



Spanish-Language Radio in a PPM™ Measured World



Hispanic PPM Data Update - Nov. 2009





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Hispanic PPM Measurement Headlines:

- **Hispanic Sample Performance**

- » Arbitron gets great participation from Hispanic panelists
- » The Hispanic PPM panel performance exceeds expectation

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- **Key Improvements in PPM Sample**

- » Early results show PPM panels reflect the diversity of the local Hispanic community, now including country-of-origin
- » Arbitron is increasing the number of cell phone-only households in the panel

Ethnic groups and young demos are expected to benefit most by increases in cell-only sample

- » Today, 35% of the Spanish-dominant panel in New York are cell phone-only

- **Spanish-Language Formats**

- » Many Spanish stations perform BETTER with PPM methodology than they did in Diary while the number of Spanish stations are INCREASING in PPM markets
- » Hispanic listening continues to exceed general market levels, even in PPM
- » The Hispanic marketplace can take advantage of programming changes and sports with granular PPM analysis



Hispanic Sample Performance Overview



Sample Performance Overview November 2009

	Percent of Target In-Tab
Persons 6+	106%
Persons 18-54	101%
Persons 18-34	92%
Black 18-34	90%
Hispanic 18-34	93%
Other 18-34	91%
Black and Hispanic Sample	
Black	106%
Hispanic	112%
<i>Spanish-Dominant</i>	<i>115%</i>
<i>English-Dominant</i>	<i>109%</i>

Hispanics continue to achieve the highest performance by race

Average among 25 PPM Currency Markets, 15 markets for black, 17 markets for Hispanic, and 12 markets for language preference



Hispanics Continue to Deliver the Best Compliance in the PPM System

Average Daily In-Tab Rate for November 2009

	Benchmark	25-Market Average
Persons 18-34	70%	68% <i>Avg. to Date</i>
Black 18-34	70%	64% <i>Avg. to Date</i>
Hispanic 18-34	70%	71% <i>Avg. to Date</i>
Other 18-34	70%	69% <i>Avg. to Date</i>

How to Read: As of November 2009, 71% of Hispanic 18-34 year olds panelists were “In-Tab” on an average day, making Hispanics respondents the best compliers, as we have seen in numerous past months.

The In-Tab Rate benchmark for Hispanic 18-34 is 70%.

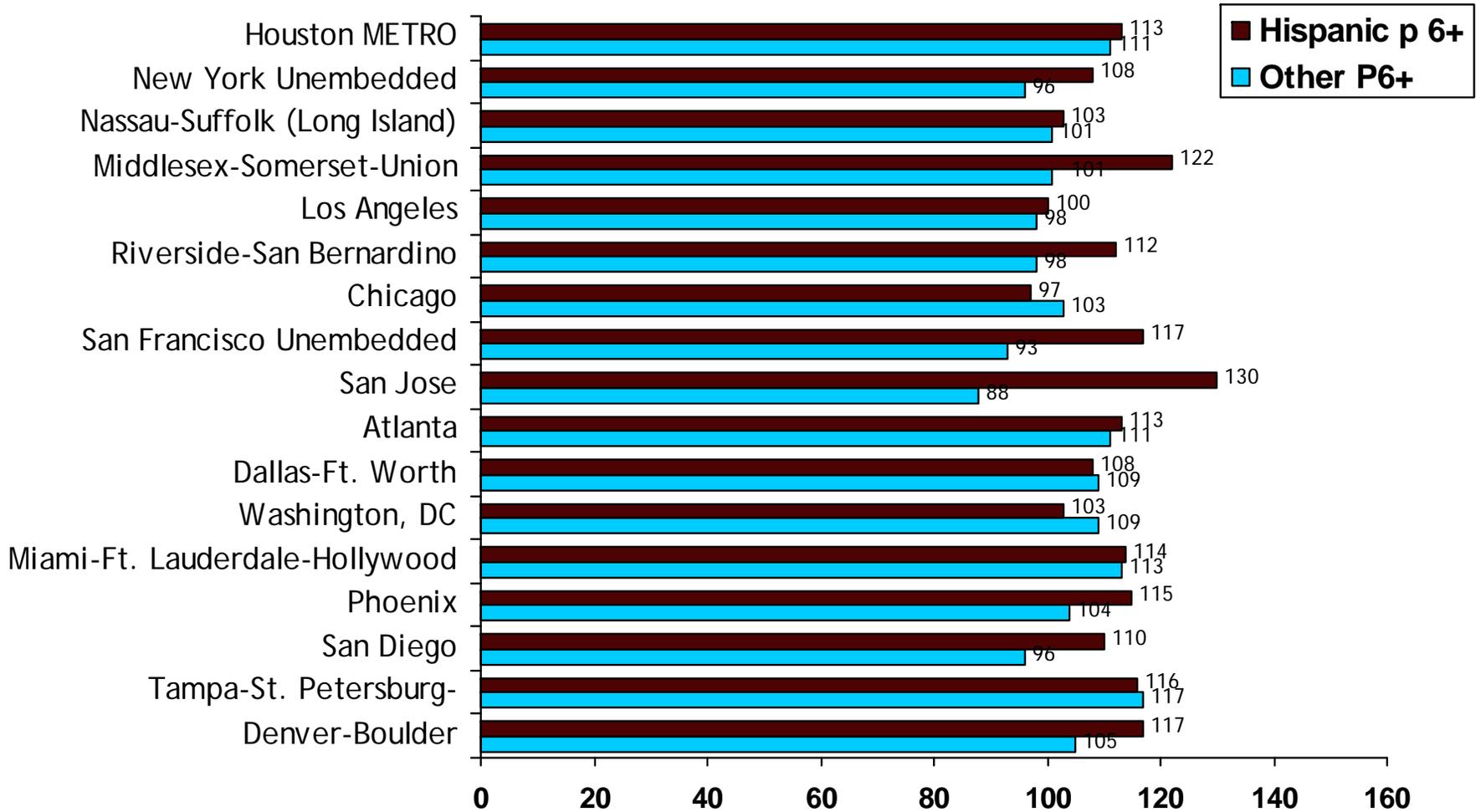
(Adult PPM Panelists must keep the meter in motion for at least 8 hours a day to be counted “In Tab” for a day)





