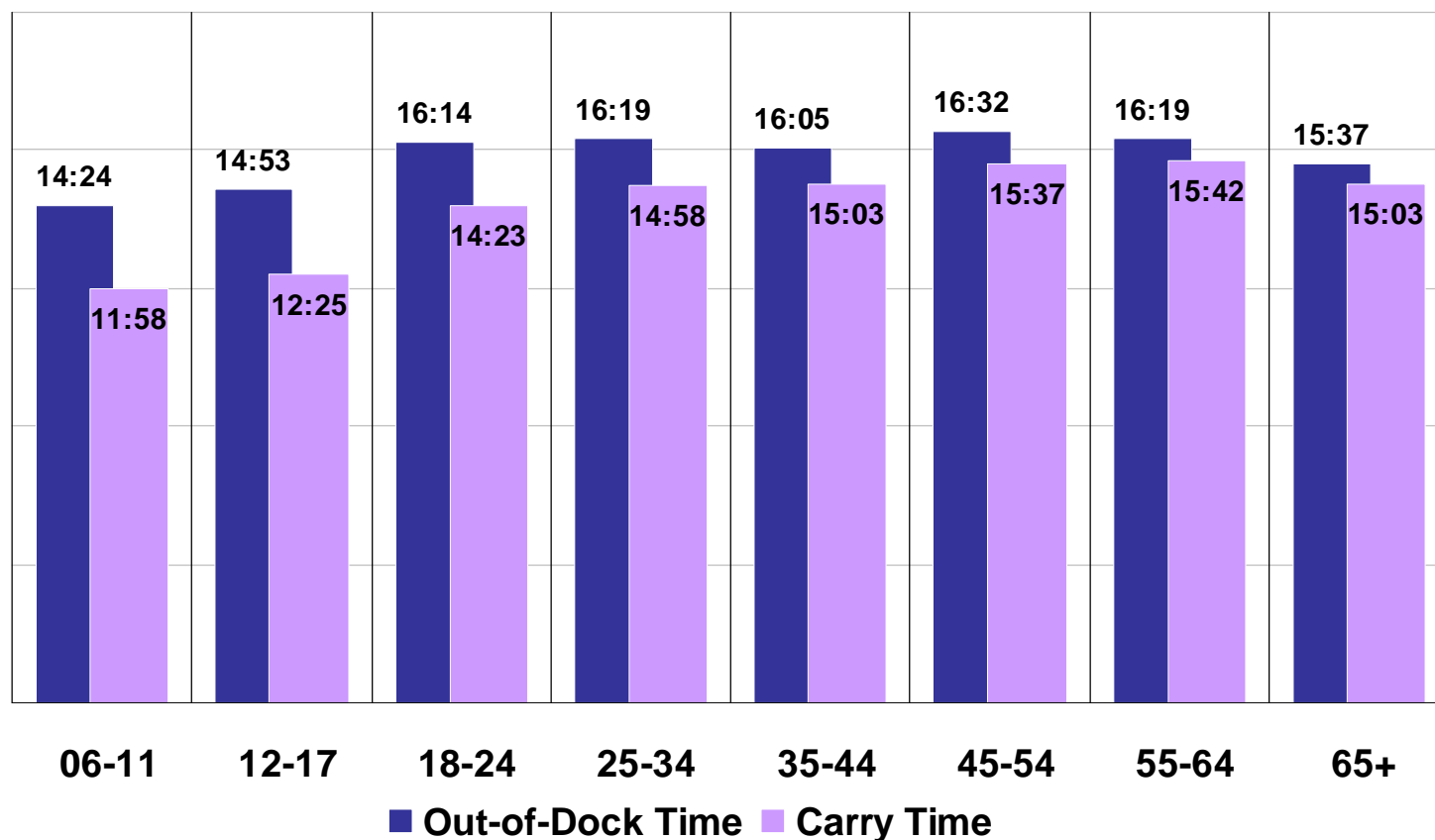




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Tampa-St. Petersburg-Clearwater Median Carry Times by Age

Median Out-of-Dock and Carry Times



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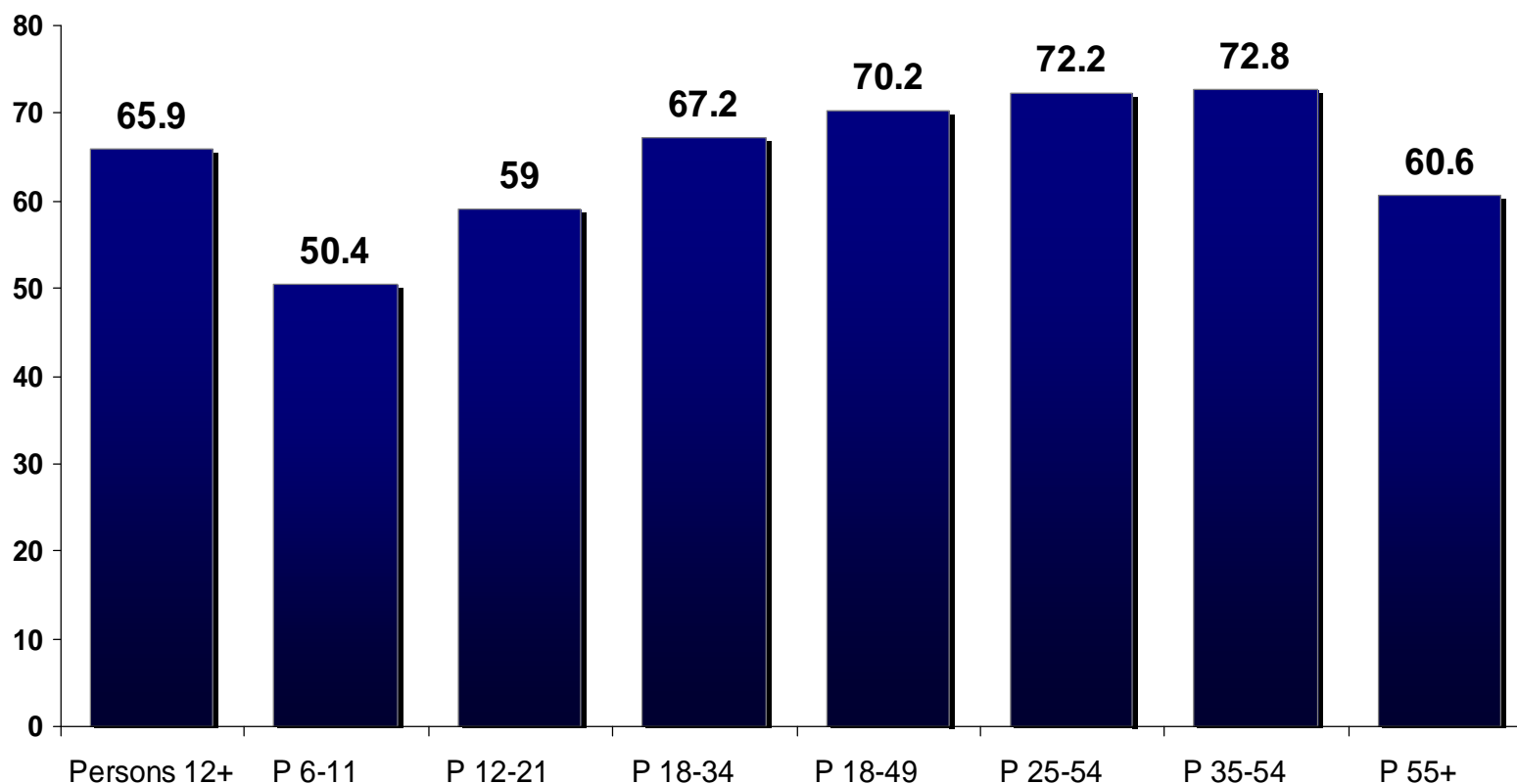
Tampa-St. Petersburg Clearwater PPM Cume Estimates

July 09



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Tampa-St. Petersburg-Clearwater PPM Daily Cume Rating Mon-Sun 6a-12m

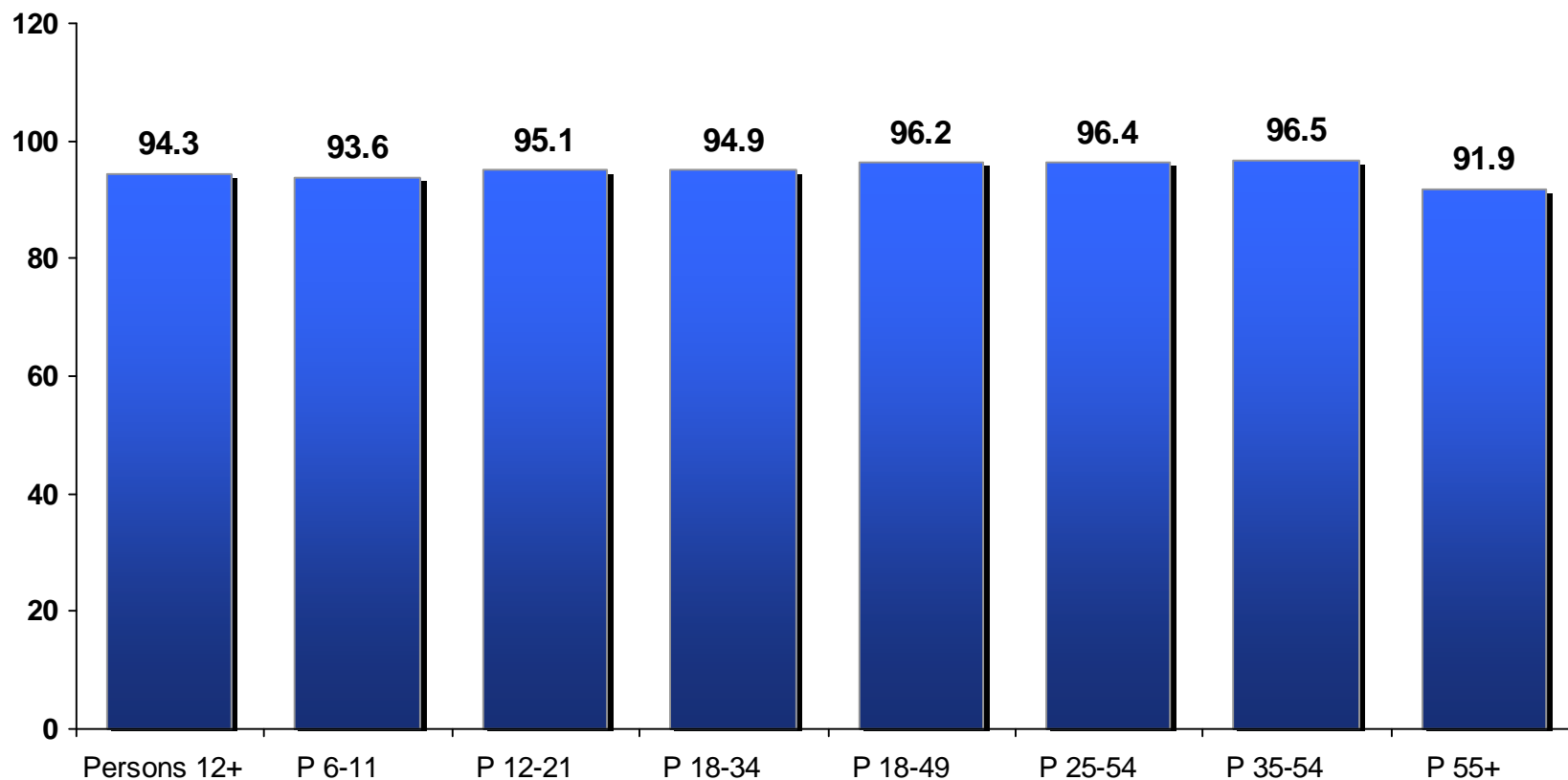




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Tampa-St. Petersburg Clearwater PPM Weekly Cume Rating

