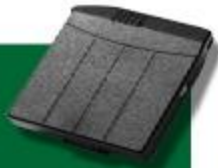




San Diego Findings: April 2009 PPM Pre-Currency Data

Cristina Perez, Account Manager
Jenny Griffith, Training Service Consultant
Jenny Tsao, PPM Implementation Manager



SAN DIEGO

How do I ask a question during the WebEx session?

1. ***Please mute your phone line using * 6. To unmute, use # 6.***
2. ***Email us directly and we will reply to your questions once the session has ended.***

– You may send multiple questions.

Our emails are:

Cristina.Perez@Arbitron.com

Jenny.Griffith@Arbitron.com

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.

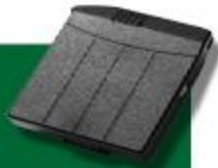
– ***Chat can be found in the lower right hand side of your screen.***



PPM in San Diego



San Diego Findings: April 2009 PPM Pre-Currency Data



SAN DIEGO

Agenda

- § **Encoding Stations**
- § **General Findings**
- § **Commercialization Schedule**
- § **San Diego Panel Sample**
 - » Market Representation
 - » Compliance
- § **Estimate Comparisons**
 - » Cume
 - » TSL
 - » AQH
- § **Compression**
- § **Recap**
- § **Next Steps**

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.



SAN DIEGO

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

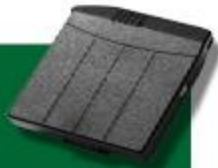
- § KSDS-FM

San Diego State University

- § KPBS-FM

Uniradio Corp

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

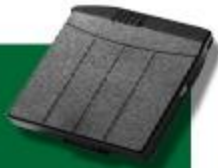


SAN DIEGO

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



SAN DIEGO

San Diego PPM Pre-Currency Findings

- § **The San Diego sample for April is representative of all demos, ethnicities, counties and language preferences.**
- § **Compliance is similar to other PPM 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.**
- § **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.**
- § **Ratings are more compressed among the top stations than in the diary service.**
 - » San Diego, based on Apr09 PPM, seems to show slightly less compression than other PPM markets
- § **Granular data continues to provide insight into how consumers use radio.**





SAN DIEGO

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

June 09

Winter 2009 Diary Book Still Currency

6/18 : May PPM Pre-Currency Data Release

July 09

Winter 2009 Diary Book *NO* 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 pre-currency data prior to Currency



SAN DIEGO

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

§ Phoenix

» KMVA-IF .5

§ San Francisco

» KSFO-IA .5

§ San Jose

» KSFO-IA .7

§ Washington DC

» WRQX-IF .6

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

* The WWWQ-FM HD2 content was re-broadcast on 97.9 FM in Atlanta

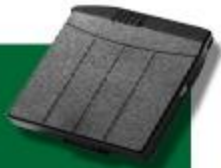


PPM in San Diego



PPM Sample

San Diego April 2009 PPM Pre-Currency Data



SAN DIEGO

Metro Population Statistics

§ San Diego Metro Population 6+

» 2,793,600

» Ethnic composition

- *Hispanic: 829,400 (29.7%)*
- *Black: 142,800 (5.1%)*
- *Other: 1,821,400 (65.2%)*





SAN DIEGO

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%

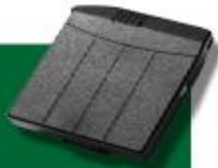
Total Persons in Daily Sample

Panel Target Size	1,080
Avg Daily In-tab Persons	1,169
Avg Daily In-tab Rate	75%
Compliance-Capable*	1,435
Compliance Rate**	81.5%
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





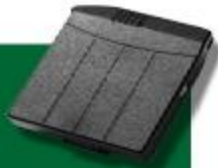
SAN DIEGO

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: $DDI = (actual/target)*100$ Updated slide

