

PPM in Seattle-Tacoma



Seattle-Tacoma PPM

April 2009 Pre-Currency PPM Data

To hear the audio of this meeting please dial:

1-866-248-7961

Passcode: 8246605

**Brendan Kane
Senior Account Manager
Radio Station Services**





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Findings

- **The Seattle-Tacoma 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.**
 - » Employment and out-of-home listening continues to drive ratings
- **PPM listening levels compared to diary are similar to 13 other PPM commercialized markets.**
 - » A mix of 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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Seattle-Tacoma PPM Scheduled Commercialization Plan

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

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





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Seattle-Tacoma Converts to Currency



PPM Data Are Scheduled to Become Currency in Seattle-Tacoma on July 16, 2009

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

Seattle-Tacoma PPM Pre-Currency Data
The Seattle-Tacoma 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 Seattle-Tacoma PPM launch, go to www.arbitron.com/ppm or contact your Arbitron account manager.

- 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 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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Sample

Seattle-Tacoma PPM April 2009





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Seattle-Tacoma Metro Sample

April 2009

Total Persons in Monthly Sample

Monthly Installed Persons	1,844
Monthly In-tab Persons	1,738
Monthly In-tab Rate	94.3%

Total Persons in Daily Sample

Panel In-Tab Target	1,219
Avg Daily In-tab Persons	1,293
Avg Daily In-tab Rate	73.7%
Compliance-Capable*	1,601
Compliance Rate**	80.8%
Installed Cell-Phone-Only Persons	129
Avg. Cell-Phone-Only In-Tab Persons	101

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

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

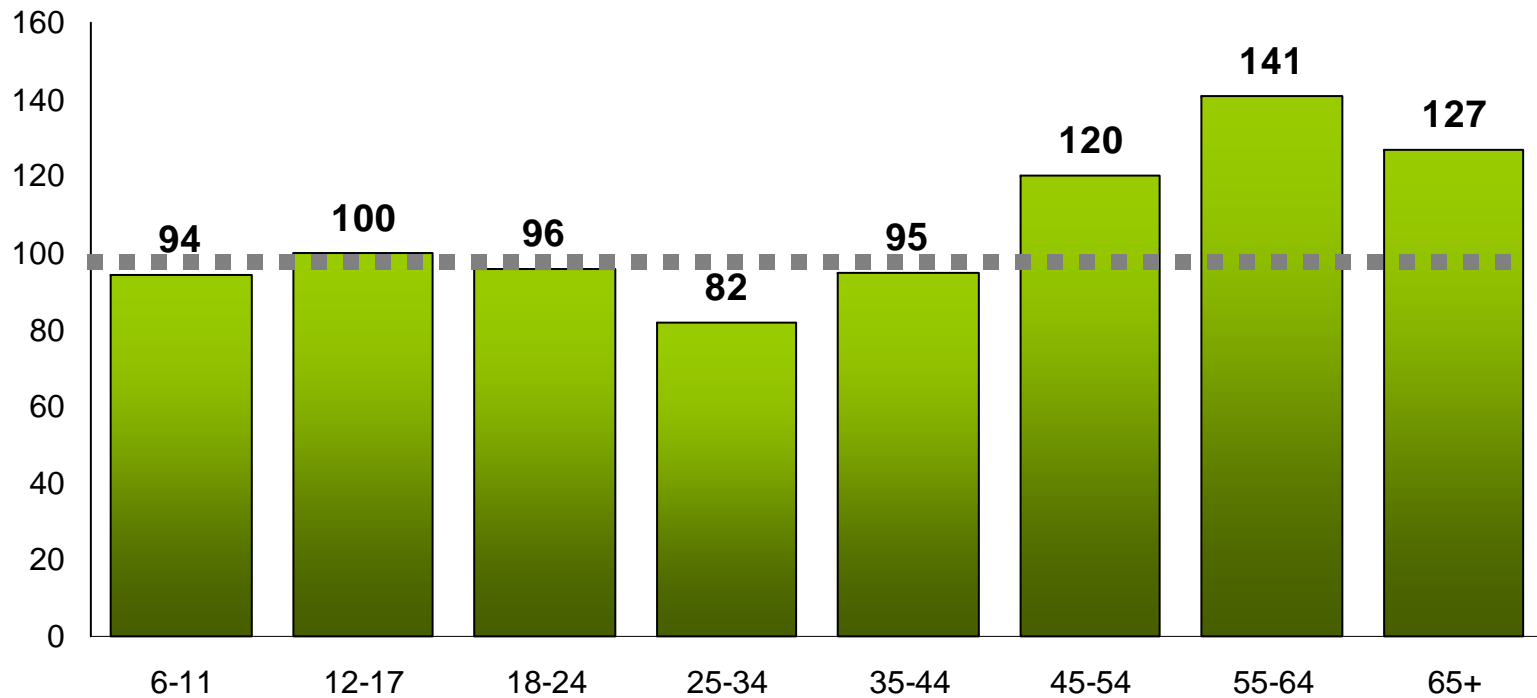




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Sample Performance by Age Cell

April 2009



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



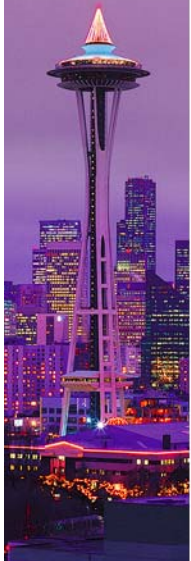


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In-Tab Size Demo and Race/Ethnicity

	Seattle- Tacoma			
April 2009	Avg. Daily In-tab Target	Avg. Daily In-tab Actual	DDI*	Unique Monthly In-Tab
P6+	1,219	1,293	106	1,738
P18+	1,015	1,096	108	1,425
P18-54	704	700	99	943
P25-54	587	588	100	783
Black 6+	83	99	143	142
Hispanic 6+	81	165	203	217
Other 6+	1,069	1,030	96	1,379

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





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In-Tab Size 18-34 DDI Performance

	Seattle- Tacoma			
April 2009	Avg. Daily In-tab Target	Avg. Daily In-tab Actual	DDI*	Unique Monthly In-Tab
Persons 18-34	295	275	87	382
Men 18-34	152	124	81	178
Women 18-34	143	134	94	204
Black 18-34	19	16	83	26
Hispanic 18-34	33	46	141	63
Other 18-34	243	195	81	293

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





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In-Tab Size 25-54 Race/Ethnicity

	Seattle- Tacoma			
April 2009	Avg. Daily In-tab Target	Avg. Daily In-tab Actual	DDI*	Unique Monthly In-Tab
Persons 25-54	587	588	100	783
Men 25-54	297	282	95	368
Women 25-54	291	306	105	415
Black 25-54	38	48	138	67
Hispanic 25-54	39	75	190	95
Other 25-54	514	466	91	621

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



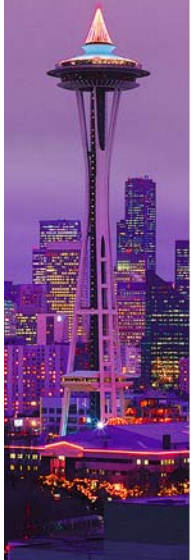


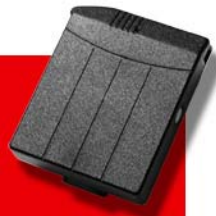
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Seattle-Tacoma In-Tab Rates

April 2009

	Persons 6+	Persons 18-34	Men 18-34	Women 18-34	Black 18-34	Hispanic 18-34	Other 18-34
BENCHMARK	75%	70%	60%	60%	60%	60%	60%
Seattle- Tacoma April 2009	73.7%	66.4%	68.2%	64.8%	65.3%	72.5%	65.2%

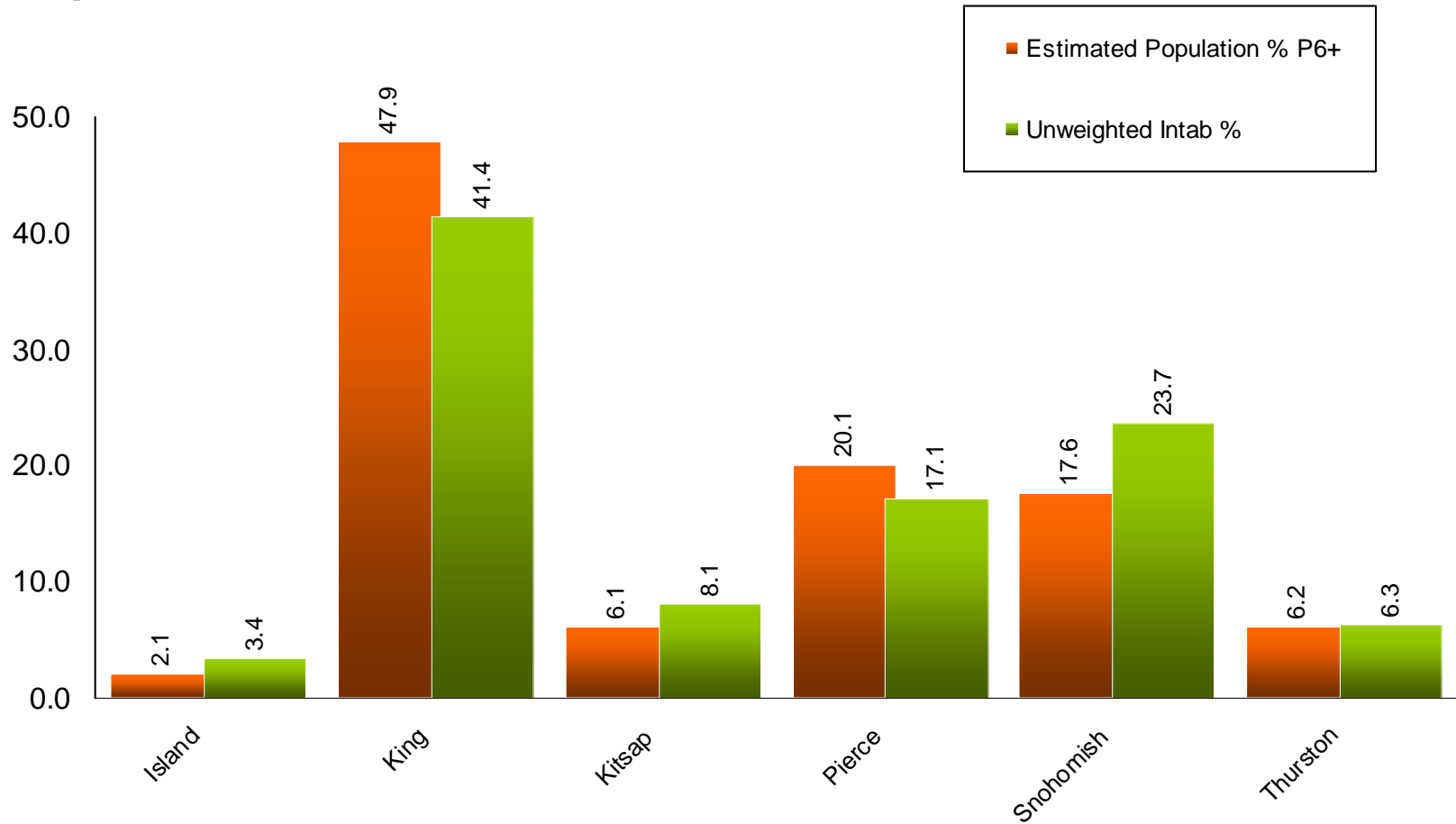




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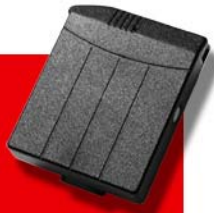
PPM County Sample