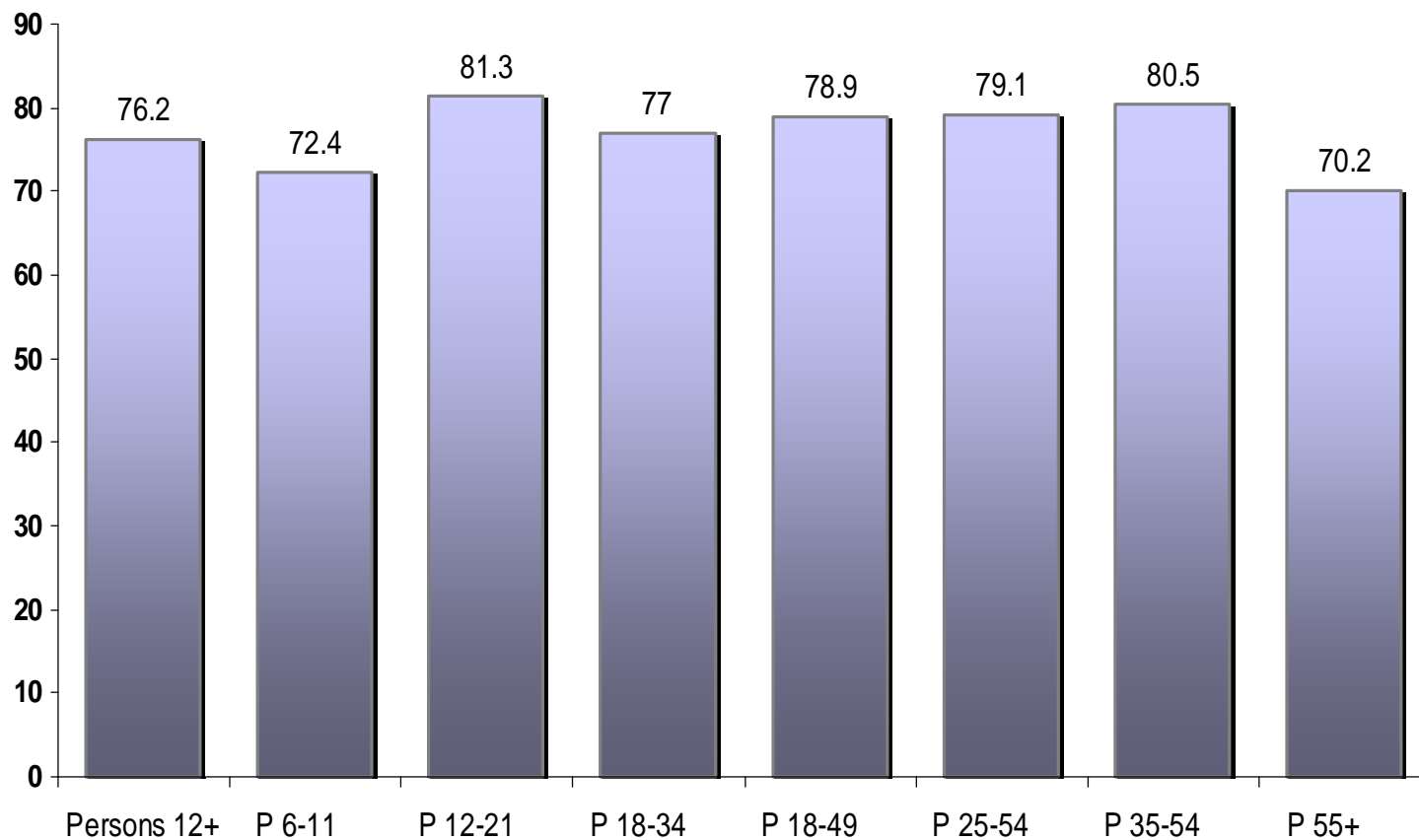
Mon-Fri 6a-12m





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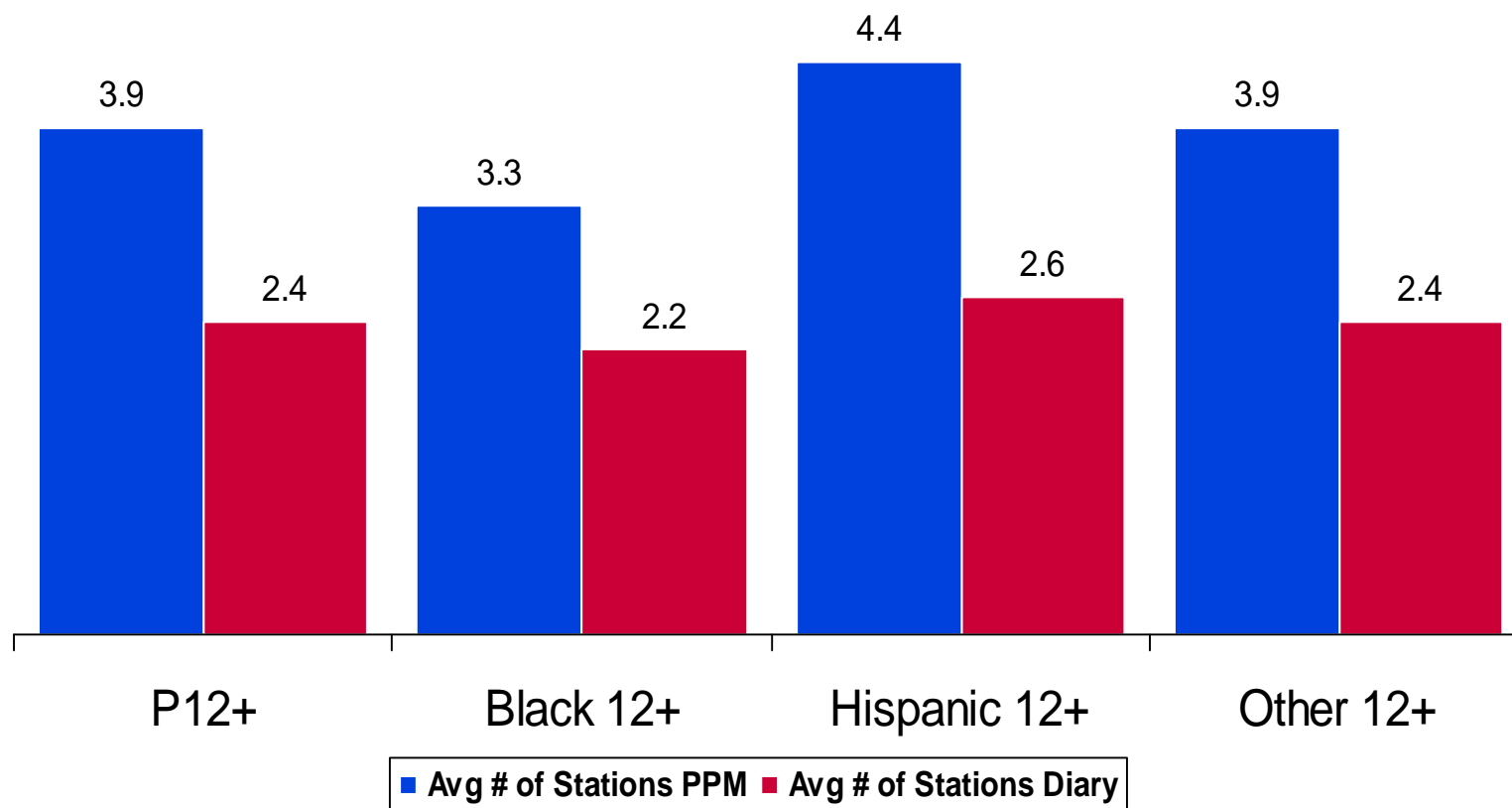
Tampa-St. Petersburg-Clearwater PPM Weekend Cume Rating Sat-Sun 6a-12m





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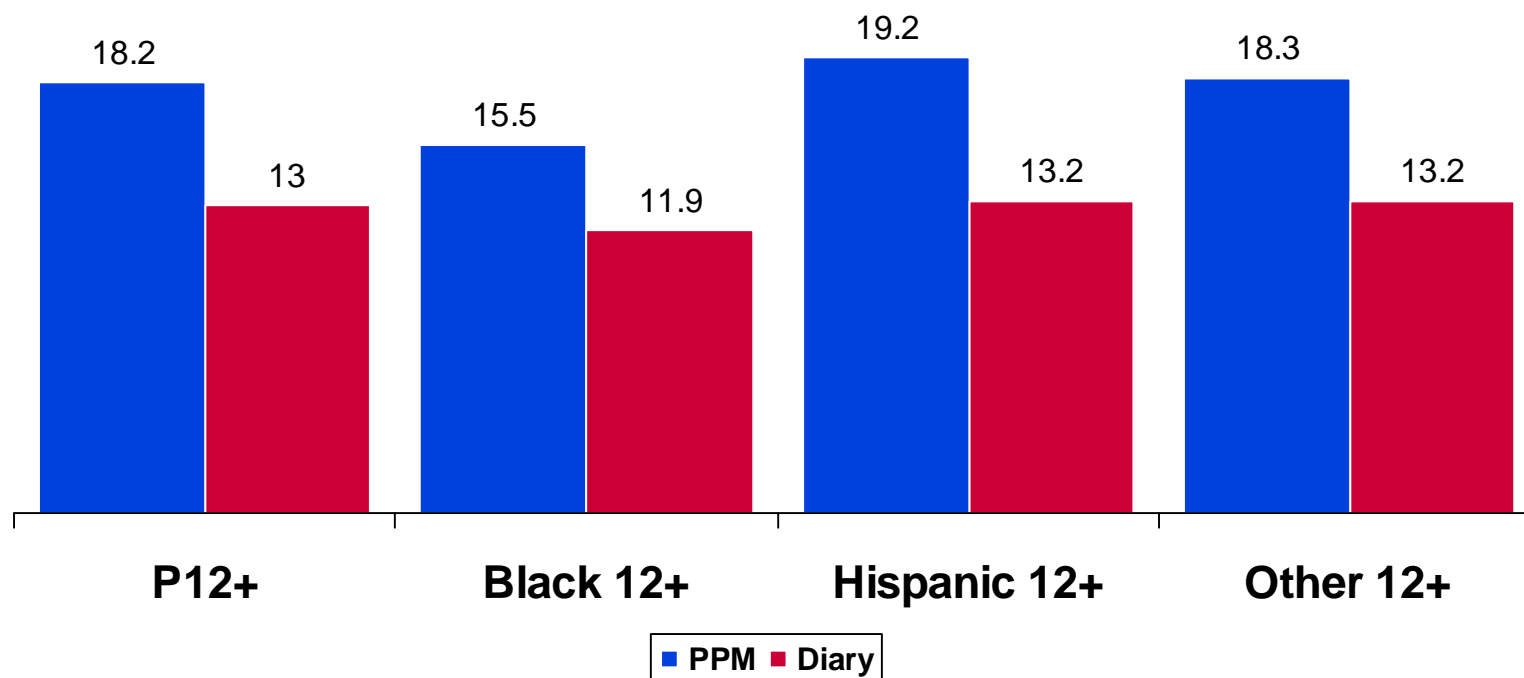
Tampa-St. Petersburg-Clearwater Average Number Of Stations





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Tampa-St. Petersburg-Clearwater Number Of Listening Occasions