Hispanic Performance is Higher Than the General Market

Hispanic Average DDI: 112; "Other" DDI: 103



Performance against target is for P6+ / November 2009. This is also called DDI = Designated Delivery Index = (actual/target)*100





Key Improvements Affecting the Hispanic Sample



Country of Origin Among PPM Panelists Confirm The Diversity of the Hispanic PPM Markets

Distribution of Country of Origin among Hispanic Panelists 6+ by Market

July 2009 Country of Origin Auxiliary Report

	Chicago		Los Angeles		New York		Miami - Ft. Lauderdale	
	Estimated Hispanic Pop	Installed Hispanic panelists						
Mexican	77.8	80.7	78.0	79.5	10.7	14.9	3.8	3.0
Puerto Rican	9.9	5.0	1.0	1.1	30.6	27.4	8.4	5.0
Cuban	1.1	1.0	0.9	0.6	3.4	2.4	46.2	49.3
Dominican	0.2	1.5	0.1	0.0	19.7	15.4	4.0	5.6
Central American	3.3	2.5	13.3	11.3	10.2	9.9	12.8	11.8
South American	3.6	6.0	2.6	1.6	19.2	19.3	19.7	20.8
All Other Hispanic	4.0	3.3	4.2	5.9	6.1	10.7	5.0	4.4