April 2009



Seattle- Tacoma, PPM April 2009 Estimated Pop % 6+; Unweighted In-tab % 6+





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Compliance and Carry Times

Seattle-Tacoma
PPM April 2009





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Median Undock/Dock Times

April 2009 Weekdays



Female 6+

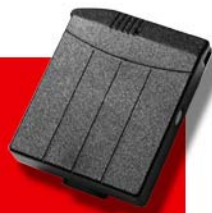
Male 6+

7:30 AM

7:18 AM

10:51 PM

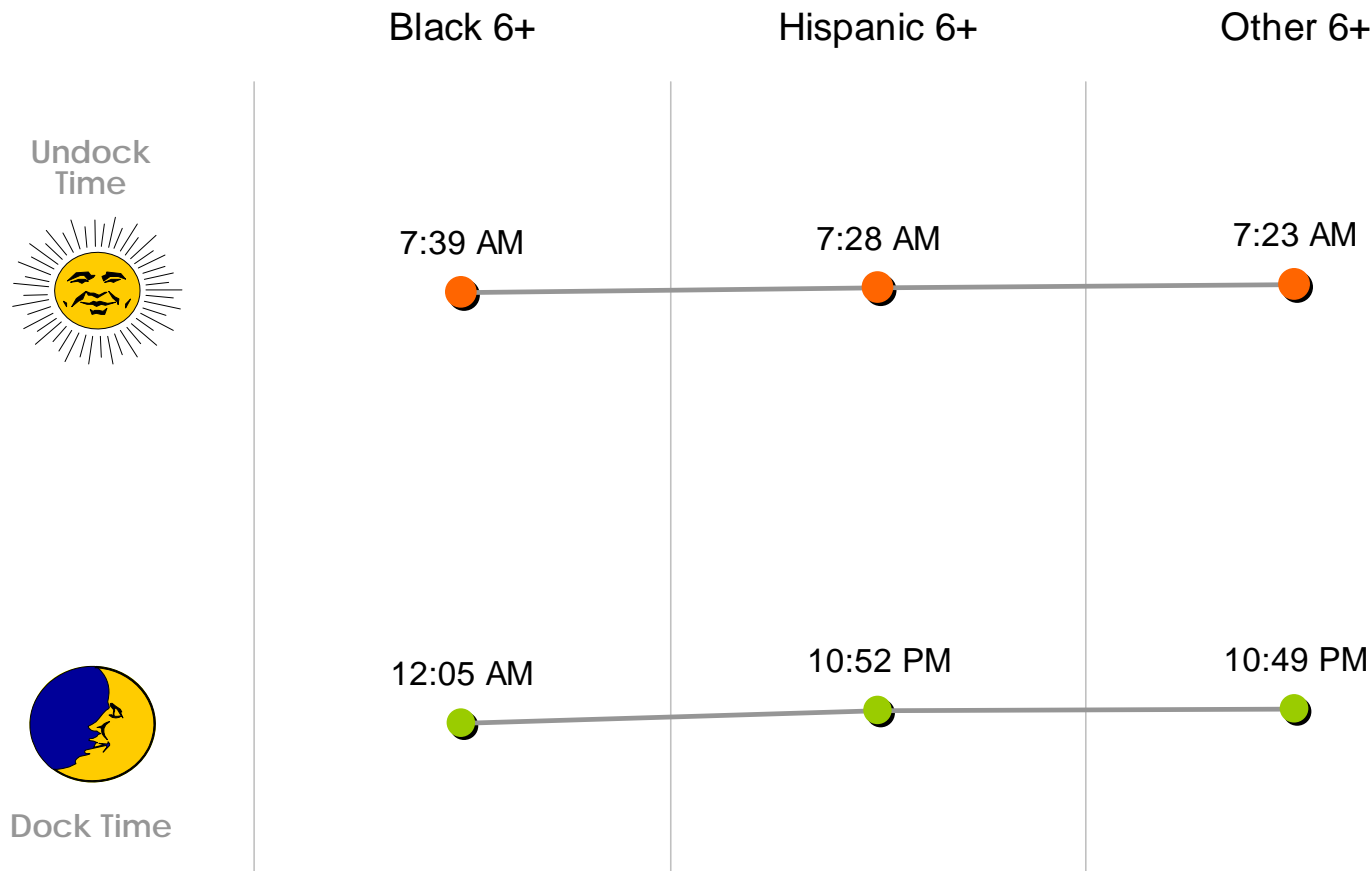
10:54 PM



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Median Undock/Dock Times

April 2009 Weekdays



Seattle- Tacoma Metro, In-Tab Persons 6+, April 2009





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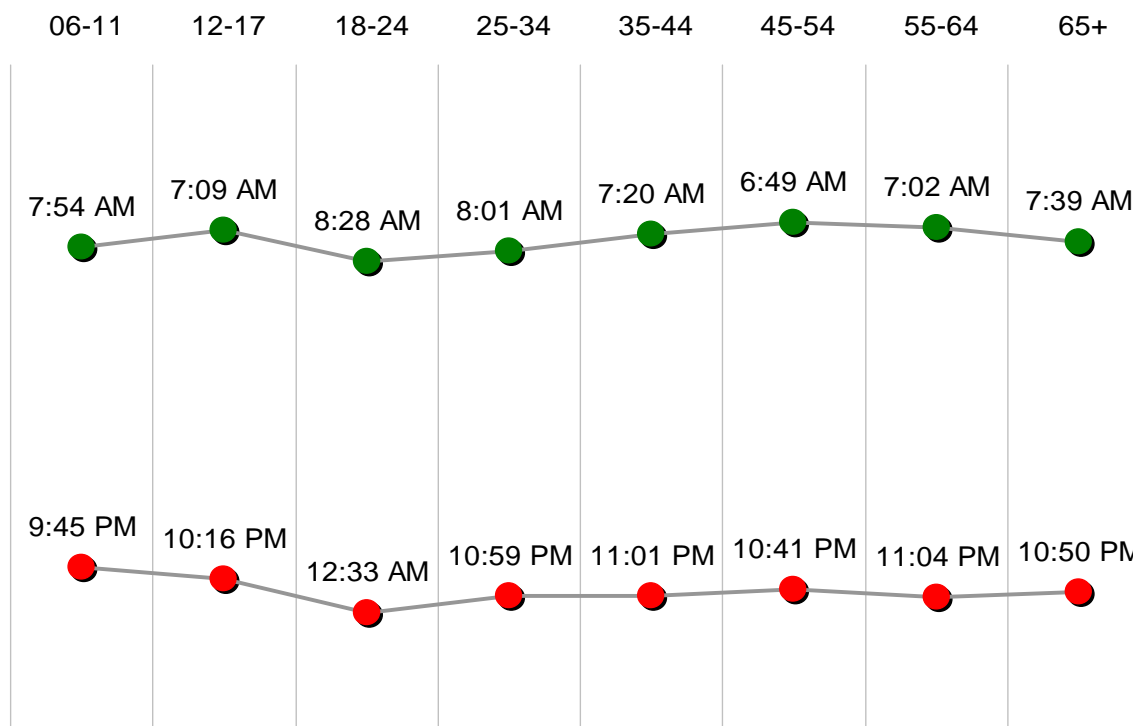
Median Undock/Dock Times

April 2009 Weekdays

Undock Time



Dock Time



Seattle- Tacoma Metro, In-Tab Persons 6+, April 2009





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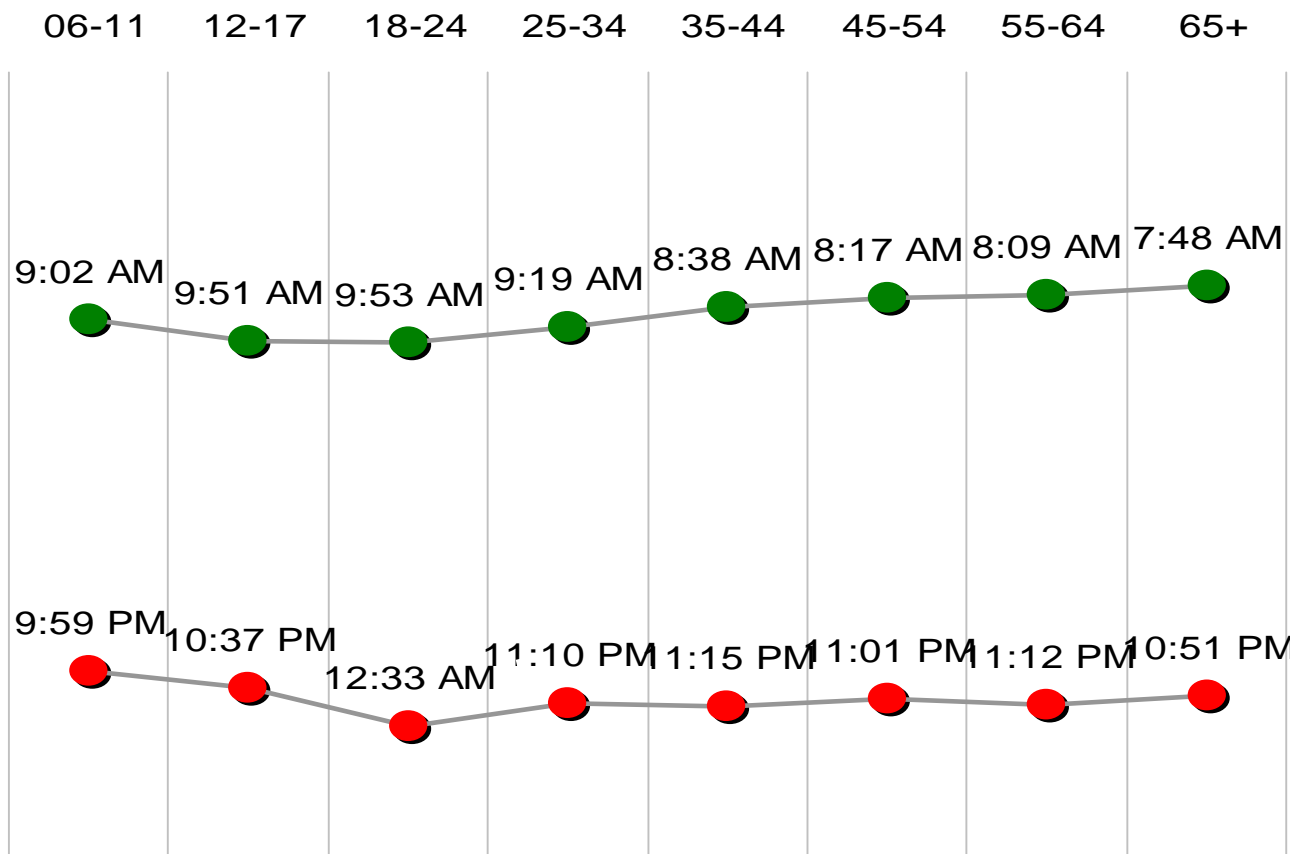
Median Undock/Dock Times

April 2009 Weekends

Undock Time



Dock Time

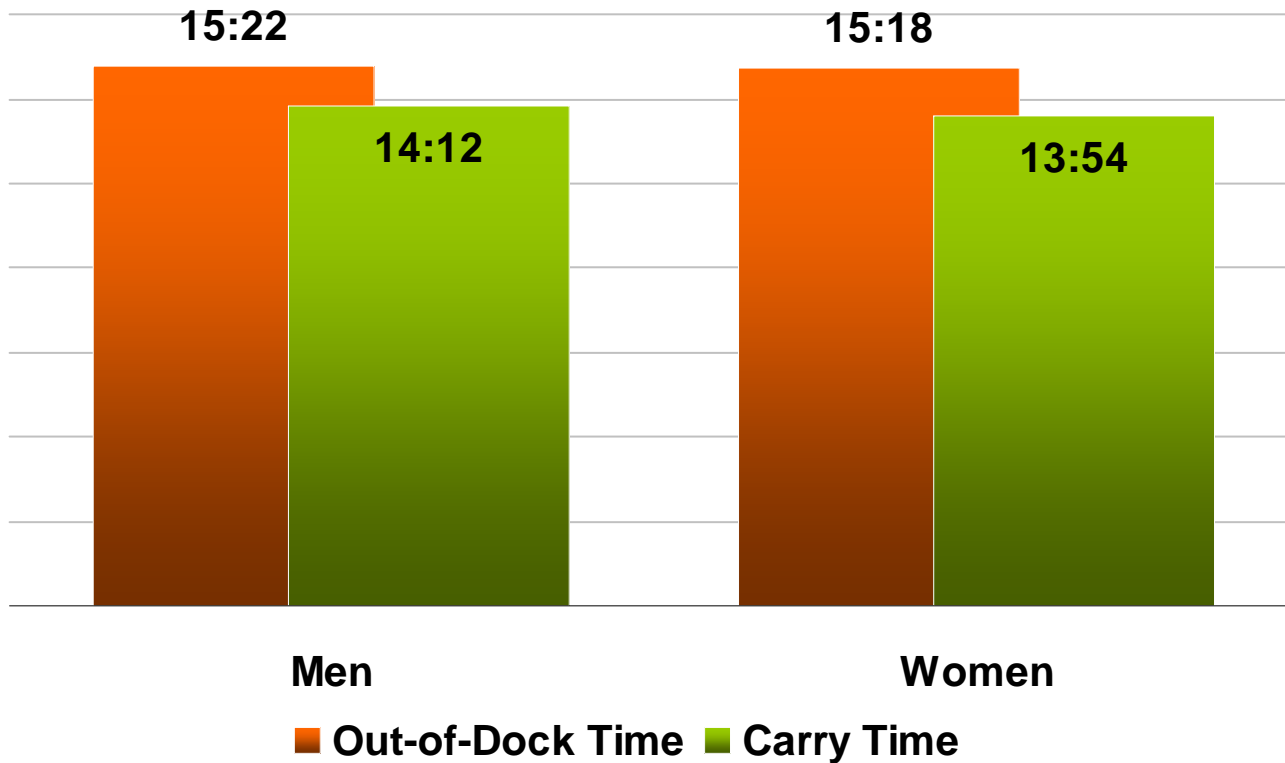




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Median Times by Gender

Out-of-Dock and Carry Times



Seattle- Tacoma Metro, In-Tab Persons 6+, April 2009, Weekday

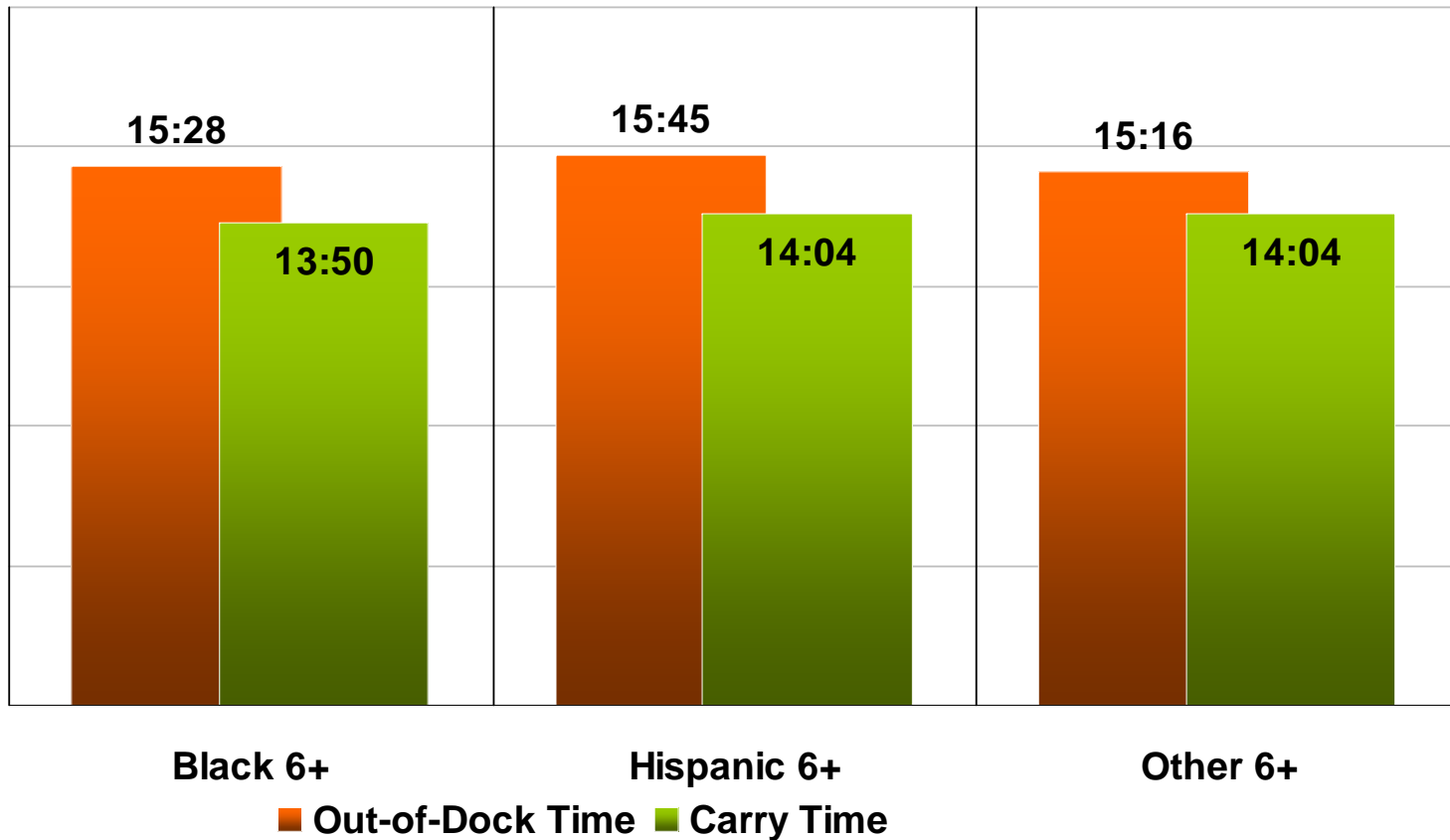




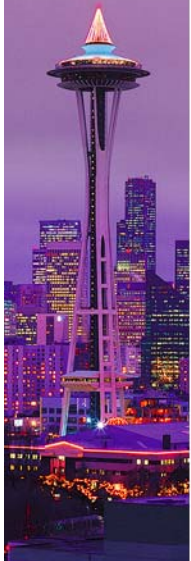
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Median Times by Race/Ethnicity

