

*PPM in San Diego*



# San Diego PPM

April 2009 Pre-Currency PPM Data

**Michael Nelson**

**Account Manager, Radio Station Services**

**May 21, 2009**



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# How do I ask a question during the WebEx session?

**1. Email us directly and we will reply to your questions once the session has ended.**

- You may send multiple questions.

*Our emails are:*

**[Michael.Nelson@Arbitron.com](mailto:Michael.Nelson@Arbitron.com)**

**[Jenny.Tsao@Arbitron.com](mailto:Jenny.Tsao@Arbitron.com)**

**2. Use the chat option within WebEx.**

- You will not be able to chat with others, only the host. The host may choose to answer questions as they come in or respond to them at the end of the session or after the session has ended.
- ***Chat can be found in the lower right hand side of your screen.***





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# Findings

- § **The San Diego sample for April is representative of all demos, ethnicities, counties and language preferences.**
- § **Compliance is similar to all other PPM markets.**
  - » On average 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.**
  - » Many different formats are found in top rank positions
- § **Ratings are more compressed among the top stations than in the diary service.**
- § **Granular data continues to provide insight into how consumers use radio.**

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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# San Diego 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 <b>NO</b> 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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# San Diego Converts to Currency



## PPM Data Are Scheduled to Become Currency in San Diego on July 16, 2009

Arbitron PPM™ data will not be the official ratings currency in San Diego before July 16, 2009. All Arbitron clients who conduct business in San Diego 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.

### San Diego PPM Pre-Currency Data

The San Diego 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 San Diego PPM launch, go to [www.arbitron.com/ppm](http://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](http://www.arbitron.com/ppm) • [www.ArbitronTraining.com](http://www.ArbitronTraining.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 San Diego*



## **Sample**

**San Diego PPM April 2009**



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# San Diego Metro Sample

## April 2009

### Total Persons in Monthly Sample

Monthly Installed Persons	1,631
Monthly In-tab Persons	1,574
Monthly In-tab Rate	96.5%

### Total Persons in Daily Sample

Panel Target Size	1,080
Avg Daily In-tab Persons	1,169
Avg Daily In-tab Rate	75%
Compliance-Capable*	1,435
Compliance Rate**	<b>81.5%</b>
Installed Cell-Phone-Only Persons	102
Avg. Cell-Phone-Only In-Tab Persons	75

\*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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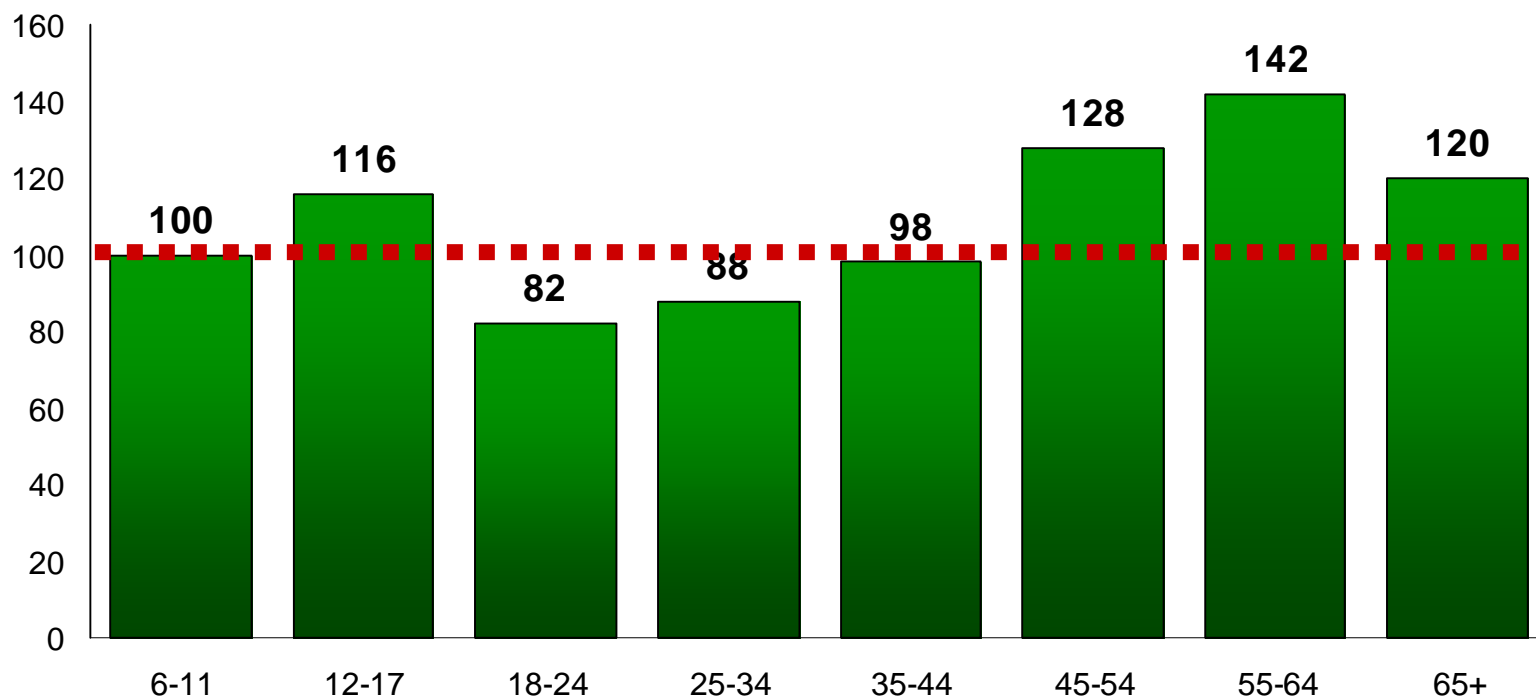
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# Sample Performance by Age Cell

April 2009



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

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# In-Tab Size Demo and Race/Ethnicity

	San Diego			
April 2009	Avg. Daily In-tab Target	Avg. Daily In-tab Actual	DDI*	Unique Monthly In-Tab
P6+	1,080	1,169	108	1,574
P18+	885	958	108	1,272
P18-54	636	634	100	868
P25-54	504	525	104	703
Black 6+	55	76	138	109
Hispanic 6+	321	337	105	446
Other 6+	704	756	107	1,019

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

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# In-Tab Size 18-34 DDI Performance

	San Diego			
April 2009	Avg. Daily In-tab Target	Avg. Daily In-tab Actual	DDI*	Unique Monthly In-Tab
Persons 18-34	302	258	85	386
Men 18-34	163	132	81	202
Women 18-34	140	126	91	184
Black 18-34	17	9	53	10
Hispanic 18-34	114	95	84	69
Other 18-34	171	154	90	230

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

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# In-Tab Size 25-54 Race/Ethnicity

	San Diego			
April 2009	Avg. Daily In-tab Target	Avg. Daily In-tab Actual	DDI*	Unique Monthly In-Tab
Persons 25-54	504	525	104	703
Men 25-54	257	245	95	329
Women 25-54	247	281	114	374
Black 25-54	26	33	125	48
Hispanic 25-54	146	152	104	195
Other 25-54	331	340	103	460

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





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# San Diego In-Tab Rates

## April 2009

	Persons 6+	Persons 18-34	Men 18-34	Women 18-34	Black 18-34	Hispanic 18-34	Other 18-34
<b>BENCHMARK</b>	<b>75%</b>	<b>70%</b>	<b>60%</b>	<b>60%</b>	<b>60%</b>	<b>60%</b>	<b>60%</b>
<b>San Diego April 2009</b>	<b>75%</b>	<b>66.3%</b>	<b>65.7%</b>	<b>66.9%</b>	<b>44.1%</b>	<b>67.5%</b>	<b>67.5%</b>



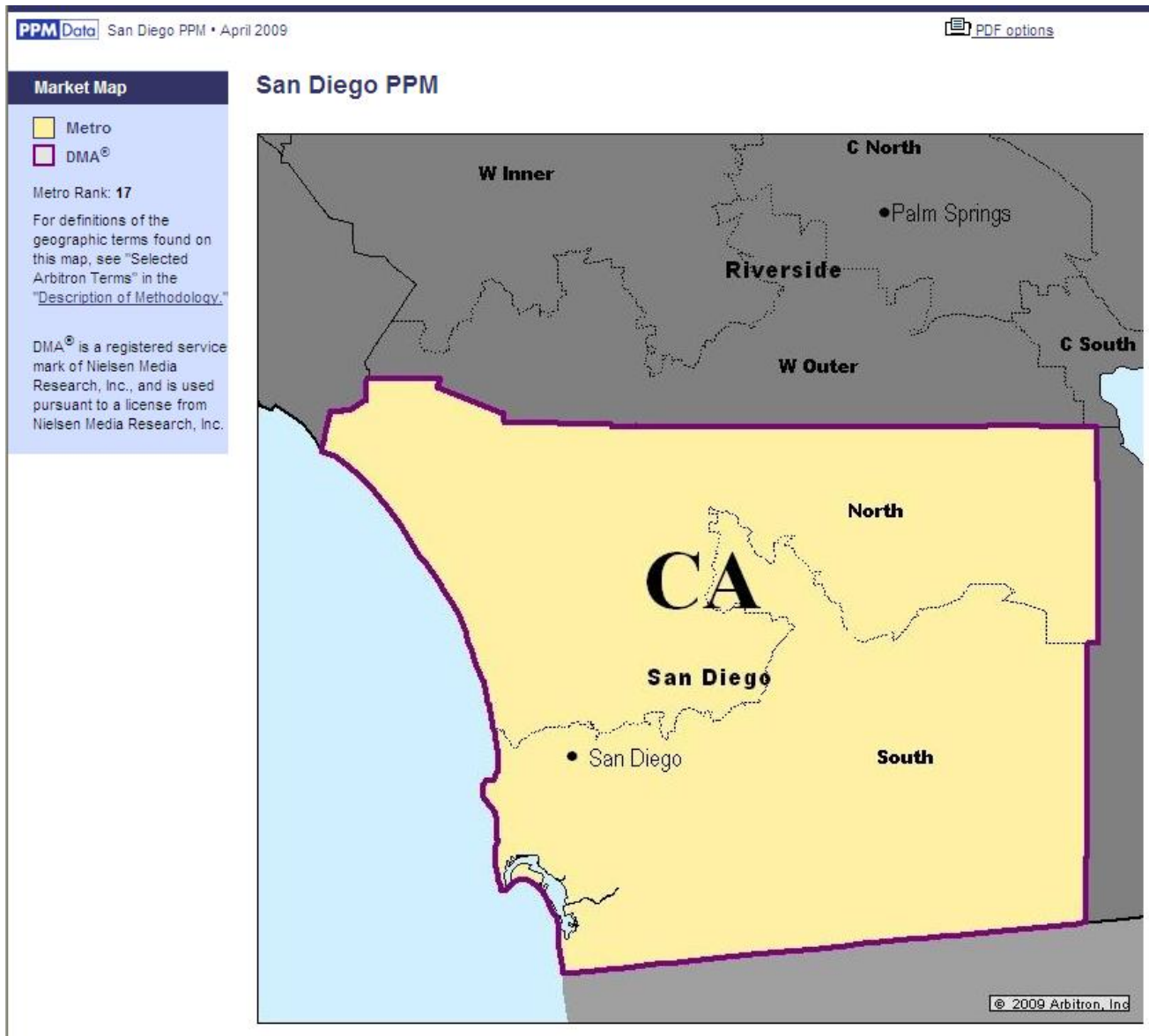


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# San Diego Metro & DMA



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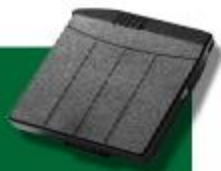


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# Compliance and Carry Times