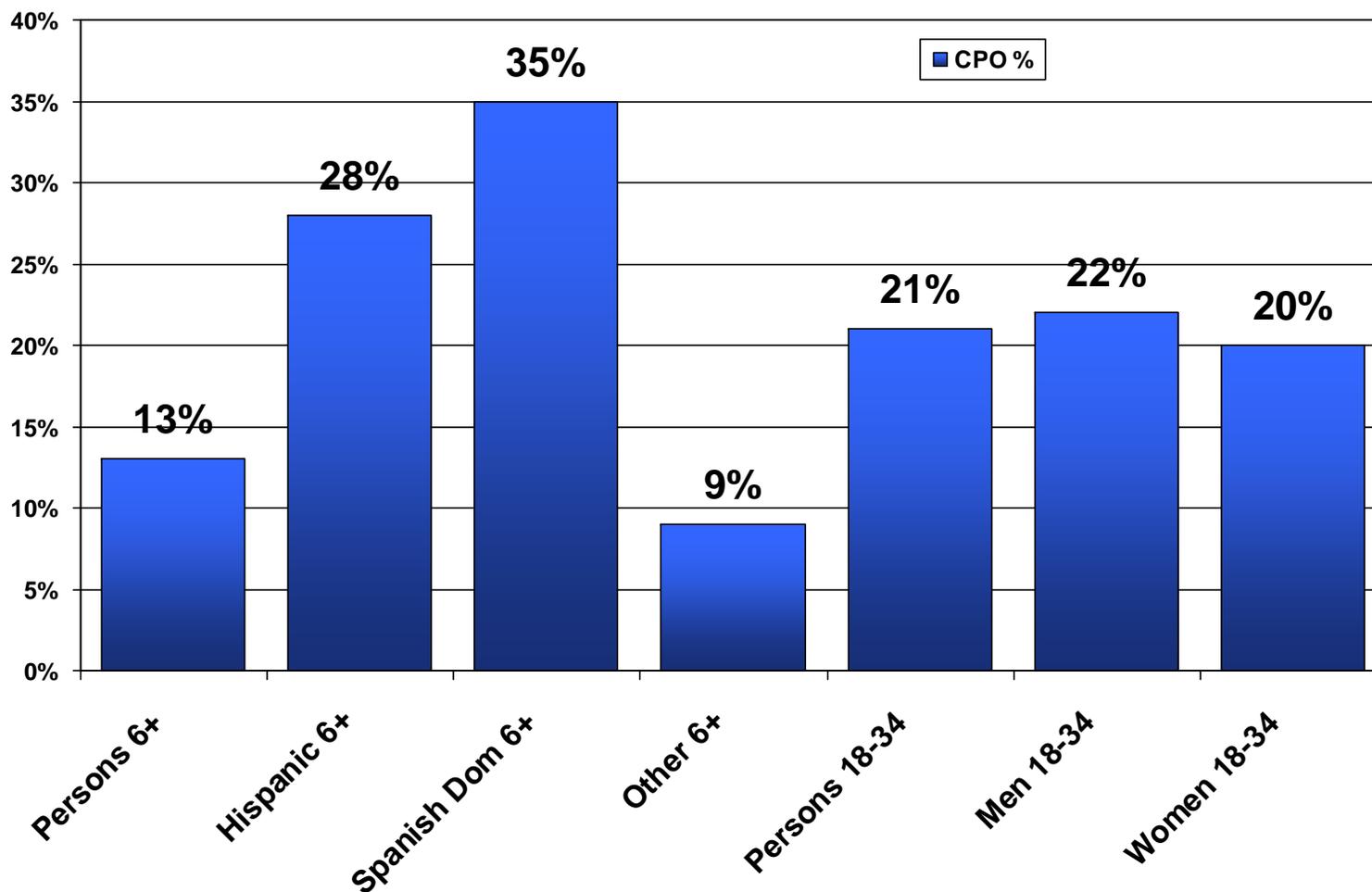
- **Hispanic country of origin is coming soon: Beginning with first quarter 2010, Arbitron plans to begin reporting the composition of Hispanic country of origin for its PPM panels**

**Population estimates are from the American Community Survey 2005-2007 Public Use Micro Data, Census Bureau, Washington D.C. Note: Distribution of installed panelists is based upon panelists in households that completed interview.*



35% of Spanish-Dominant Panelists in New York are Cell-Only

Ethnic groups and young demos expected to benefit most by increases in cell phone-only sample



The percentage of cell phone-only homes is scheduled to rise again in 2010!



Cell-Phone-Only Sampling Increases

- » Plan to increase Persons 6+ In-Tab targets to:
 - Average of 10% by July 2009
 - Average of 15% by year-end 2009
 - Average of 20% by year-end 2010

NEW

- » *Address-based sample frame introduced for cell-phone-only recruiting in all markets*



Arbitron PPM™ System:

From Left: Household Collector, Cellular Modem, Docking Station/Recharger and Meter.



More Spanish Language Radio Success in PPM



“PPM is Killing Hispanic Radio?”

Then why have the number of Spanish-Language Stations *GROWN* in PPM Markets?