Out-of-Dock and Carry Times



Seattle- Tacoma Metro, In-Tab Persons 6+, April 2009, Week-day

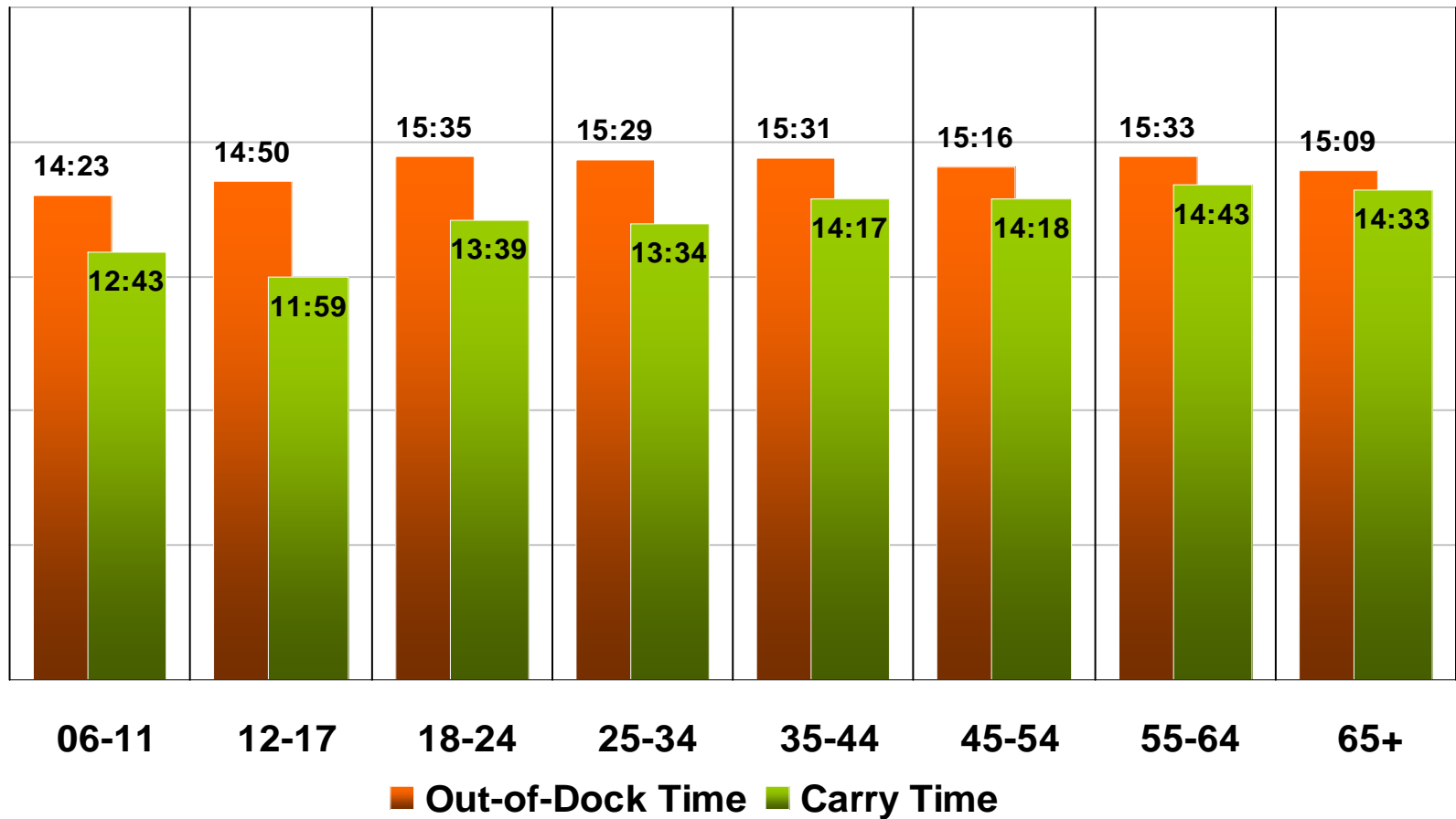




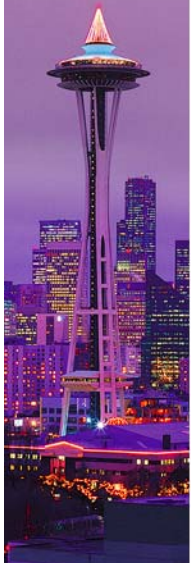
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Median Times by Age

Out-of-Dock and Carry Times



Seattle- Tacoma Metro, In-Tab Persons 6+, April 2009, Week-day





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Cume Estimates

**Seattle-Tacoma
PPM April 2009**

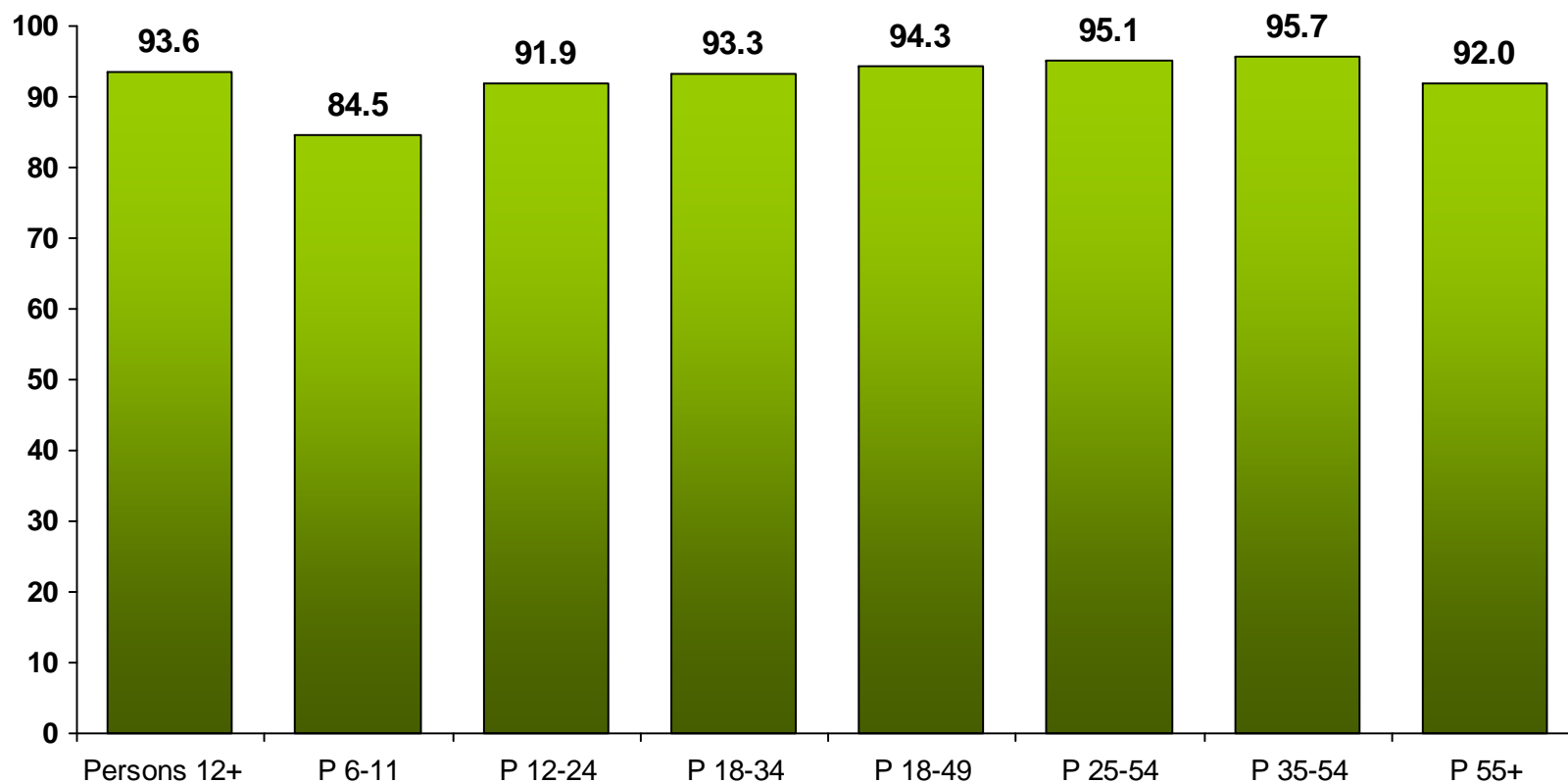




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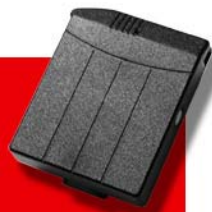
PPM Weekly Cume Rating

Mon-Fri 6a-12m



Seattle- Tacoma Metro PPM, Avg Weekly Cume Rating by Demo, April 2009

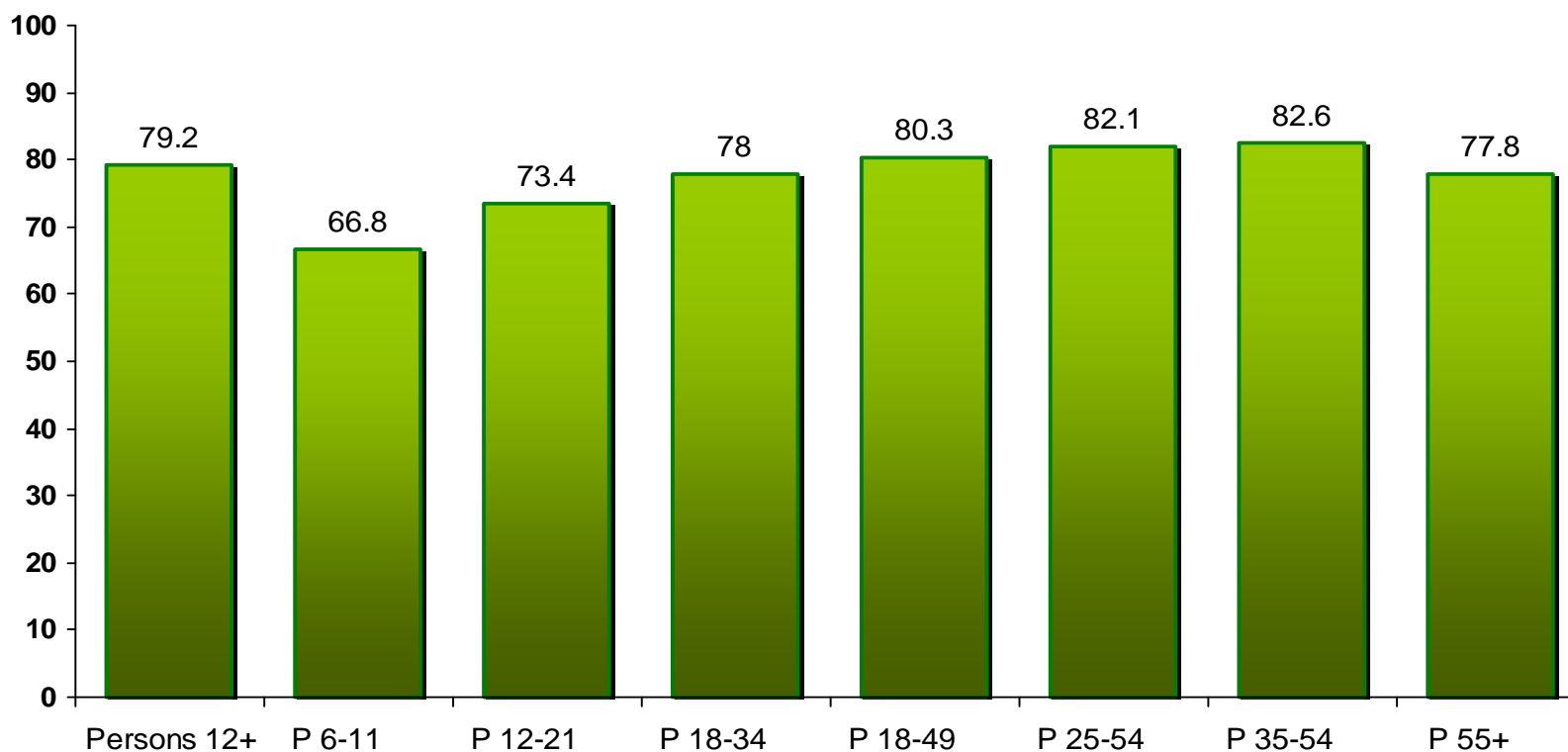




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PPM Weekend Cume Rating

Sat-Sun 6a-12m



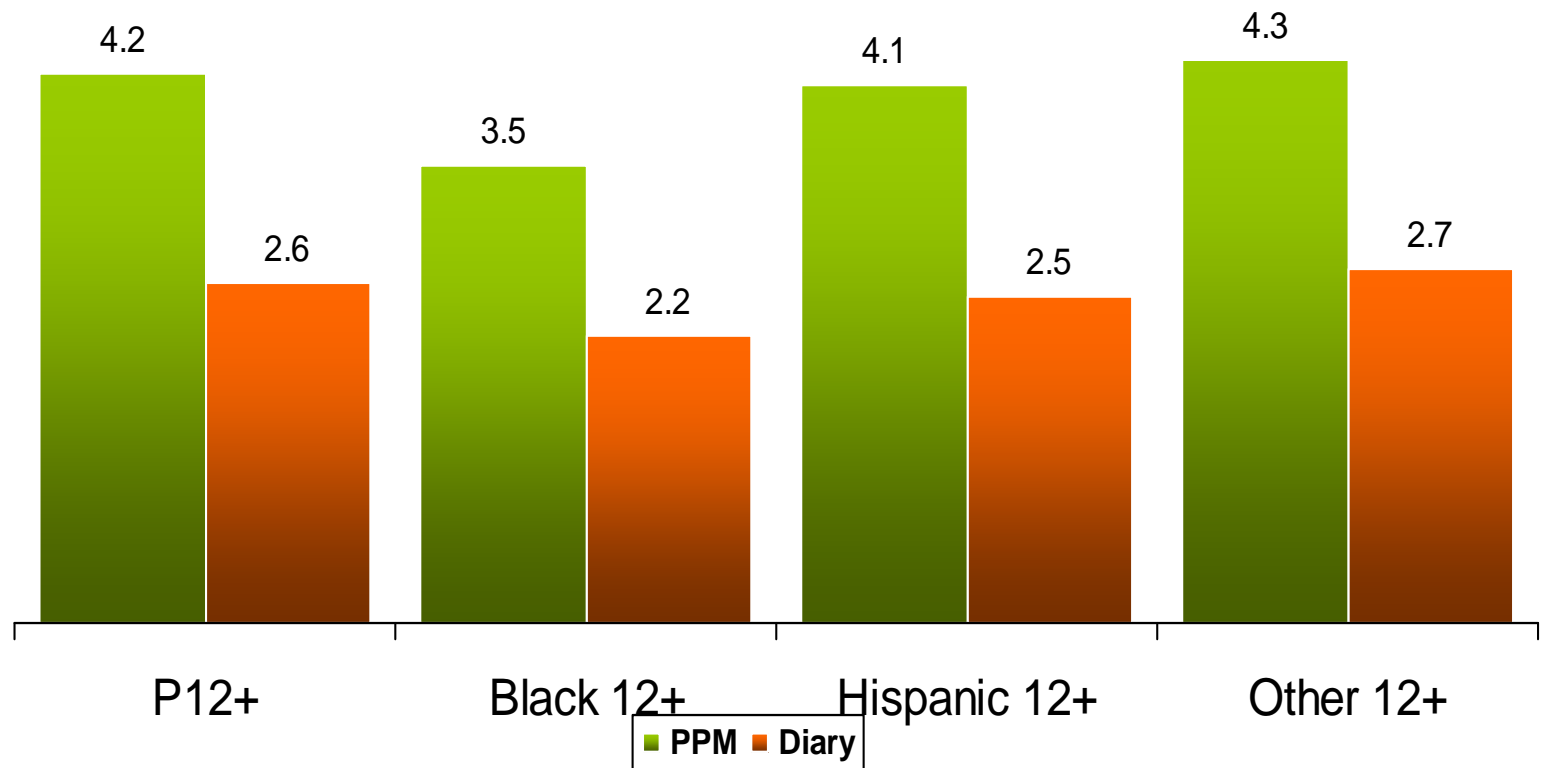
Seattle- Tacoma Metro PPM, Avg Weekly Daily Cume Rating by Demo, April
2009