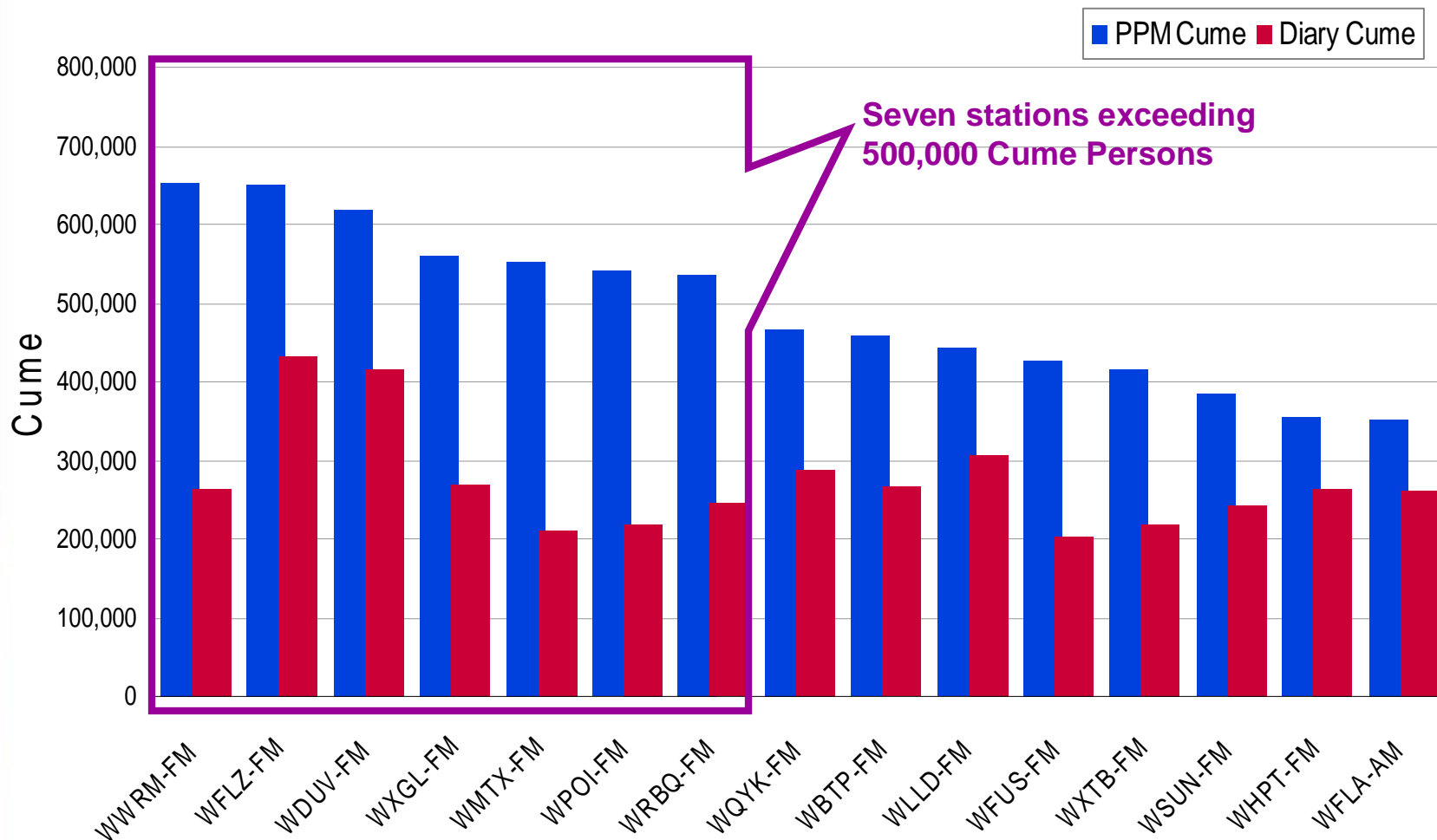




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Avg Weekly Cume Comparison

Tampa-St. Petersburg-Clearwater July 09 PPM



PPM, Tampa-St. Petersburg-Clearwater PPM, July 09 Data, Mon-Sun 6AM-MID, Persons 12+ vs.
Diary, Tampa-St. Petersburg-Clearwater Metro, Spring 2009, Mon-Sun 6AM-MID, Persons 12+

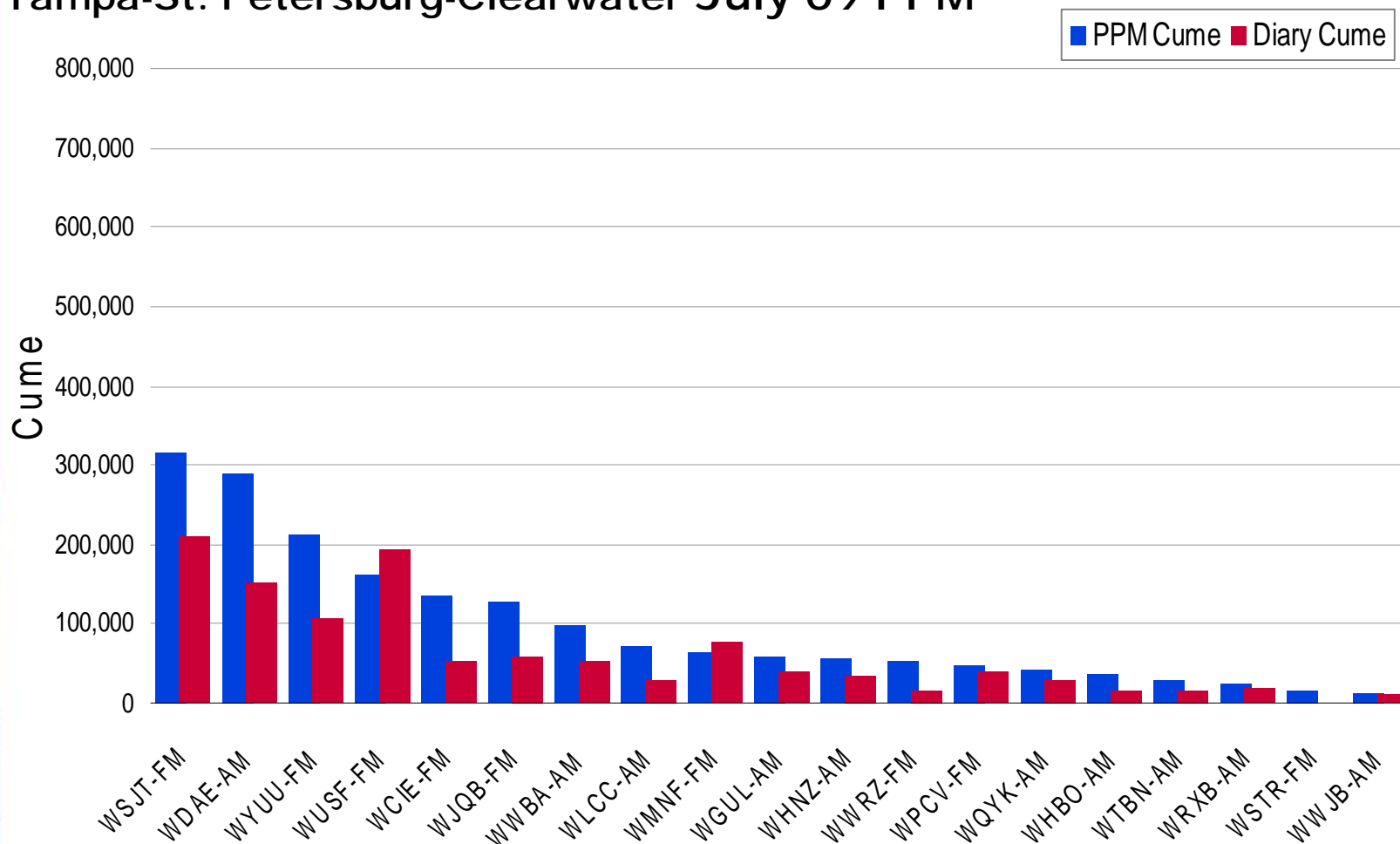




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Avg Weekly Cume Comparison Continued

Tampa-St. Petersburg-Clearwater July 09 PPM



PPM, Tampa-St. Petersburg-Clearwater PPM, July 09 Data, Mon-Sun 6AM-MID, Persons 12+ vs.
Diary, Tampa-St. Petersburg-Clearwater Metro, Spring 2009, Mon-Sun 6AM-MID, Persons 12+

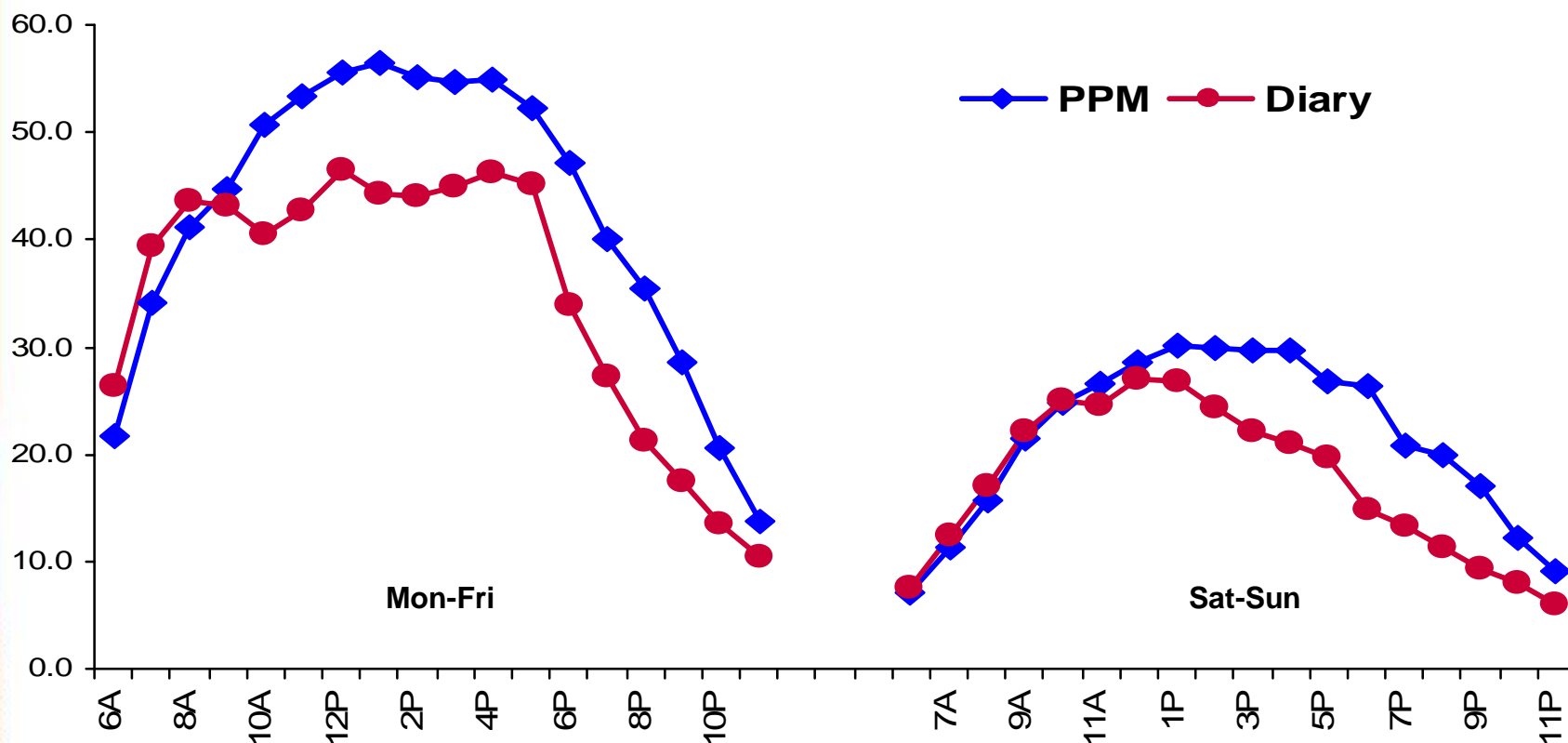




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PPM Vs. Diary Hour-by-Hour Cume Rating Comparison

July 09



PPM, Tampa-St. Petersburg-Clearwater PPM, July 09 Data, Mon-Sun 6AM-MID, Persons 12+ vs.
Diary, Diary Metro, Spring 2009, Mon-Sun 6AM-MID, Persons 12+