**San Diego PPM April 2009**



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# Median Undock/Dock Times

## April 2009 Weekdays

Female 6+

Male 6+

Undock Time



7:35 AM

7:21 AM



Dock Time

10:53 PM

10:52 PM





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# Median Undock/Dock Times

## April 2009 Weekdays

Black 6+

Hispanic 6+

Other 6+

Undock Time



7:53 AM

7:31 AM

7:25 AM

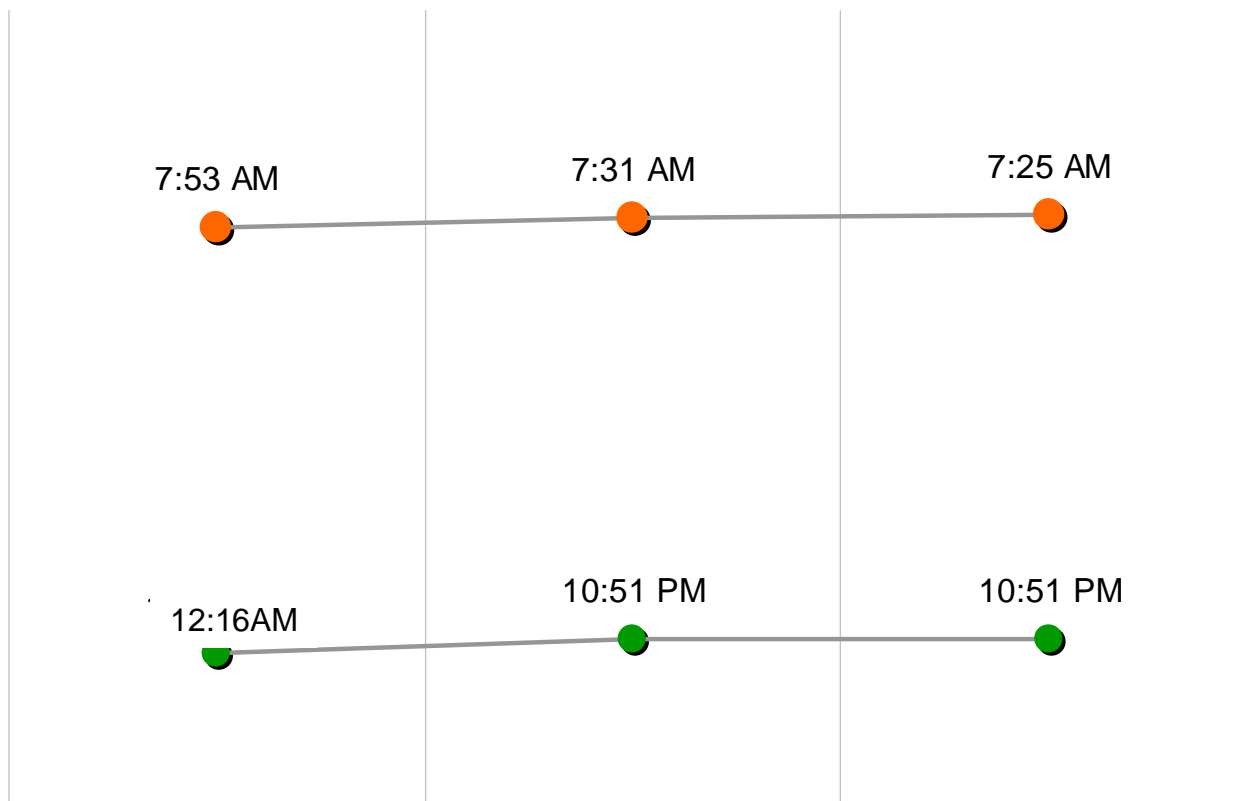


Dock Time

12:16AM

10:51 PM

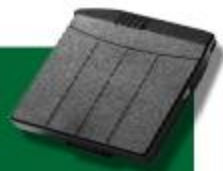
10:51 PM



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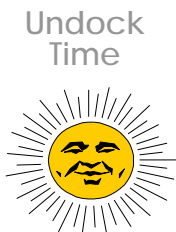
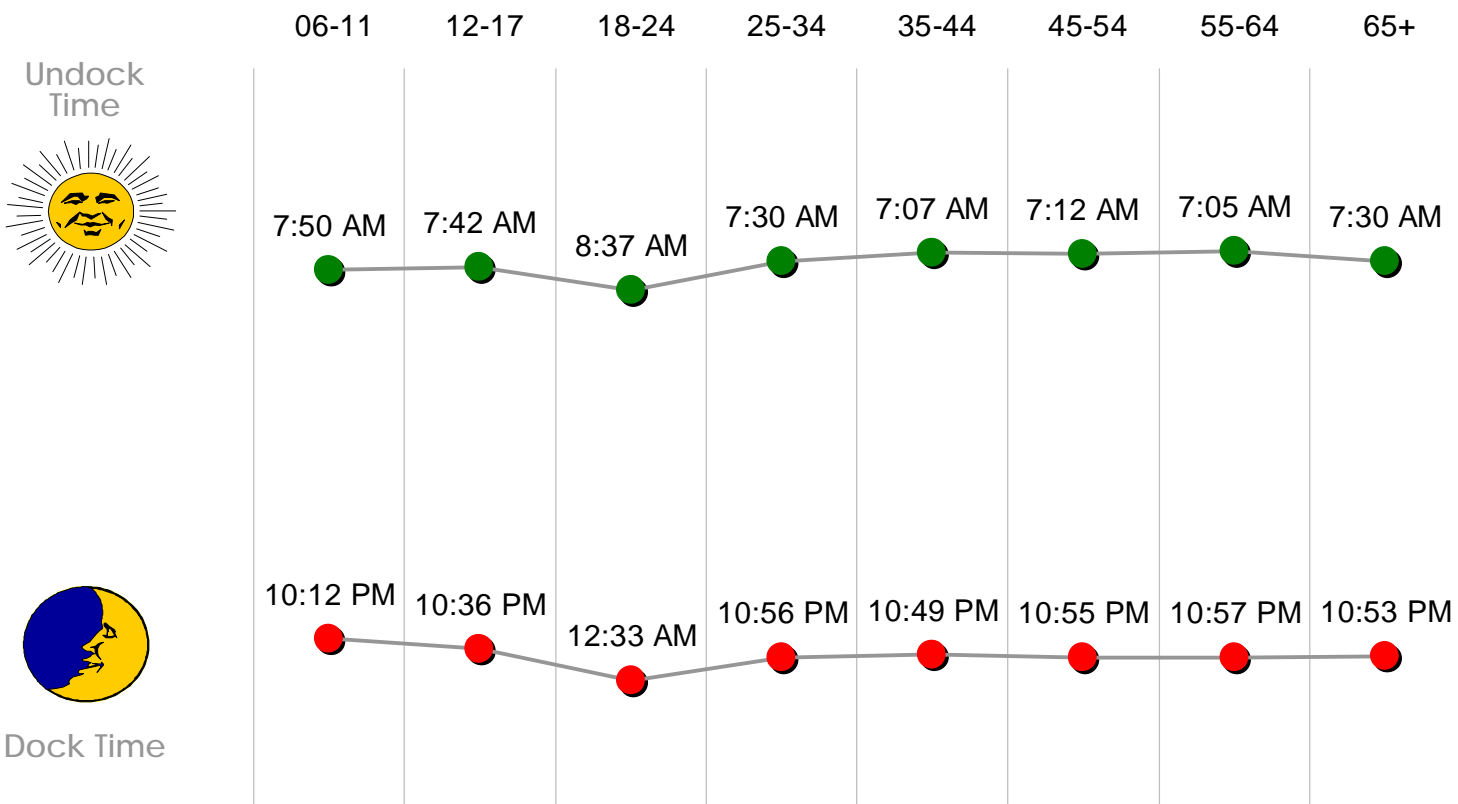




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# Median Undock/Dock Times

## April 2009 Weekdays

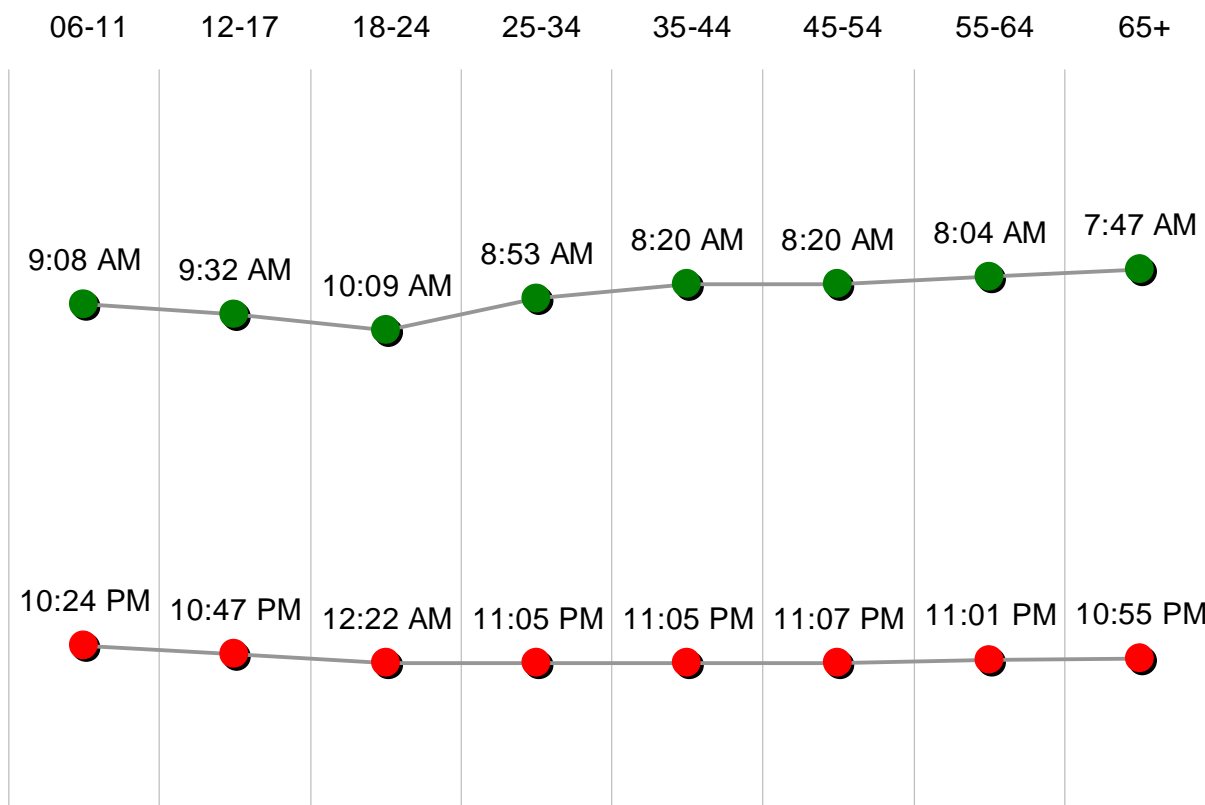




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# Median Undock/Dock Times

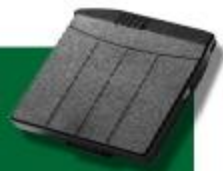
## April 2009 Weekends



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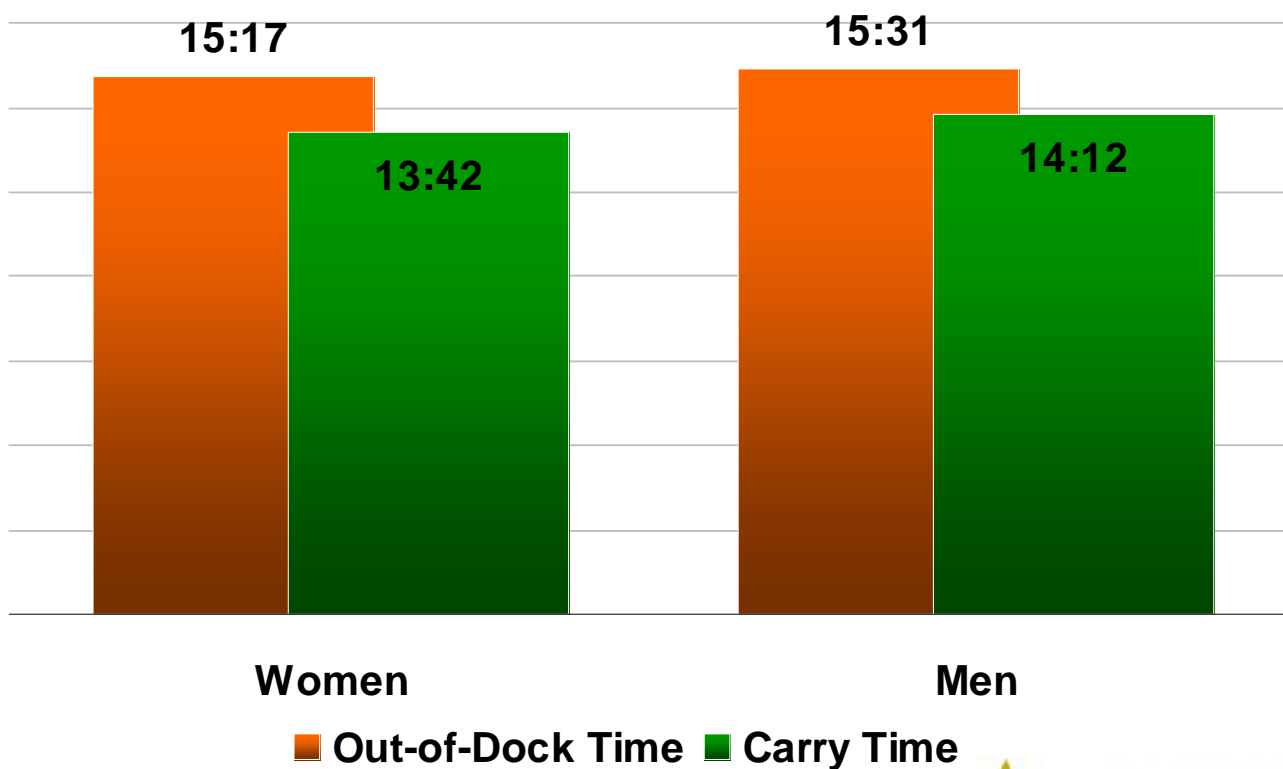




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# Median Times by Gender

## Out-of-Dock and Carry Times



Women

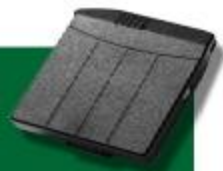
Men

■ Out-of-Dock Time ■ Carry Time



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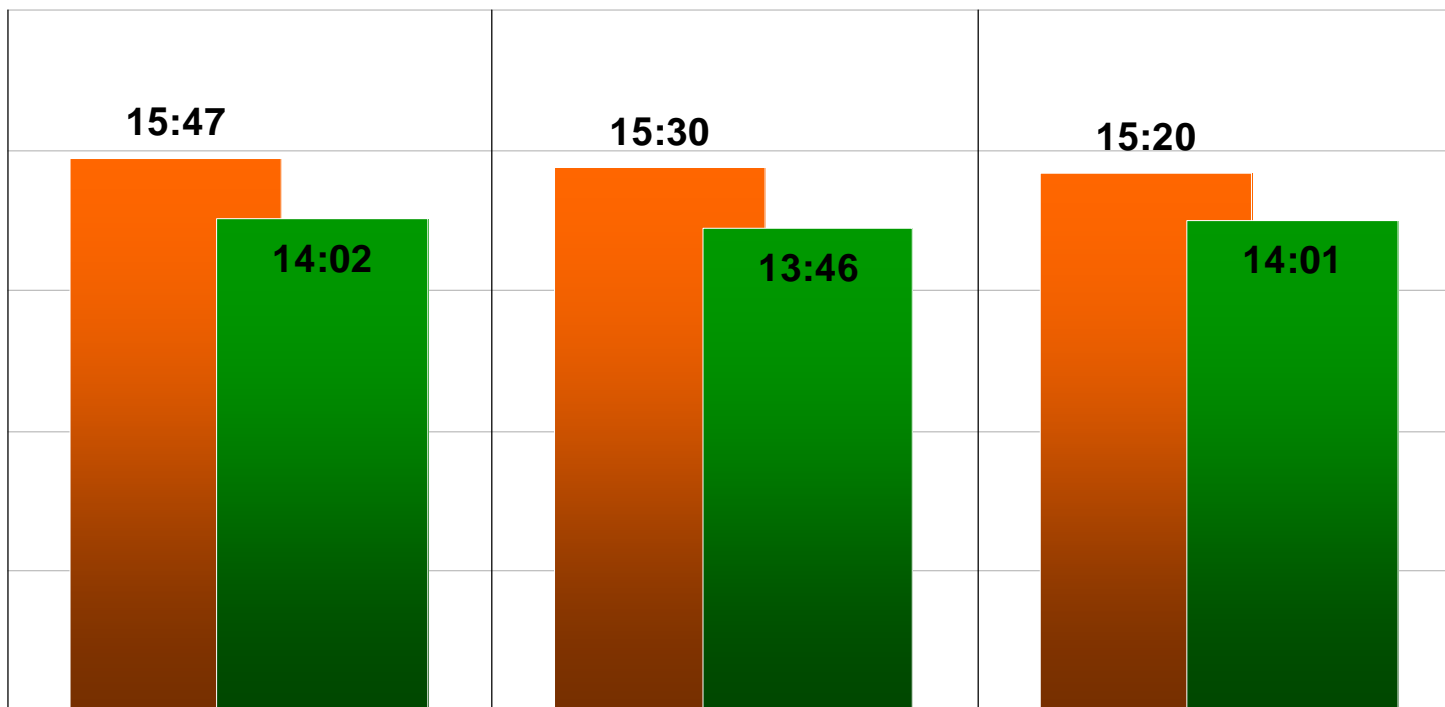
• portable people meter



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# Median Times by Race/Ethnicity