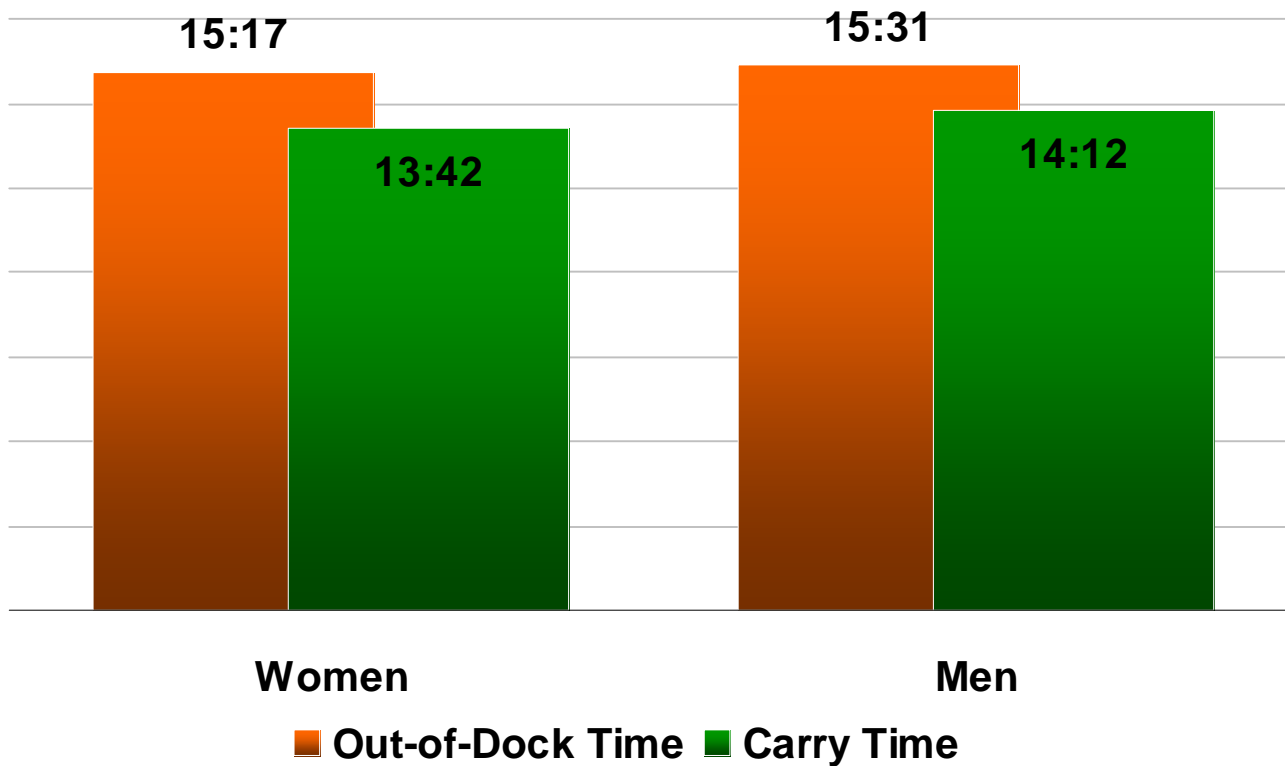


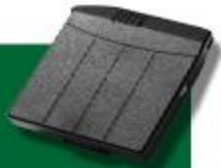


SAN DIEGO

Median Times by Gender

Out-of-Dock and Carry Times

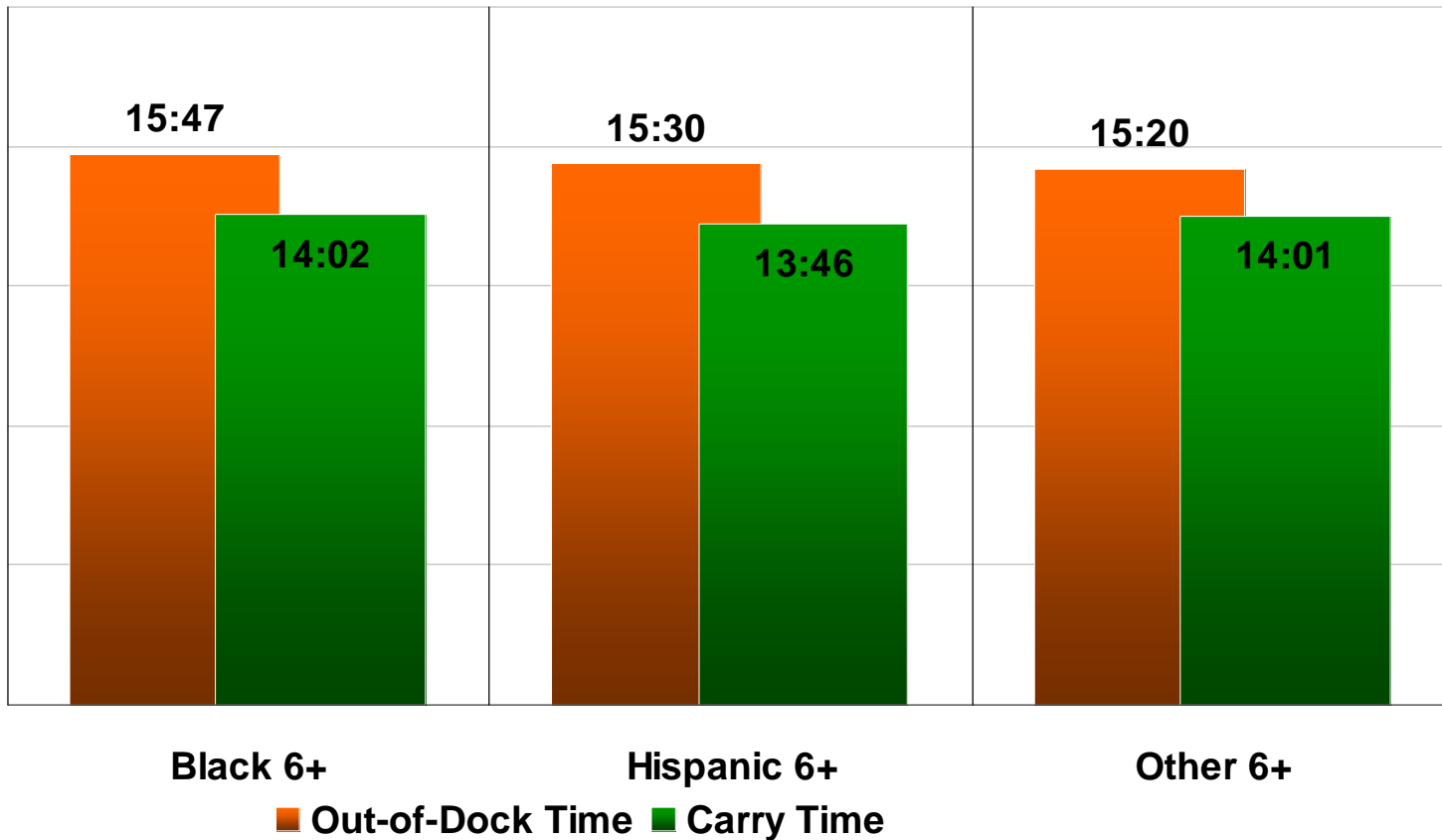


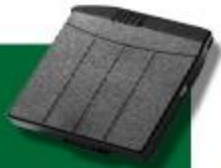


SAN DIEGO

Median Times by Race/Ethnicity

Out-of-Dock and Carry Times

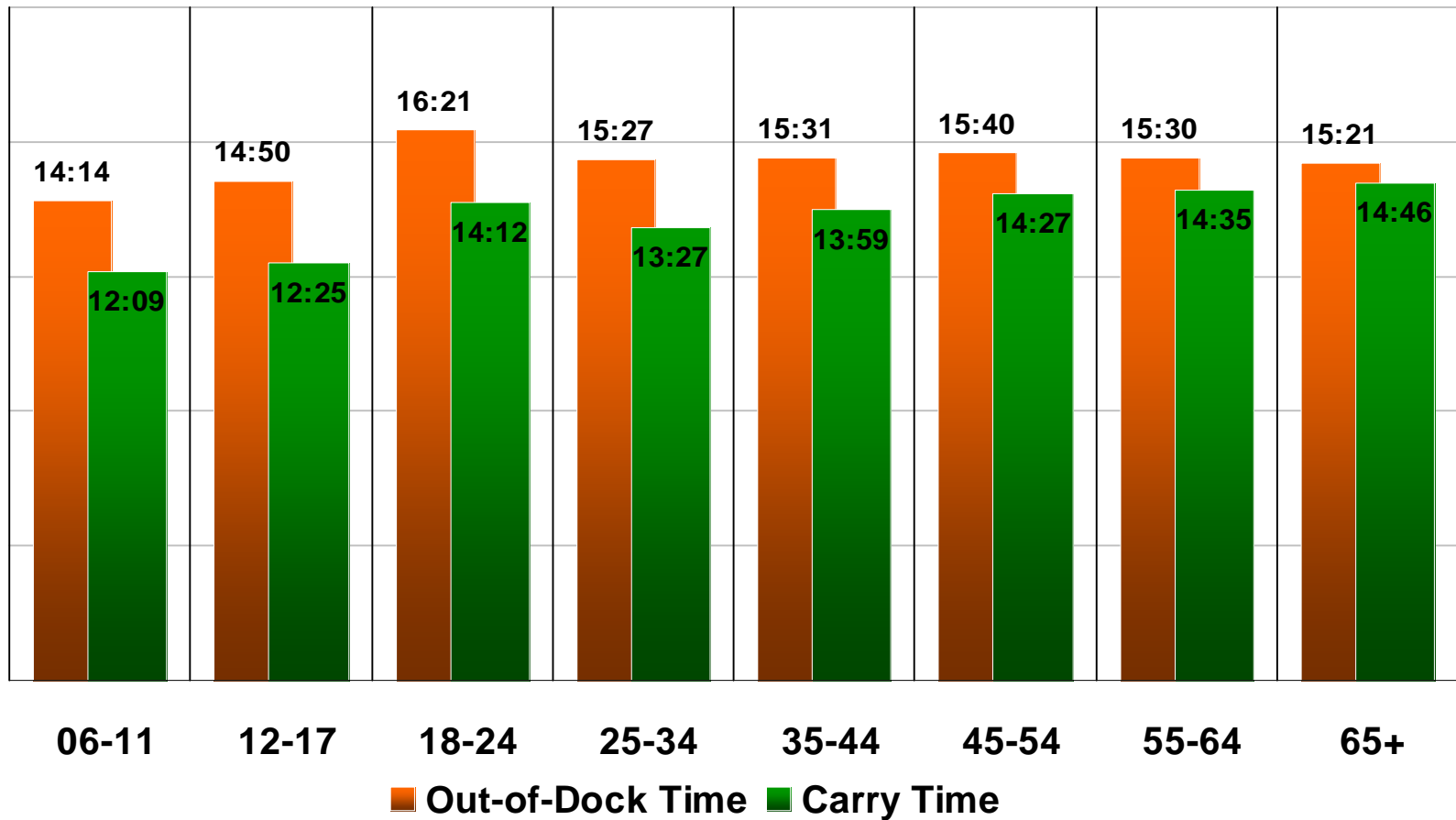




SAN DIEGO

Median Times by Age

Out-of-Dock and Carry Times





Estimate Comparisons

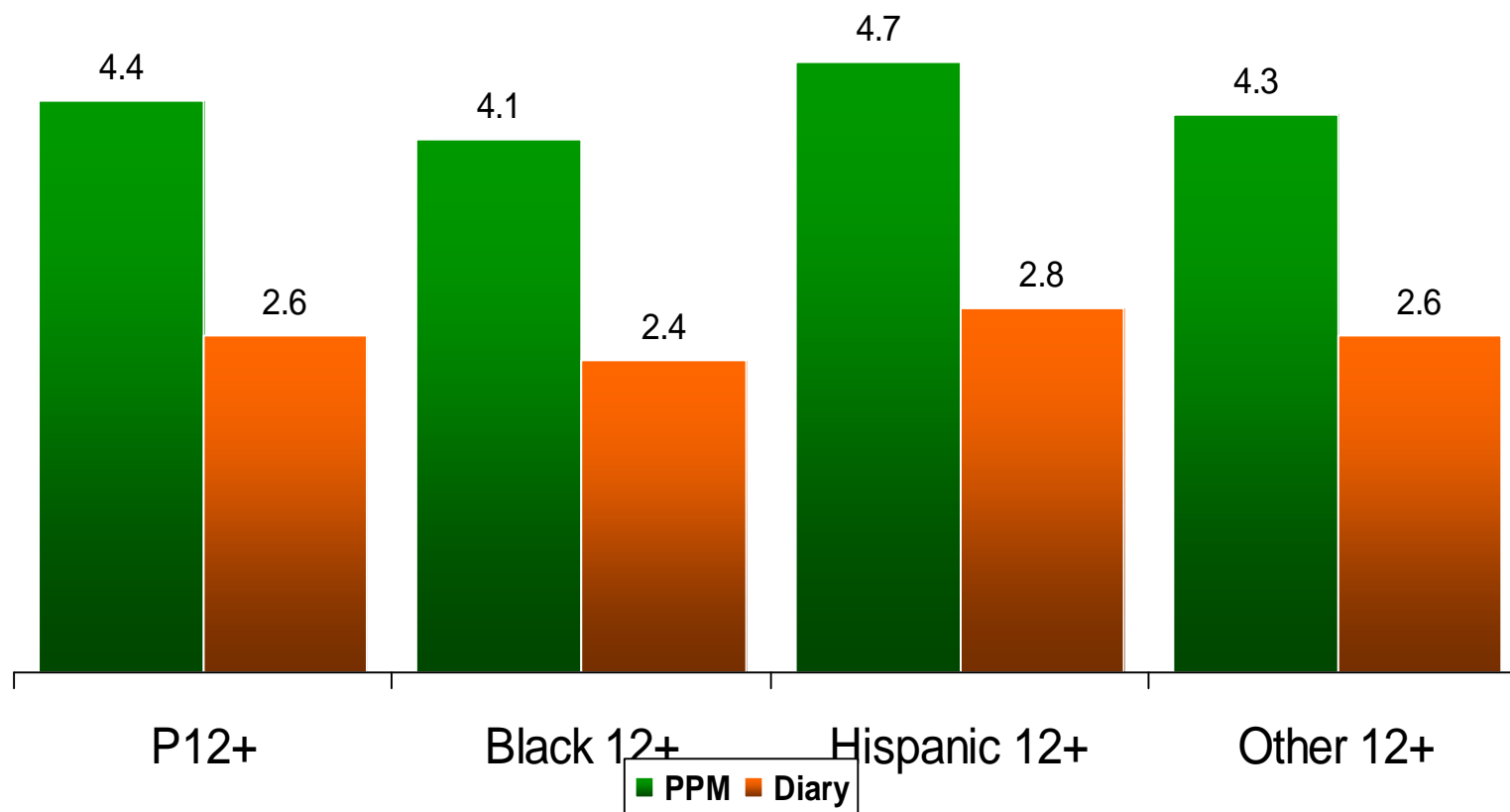
April 09 PPM Pre-Currency Data

San Diego April 09 PPM data compared to Winter 2009 Diary unless noted differently



SAN DIEGO