PPM in Tampa-St. Petersburg-Clearwater



Rating Comparisons

**Tampa-St. Petersburg-Clearwater
PPM**

July 09

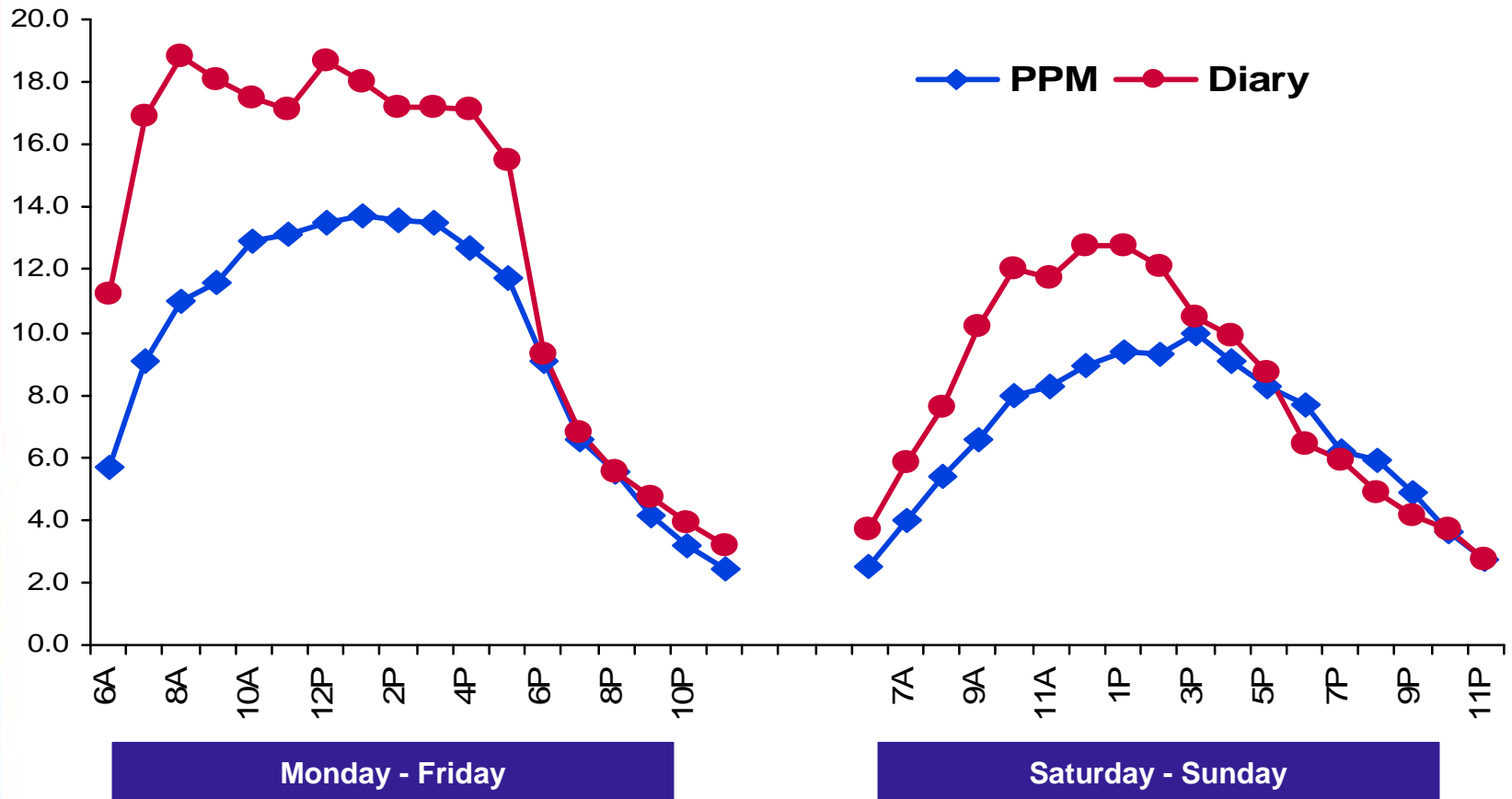


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PPM Vs. Diary Hour-by-Hour, AQH Rating Comparison

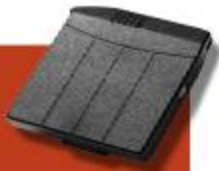
Persons 12+

July 09



PPM, Tampa-St. Petersburg-Clearwater PPM, July 09 Preliminary Data, Mon-Sun 6AM-MID, Persons 12+ vs.
Diary, Tampa-St. Petersburg-Clearwater Metro, Spring 2009, Mon-Sun 6AM-MID, Persons 12+

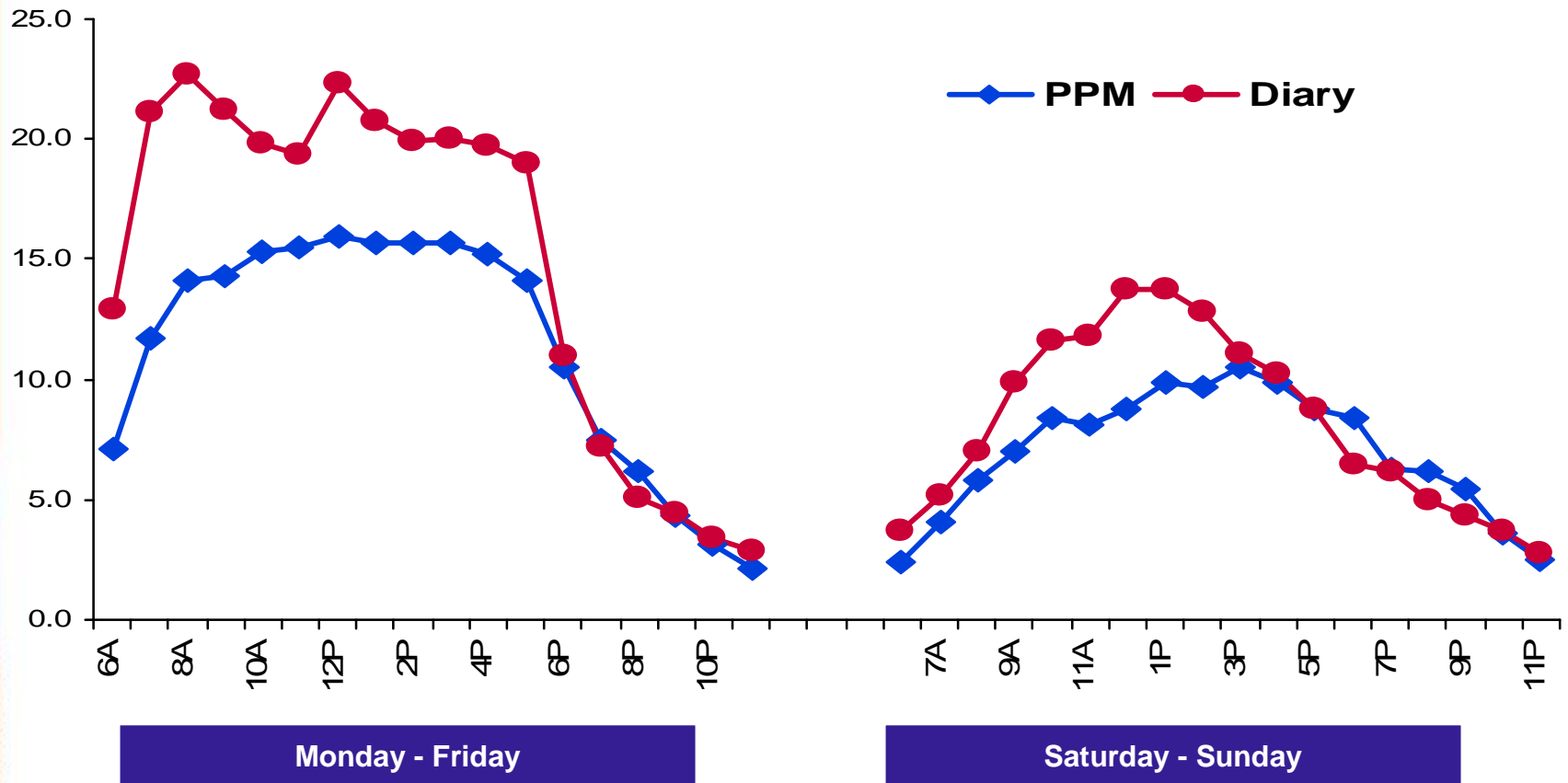




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PPM Vs. Diary Hour-by-Hour, Persons 25-54 AQH Rating Comparison

July 09



PPM, Tampa-St. Petersburg-Clearwater PPM, July 09 Data, Mon-Sun 6AM-MID, Persons 25+ vs.
Diary, Tampa-St. Petersburg-Clearwater Metro, SP 07, Mon-Sun 6AM-MID, Persons 25-54

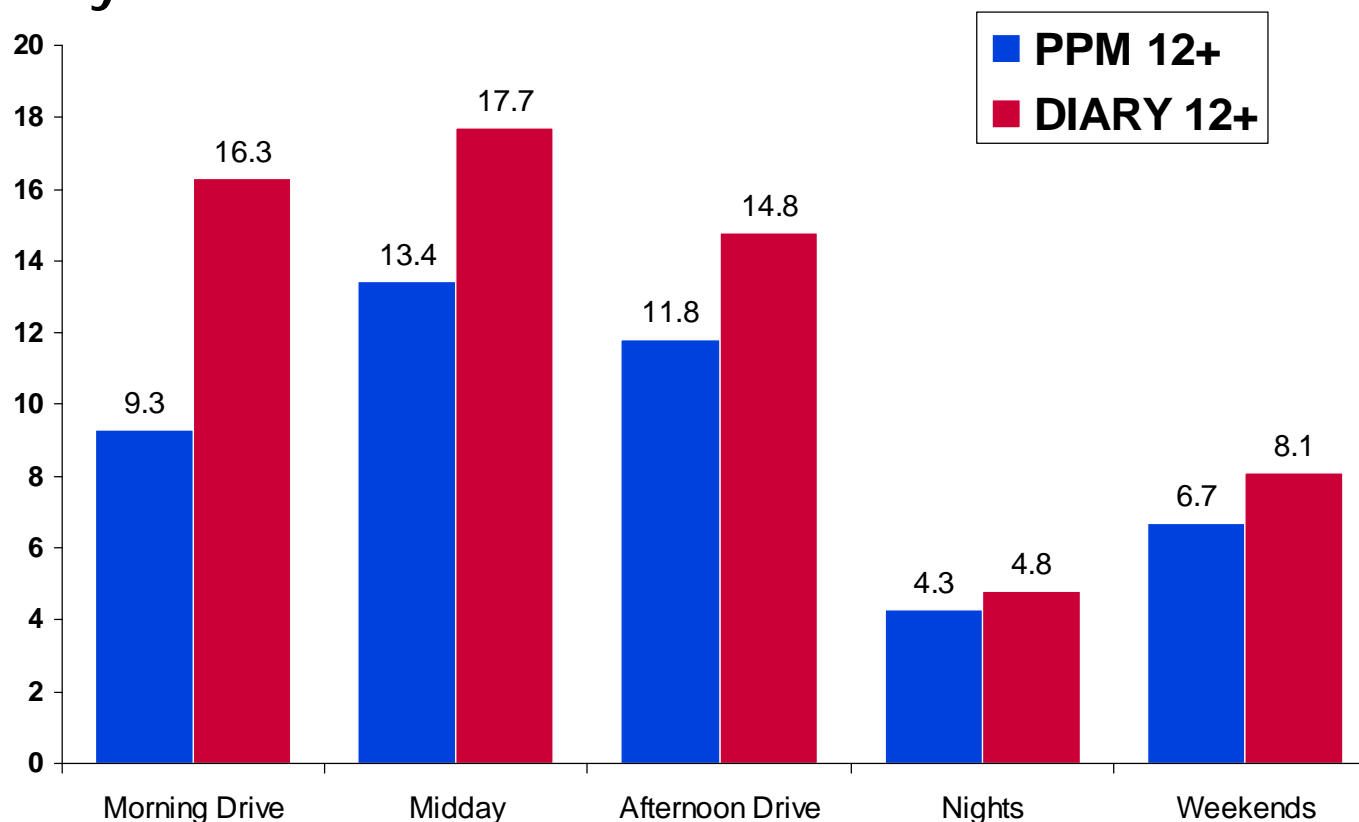




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Tampa-St. Petersburg- Clearwater PPM Vs. Diary AQH Ratings By Daypart