## Out-of-Dock and Carry Times



Black 6+

Hispanic 6+

Other 6+

■ Out-of-Dock Time ■ Carry Time

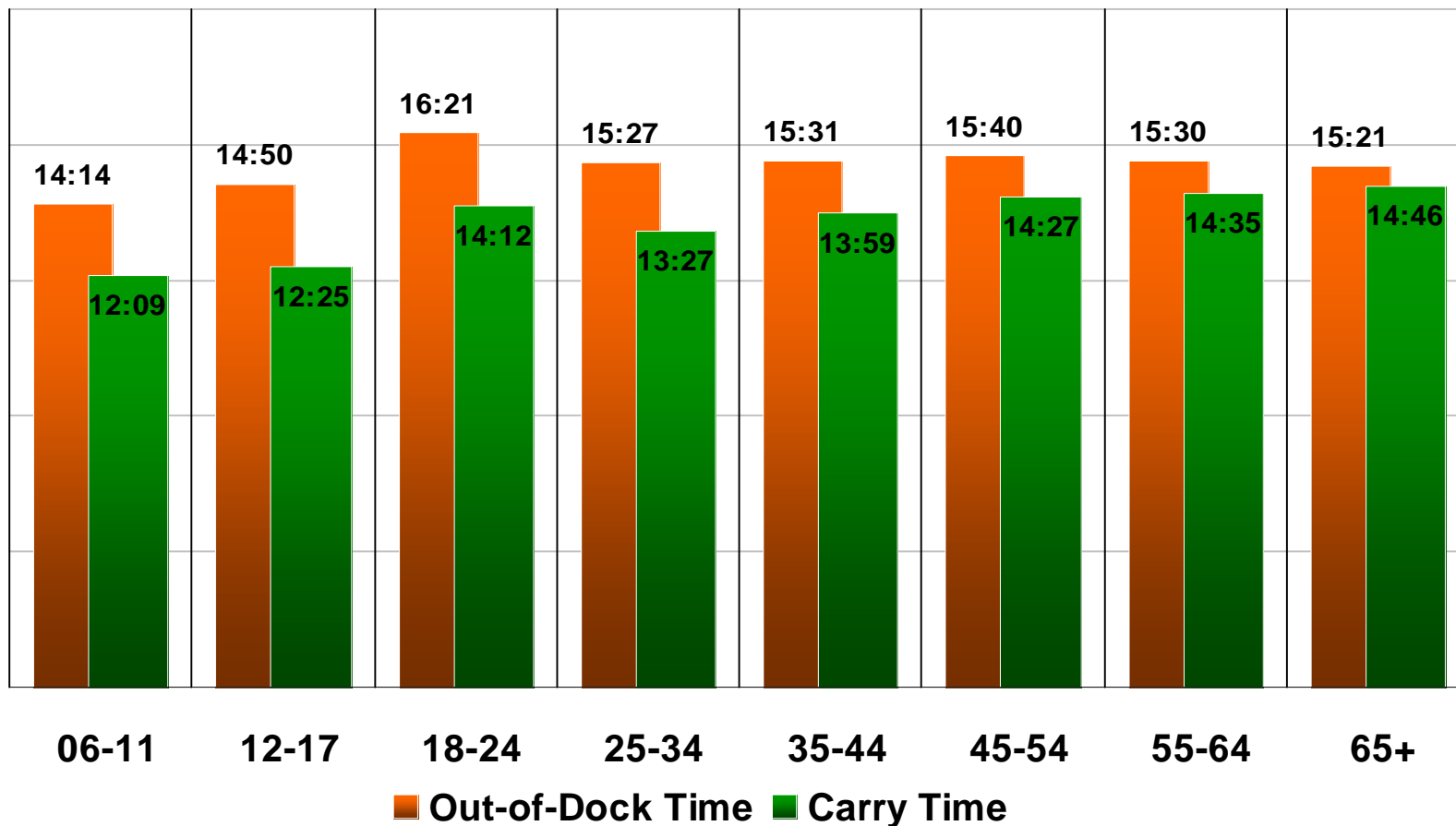




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# Median Times by Age

## Out-of-Dock and Carry Times



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# Station Encoding

**San Diego PPM April 2009**



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# Who's Encoding\* for PPM?

## Astor Broadcast Group

- § KCEO-AM
- § KFSD-AM

## Broadcast Co. of the Americas

- § XEPE-AM
- § XPRS-AM
- § XPRS-FM

## CBS Radio

- § KSCF-FM
- § KYXY-FM

## Clear Channel

- § KGB-FM
- § KHTS-FM
- § KIOZ-FM
- § KLSD-AM
- § KMYI-FM
- § KOGO-AM
- § KUSS-FM

## Compass Radio Group

- § KPRI-FM

## Educational Media Foundation

- § KLVJ-FM

## Entravision

- § KSSD-FM

## Family Stations

- § KECR-AM

## Finest City Broadcasting

- § XHRM-FM
- § XHTZ-FM
- § XTRA-FM

## Hi-Favor Broadcasting

- § KSDO-AM

## Lincoln Financial

- § KBZT-FM
- § KIFM-FM
- § KNSN-AM
- § KSON-FM
- § KSOQ-FM

## MVS Comunicaciones

- § XGLX-FM
- § XOCL-FM

## Midwest Television

- § KFMB-AM
- § KFMB-FM

## More Enterprise Communications

- § XMOR-FM
- § XSPN-AM

## Palomar Community College

- § KKSM-AM

## Radio Imagen

- § XLTN-FM

## Salem Communications

- § KCBQ-AM
- § KPRZ-AM

## San Diego Community College

- § KSDS-FM

## San Diego State University

- § KPBS-FM

## Uniradio Corp

- § XEMO-AM
- § XHA-FM
- § XHFG-FM
- § XHTY-FM
- § XRCN-AM



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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**

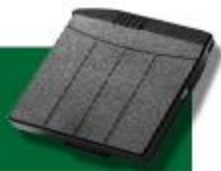


*PPM in San Diego*



## Cume Estimates

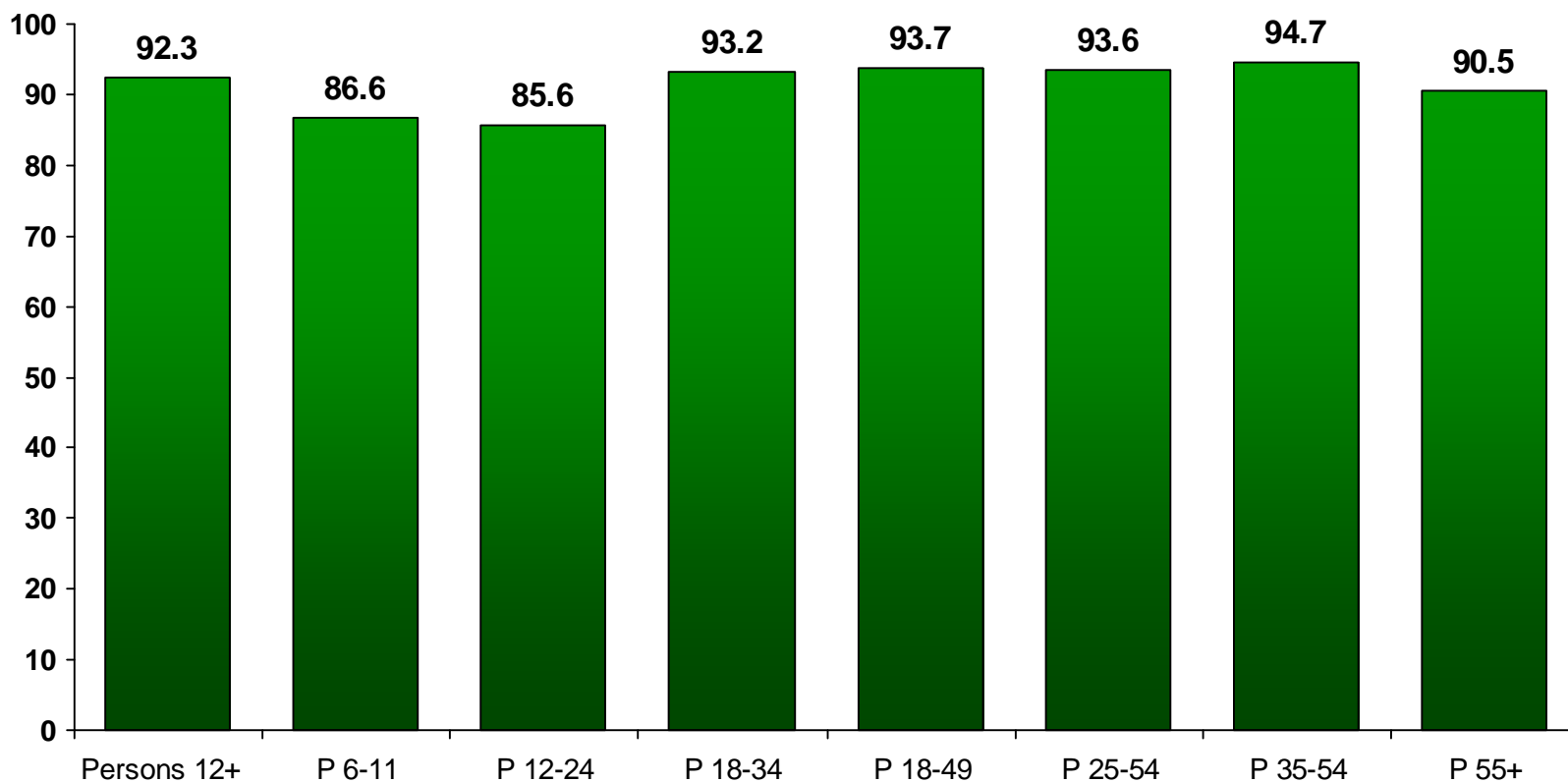
**San Diego PPM April 2009**



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# PPM Weekday Cume Rating

Mon-Fri 6a-12m



San Diego Metro PPM, Avg Weekly Cume Rating by Demo, April 2009

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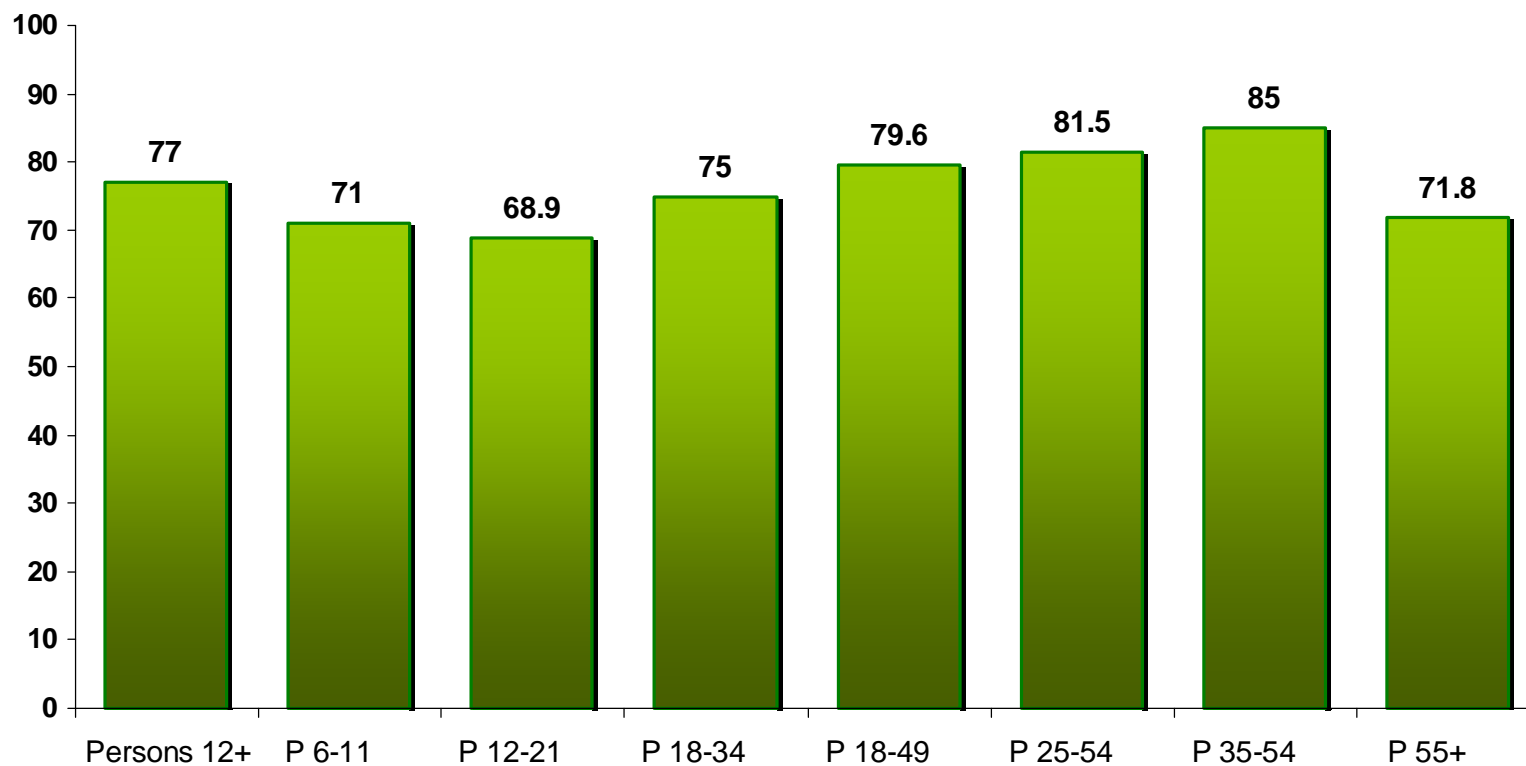
• portable people meter