Stations Switching to Spanish Language Formats in PPM Markets:

- 1) Los Angeles KDLD-FM (Alt Rock to Regional Mexican) January 2009
- 2) Dallas KMVK-FM (Rhythmic AC to Spanish Hot AC) February 2009
- 3) Houston KPTY-FM (Rhythmic CHR to Regional Mexican) March 2009
- 4) Los Angeles KMVN-FM (Rhythmic AC to Spanish Adult Contemp.) April 2009
- 5) Chicago WNUA-FM (Smooth Jazz to Spanish Contemp.) May 2009

Stations Dropping Spanish Language Formats in PPM Markets:

- 1) Atlanta WWVA-FM (Spanish CHR to Rhythmic CHR) October 2009

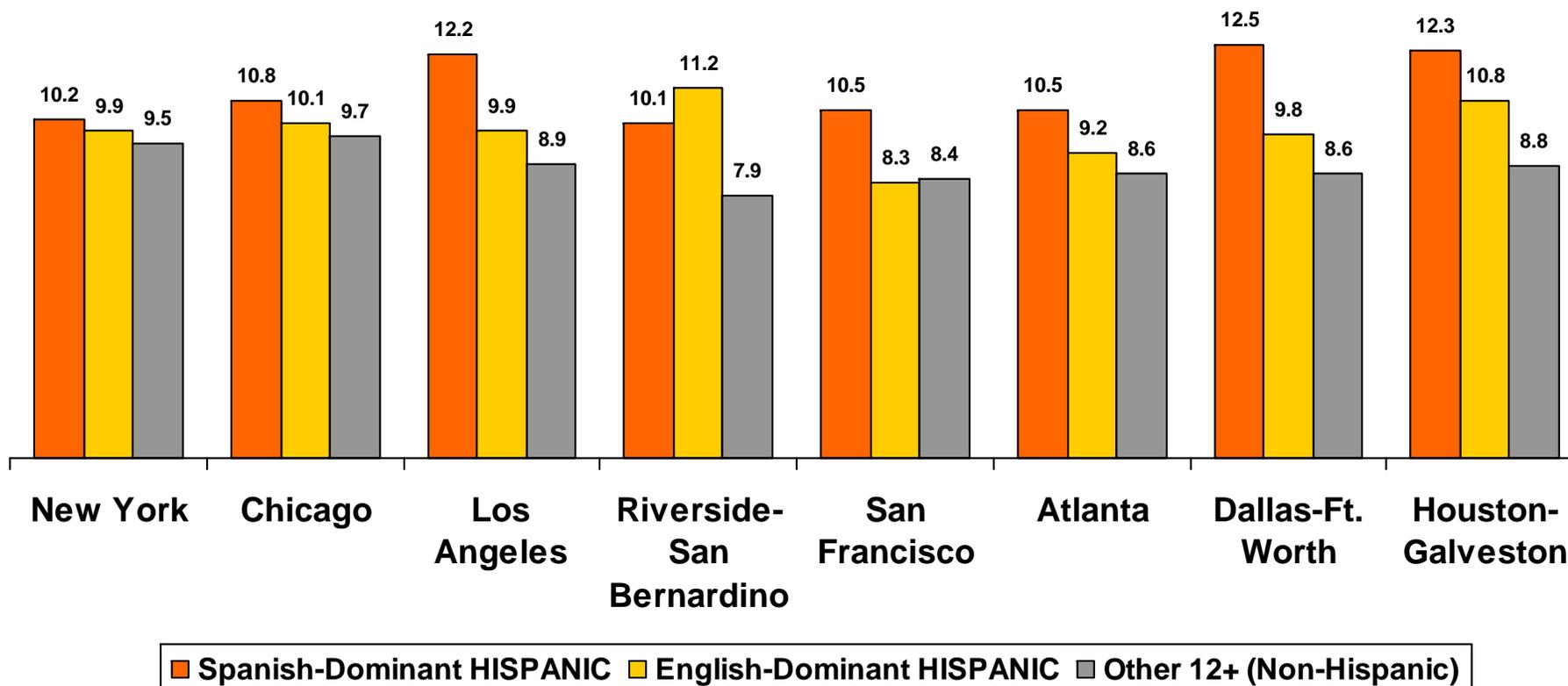
* This chart does not include station format flips between general market formats. The chart was compiled using external sources and Arbitron does not represent that the chart is comprehensive or accurate. Arbitron does not have information regarding the reason for the format flips.