July 09



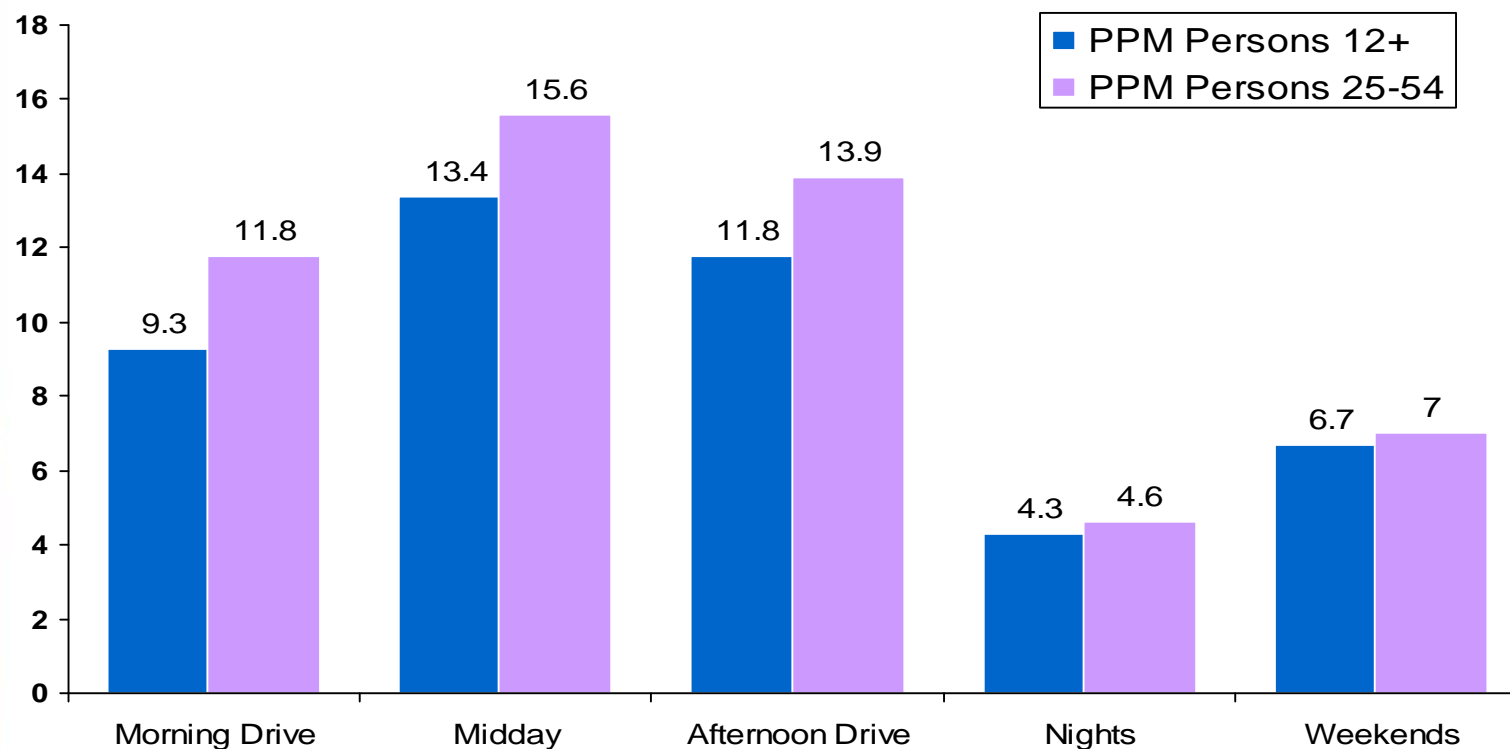
Tampa-St. Petersburg-Clearwater AQH Ratings, July 09 vs. Spring 2009, P12+ Market totals.



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Tampa-St. Petersburg-Clearwater PPM AQH Ratings By Demo and Daypart

July 09



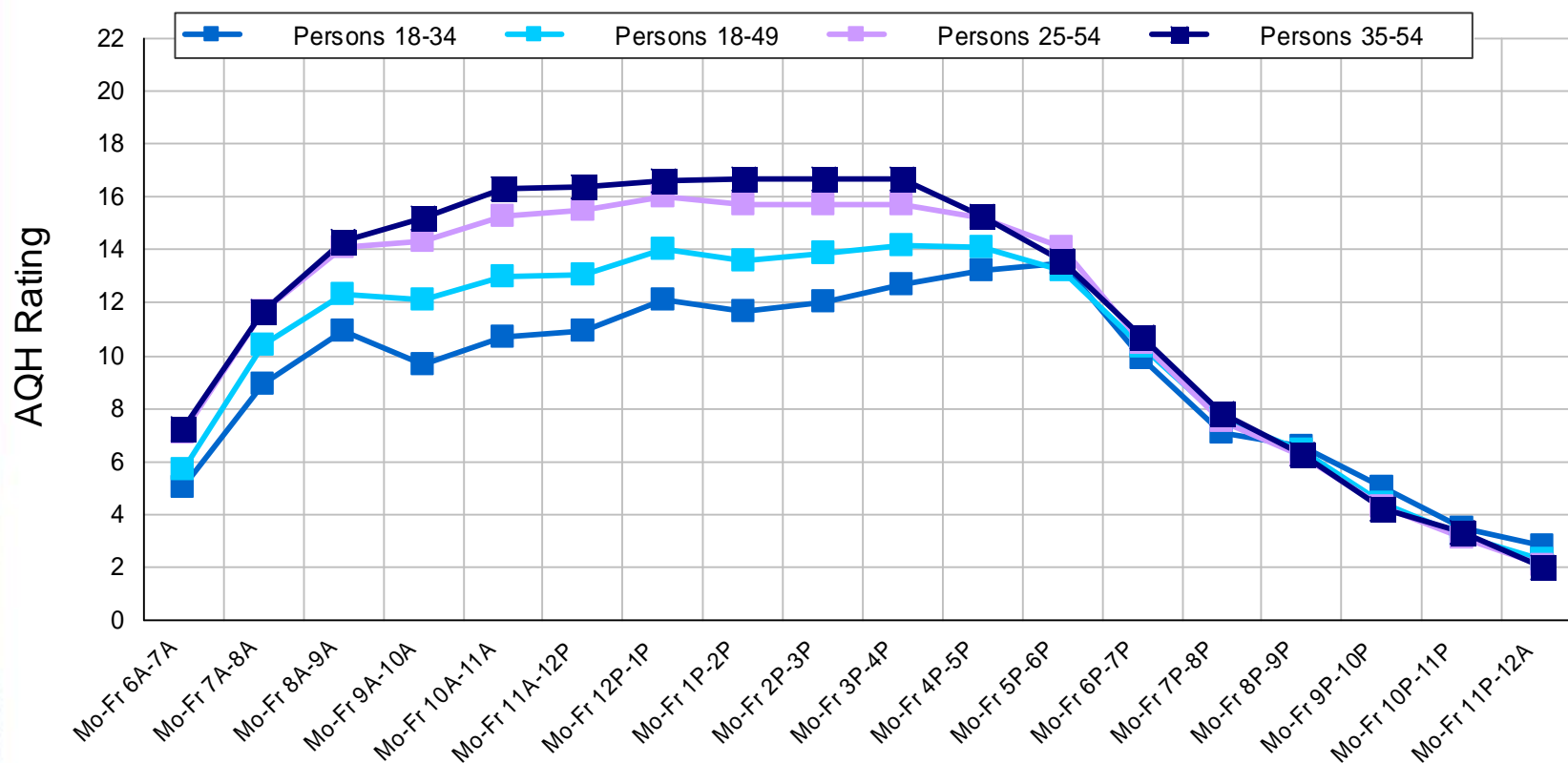
PPM Tampa-St. Petersburg-Clearwater AQH Ratings, July 09 Market totals.



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Tampa-St. Petersburg-Clearwater Listening By Demo

Monday-Friday 6AM-MID



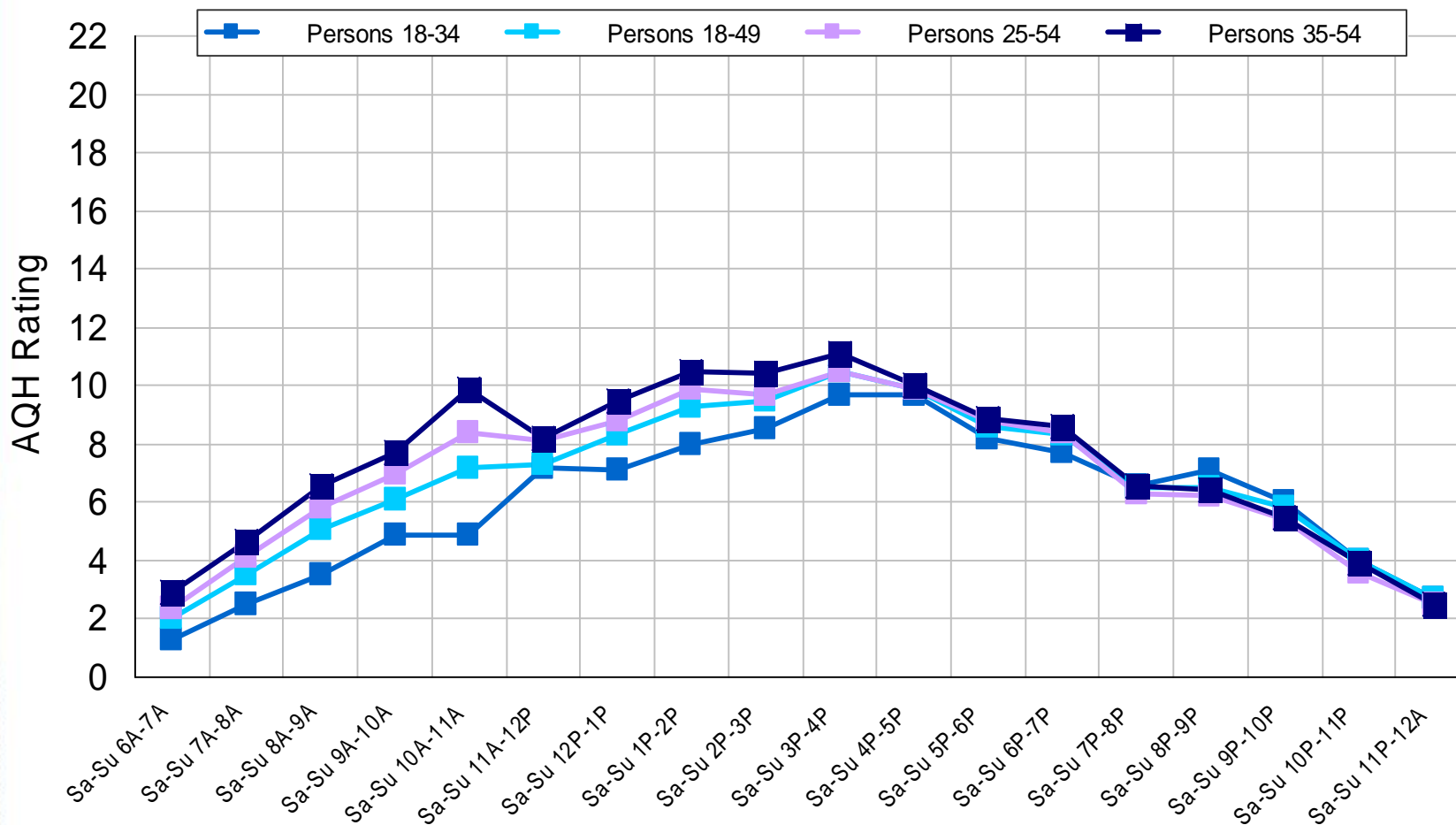
Tampa-St. Petersburg-Clearwater PPM, July 09 Data, Mon-Fri 6AM-MID,