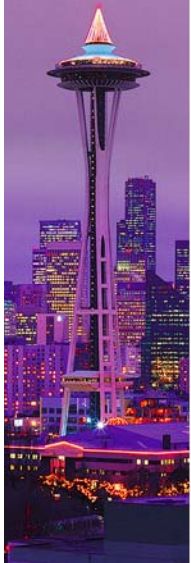


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Average Number Of Stations



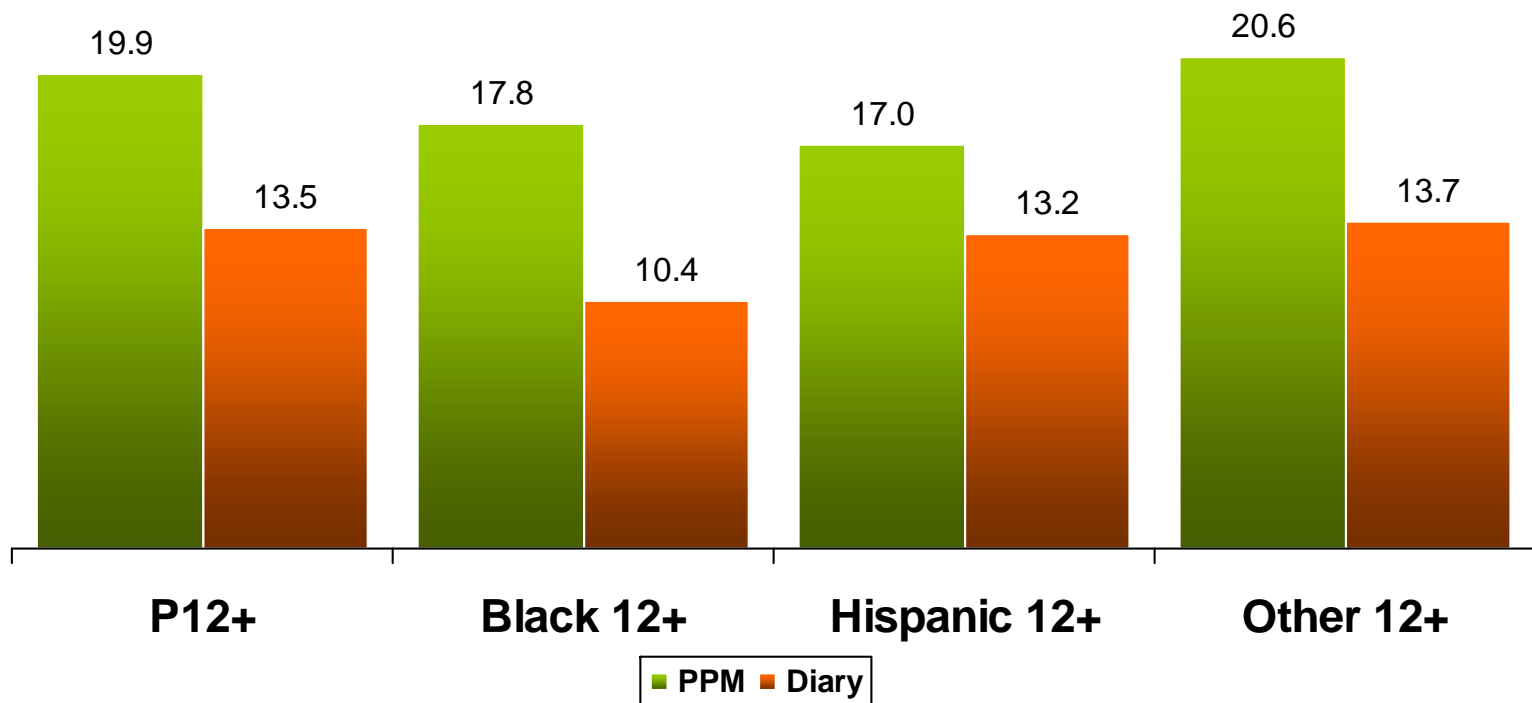
*PPM, Seattle- Tacoma Metro, April 2009, Mon-Sun 6AM-MID, Persons 12+ vs. Diary, Seattle- Tacoma Metro, Winter 2009, Mon-Sun 6AM-MID, Persons 12+
Note: Same stations are being used for comparison from Diary to PPM*





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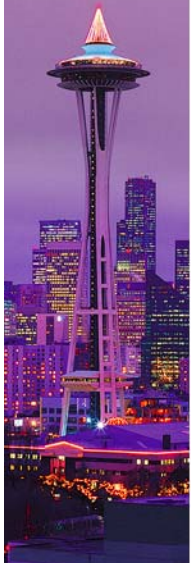
Number Of Listening Occasions



PPM, Seattle- Tacoma Metro, April 2009, Mon-Sun 6AM-MID, Persons 12+ vs.

Diary, Seattle- Tacoma Metro, Winter 2009, Mon-Sun 6AM-MID, Persons 12+

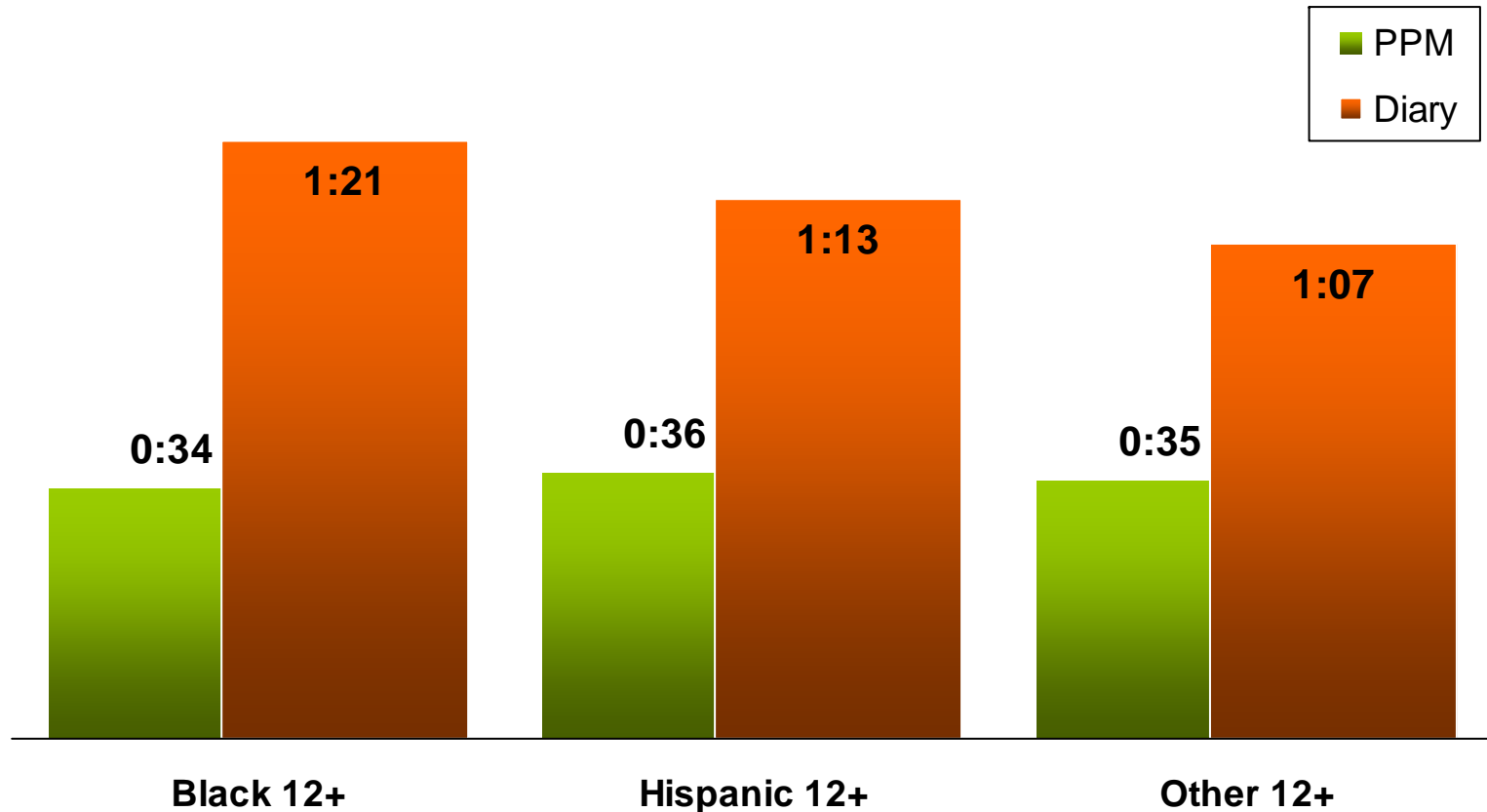
Note: Same stations are being used for comparison from Diary to PPM





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Average Time Spent Per Tune-in



PPM, Seattle- Tacoma Metro, April 2009, Mon-Sun 6AM-MID, Persons 12+ vs.

Diary, Seattle- Tacoma Metro, Winter 2009, Mon-Sun 6AM-MID, Persons 12+

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

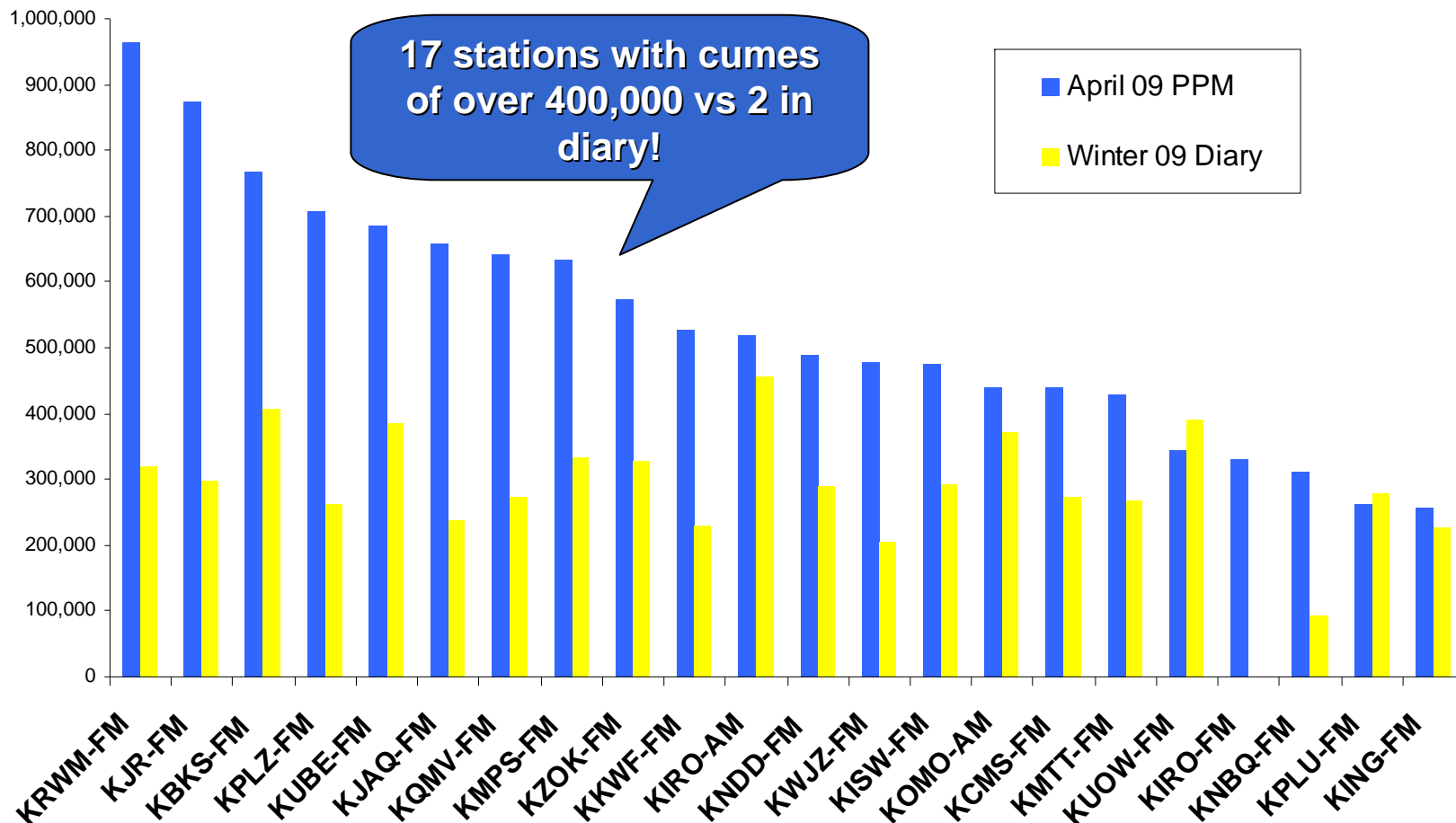




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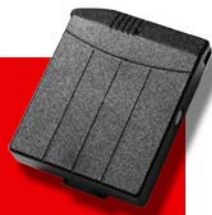
Cume changes PPM vs Diary