Average Number Of Stations

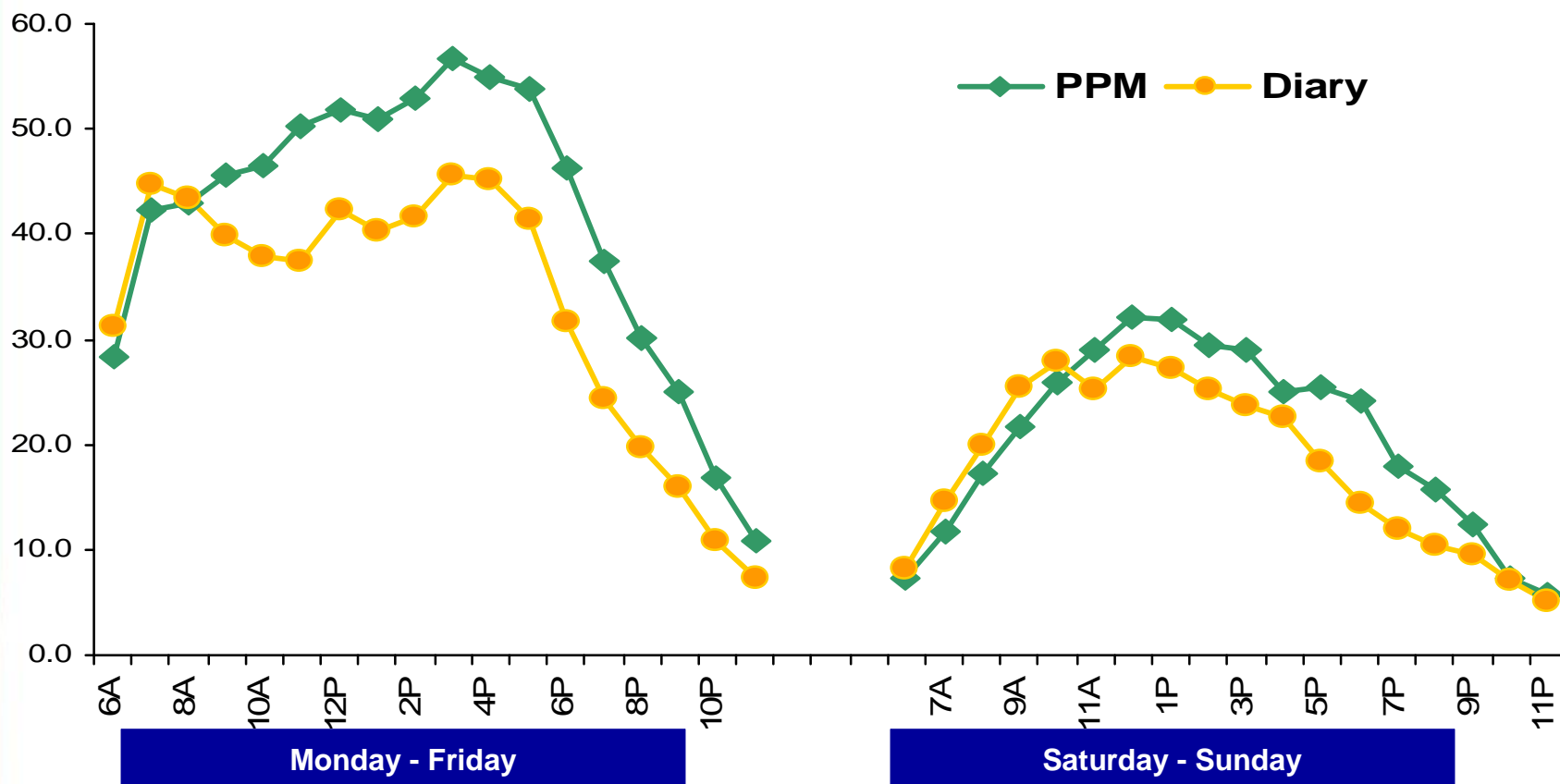


*PPM, San Diego Metro, April 2009, Mon-Sun 6AM-MID, Persons 12+ vs. Diary, San Diego Metro, Winter 2009, Mon-Sun 6AM-MID, Persons 12+
Note: Same stations are being used for comparison from Diary to PPM*



SAN DIEGO

Hour-by-Hour Cume Rating Comparison



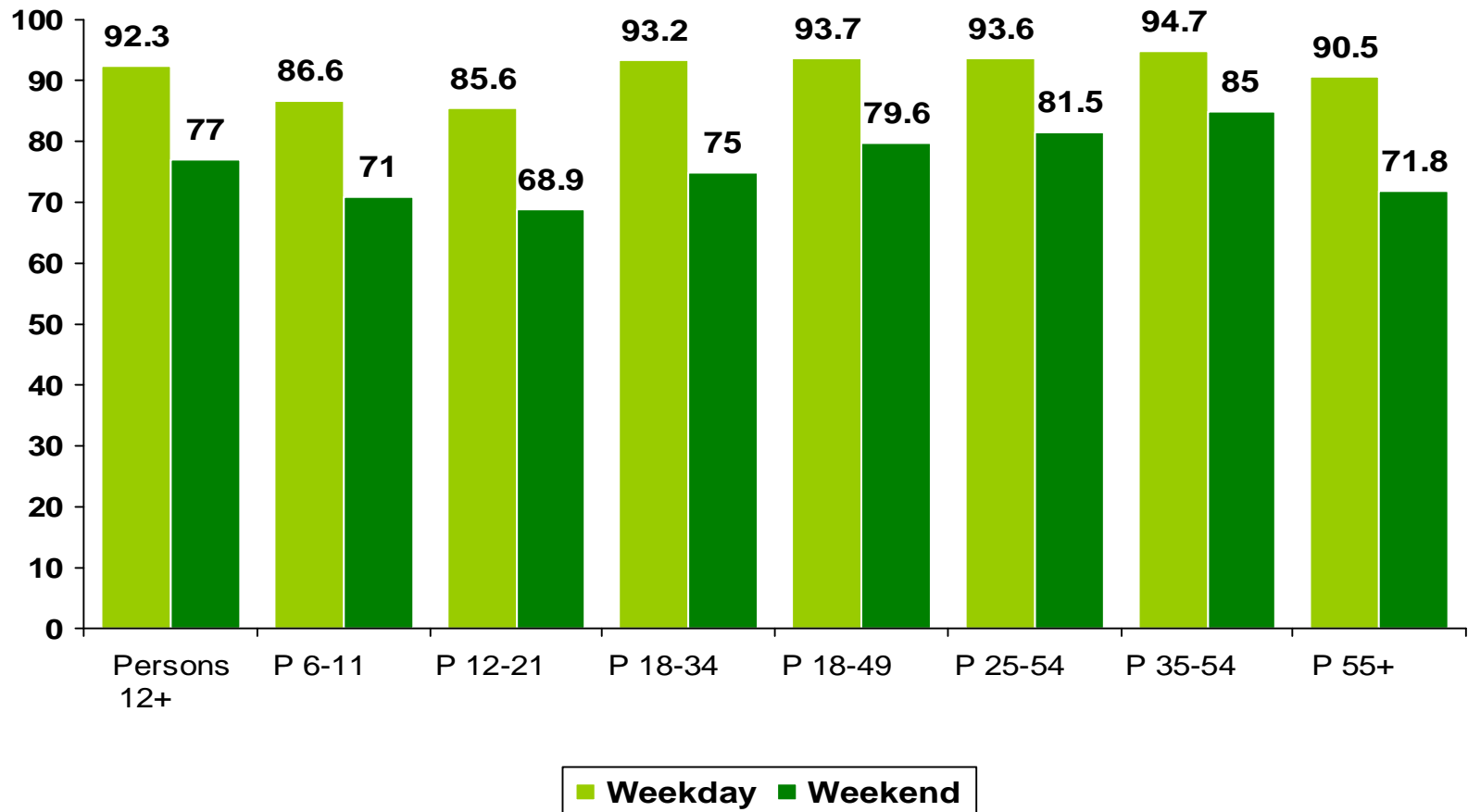
PPM, San Diego Metro, April 2009, Mon-Sun 6AM-MID, Persons 12+ vs.
 Diary, San Diego Metro, Winter 2009, Mon-Sun 6AM-MID, Persons 12+
 Note: Same stations are being used for comparison from Diary to PPM
 19 © 2009 Arbitron Inc.