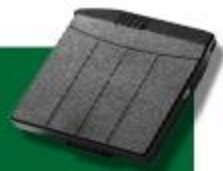


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# PPM Weekend Cume Rating

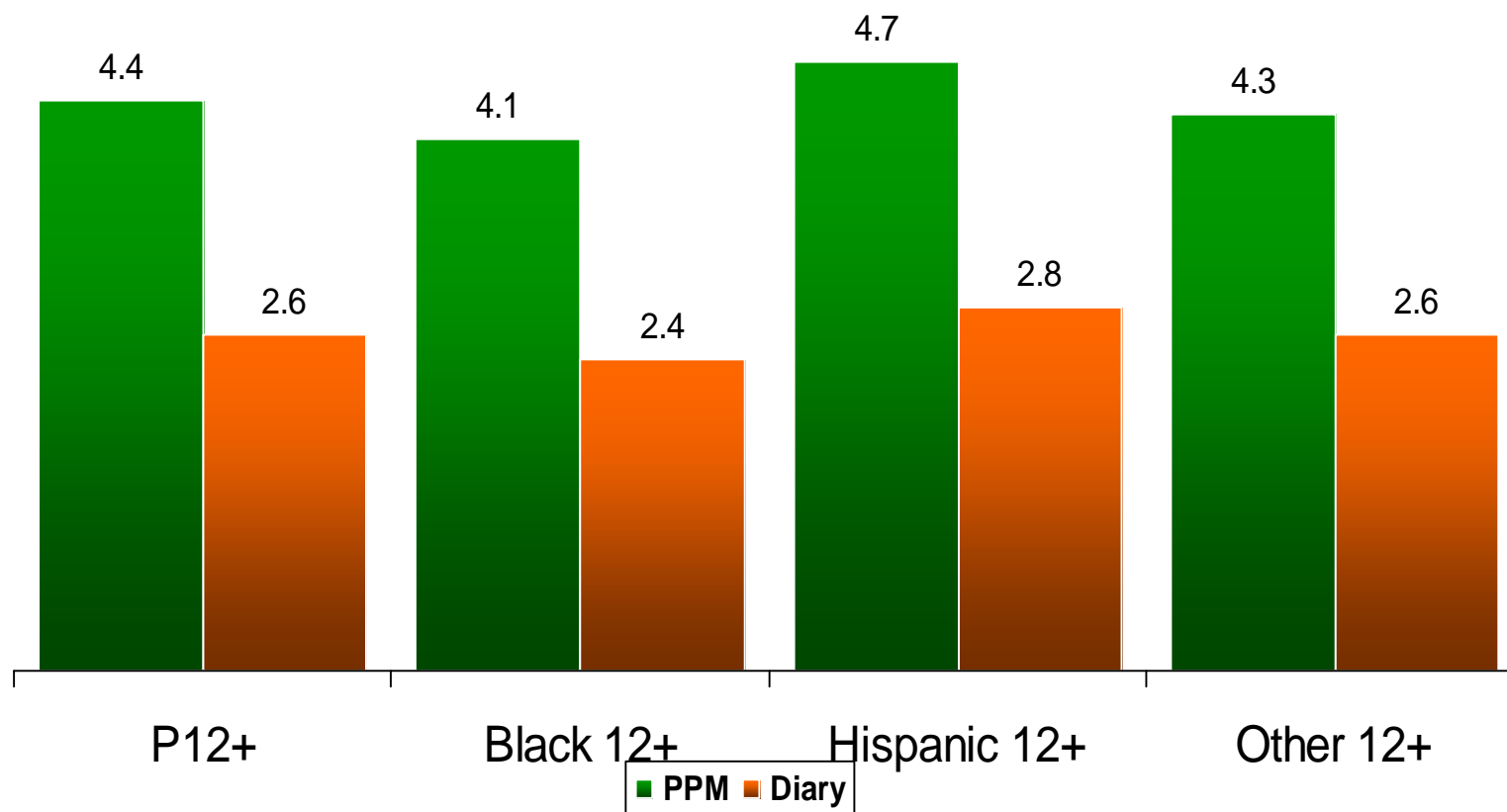
## Sat-Sun 6a-12m





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# Average Number Of Stations



*PPM, San Diego Metro, April 2009, Mon-Sun 6AM-MID, Persons 12+ vs.*

*Diary, San Diego 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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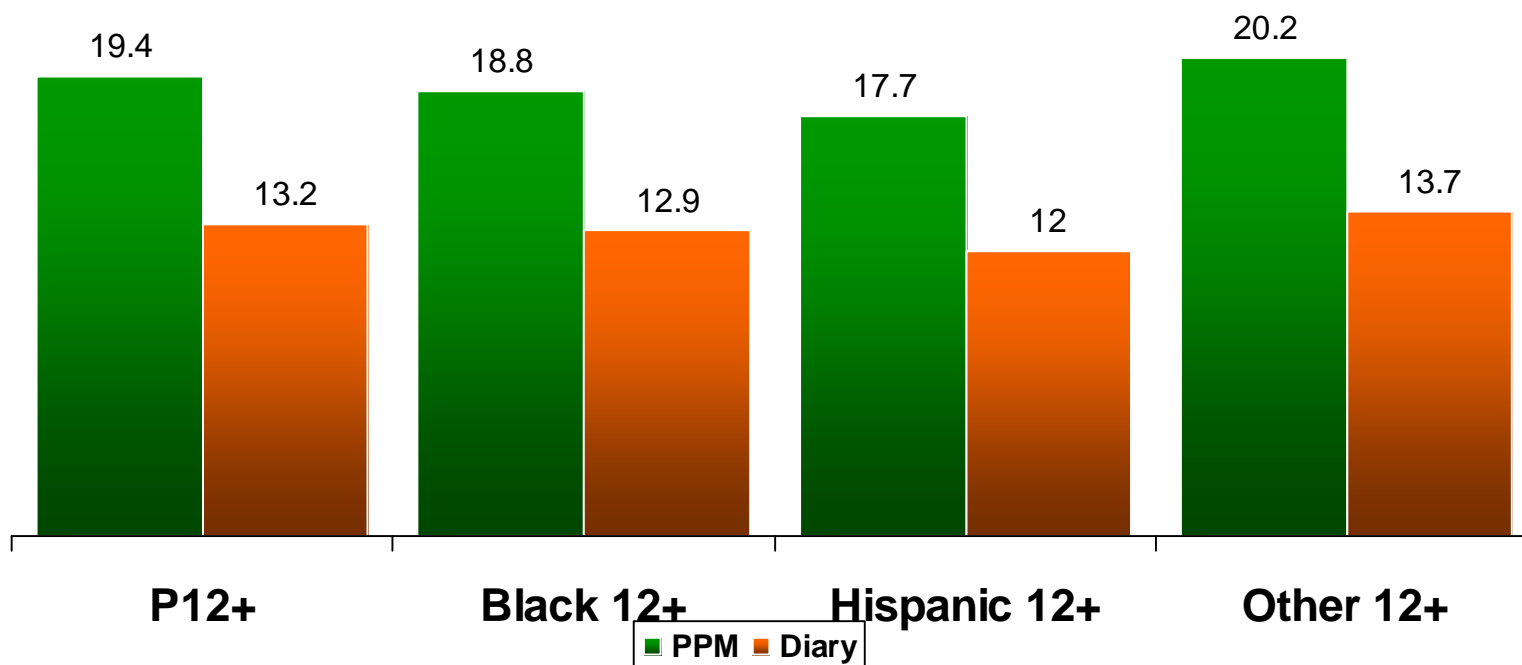
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# Number Of Listening Occasions



*PPM, San Diego Metro, April 2009, Mon-Sun 6AM-MID, Persons 12+ vs.*

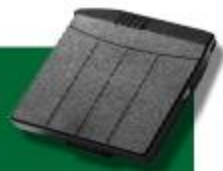
*Diary, San Diego Metro, Winter 2009, Mon-Sun 6AM-MID, Persons 12+*

*Note: Same stations are being used for comparison from Diary to PPM*



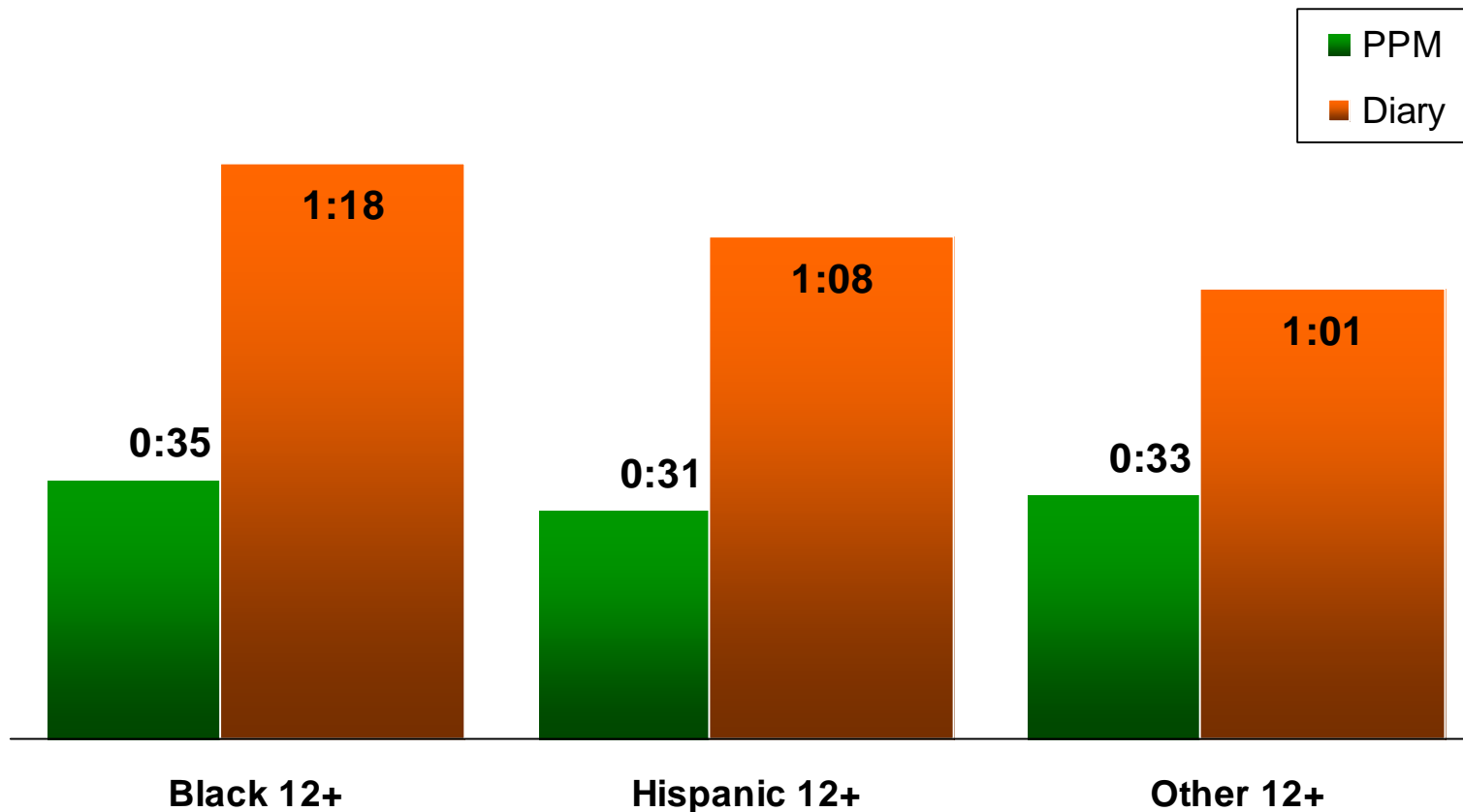
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# Average Time Spent Per Tune-in



*PPM, San Diego Metro, April 2009, Mon-Sun 6AM-MID, Persons 12+ vs. Diary, San Diego 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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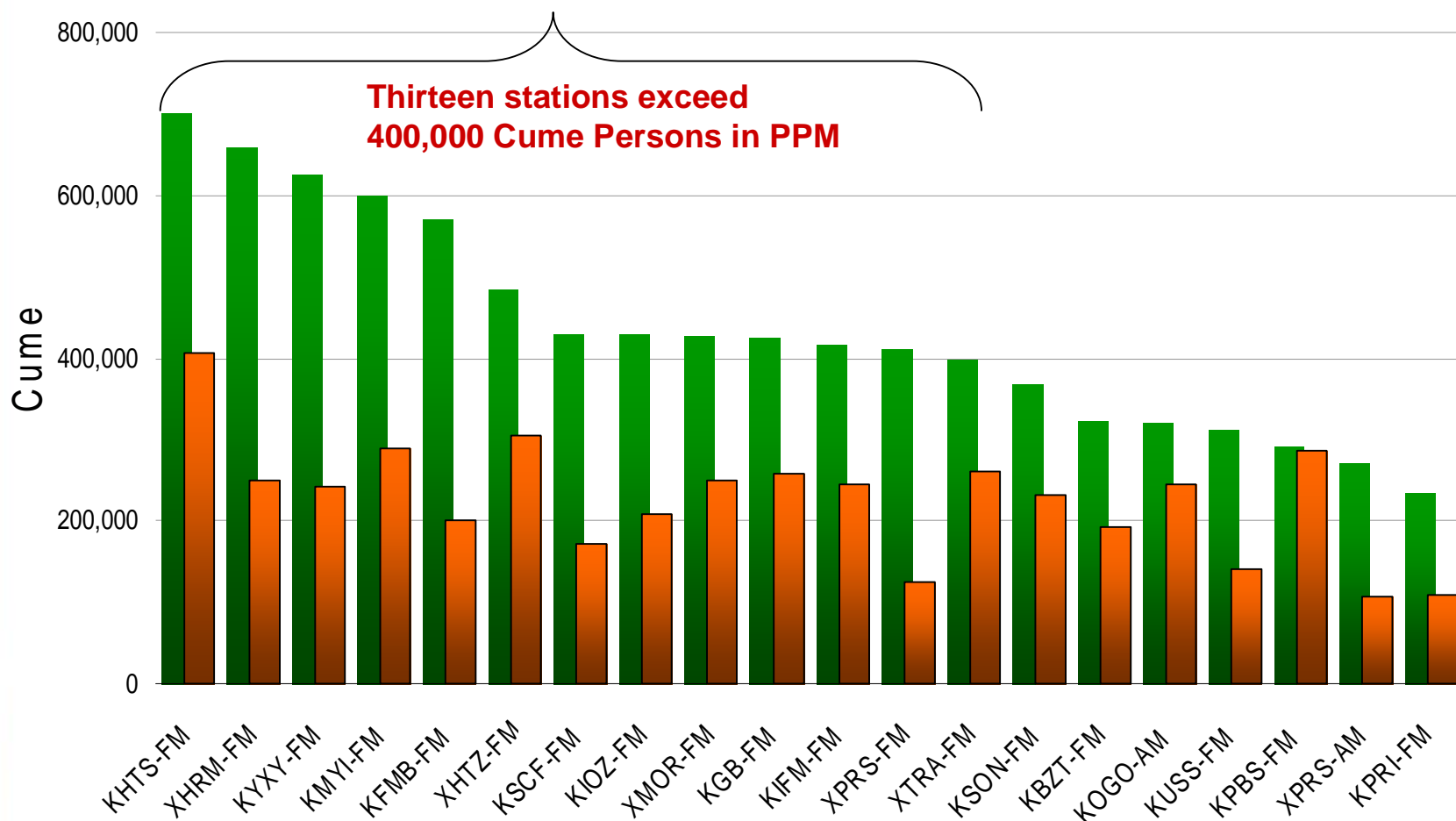


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# Avg Weekly Cume Comparison

## San Diego April 2009 PPM

■ PPM Cume ■ Diary Cume



PPM, San Diego PPM, April 2009, Mon-Sun 6AM-MID, Persons 12+ vs.