Full Week Persons 12+ vs Winter 09 Diary



Seattle Metro. Winter 09 Diary vs April 09 PPM Pre-Currency M-Su 6a-Mid P12+

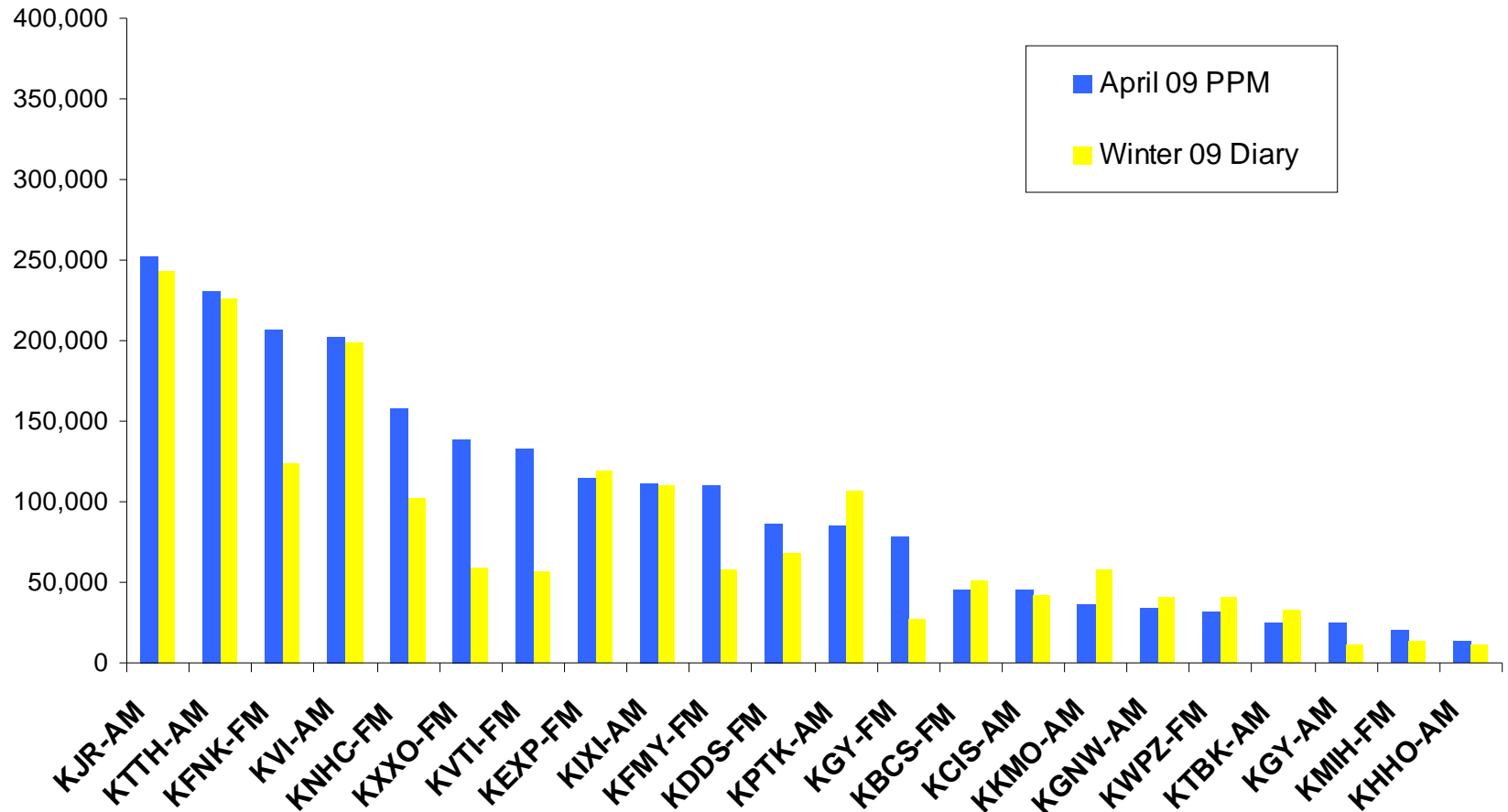




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Cume changes PPM vs Diary cont.

Full Week Persons 12+ vs Winter 09 Diary

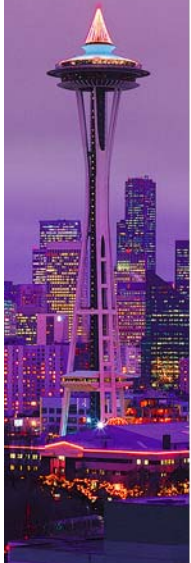


Seattle Metro. Winter 09 Diary vs April 09 PPM Pre-Currency M-Su 6a-
Mid P12+



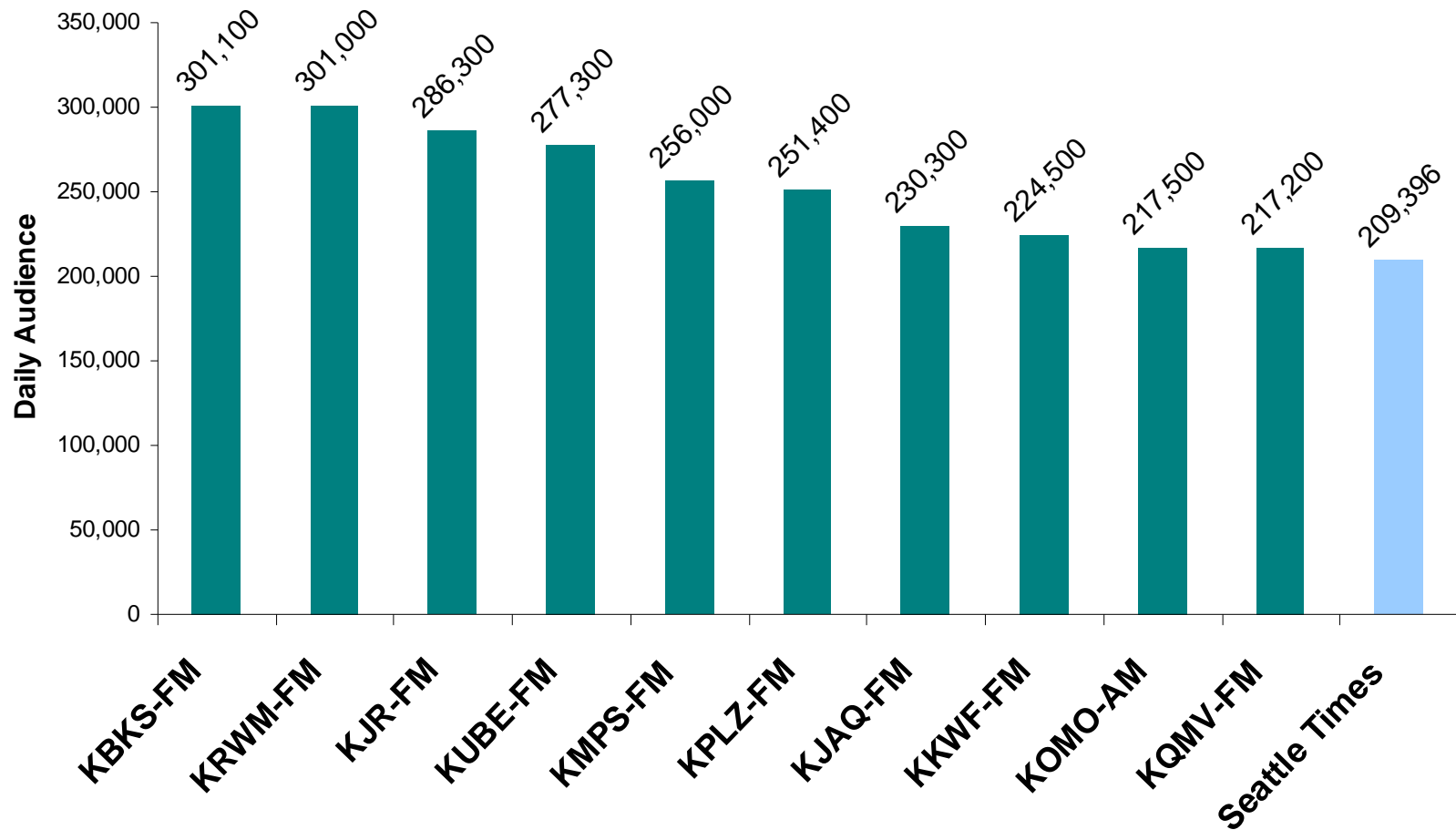


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Radio cumes vs Newspaper

Daily Cume vs. Circulation in Seattle



PPM, Seattle Metro Daily Cume April 2009 Pre Currency Data,
Mon-Fri 6AM-12mid, P6+

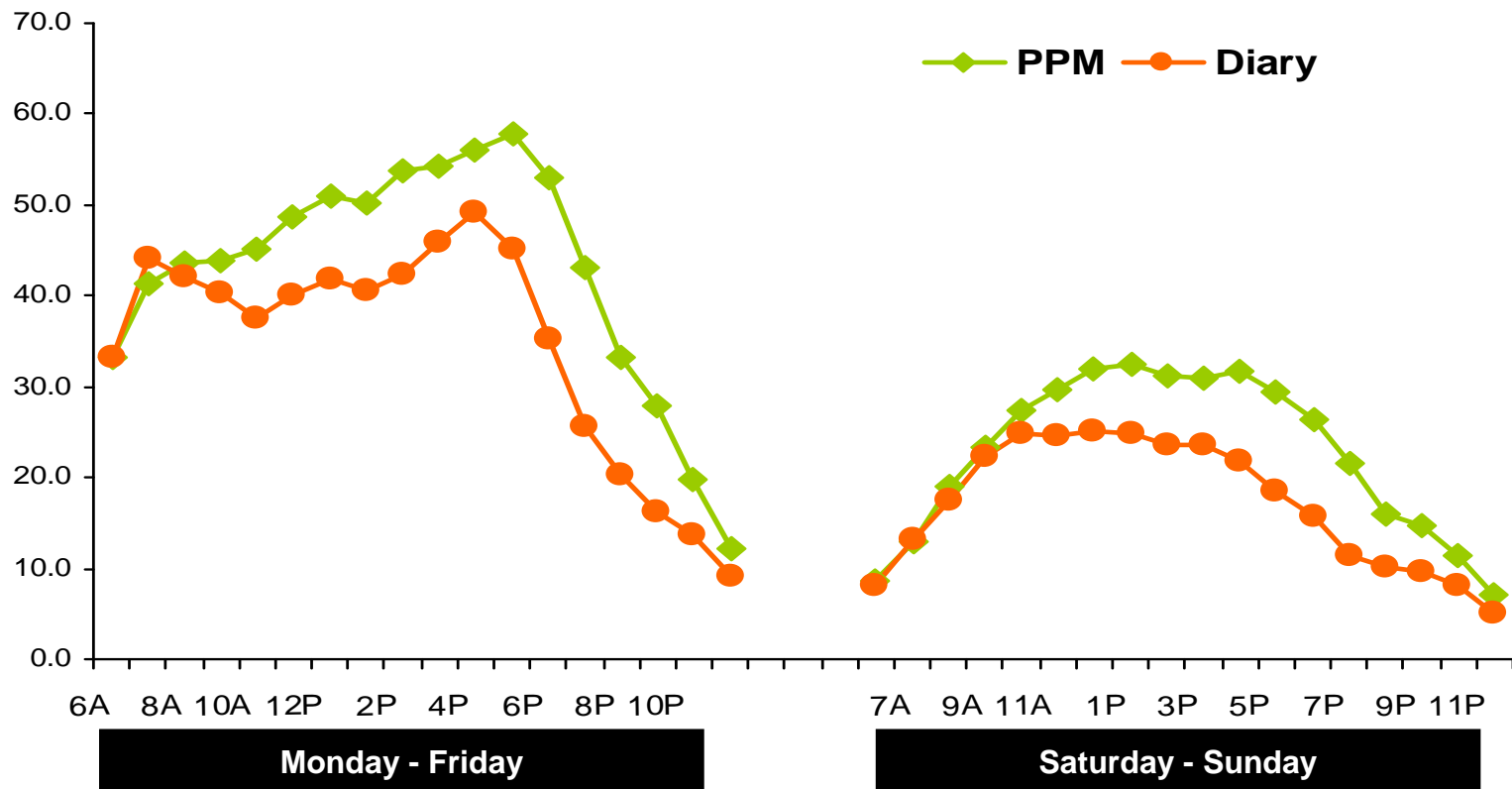
Daily Newspaper Circulation from ABC



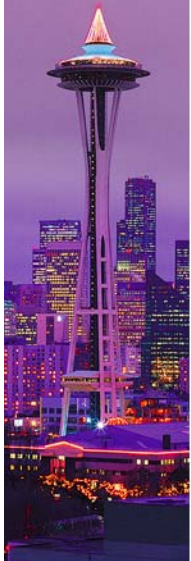
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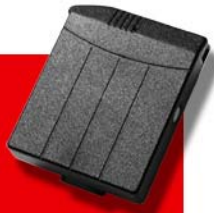
PPM Vs. Diary Hour-by-Hour Cume Rating Comparison

April 2009



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

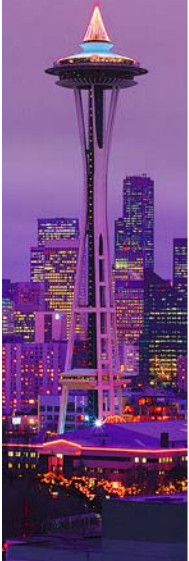


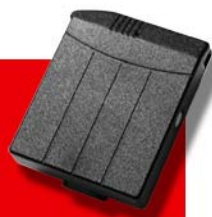


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Rating Comparisons

Seattle-Tacoma
PPM April 2009

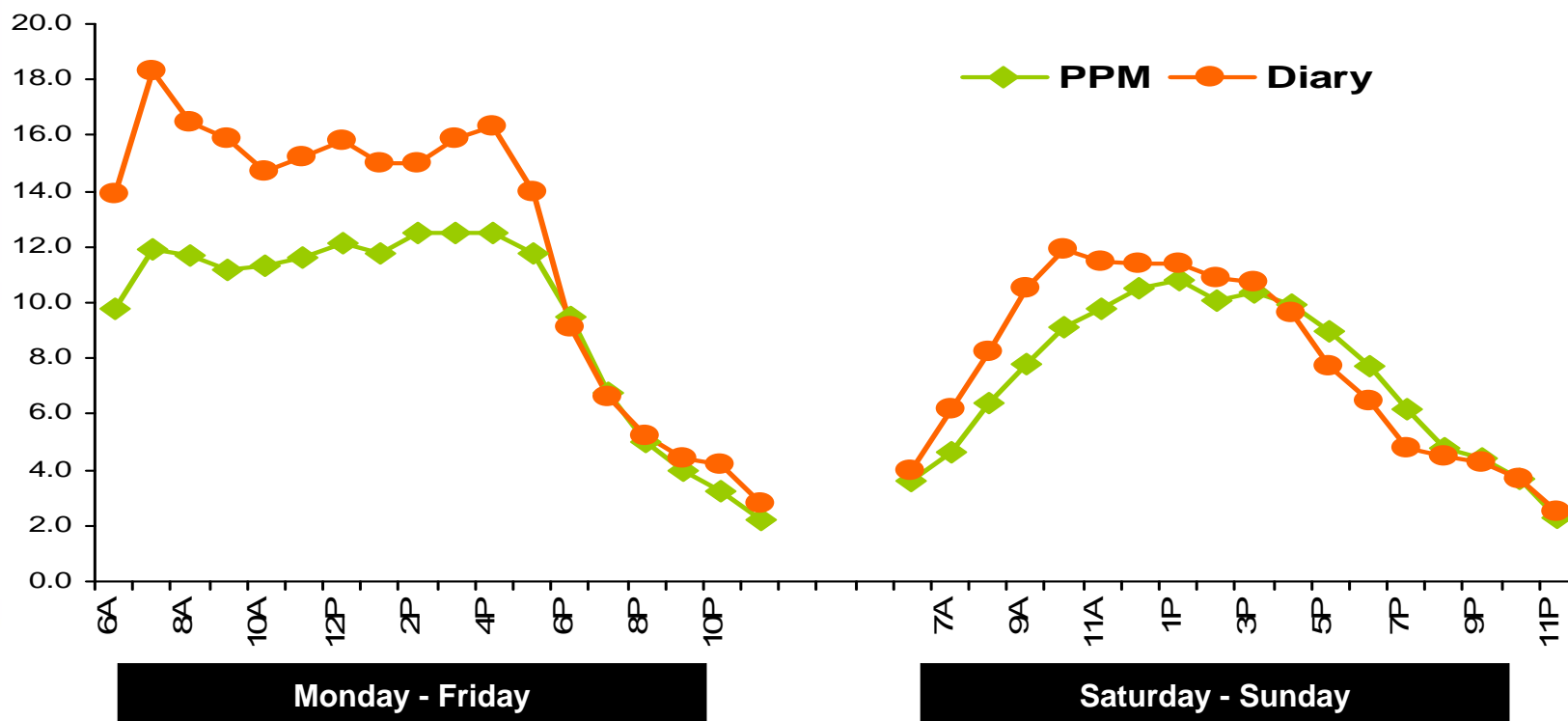




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PPM Vs. Diary Hour-by-Hour

Persons 12+ AQH Rating Comparison



PPM, Seattle- Tacoma PPM, April 2009, Mon-Sun 6AM-MID, Persons 12+ vs.