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Tampa-St. Petersburg-Clearwater Listening By Demo

Sat-Sun 6AM-MID



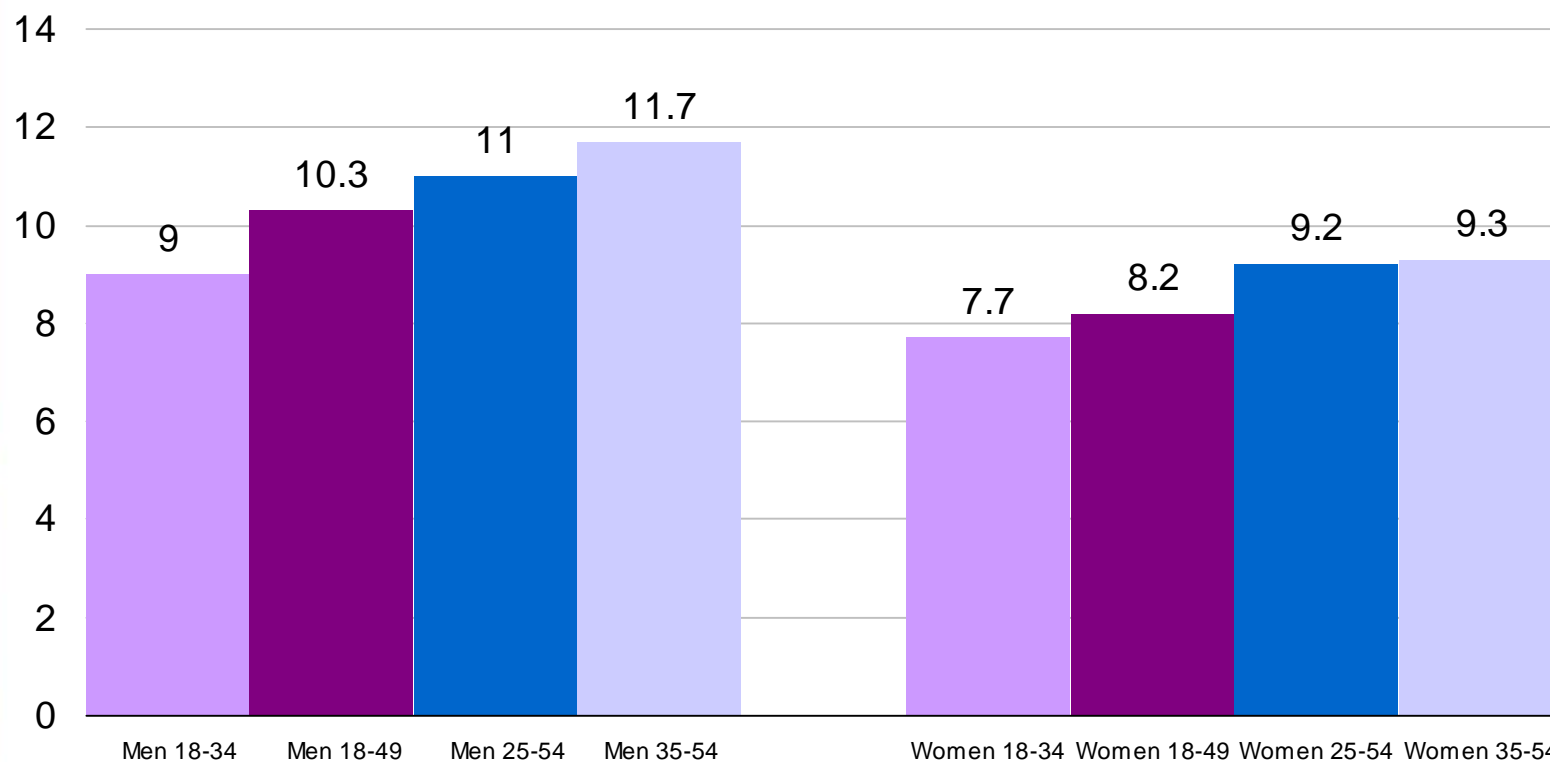
Tampa-St. Petersburg-Clearwater PPM, July 09 Data, Sat-Sun 6AM-MID,





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Tampa-St. Petersburg- Clearwater PPM AQH Ratings by Age/Sex

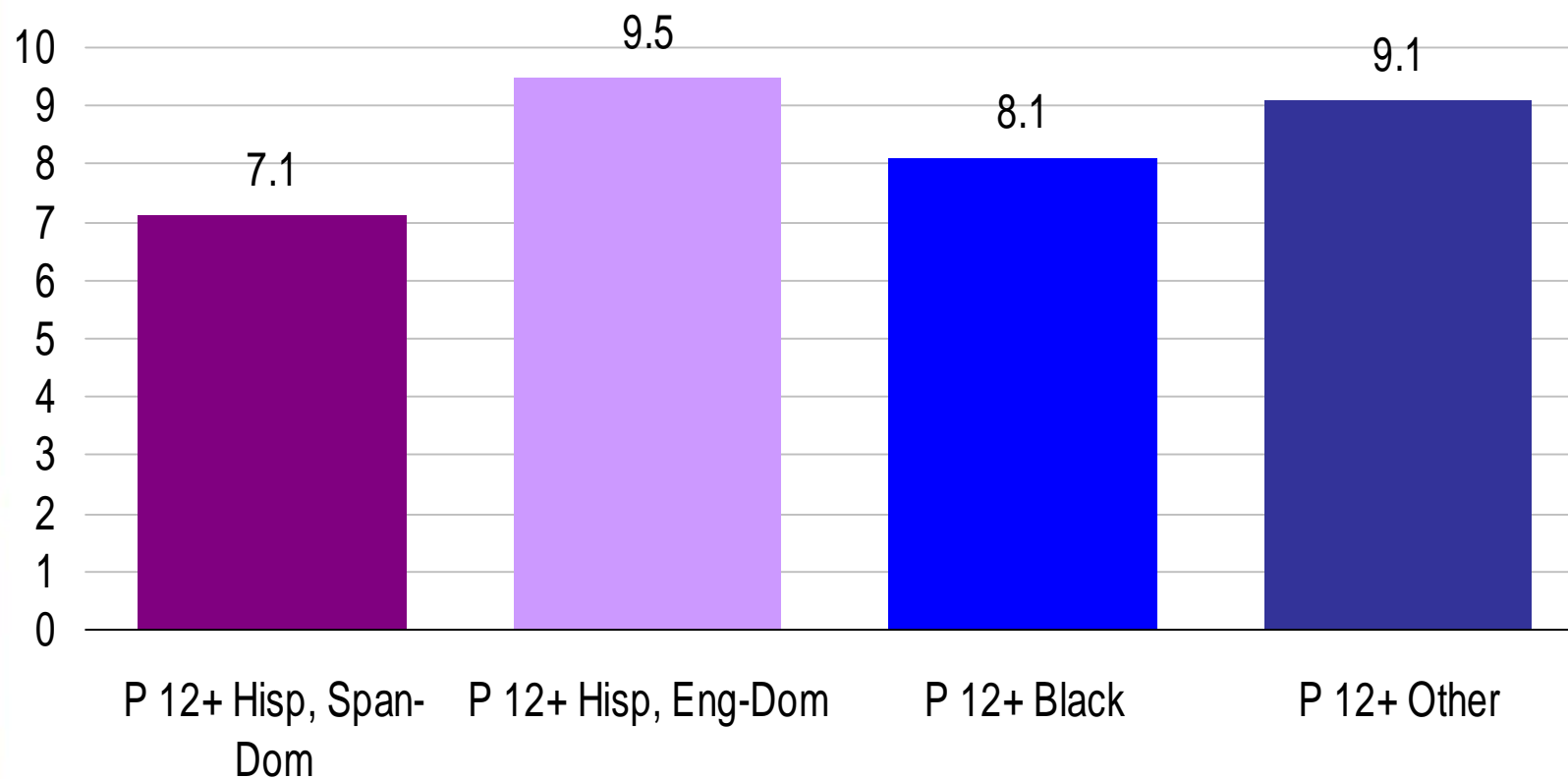


Tampa-St. Petersburg-Clearwater PPM, July 09 Data, Mon-Sun 6AM-MID



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Tampa-St. Petersburg- Clearwater Listening Levels by Race and Ethnicity



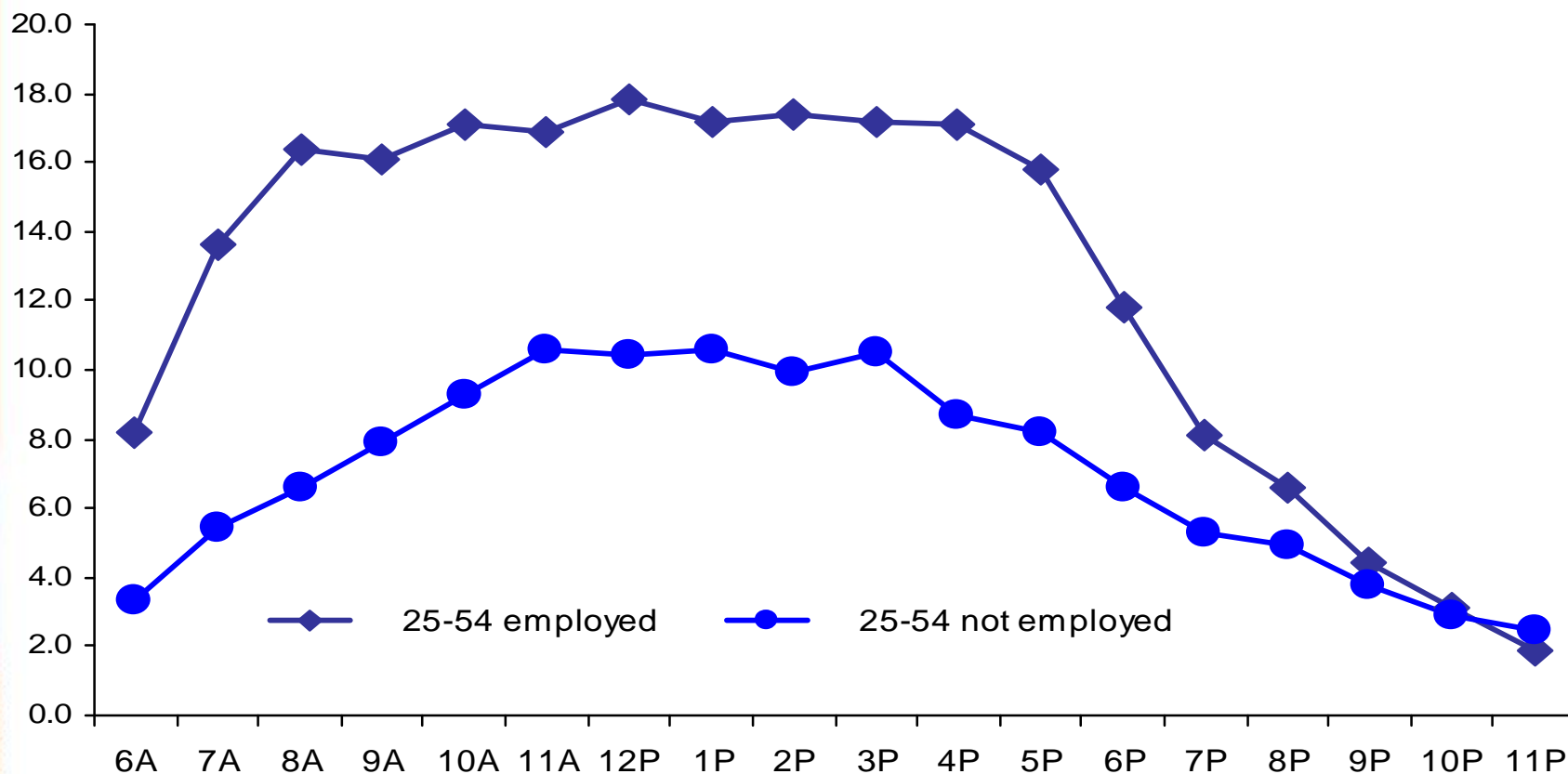
PPM, Tampa-St. Petersburg-Clearwater, July 09 data, Mon-Sun 6AM-MID, Persons 12+, AQH Rating