SAN DIEGO

PPM Weekly Cume Rating



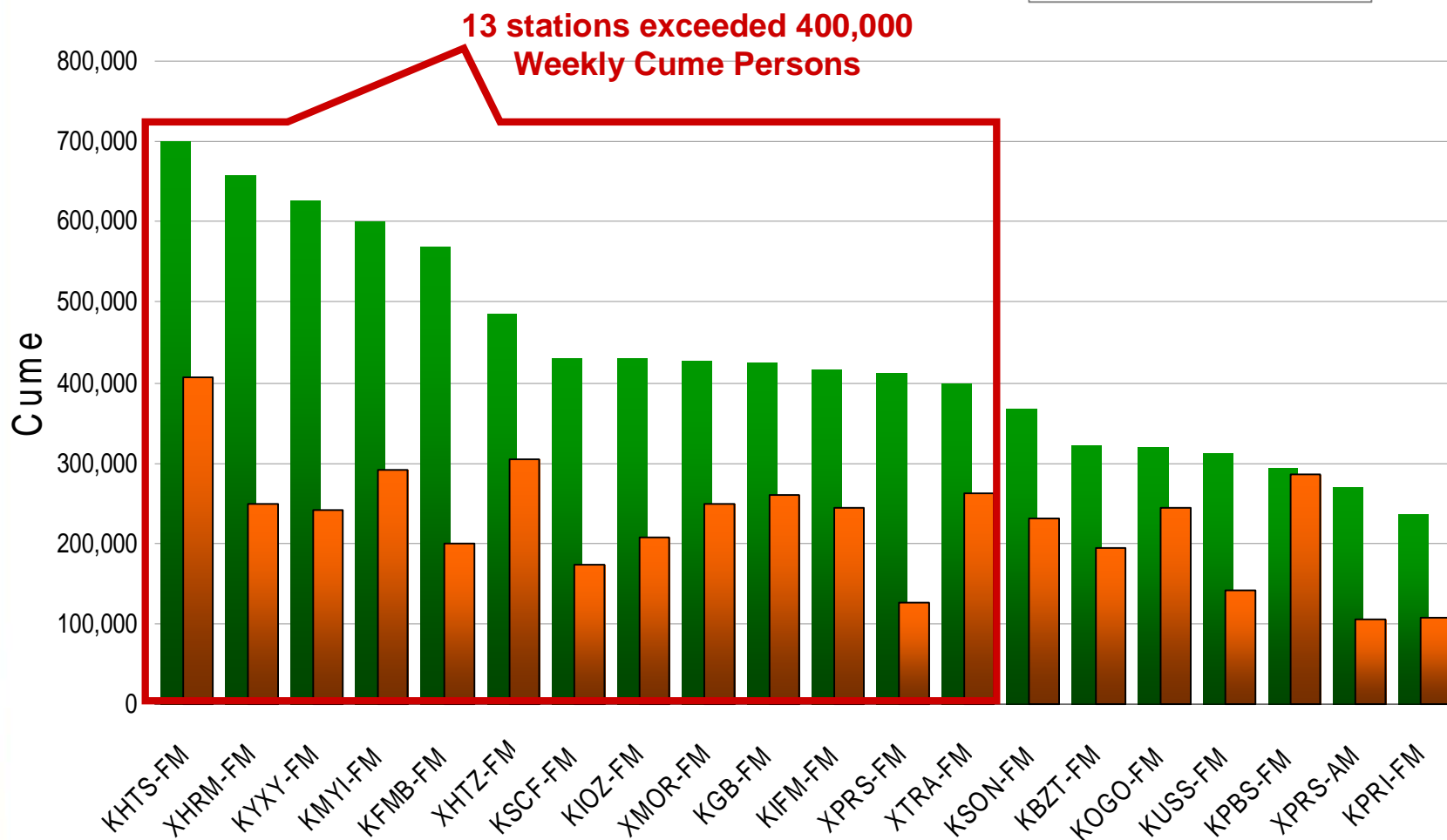


SAN DIEGO

Avg Weekly Cume Comparison

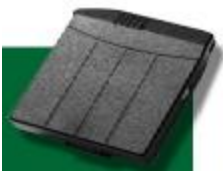
April 2009 PPM

■ PPM Cume ■ Diary Cume



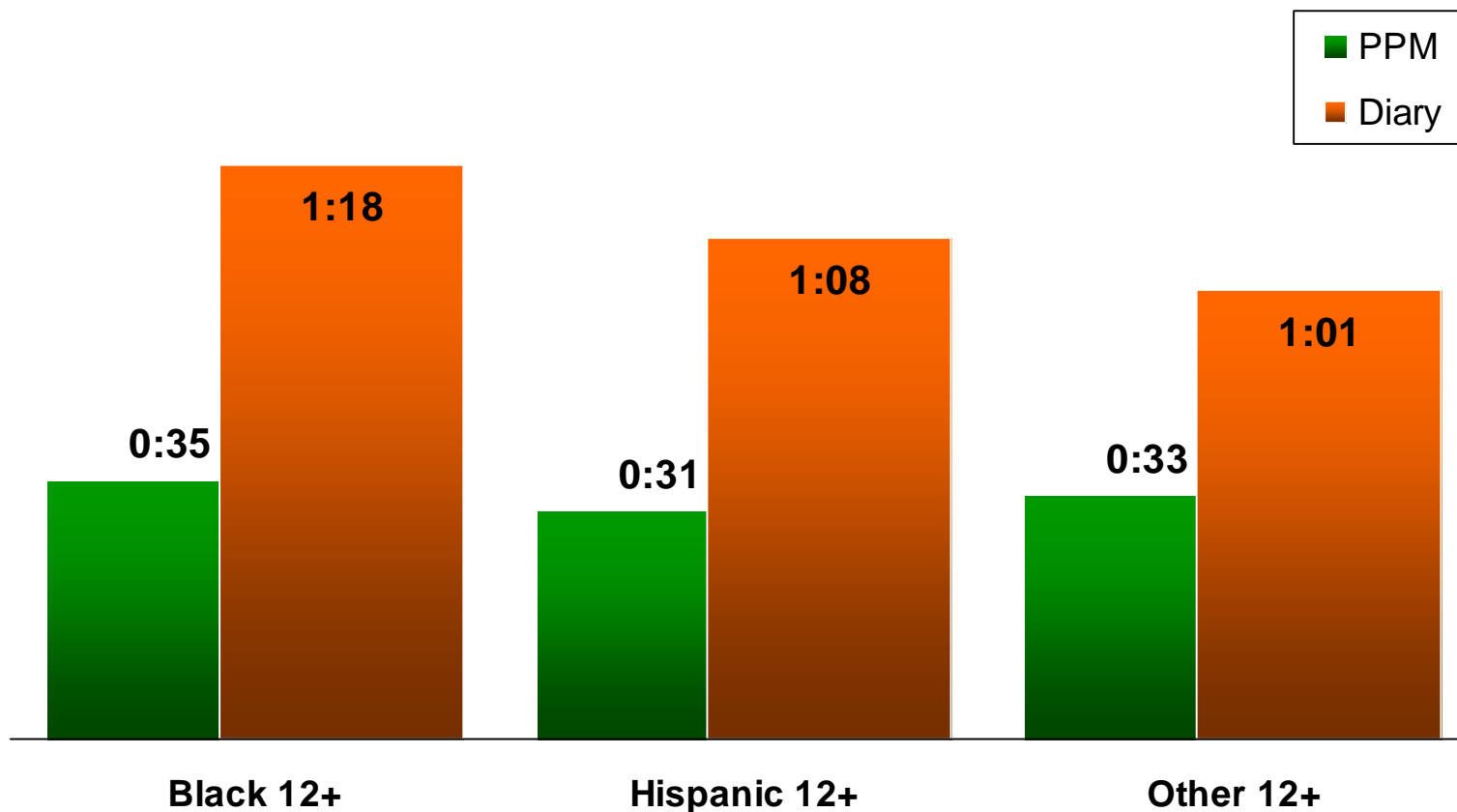
PPM, San Diego Metro, April 2009, Mon-Sun 6AM-MID, Persons 12+ vs.
 Diary, San Diego Metro, Winter 2009, Mon-Sun 6AM-MID, Persons 12+
 Note: Same stations are being used for comparison from Diary to PPM