Diary, Seattle- Tacoma Metro, Winter 2009, Mon-Sun 6AM-MID, Persons 12+

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

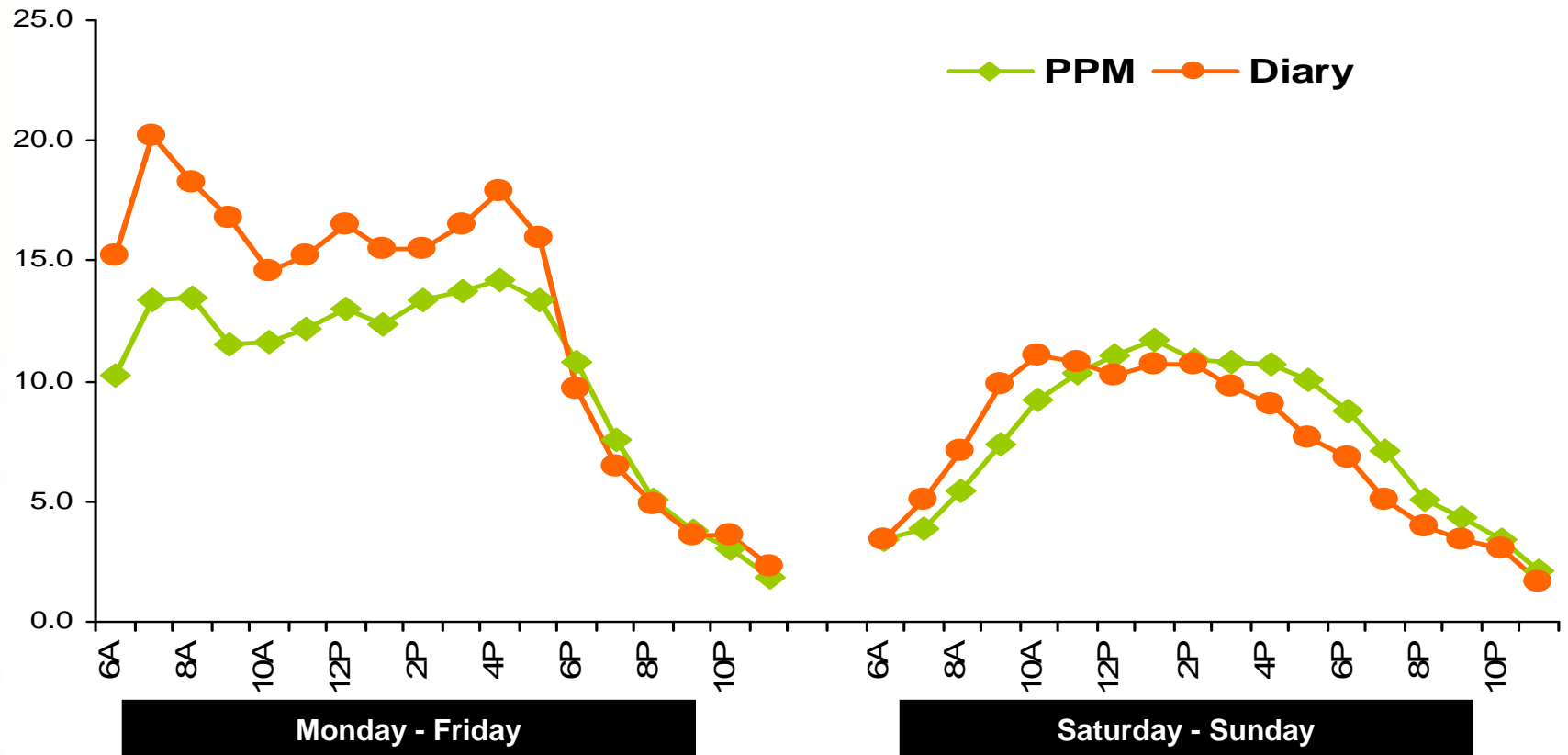




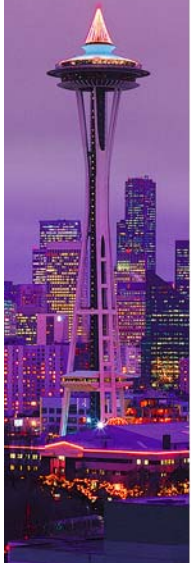
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PPM Vs. Diary Hour-by-Hour

Persons 25-54 AQH Rating Comparison



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

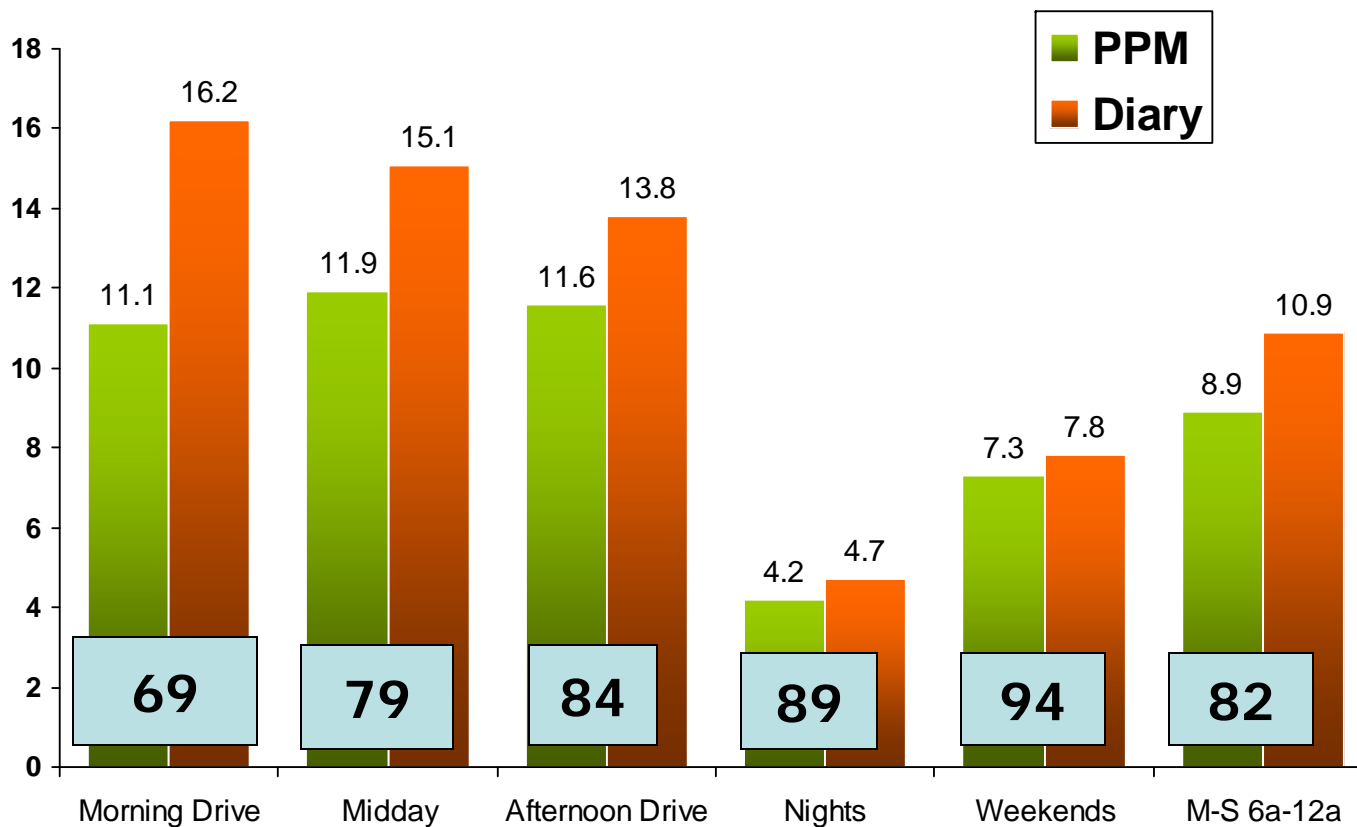




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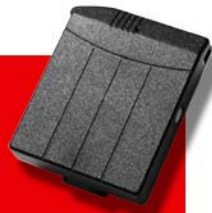
PPM Vs. Diary

AQH Ratings By Daypart: P 12+



Seattle- Tacoma AQH Ratings, April 2009 vs. Winter 2009, P12+ Market totals
Weekends are Sat-Sun 6a-12a
Note: Same stations are being used for comparison from Diary to PPM

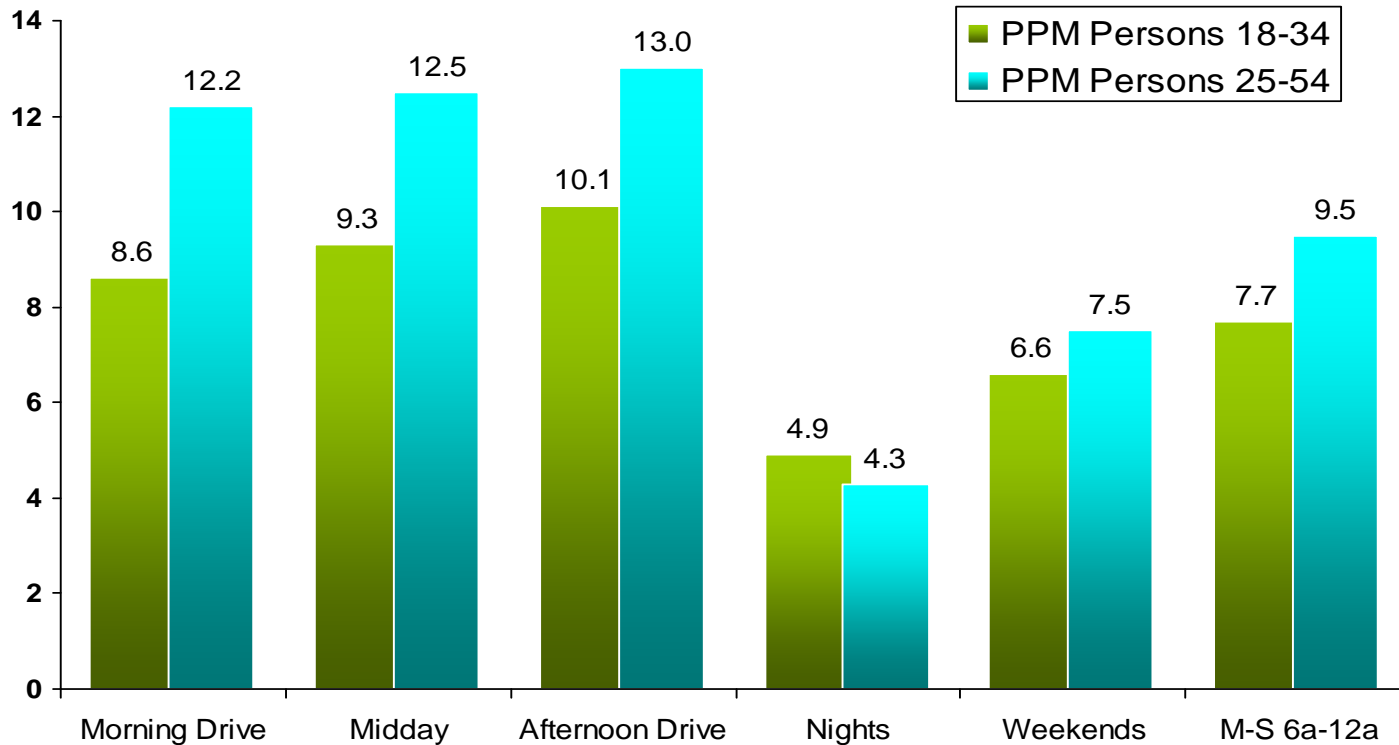




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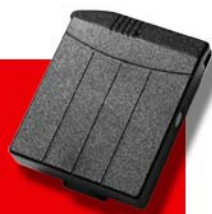
PPM AQH Ratings By Demo and Daypart

April 2009



PPM Seattle- Tacoma AQH Ratings, April 2009 Market totals.