Diary, San Diego 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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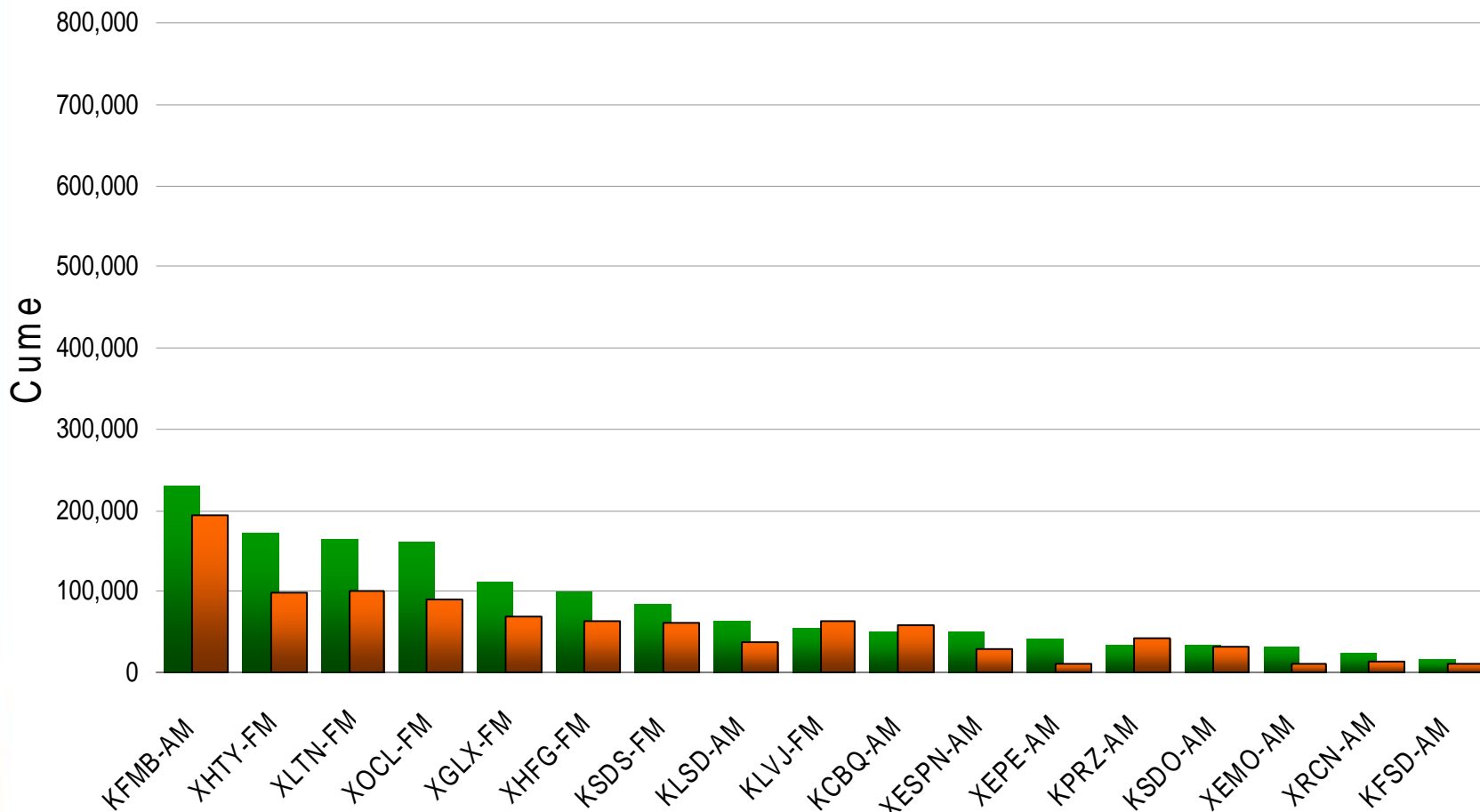


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# Avg Weekly Cume Comparison

## San Diego April 2009 PPM

■ PPM Cume ■ Diary Cume



PPM, San Diego PPM, April 2009, Mon-Sun 6AM-MID, Persons 12+ vs.

Diary, San Diego 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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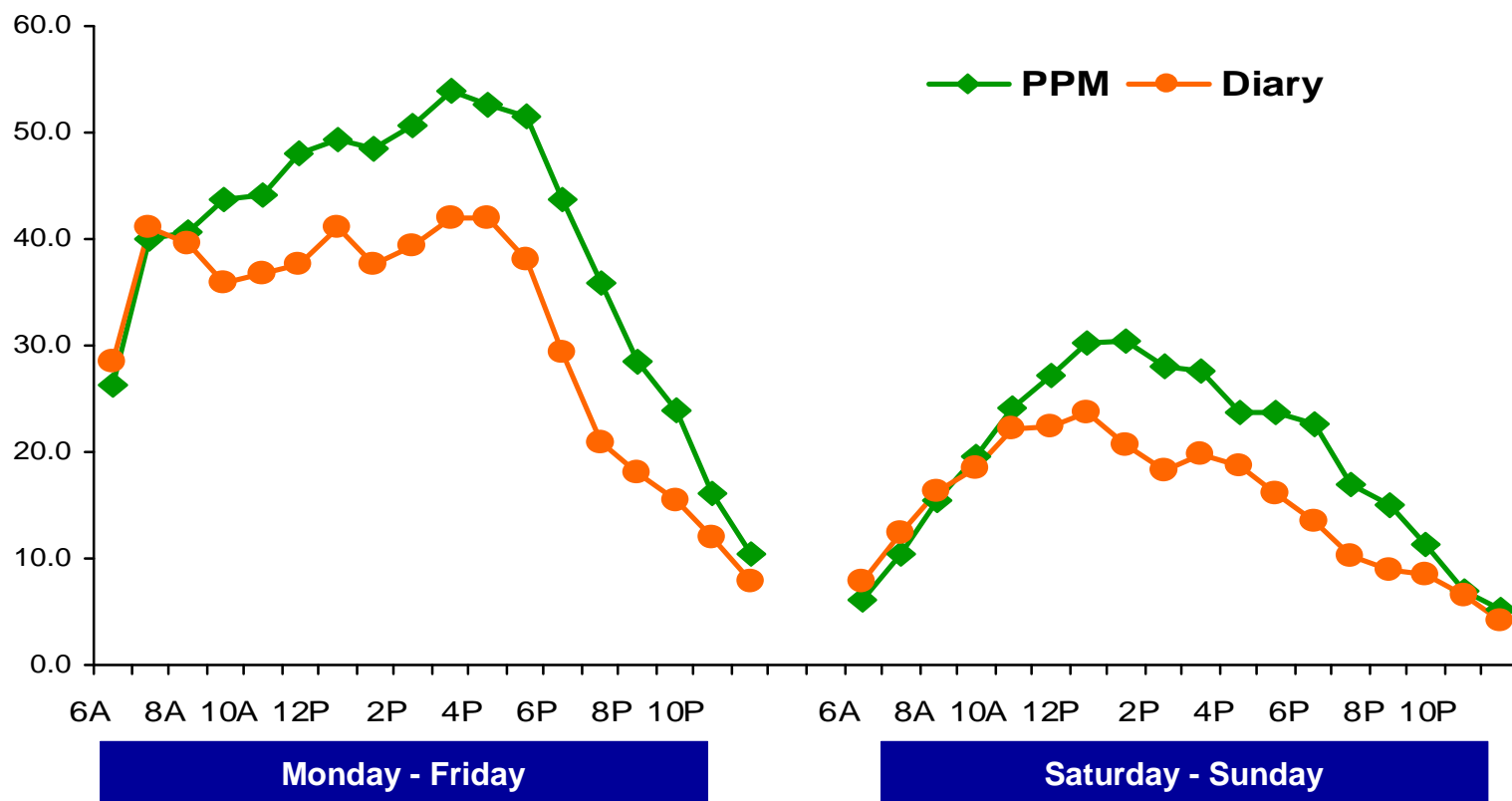
• portable people meter



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

## April 2009



PPM, San Diego PPM, April 2009, Mon-Sun 6AM-MID, Persons 12+ vs.

Diary, San Diego 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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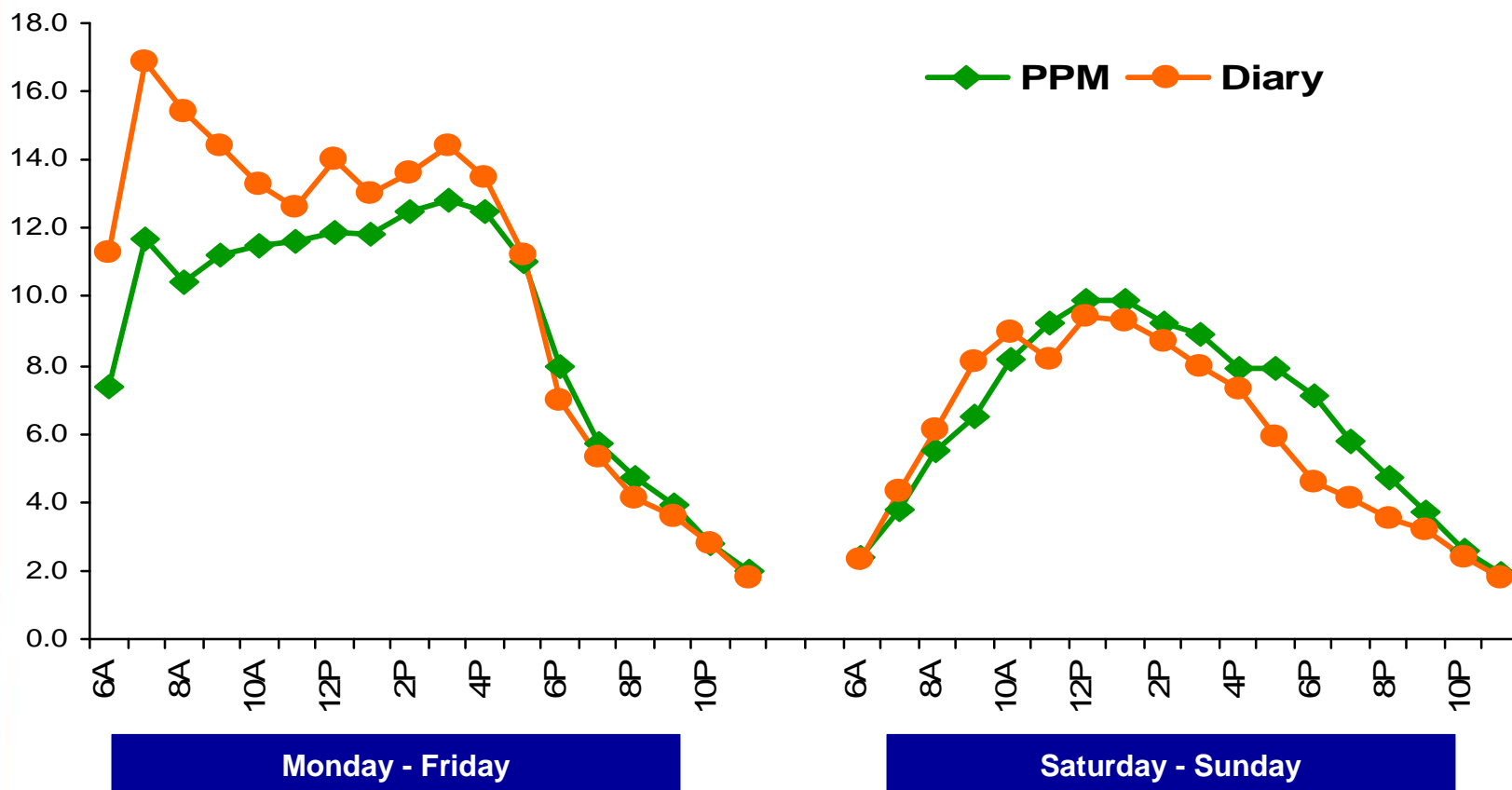
# Rating Comparisons

**San Diego PPM April 2009**



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



PPM, San Diego PPM, April 2009, Mon-Sun 6AM-MID, Persons 12+ vs.

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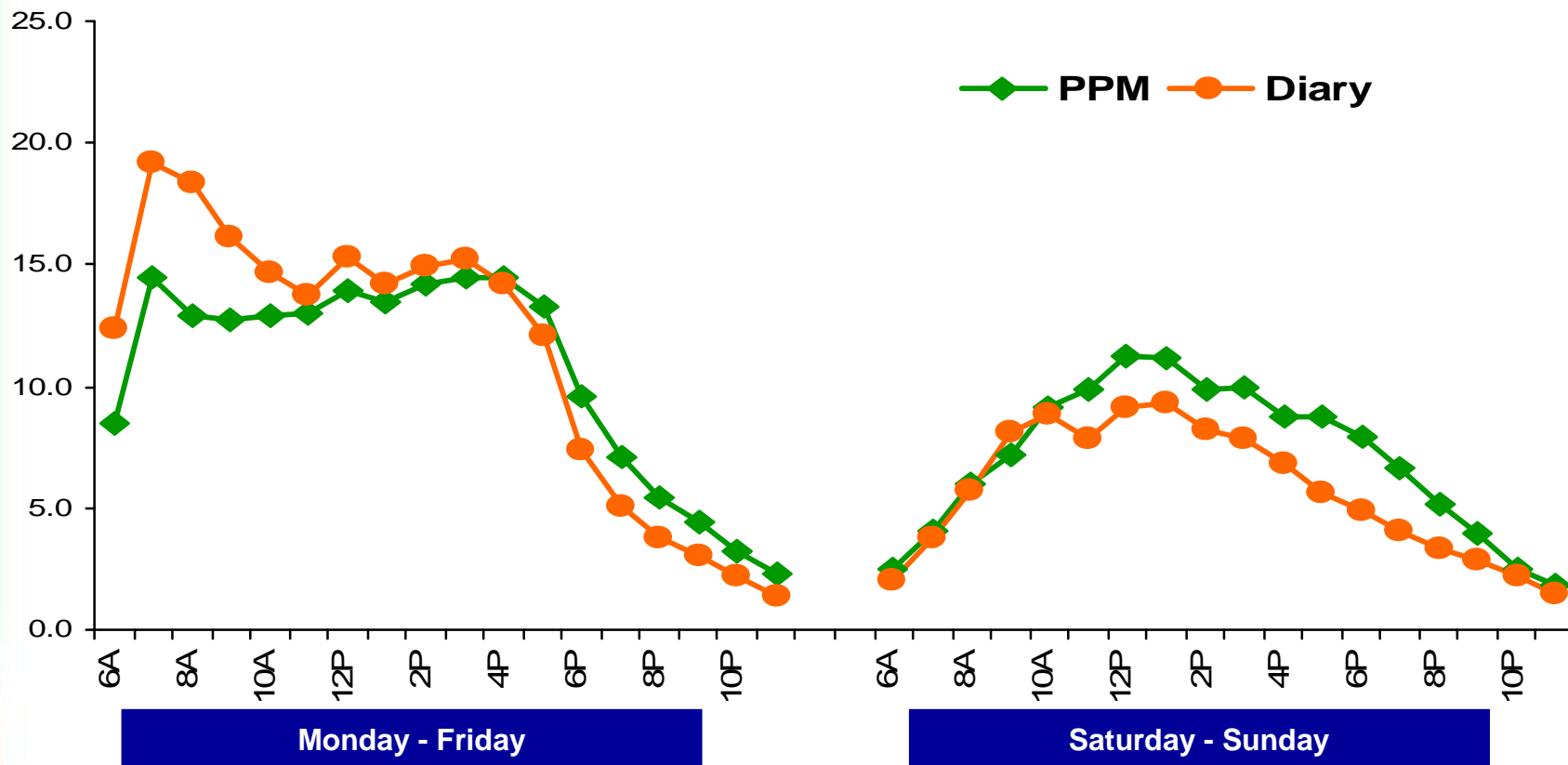
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# PPM Vs. Diary Hour-by-Hour Persons 25-54 AQH Rating Comparison