SAN DIEGO

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

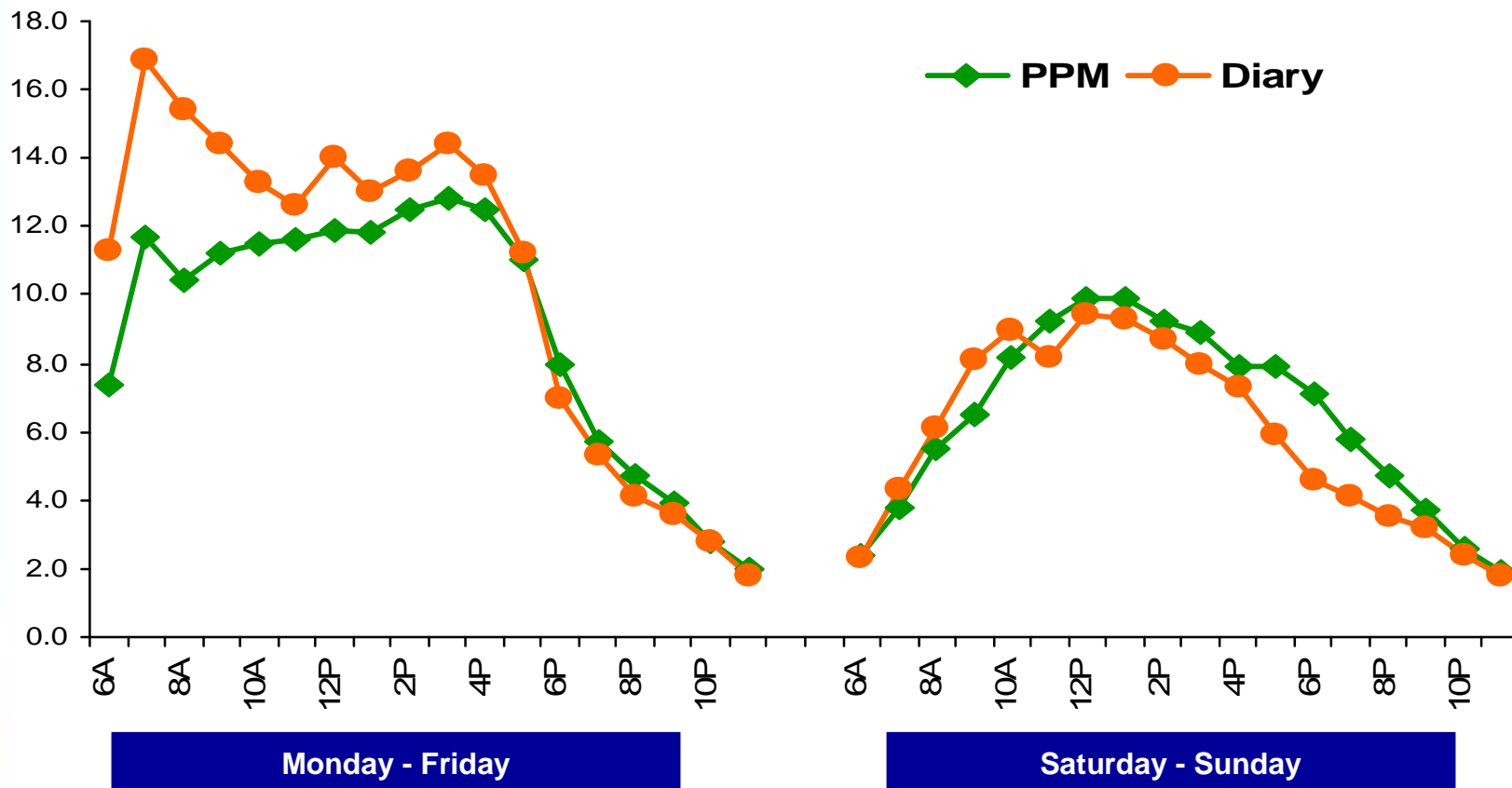
22 © 2009 Arbitron Inc.





SAN DIEGO

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
 23 © 2009 Arbitron Inc.





SAN DIEGO

AQH Rating Index PPM vs. Diary

Top 20 Stations based on PPM

San Diego	Persons 12+	Teens 12-17	Persons 18-34	Persons 18-49	Persons 25-54
Mo-Su 6a-12m	85	81	79	90	99
Mo-Fr 6a-10a	69	53	66	65	73
Mo-Fr 10a-3p	85	142	77	83	94
Mo-Fr 3p-7p	92	68	91	94	104
Mo-Fr 7p-12m	103	62	94	128	129
Sa-Su 6a-7p	109	95	91	108	124