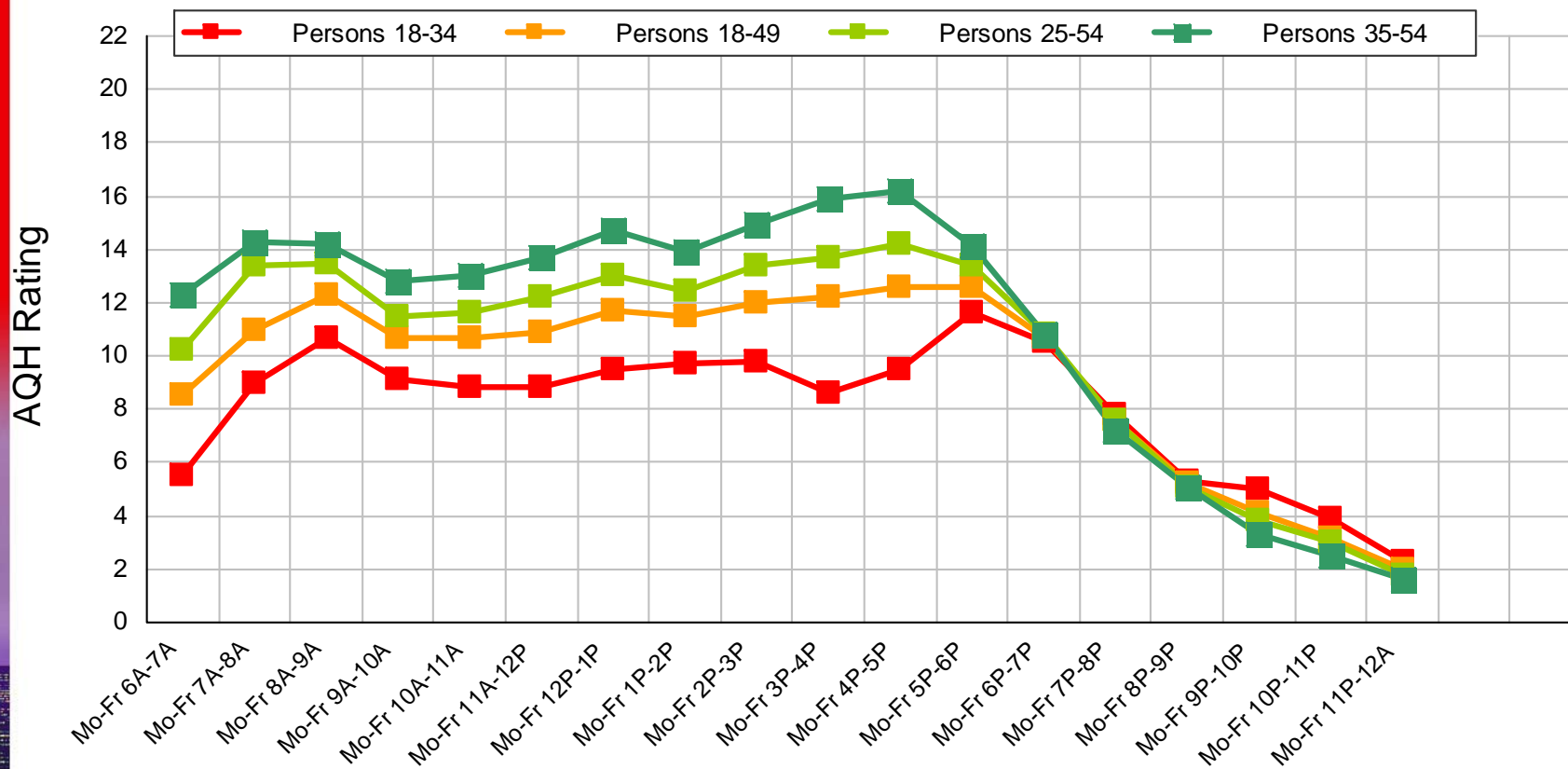




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Listening By Demo

Monday-Friday 6AM-MID



Seattle- Tacoma April 2009 PPM, Mon-Fri 6AM-MID

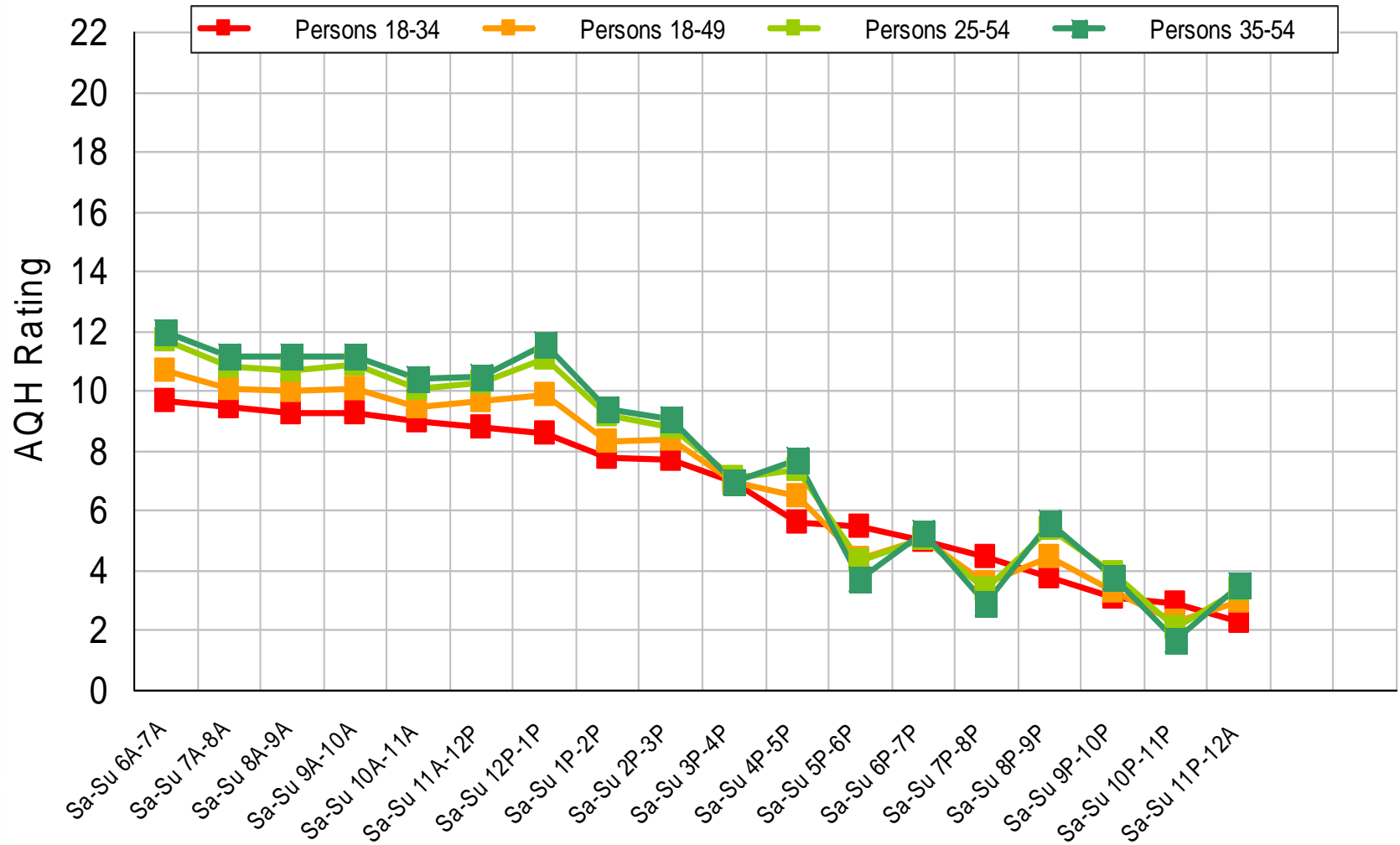




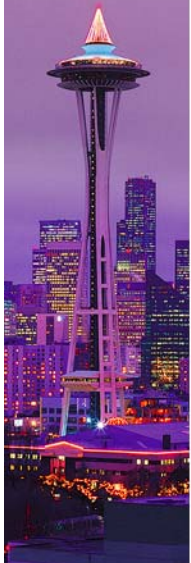
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Listening By Demo

Sat-Sun 6AM-MID



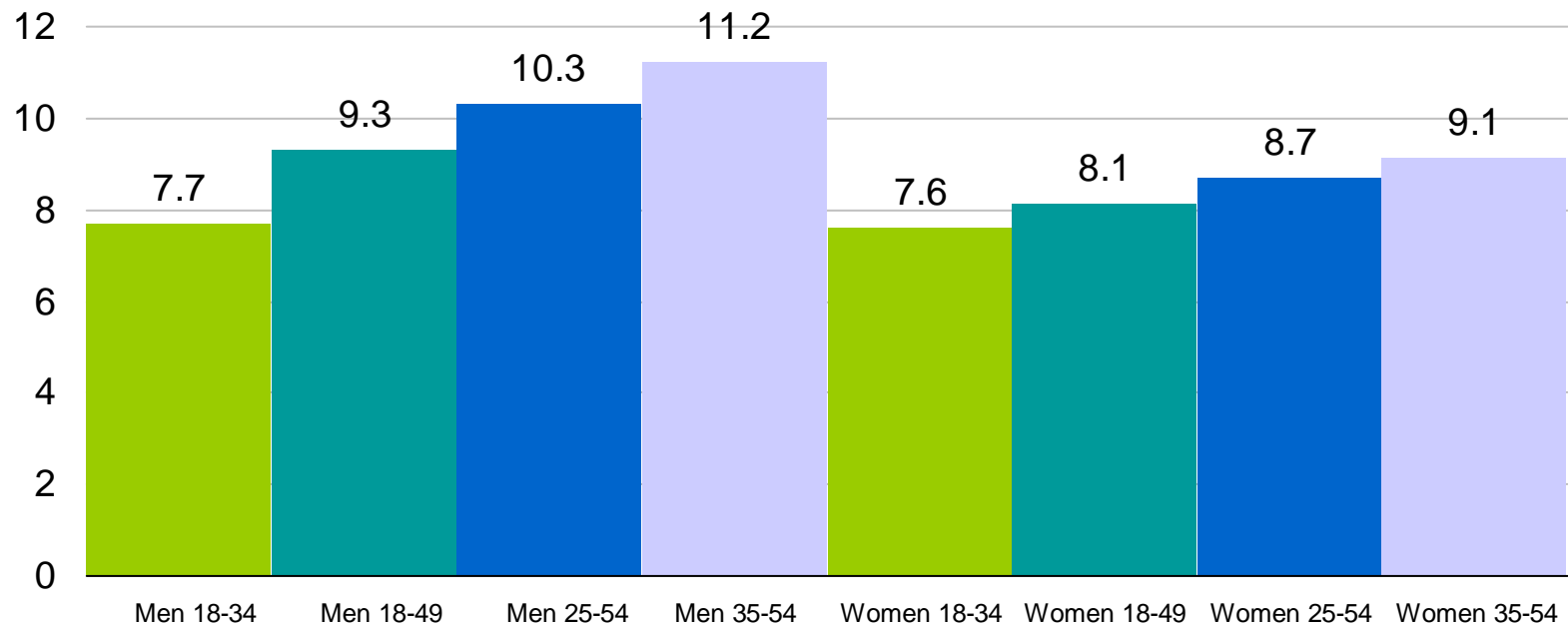
Seattle- Tacoma April 2009 PPM, Sat-Sun 6AM-MID,





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PPM AQH Ratings by Age/Sex



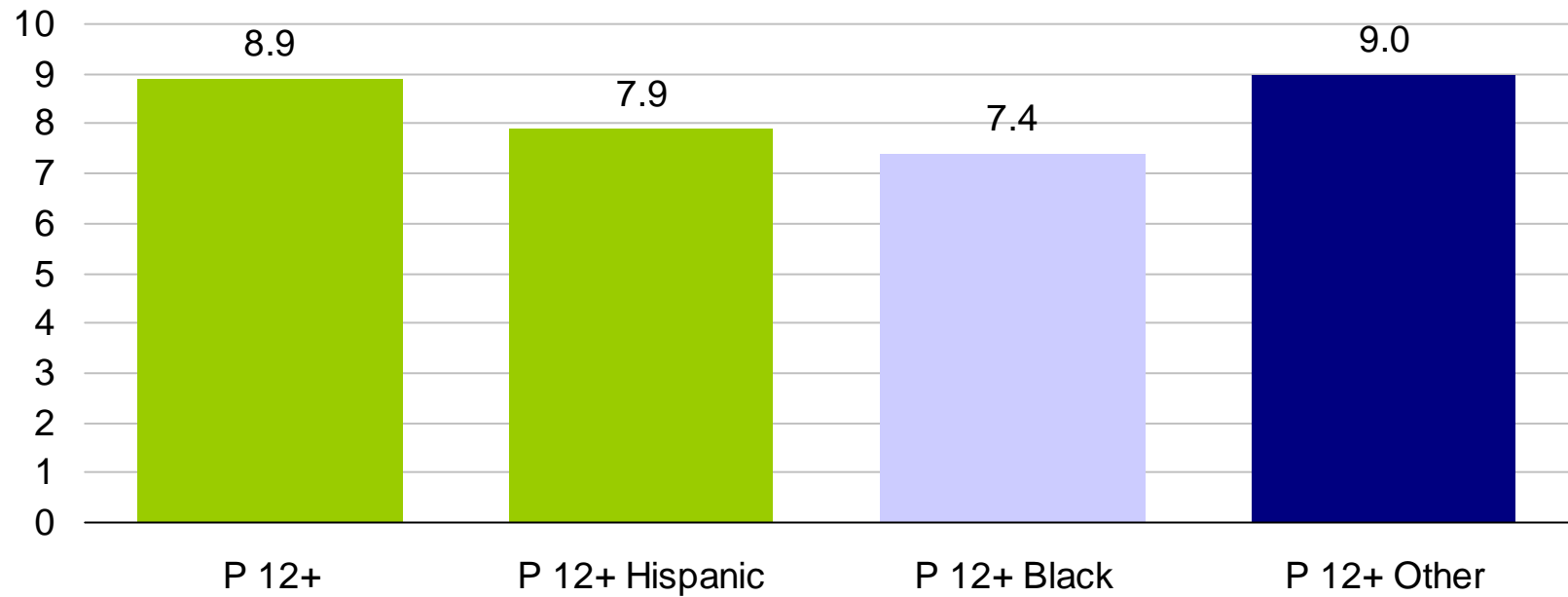
Seattle- Tacoma PPM, April 2009, Mon-Sun 6AM-MID, AQH Rating



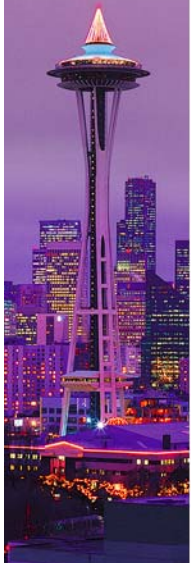


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Listening Levels by Race and Ethnicity



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





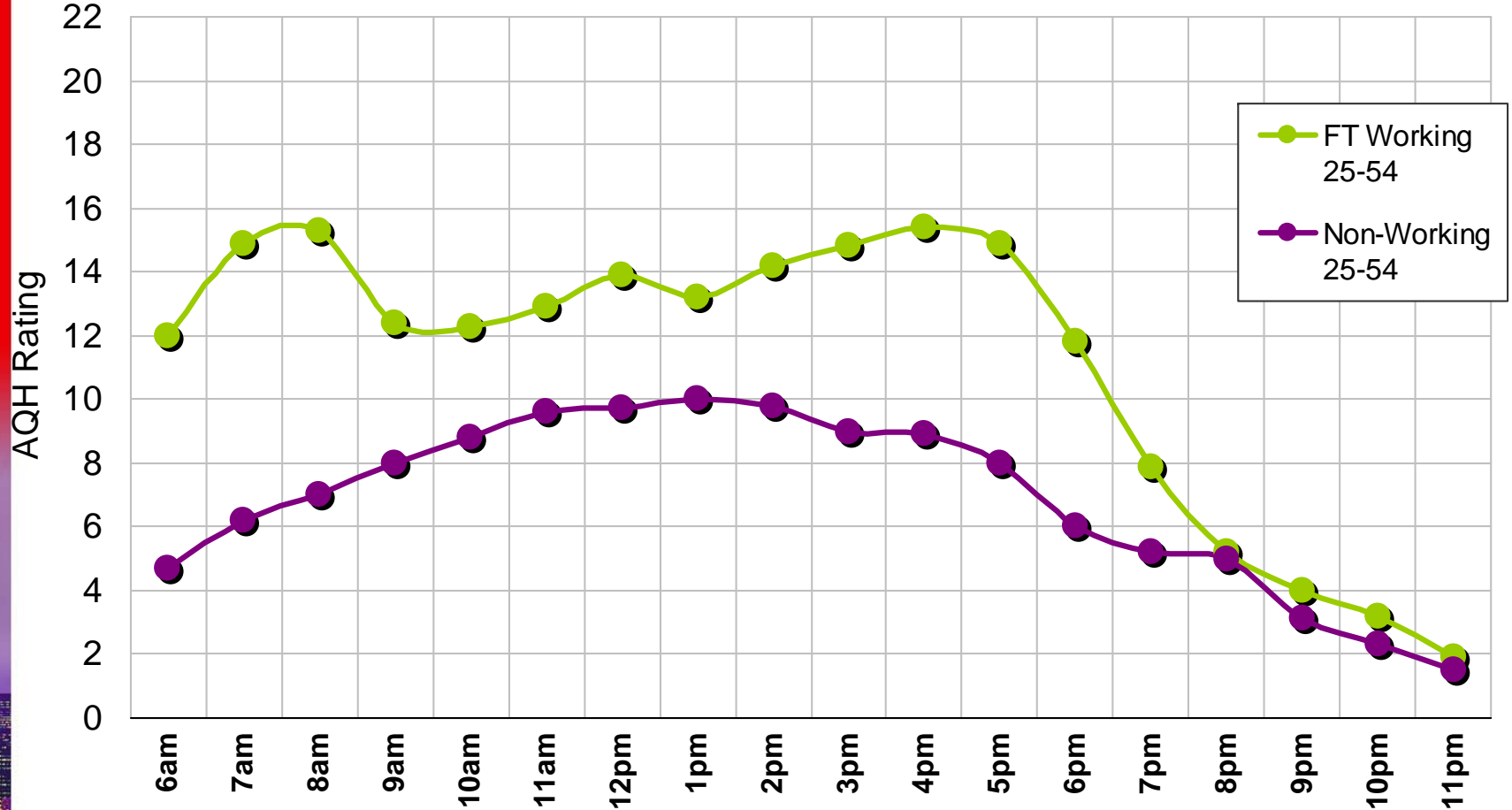
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Employed vs. Non-employed Listening