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

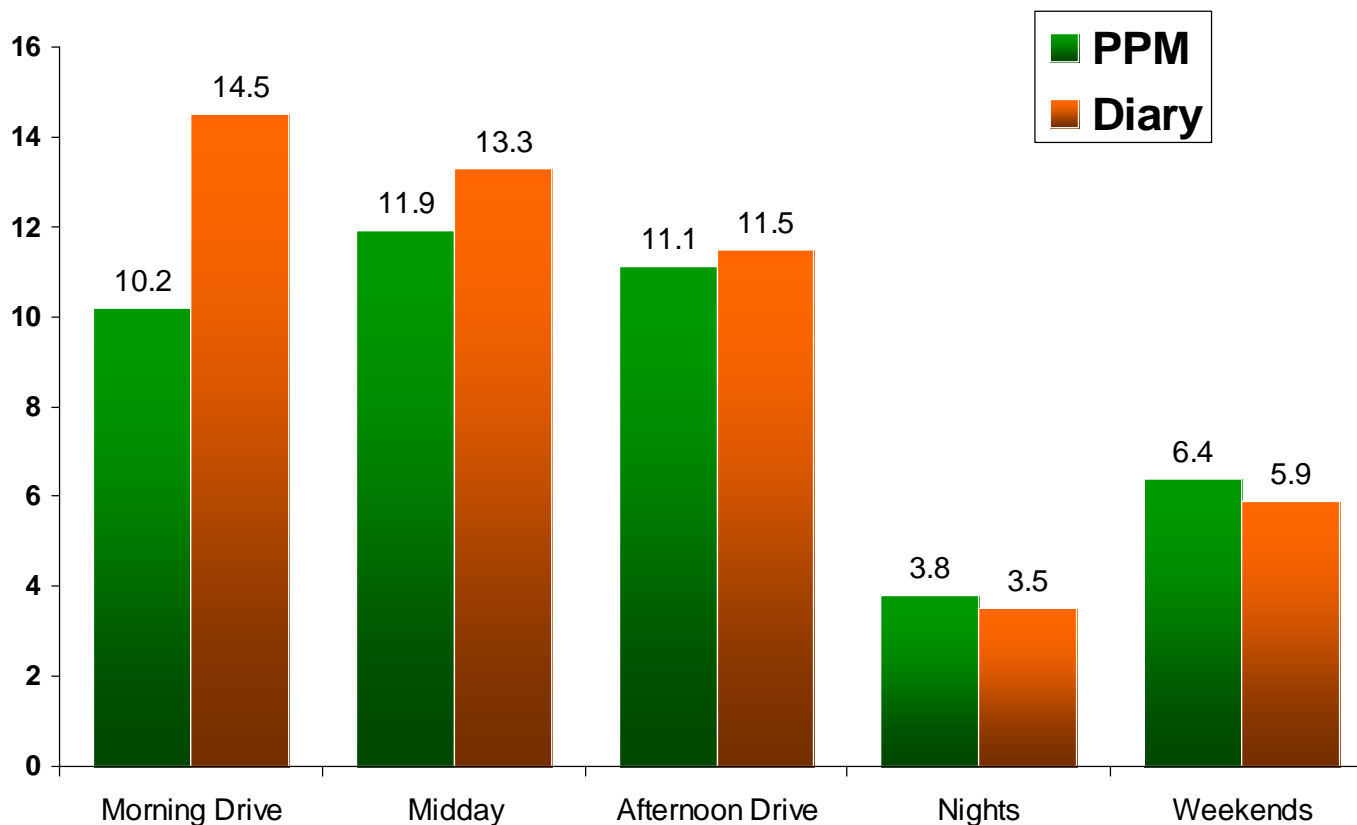




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# PPM Vs. Diary

## AQH Ratings By Daypart, P12+



San Diego 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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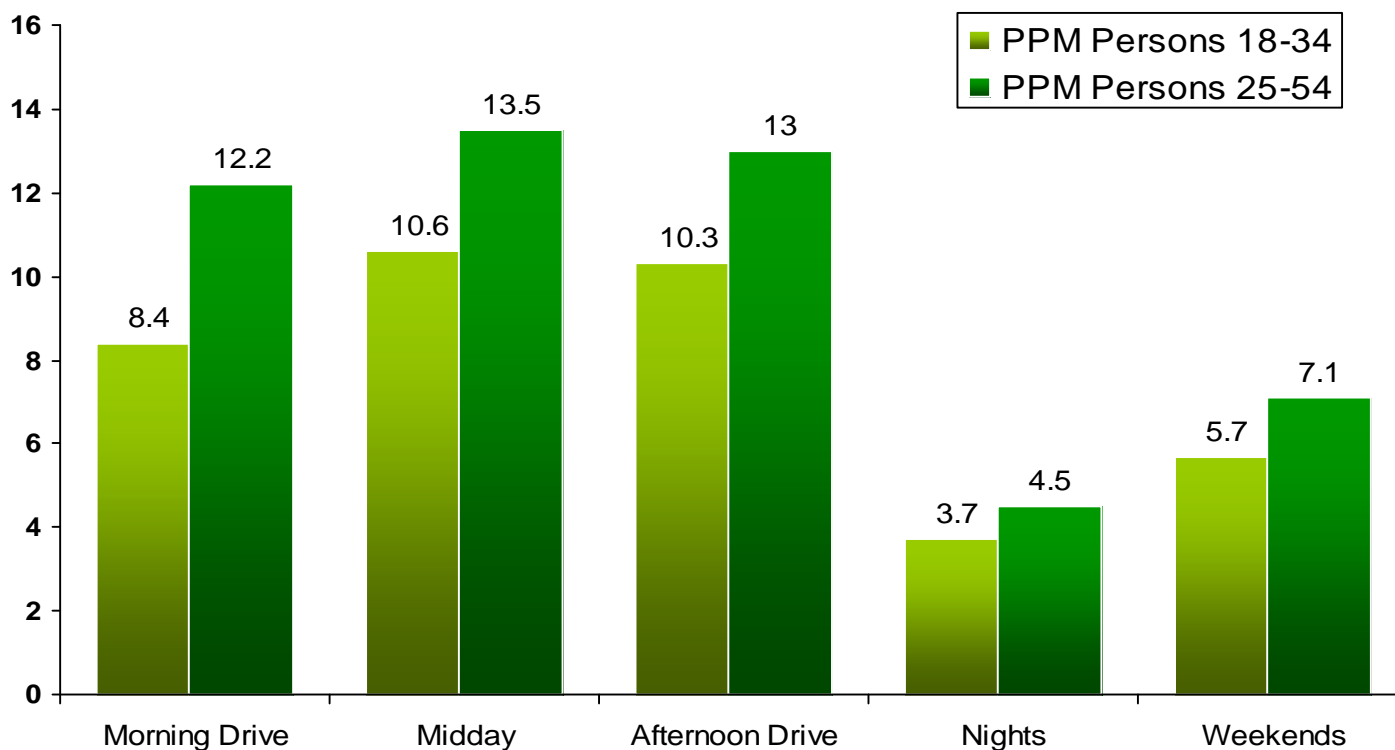




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# PPM AQH Ratings By Demo and Daypart

## April 2009



PPM San Diego AQH Ratings, April 2009 Market totals.



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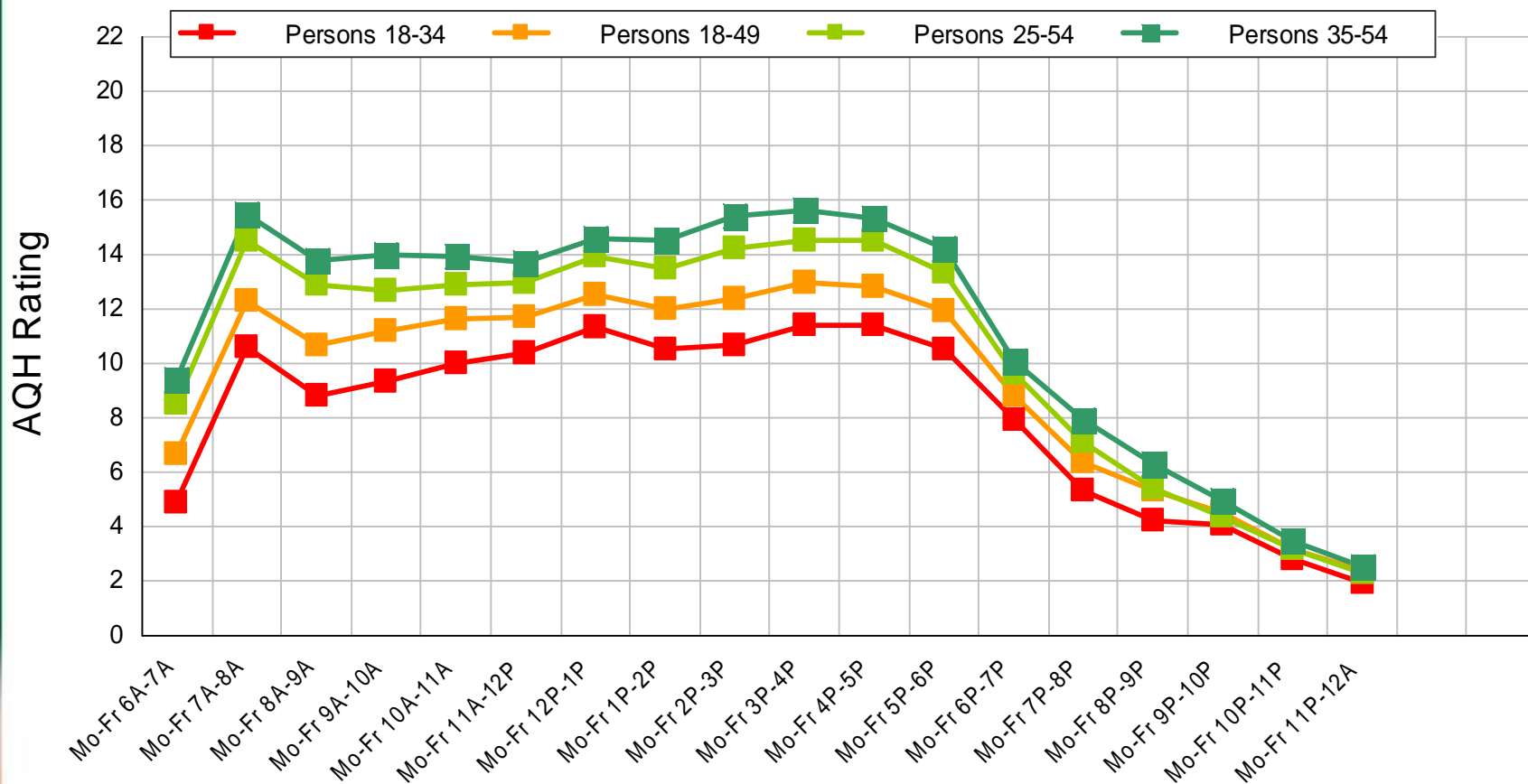
• portable people meter



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# Listening By Demo

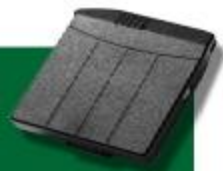
## Monday-Friday 6AM-MID



San Diego April 2009 PPM, Mon-Fri 6AM-MID

© 2009 Arbitron Inc.