San Diego April 09 PPM to Winter 09 Diary; AQH Rating

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





SAN DIEGO

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





SAN DIEGO

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

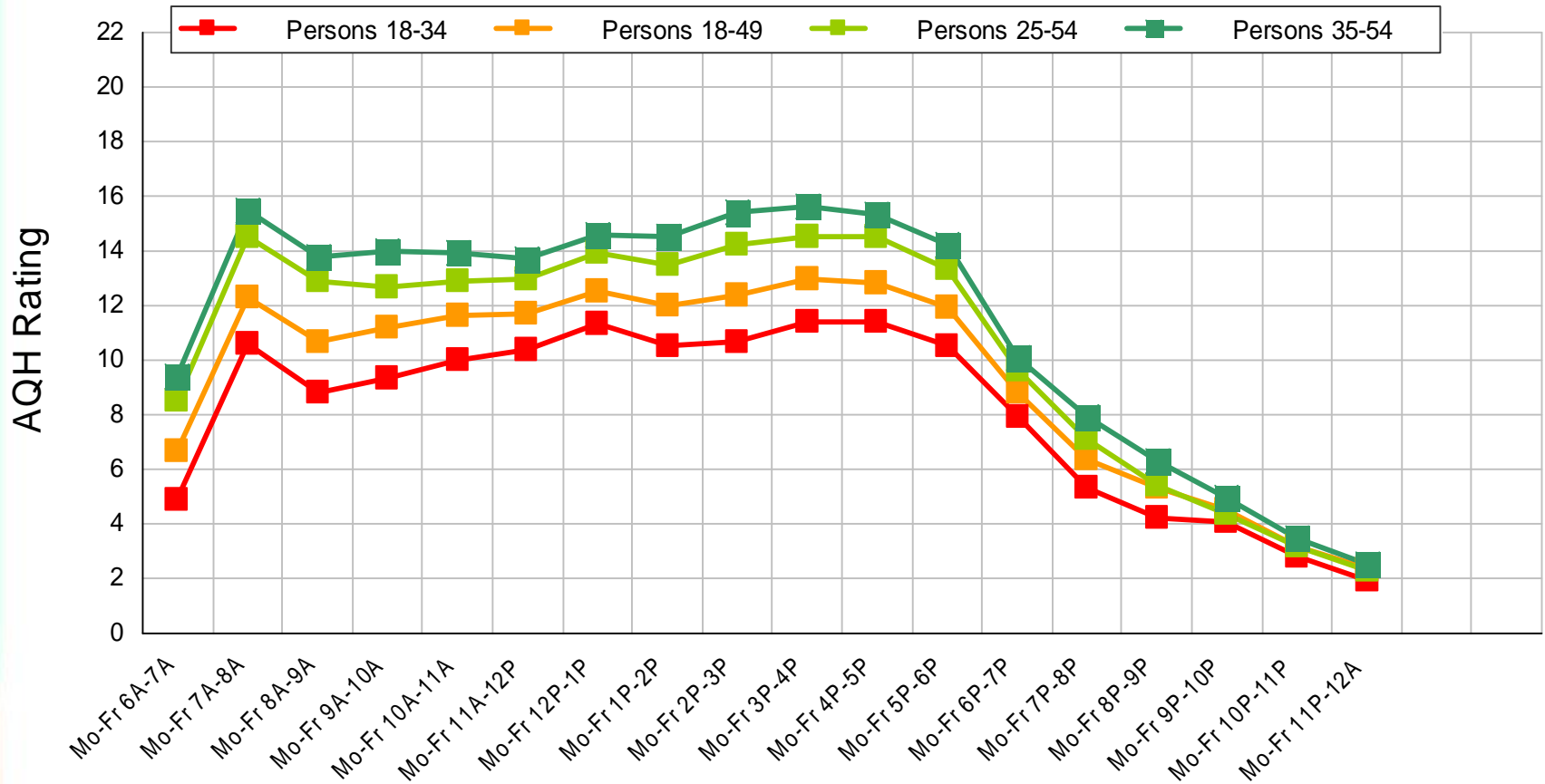




SAN DIEGO

Listening By Demo

Monday-Friday 6AM-MID



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

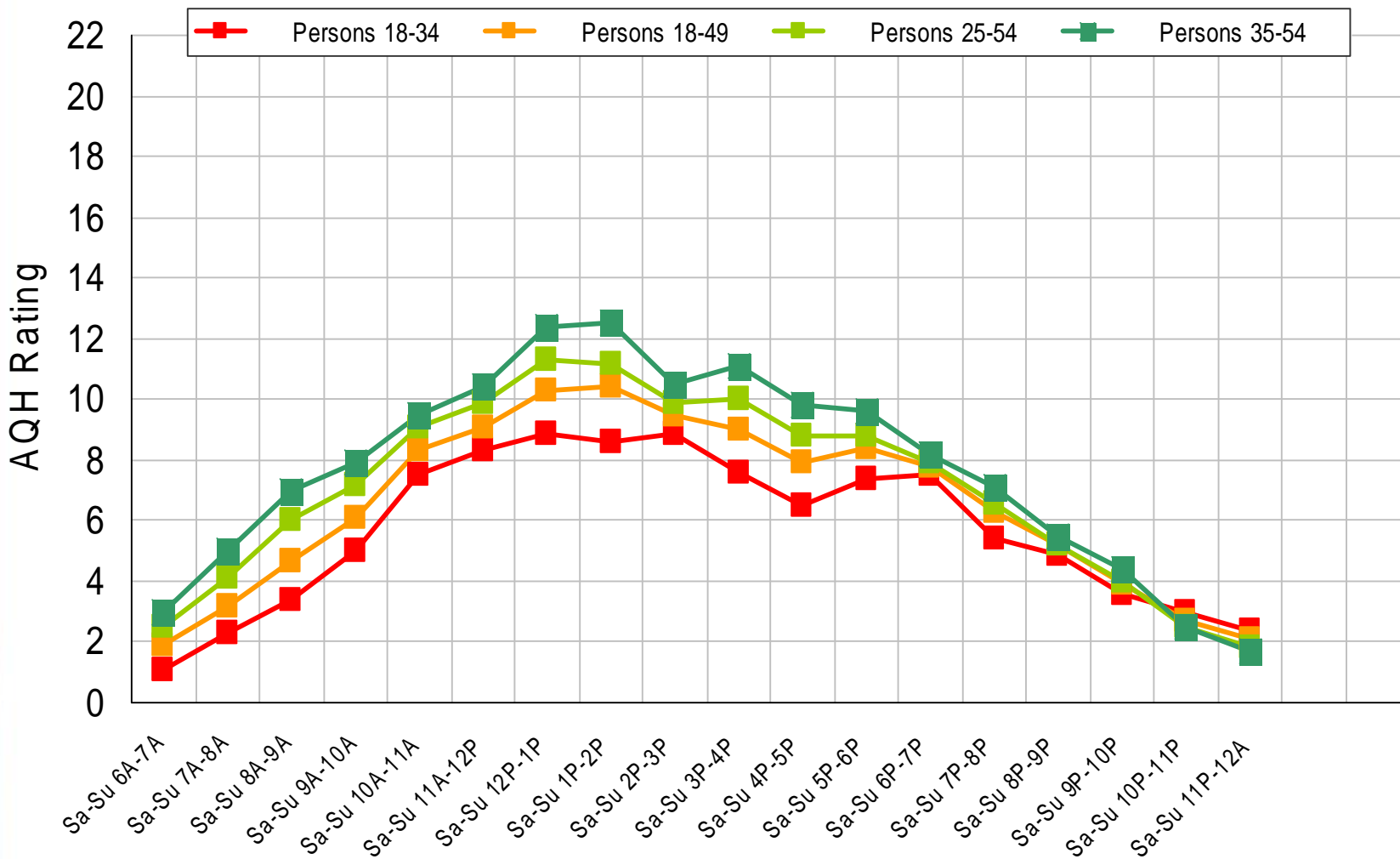




SAN DIEGO

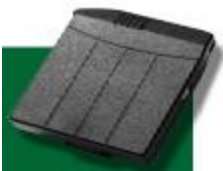
Listening By Demo

Sat-Sun 6AM-MID



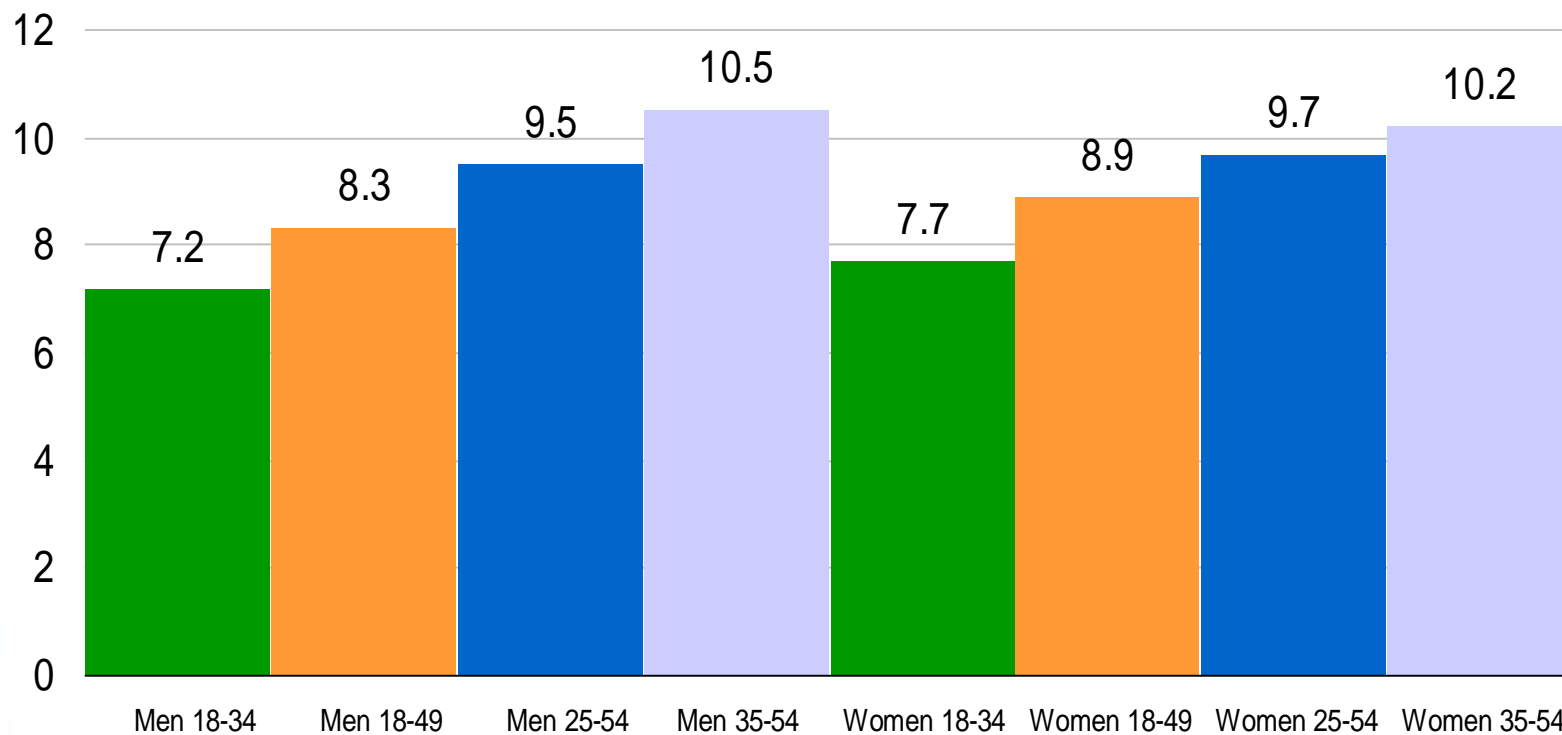
San Diego April 2009 PPM, Sat-Sun 6AM-MID,