Seattle daytime radio listening by employment

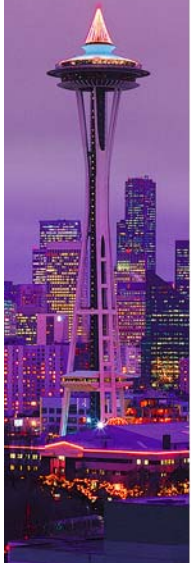
Mon-Fri 6AM-MID



Seattle Metro April 09 PPM Pre Currency Monday-Friday 6a-12a Hour-by-Hour
Total market AQH rating

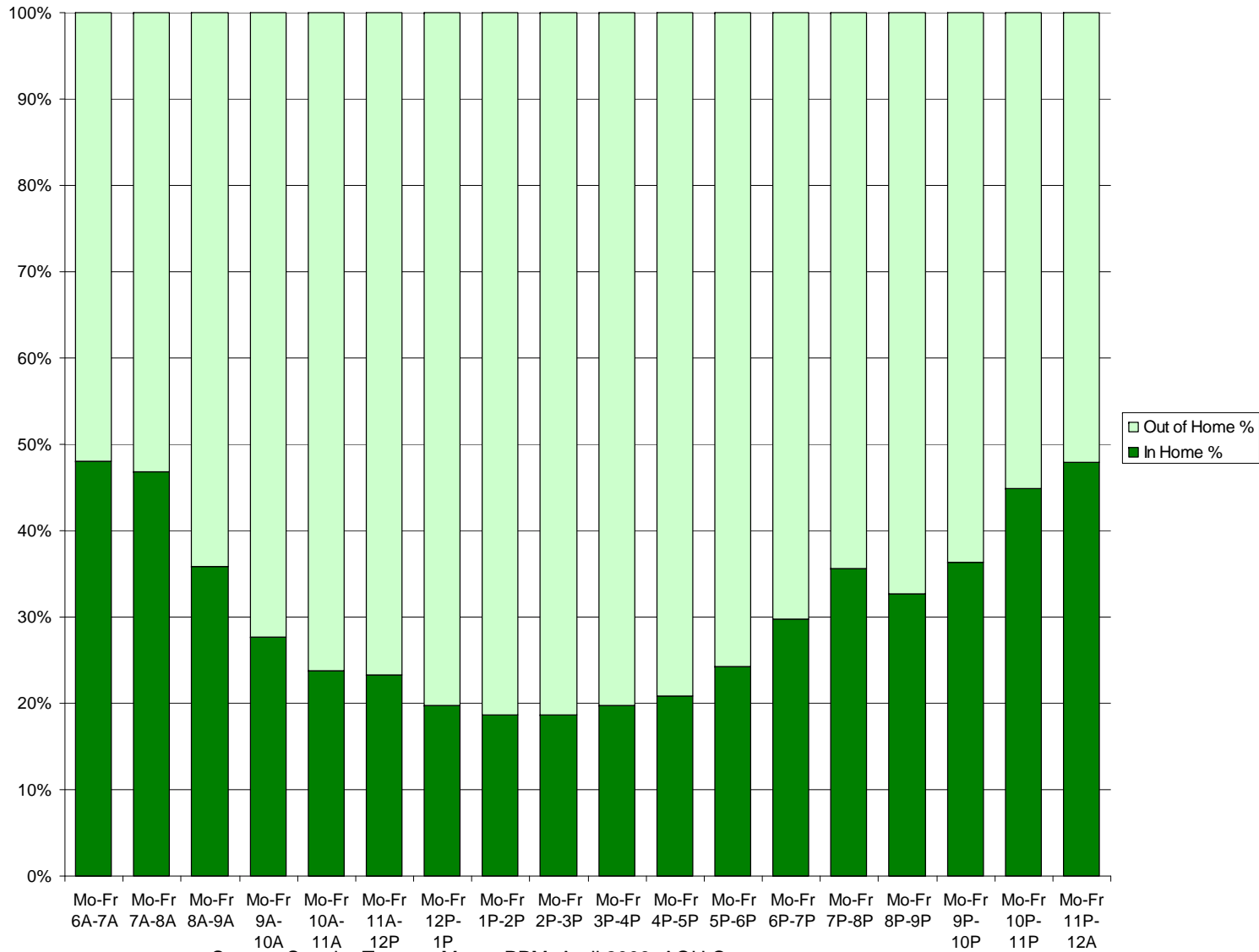


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Ratings by In/Out of Home Listening

Persons 25-54

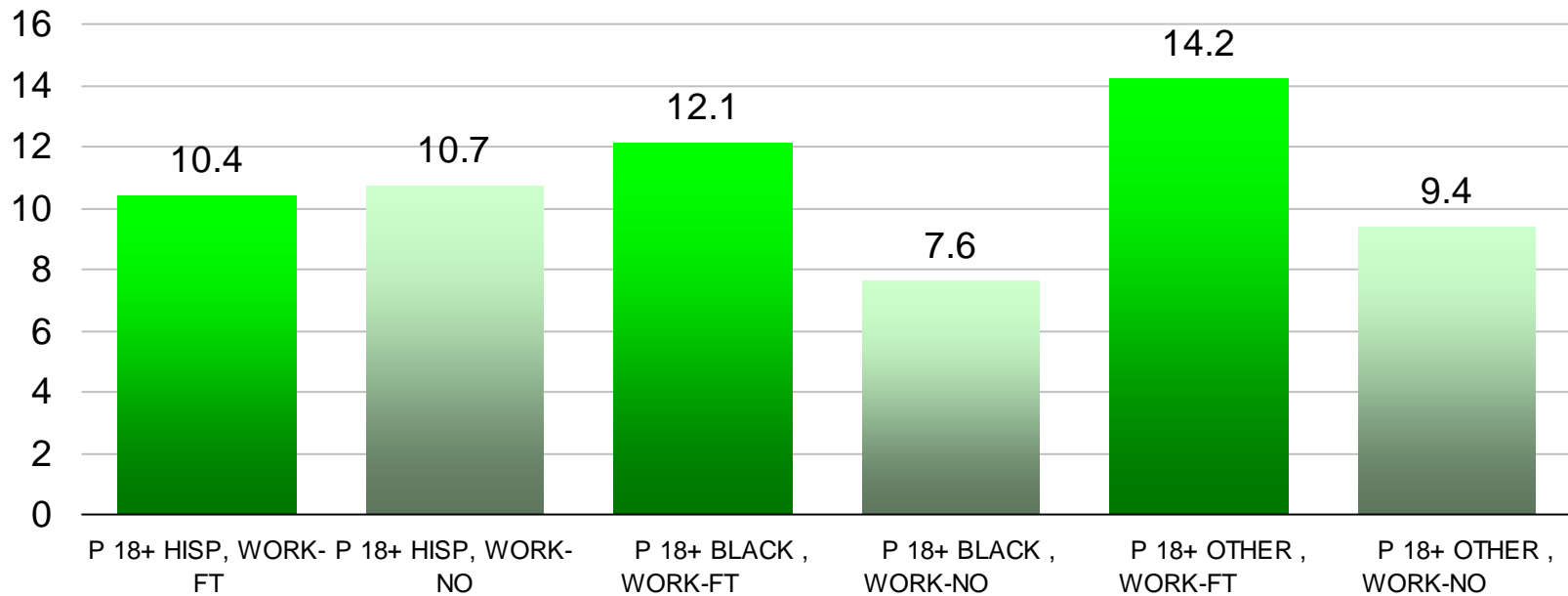


Source: Seattle-Tacoma Metro, PPM, April 2009, AQH Comp

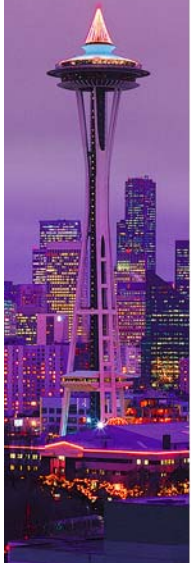


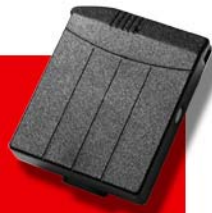
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Listening Levels by Race/ Ethnicity and Employment Status



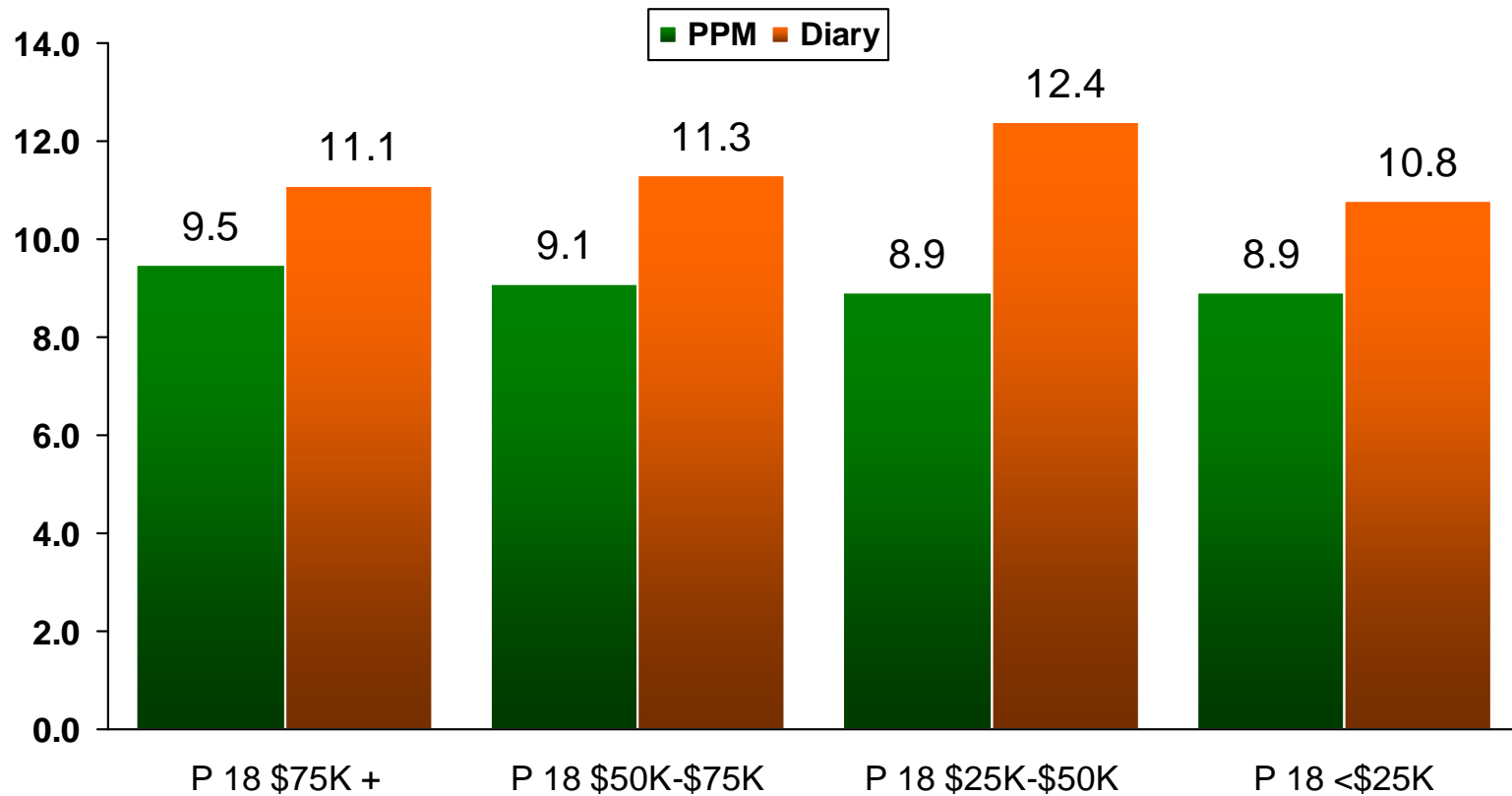
Seattle- Tacoma, April 2009 data, Mon-Fri 6a-7p, Persons 18+, AQH Rating



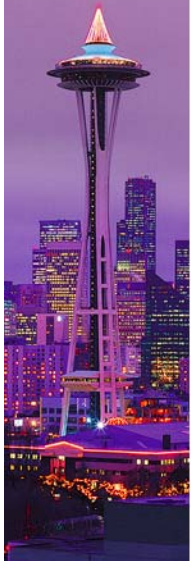


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Listening Levels by Income Level



*PPM, Seattle- Tacoma PPM, April 2009, Mon-Sun 6AM-MID, Persons 18+ vs.
Diary, Seattle- Tacoma 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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Seattle-Tacoma Rank Positions

Top Five Stations Represent Many Formats

Persons 12+

Soft Adult Contemporary
Hot Adult Contemporary
Classic Hits
Country
Country

Persons 25-54

Hot Adult Contemporary
Adult Hits
Soft Adult Contemporary
Classic Hits
Active Rock

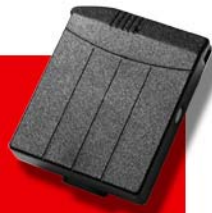
Persons 18-34

Pop Contemporary Hit Radio
Rhythmic Contemporary Hit Radio
Active Rock
Alternative
Contemporary Christian

Persons 35-54

Hot Adult Contemporary
Soft Adult Contemporary
Classic Hits
Classic Rock
Adult Hits





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PPM Ratings Are More Compressed

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

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

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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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 Seattle-Tacoma is over 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



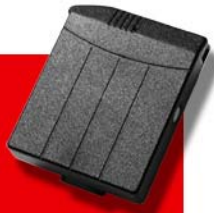


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Thank You For Joining

- A copy of this presentation will be available by 1pm PST at the Seattle-Tacoma PPM website:
http://www.arbitron.com/ppm_seattle
- To register for next week's (Tuesday, May 26th) PPM Software Training Webinars, go to <http://www.arbitrontraining.com>
- For additional training you may also contact your Seattle Training Service Consultant Janeen Arnberger directly at 310-824-6644
- Data is available NOW via Arbitron's Downloader & within TAPSCAN Web
- On Wednesday, May 27th at 12p local time, you will be able to access your first Weeklies data.





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Seattle-Tacoma

April 2009 Pre-Currency PPM Data

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May 21, 2009

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