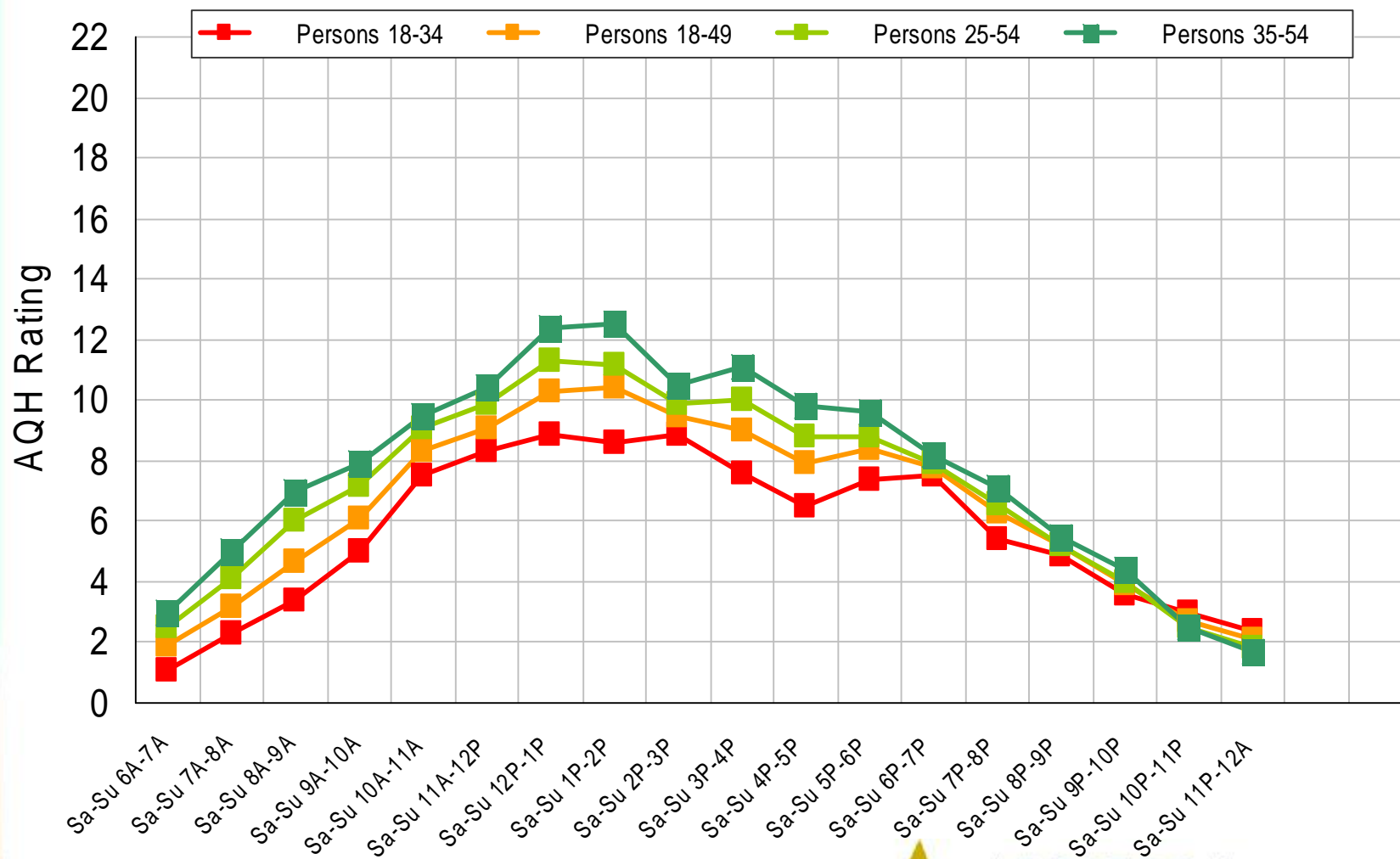




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# Listening By Demo

## Sat-Sun 6AM-MID



San Diego April 2009 PPM, Sat-Sun 6AM-MID,

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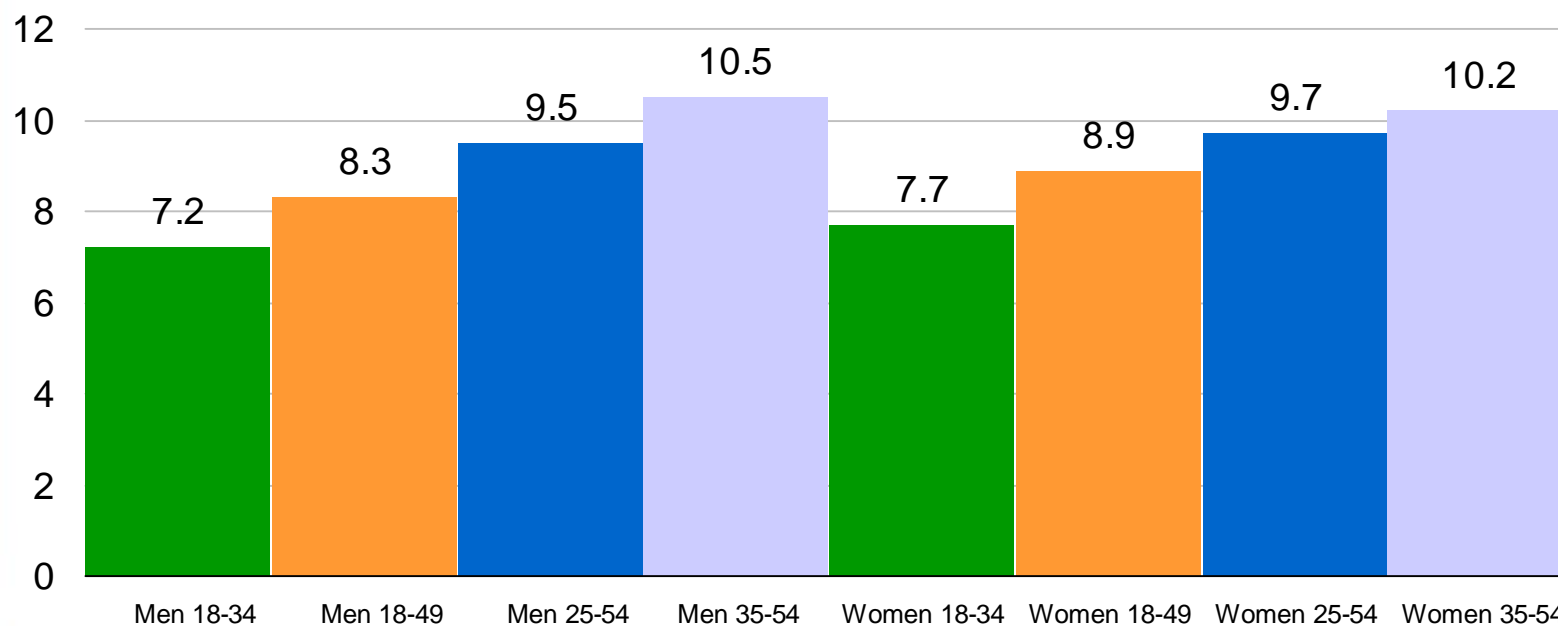
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# PPM AQH Ratings by Age/Sex



*San Diego PPM, April 2009, Mon-Sun 6AM-MID, AQH Rating*

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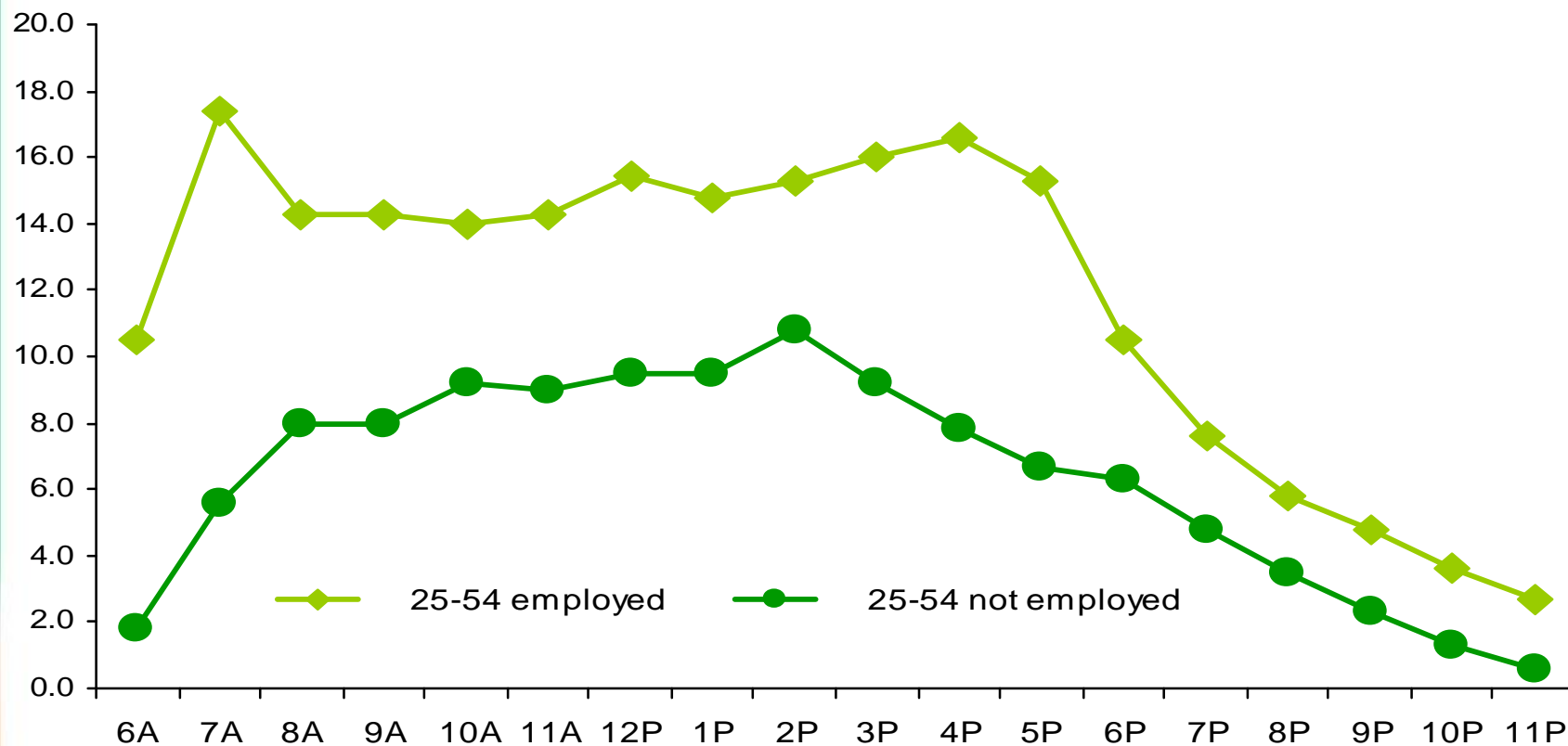




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# Ratings by Employment Status

## Persons 25-54



PPM, San Diego, April 2009, Mon-Fri 6a-12m Persons 25-54 full-time/part-time vs. not employed, AQH Rating



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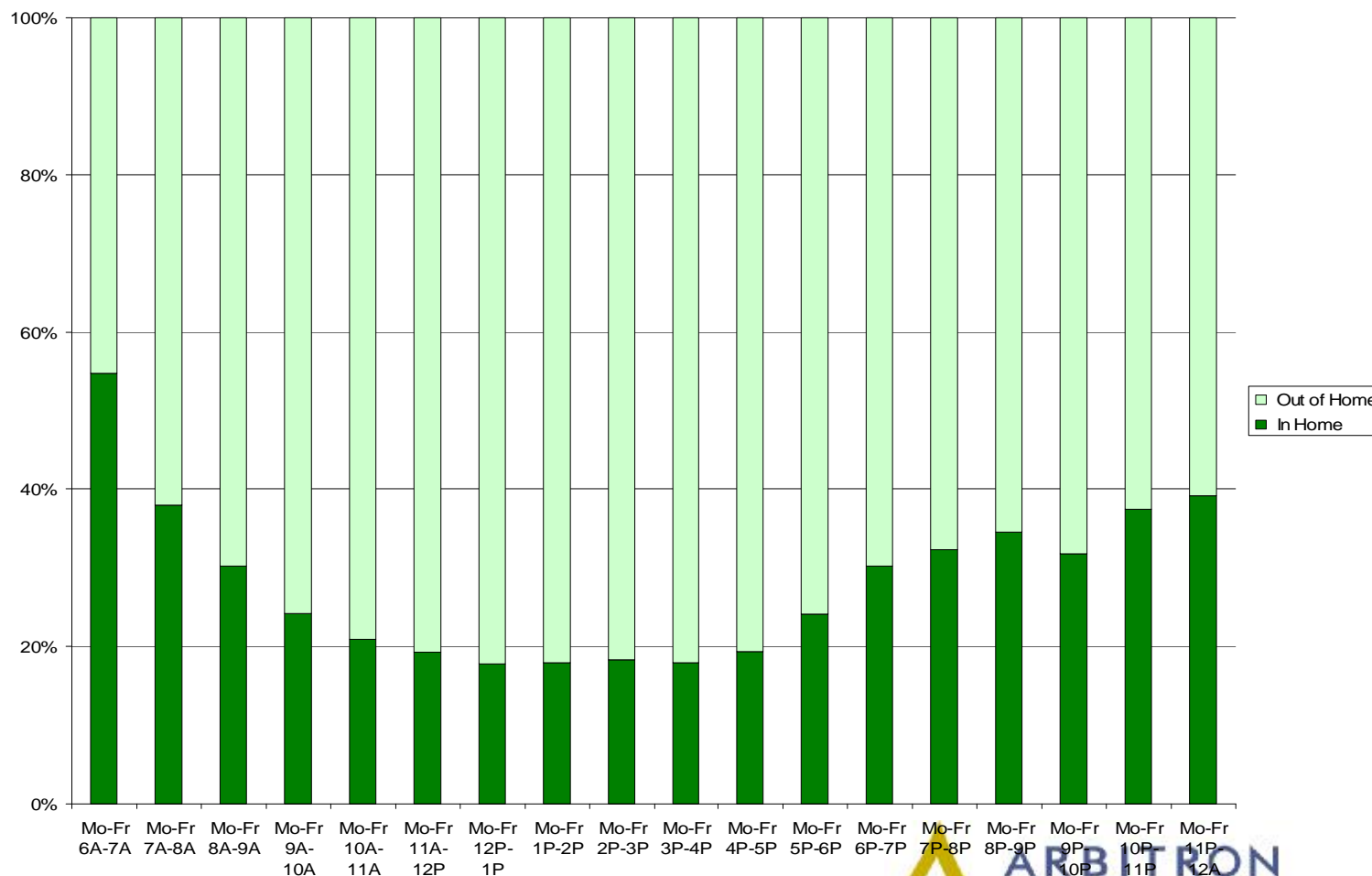
portable people meter



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# Ratings by In/Out of Home Listening

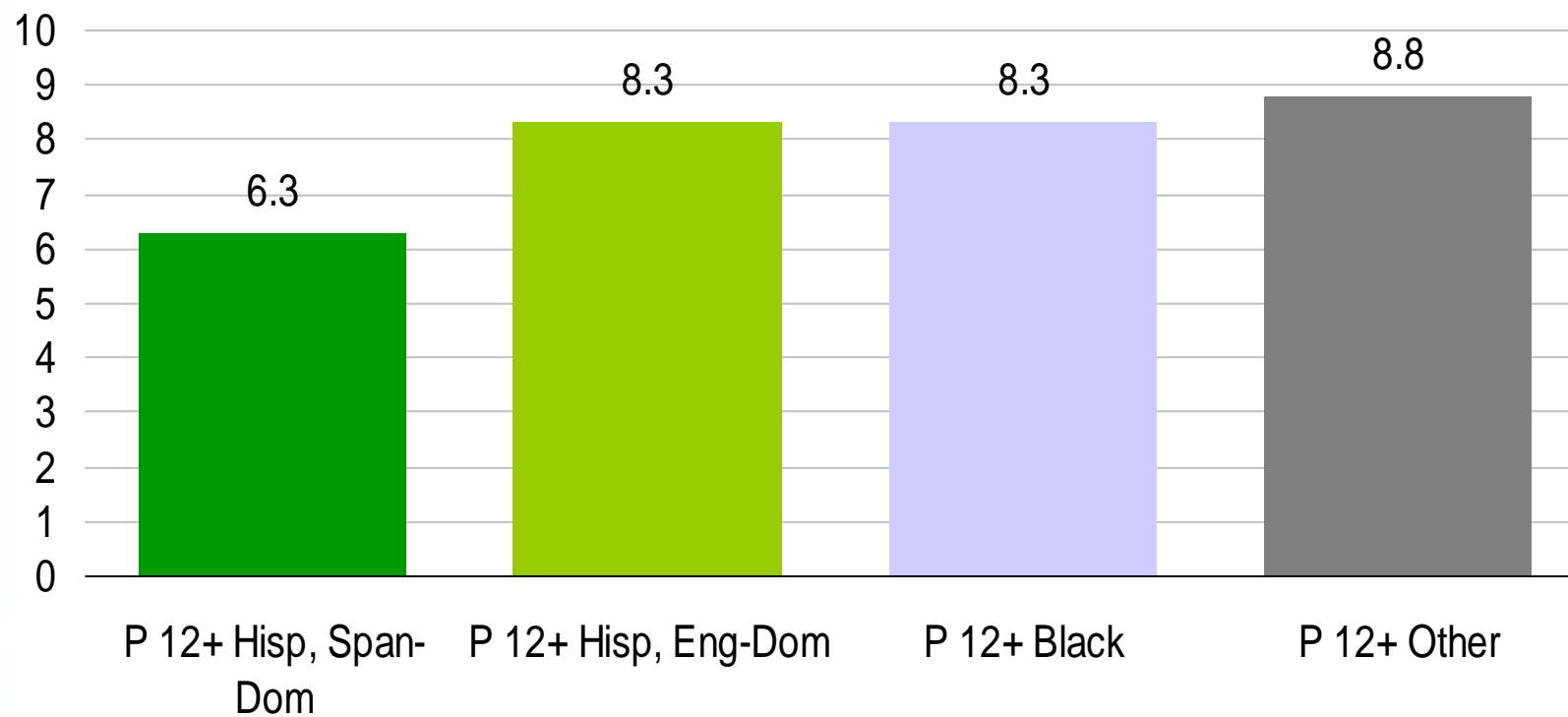
## Persons 25-54





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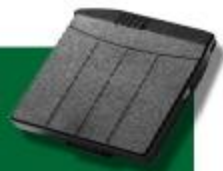
# Listening Levels by Race and Ethnicity