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Ratings by Employment Status Persons 25-54

July 09; M-F 6a-12m



PPM, Tampa-St. Petersburg-Clearwater PPM, Data, Mon-Fri 6a-12m

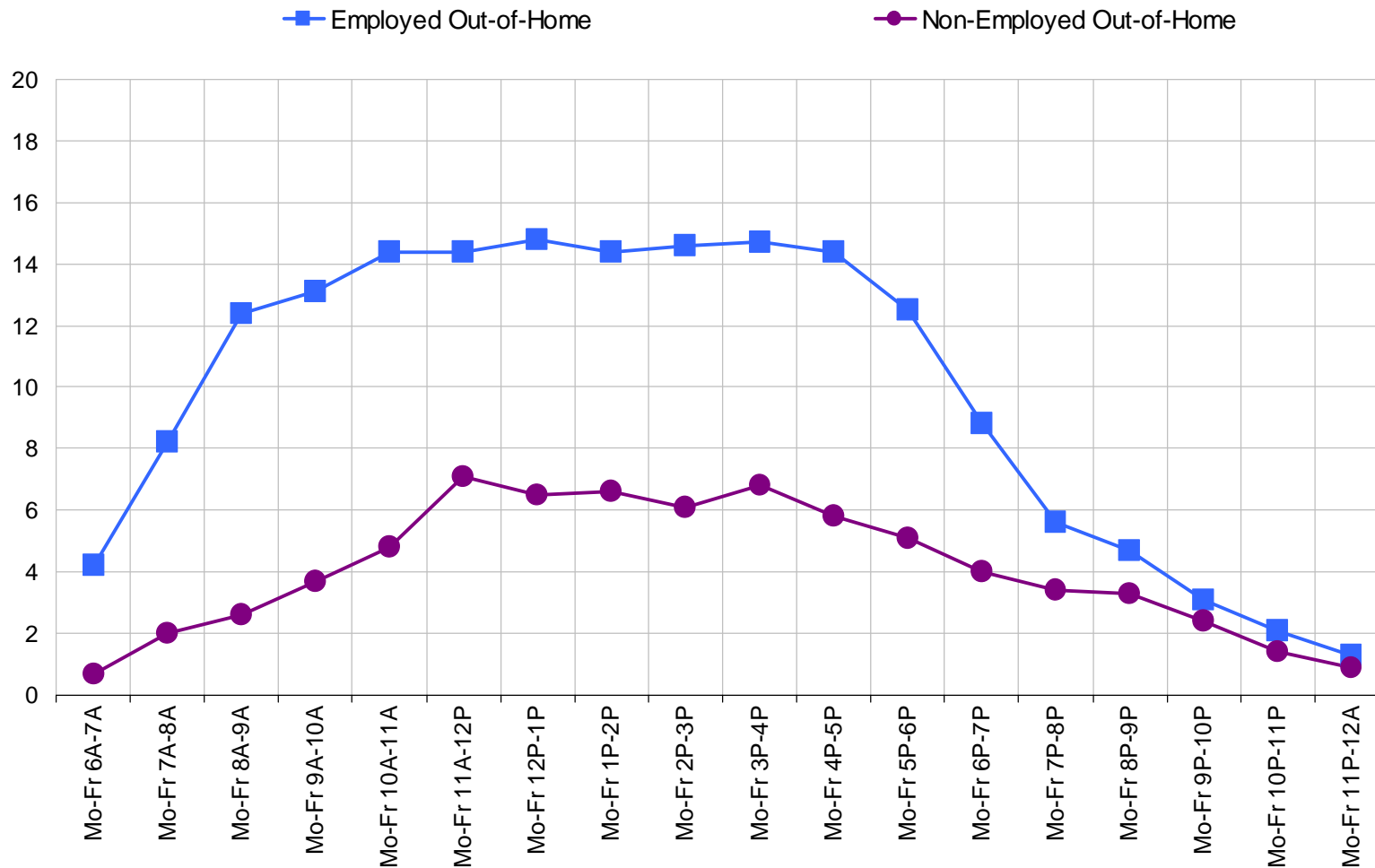


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Out-of-Home Listening By Employment

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

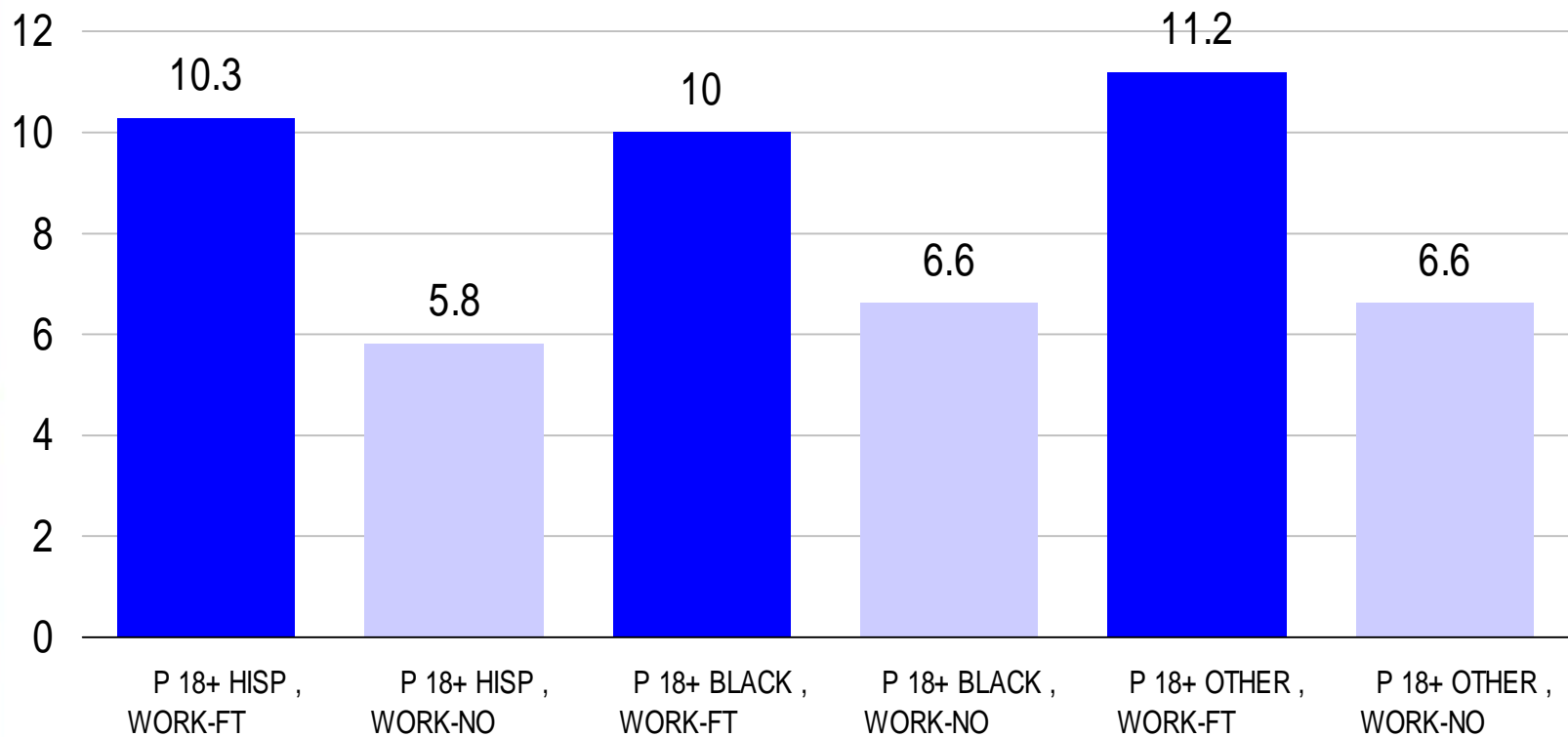


Source: Tampa-St. Petersburg-Clearwater Metro July 09 PPM; P 25-54; Mo-Fr 6a-12m; Avg AQH Comp%



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Tampa-St. Petersburg-Clearwater Listening Levels by Race/Ethnicity and Employment Status

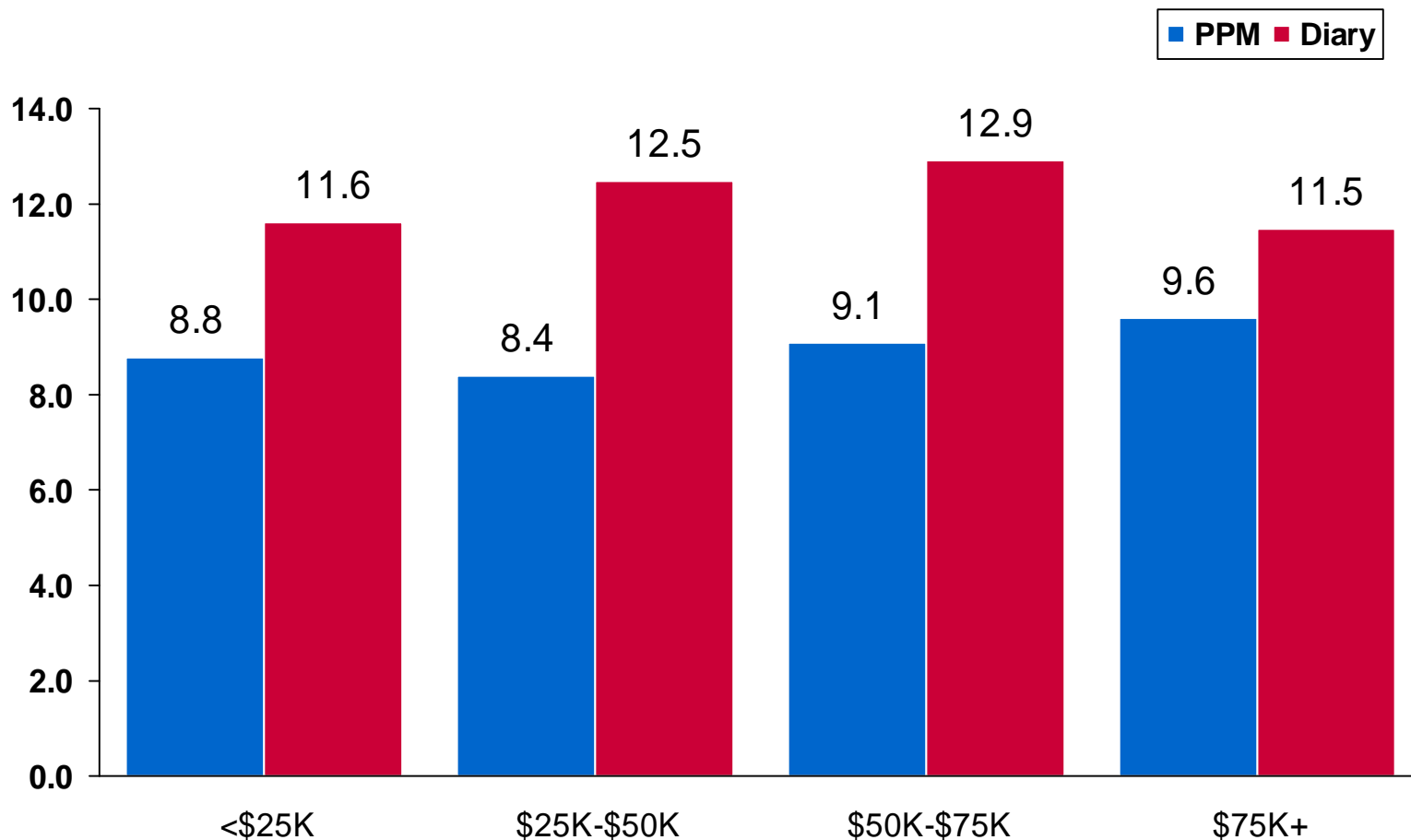


Tampa-St. Petersburg-Clearwater, July 09 data, Mon-Sun 6AM-MID, Persons 18+, AQH Rating