SAN DIEGO

In San Diego, Gender Does Not Seem to be a Factor in Ratings



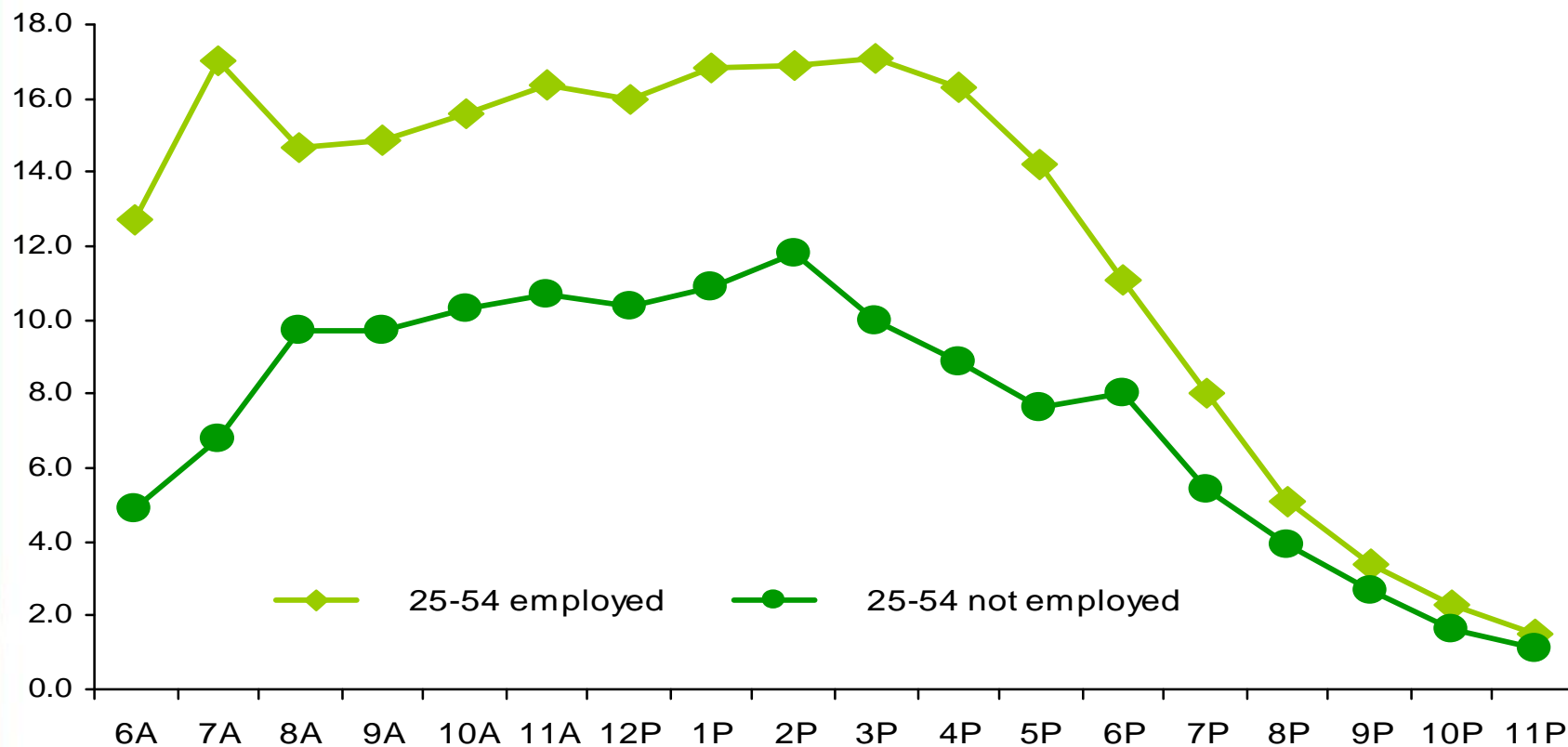
San Diego PPM, April 09 Data, Mon-Sun 6AM-MID



SAN DIEGO

Ratings by Employment Status

Persons 25-54



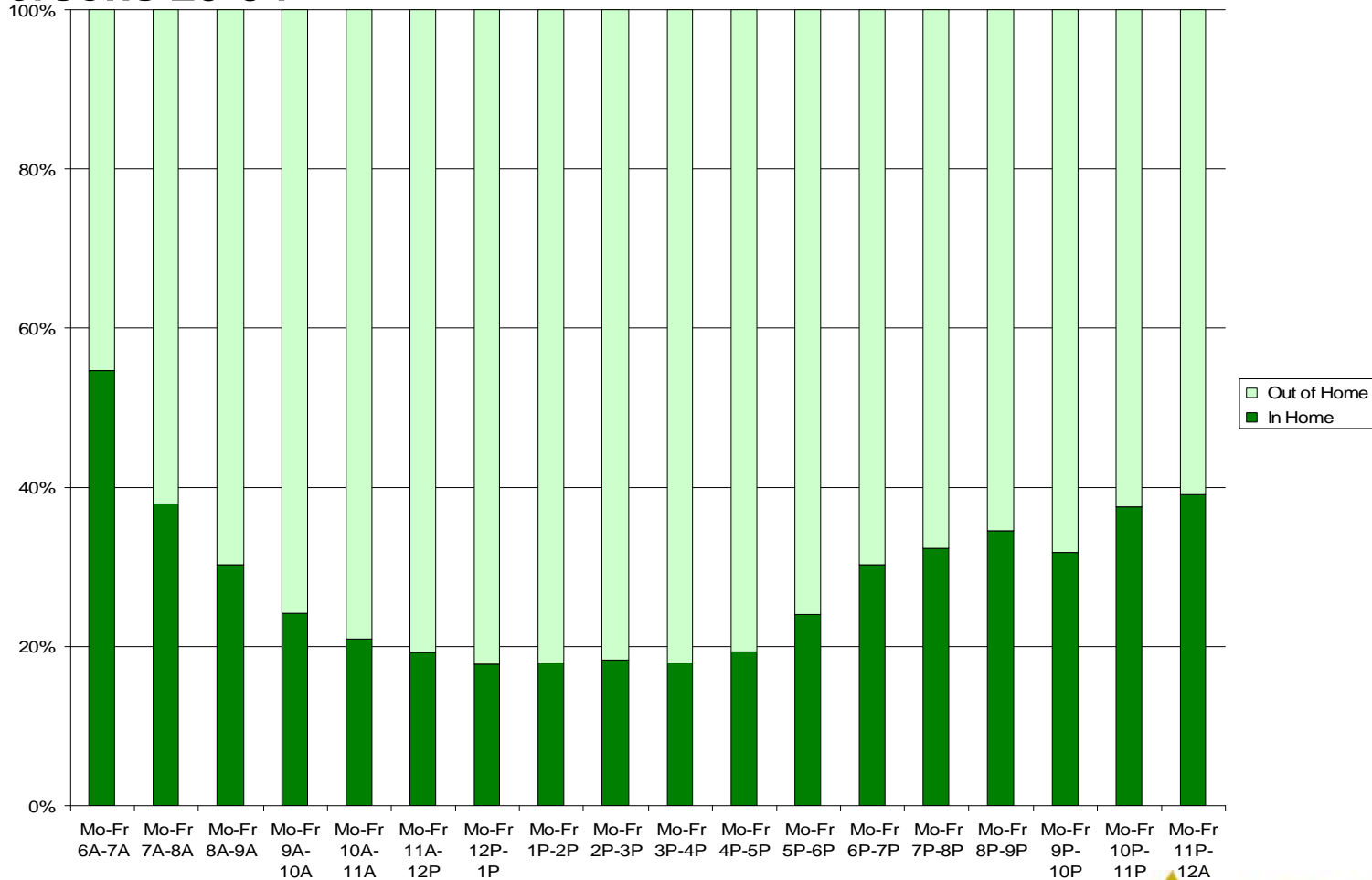
PPM, San Diego, April 2009, Mon-Fri 6a-12m Persons 25-54 full-time/part-time vs. not employed, AQH Rating

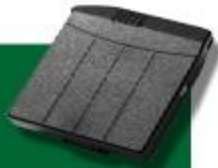


SAN DIEGO

Ratings by In/Out of Home Listening

Persons 25-54





SAN DIEGO

PPM Ratings Are More Compressed

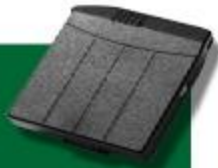
Difference in AQH rating points between the number 1 station and the number 10 station

	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	1.3	0.5	0.9	0.6	1.0	0.7	1.4	0.9
M-F 10a-3p	0.9	0.8	0.4	0.6	0.6	0.8	0.6	1.2
M-F 3p-7p	0.7	0.7	0.4	0.6	0.2	0.4	0.3	0.7
M-F 7p-12m	0.5	0.2	0.3	0.2	0.3	0.3	0.2	0.4
Sa-Su 6a-12a	0.5	0.2	0.3	0.4	0.1	0.4	0.1	0.4

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





SAN DIEGO

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

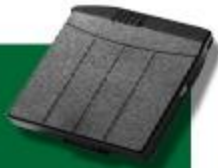
Persons 18-34

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



SAN DIEGO

Summary

- § Compliance is similar to 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 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's reach in San Diego is approximately 92% of the San Diego metro each weekday, 77% during the weekends
- § Ratings are compressed among top tier stations, though less than seen in other PPM markets



PPM in San Diego



Next steps...