*PPM, San Diego, April 2009, Mon-Sun 6AM-MID, AQH Rating*

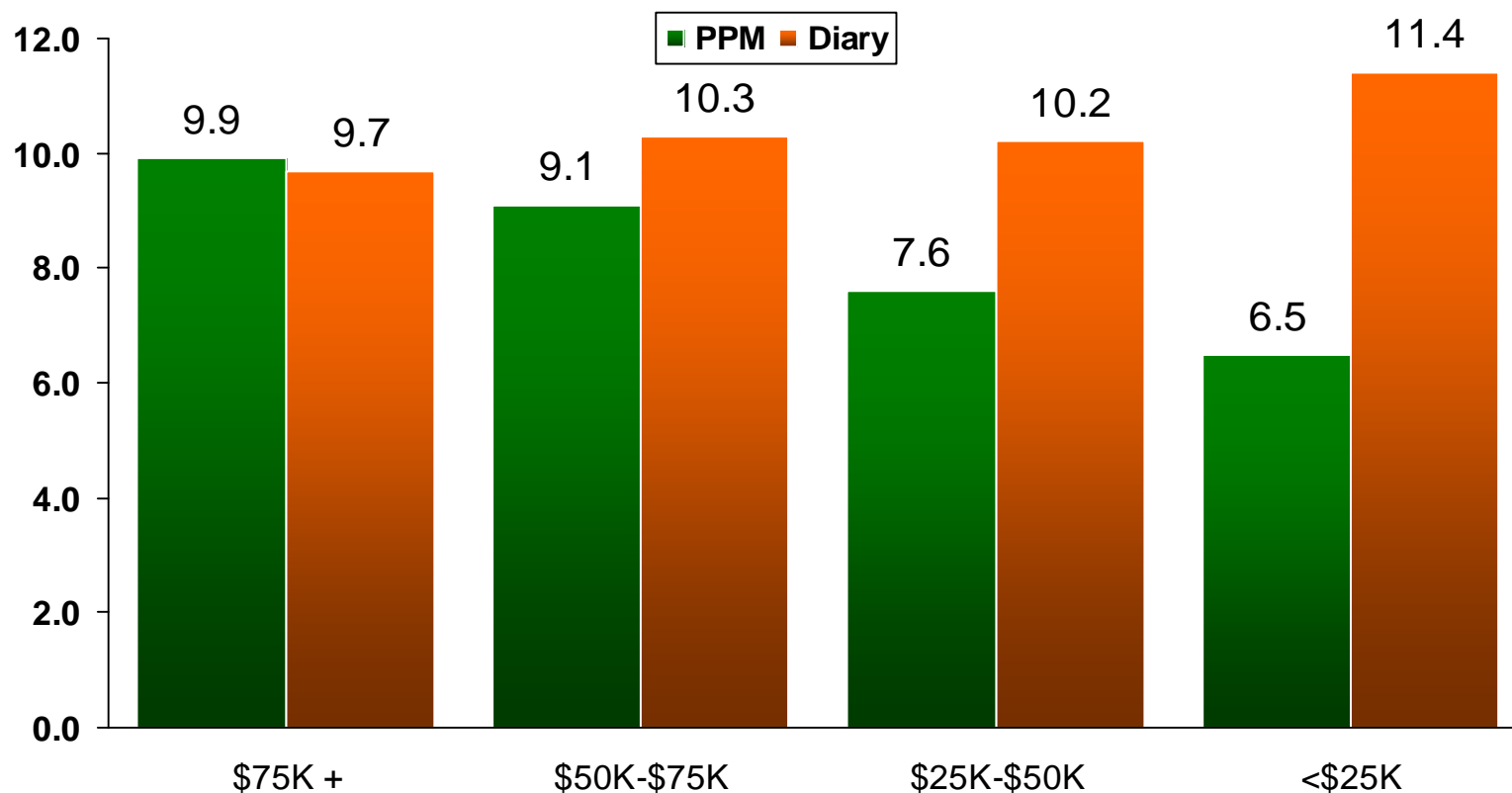
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# Listening Levels by Income Level



*PPM, San Diego PPM, April 2009, Mon-Sun 6AM-MID, Persons 18+ vs.  
Diary, San Diego 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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# San Diego Rank Positions

## Top Five Stations Represent Many Formats

### Persons 12+

Rhythmic AC  
Pop Contemporary Hit Radio  
New AC (NAC)/Smooth Jazz  
Classic Rock  
Hot Adult Contemporary

### Persons 25-54

Rhythmic AC  
New AC (NAC)/Smooth Jazz  
Classic Rock  
Pop Contemporary Hit Radio  
Hot Adult Contemporary

### Persons 18-34

Pop Contemporary Hit Radio  
Active Rock  
Alternative  
Hot Adult Contemporary  
Alternative

### Persons 35-54

Rhythmic AC  
New AC (NAC)/Smooth Jazz  
Classic Rock  
Adult Hits  
Hot Adult Contemporary

Source: PPM San Diego Metro, AQH Persons, April 2009, M-Su 6A-MID

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# PPM Ratings Are More Compressed

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

	San Diego 18-34		San Diego 18-49		San Diego 25-54		San Diego 35-54	
	Diary	PPM	Diary	PPM	Diary	PPM	Diary	PPM
M-F 6a-10a	<b>1.3</b>	<b>0.5</b>	<b>0.9</b>	<b>0.6</b>	<b>1.0</b>	<b>0.7</b>	<b>1.4</b>	<b>0.9</b>
M-F 10a-3p	<b>0.9</b>	<b>0.8</b>	<b>0.4</b>	<b>0.6</b>	<b>0.6</b>	<b>0.8</b>	<b>0.6</b>	<b>1.2</b>
M-F 3p-7p	<b>0.7</b>	<b>0.7</b>	<b>0.4</b>	<b>0.6</b>	<b>0.2</b>	<b>0.4</b>	<b>0.3</b>	<b>0.7</b>
M-F 7p-12m	<b>0.5</b>	<b>0.2</b>	<b>0.3</b>	<b>0.2</b>	<b>0.3</b>	<b>0.3</b>	<b>0.2</b>	<b>0.4</b>
Sa-Su 6a-12a	<b>0.5</b>	<b>0.2</b>	<b>0.3</b>	<b>0.4</b>	<b>0.1</b>	<b>0.4</b>	<b>0.1</b>	<b>0.4</b>

Diary data based on Winter 2009  
PPM data based on April 2009 data

Note: Same stations are being used for comparison from Diary to PPM

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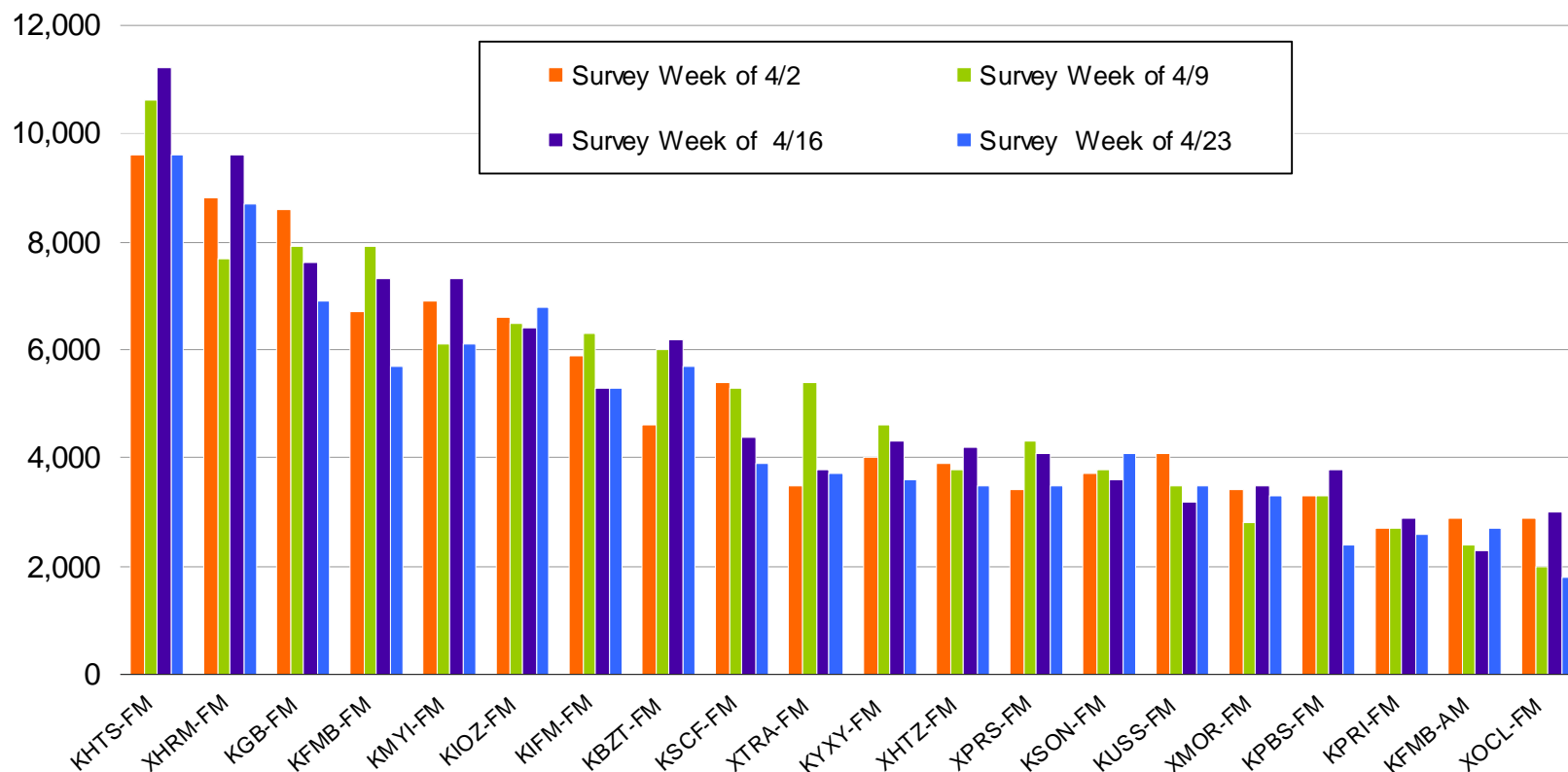




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# AQH Persons Estimates

## Persons 18-49, AQH Persons



San Diego PPM, April 2009, Mon-Sun 6AM-MID

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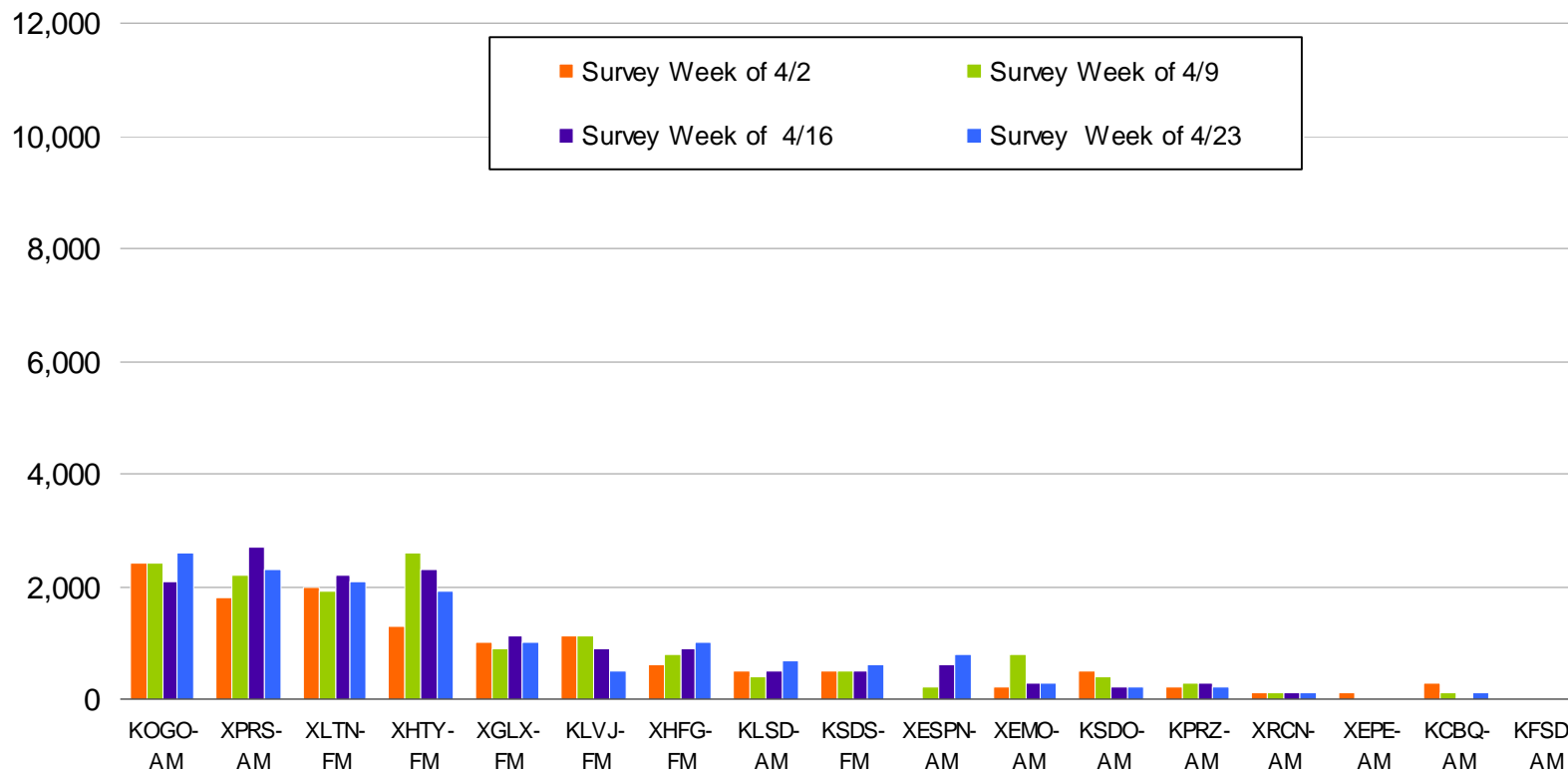




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# AQH Persons Estimates

## Persons 18-49, AQH Persons



San Diego PPM, April 2009, Mon-Sun 6AM-MID

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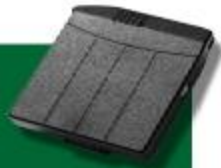


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# Summary

- § 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 San Diego is approximately 90% of the metro each week
- § Ratings are compressed among top tier stations.
- § 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 COB Thursday at the San Diego PPM website: <http://www.arbitron.com/ppmsandiego>
- § Next week Monica Narvaez, your Arbitron trainer, will be conducting PPM Software Training Webinars
- § Data will be available via Arbitron's Downloader & within TAPSCAN Web at 12p local time.
- § On Wednesday, May 27th at 12p local time, you will be able to access your first Weeklies data





# San Diego

April 2009 Pre-Currency PPM Data

**Michael Nelson**  
**Arbitron, Inc.**  
**May 21, 2009**