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Listening Levels by Income Level PPM Vs. Diary



PPM, Tampa-St. Petersburg-Clearwater PPM, July 09 Data, Mon-Sun 6AM-MID, Persons 18+ vs.
Diary, Tampa-St. Petersburg-Clearwater Metro, Spring 2009, Mon-Sun 6AM-MID, Persons 18+, AQH Rating



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Tampa-St. Petersburg-Clearwater Top Five Format Rank Positions

July 09 Mon-Sun 6a-12m

Persons 12+

Soft Adult Contemporary
Classic Hits
News/Talk
Country
Pop Contemporary Hit Radio

Persons 25-54

Urban Contemporary
Pop Contemporary Hit Radio
Classic Hits
Alternative
Country

Persons 18-34

Pop Contemporary Hit Radio
Rhythmic Contemporary Hit Radio
Country
Urban Contemporary
Adult Contemporary

Persons 35-54

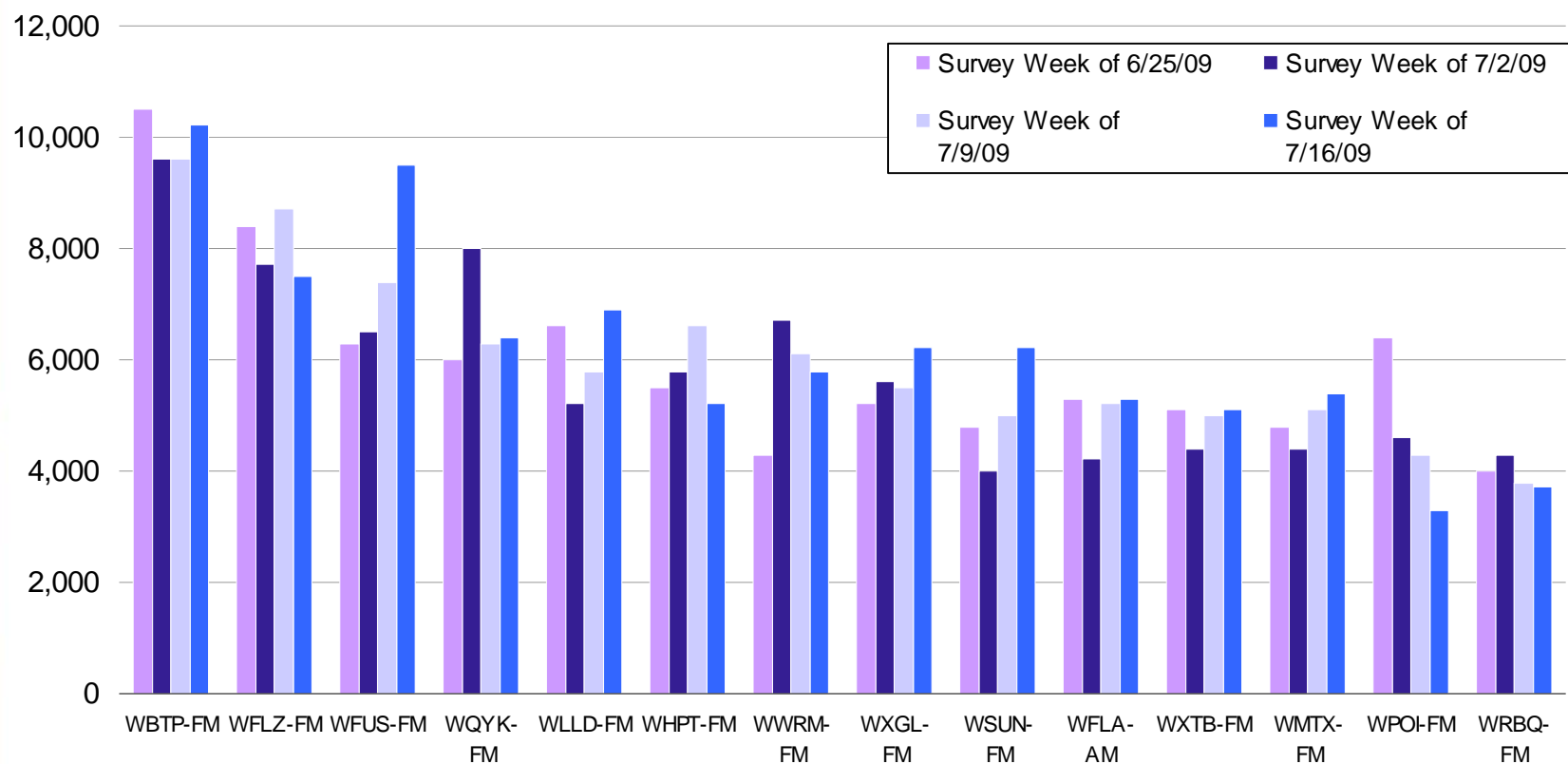
Urban Contemporary
Classic Hits
Alternative
News/Talk
Country



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Weekly AQH Persons Estimates

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



PPM, Tampa-St. Petersburg-Clearwater PPM, July 09 Data, Mon-Sun 6AM-MID

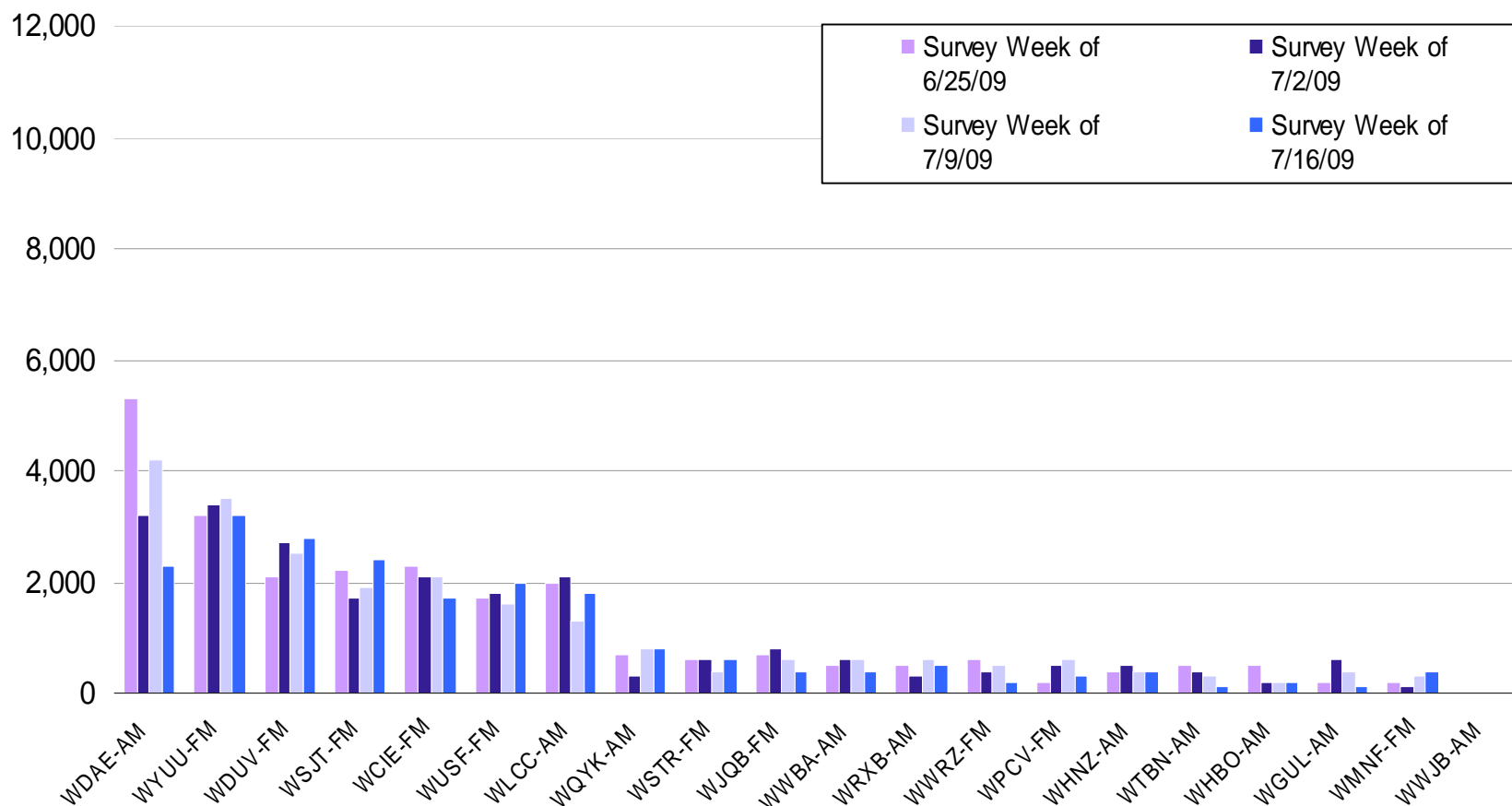




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Weekly AQH Persons Estimates

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



PPM, Tampa-St. Petersburg-Clearwater PPM, July 09 Data, Mon-Sun 6AM-MID





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Ratings Are More Compressed In PPM

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

	Tampa-St. Petersburg-Clearwater 18-34		Tampa-St. Petersburg-Clearwater 18-49		Tampa-St. Petersburg-Clearwater 25-54		Tampa-St. Petersburg-Clearwater 35-54	
	Diary	PPM	Diary	PPM	Diary	PPM	Diary	PPM
M-F 6a-10a	2.1	0.6	2.4	0.8	2.1	0.7	2.1	0.9
M-F 10a-3p	1.3	0.6	0.5	0.6	0.7	0.6	1.8	0.9
M-F 3p-7p	1.4	1.0	1.3	0.5	1.4	0.4	1.4	0.5
M-F 7p-12m	0.7	0.3	0.4	0.3	0.2	0.2	0.4	0.2
Sa-Su 6a-7p	0.7	0.4	0.5	0.3	0.3	0.3	0.4	0.4

•Diary data based on Spring 2009 PPM data based on July 09 data





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Summary

Compliance is impressive

Listening levels are strong and 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 weekends exceeds that of the diary, which has been rarely seen in a PPM market

§ **Nights are comparable to diary listening with Mid-days & Evening drive showing higher efficiencies than seen in diary**

Radio reaches the vast majority of Tampa-St. Petersburg-Clearwater

§ **Approximately 70% of the Tampa-St. Petersburg-Clearwater metro is reach daily by radio**

Ratings are compressed among top tier stations, though less than seen in other PPM markets

§ **Urban radio maintains position in market**

§ **Spanish language formats show growth in PPM**

Granularity of PPM will allow programmers to improve the product in ways not possible with diary



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Thank You For Joining

A copy of this presentation will be available this afternoon at the Tampa-St. Petersburg-Clearwater PPM website:

[http://www.arbitron.com/ppm_Tampa-St. Petersburg-Clearwater.htm](http://www.arbitron.com/ppm_Tampa-St._Petersburg-Clearwater.htm)

Data will also be available via Arbitron's Downloader & within Tapscan Web at 12p ET.

On Tuesday, August 18th at 12p ET, you will be able to access your first Weeklies data

A new version of the PPM Analysis Tool & Weeklies was released on July 24th

§ Analysis Tool version is: 12.1.9

§ Weeklies version is: 9.1.3



PPM in Tampa-St. Petersburg-Clearwater



Tampa-St. Petersburg-Clearwater

July 09 Pre-Currency PPM Data

Created by: Tasia Martin, PPM Implementation Market Manager

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