SAN DIEGO

Next Steps...

- **Discuss changes with clients and set their expectations**
 - *Arbitron offers marketing materials and reports to help you with this*
- **Talk with your station reps**
 - *Everyone's goal is to ensure the client has good ROI with Radio*
- **PLAN FOR PPM TODAY**
 - *PPM will be the only form of currency in 2009*
- **Learn the PPM Analysis Tool if you use MediaPro**
 - *PPM RLD can't be used in MediaPro; PPM Analysis Tool only*





SAN DIEGO

Want to be an Agency PPM Expert on the forefront of research, planning and buying?



This complimentary training program consists of two pre-requisite PPM sessions and several advanced sessions.

Pre-requisites:

PPM 101 Overview for Agencies
Planning & Buying in a PPM World

Advanced Sessions: *must complete three

PPM Myth Busters
Going Beyond Ratings
PPM Radio & Ethnic Audiences
Planning with PPM
Sports, Events & Promotions
PPM Software & Data
Scheduling with PPM RLD Data
How Reach & Frequency Works

Get Started Today at
www.arbitrontraining.com





SAN DIEGO

PPM Training Tools

Market-Specific Web Sites

PPM in San Diego

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

49 days until PPM currency data!

San Diego PPM Status:
Average Daily In-Tab Target: 1,080

Market-Specific Links

- Market Update 5.21.09
- Important Notice Regarding Currency Ratings in San Diego (PDF) 5.19.09
- FAQs for Ad Agencies (PDF) 2.3.09
- FAQs for Radio Stations (PDF) 2.3.09
- Release Schedule for Radio

Preference Level Trender

How is WAMJ-FM's Core Audience Trending?

Atlanta, Metro Geography
Persons 18-34 (100% P1 Through 6:00 PM EST)

	OCT08	NOV08	DEC08	JAN09	FEB09	MAR09	Change from Last Survey
Core Audience	15,704	15,113	15,102	15,744	16,202	15,912	10%
Core Persons (AQH)	15,600	14,900	15,000	15,600	16,100	15,800	10%
Core Persons (In-Tab)	3,488	3,148	3,148	3,148	3,300	3,148	30%
P1 Preference	57%	57%	58%	57%	57%	57%	0%
P1 N of AQH	8,976	8,976	8,976	8,976	8,976	8,976	0%
P1 Time Spent (In-Tab)	7:48	8:18	8:30	7:18	8:30	8:48	20%
P1 Core Persons	42,800	117,700	81,400	188,400	188,100	150,900	81%
P1 AQH Persons	6,800	7,300	6,300	9,400	9,300	8,300	20%
P2 Preference	20%	21%	20%	20%	20%	21%	1%
P2 N of AQH	3,140	3,140	3,140	3,140	3,140	3,140	0%
P2 Time Spent (In-Tab)	3:30	4:30	4:30	3:30	4:30	3:30	0%
P2 Core Persons	108,000	124,300	114,800	162,700	155,800	142,300	28%
P2 AQH Persons	3,300	4,300	4,300	5,300	5,300	4,300	18%
P3 Preference	23%	22%	22%	23%	23%	22%	0%
P3 N of AQH	4,284	4,284	4,284	4,284	4,284	4,284	0%
P3 Time Spent (In-Tab)	5:00	4:48	4:30	5:30	4:48	5:18	0%
P3 Core Persons	138,800	148,900	148,800	182,500	182,100	174,200	14%
P3 AQH Persons	1,800	1,800	1,800	1,800	1,800	2,700	50%
P4 Preference	10%	11%	11%	10%	11%	11%	0%
P4 N of AQH	1,570	1,570	1,570	1,570	1,570	1,570	0%
P4 Time Spent (In-Tab)	4:48	4:48	4:30	4:48	4:48	4:48	0%
P4 Core Persons	230,000	250,000	280,800	388,300	382,300	421,800	10%
P4 AQH Persons	1,400	1,700	2,300	1,800	2,000	2,400	17%

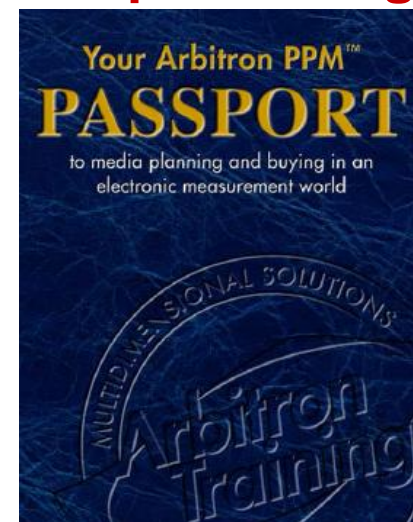
FAQ Document

Philadelphia PPM | Radio Stations

Frequently Asked Questions About the PPM™

- What are the data release dates for Philadelphia?**
January pre-currency PPM data release February 28. February pre-currency PPM data release March 28. March CURRENCY PPM data release April 25.
- What can pre-currency data be used (and not be used) for?**
The January and February pre-currency data are to be used for analysis and comparison purposes only. Stations and agencies MAY NOT use these data to conduct transactional business. Our agencies that subscribe to PPM will also have retained the data.
- Can I use the pre-currency data when currency data kick in?**
Once the March PPM data release on April 25 and beyond currency, subscribers will be able to use January and February data for averaging.
- Are everyone's AQH Ratings going to decline in PPM?**
No. Certain stations saw increases in AQH Ratings, some saw no changes and others saw decreases. The changes vary by format, day part, demo and market.

PPM Passport for Agencies





SAN DIEGO

Explaining The Change In Currency

PLANNING & BUYING RADIO ADVERTISING IN A PPM WORLD

Why Is There a Change in PPM Target Rating Points (TRPs) vs. Diary TRPs?

Different measurement methodologies can and do produce different results. We upgraded our measurement methodology, and the scale has changed accordingly. For example, each of the following describes the same quantity:



- 62 miles per hour = 100 kilometers per hour
- 32 degrees Fahrenheit = 0 degrees Celsius
- A 10K race = 6.2 miles

In the case of radio, the same-sized audience may be described with a 1.0 rating using the diary scale and a 0.7 rating using the PPM scale. Therefore, you may see that 100 diary TRPs = 70 PPM TRPs.

The results you get (store visits, product sold, change in brand impression) with your normal schedule will be the same regardless of the scale we use to describe the audience.

The bottom line: The results are the same regardless of the measurement system. We are using a new measurement scale that enhances confidence in the ratings.

“PPM is an important step in bringing more accurate, accountable and robust audience measurement to the medium of radio.”

While this new methodology may produce different results from what the industry is accustomed to seeing, PPM provides us with a sharper lens with which we can better view how individuals really use radio.

This step forward is critical in an ever changing and highly fragmented media marketplace.”

— Kyle Allen
SVP Media Planner, FKM Advertising, Houston, TX

2008-2009 PPM Commercialization Schedule

Market	Currency Month
New York	9/08
Los Angeles	9/08
Chicago	9/08
San Francisco	9/08
Nassau/Suffolk (Long Island)	9/08
Riverside-San Bernardino	9/08
San Jose	9/08
Middlesex-Somerset/Union	9/08
Dallas-Ft. Worth	12/08
Washington, DC	12/08
Detroit	12/08
Atlanta	12/08
Boston	3/09
Miami-Ft. Lauderdale-Hollywood	6/09
Seattle-Tacoma	6/09
Phoenix	6/09
Minneapolis-St. Paul	6/09
San Diego	6/09
Tampa-St. Petersburg-Clearwater	9/09
St. Louis	9/09
Baltimore	9/09
Denver-Boulder	9/09
Pittsburgh, PA	9/09
Portland, OR	12/09
Cleveland	12/09
Sacramento	12/09
Cincinnati	12/09

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Updated for 2008-2009

Planning & Buying Radio Advertising in a PPM™ World

How 70 Meter Target Rating Points Can Equal 100 Diary Rating Points





Questions?

Use the chat box on the lower right hand side of screen

OR

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