Even in the PPM system, Hispanic Listening Exceeds General Market Levels

Total Market AQH Rating (Persons 12+)



Source: PPM; New York, Chicago, Los Angeles, Riverside-San Bernardino, San Francisco, Atlanta, Dallas and Houston-Galveston Metros; November 2009; Mon-Sun 6AM-Mid; Market Totals; AQH Rating; P12+





More PPM Success Stories for Spanish Language Radio in the Newest Markets

These stations have higher ratings in PPM when all others are down

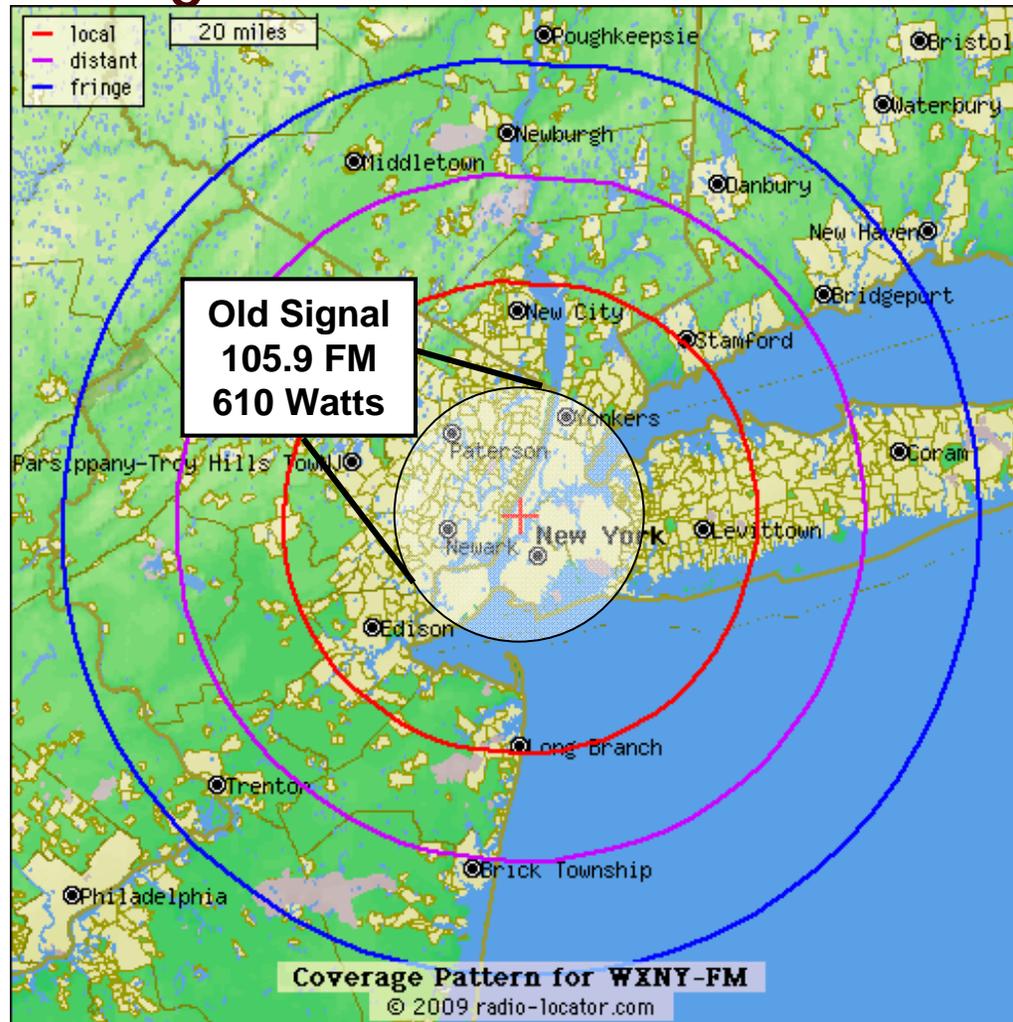
- Miami WMGE-FM (Spanish Contemp.) - #6 in PPM (was #19 in Diary)
- Las Vegas KWID-FM (Spanish Adult Hits) - #3 in PPM (was #18 in Diary)
- Las Vegas KQRT-FM (Mexican Regional) - #8 in PPM (was #11 in Diary)
- Sacramento KXSE-FM (Spanish Adult Hits) - #14 in PPM (was #19 in Diary)
- San Antonio KLEY-FM (Mexican Regional) - #13 in PPM (was #23 in Diary)

There are many more examples of Spanish Language stations doing well in PPM markets ... just ask us!

*12+ Persons, Mon-Sun, 6a-Mid, PPM Data, November 2009



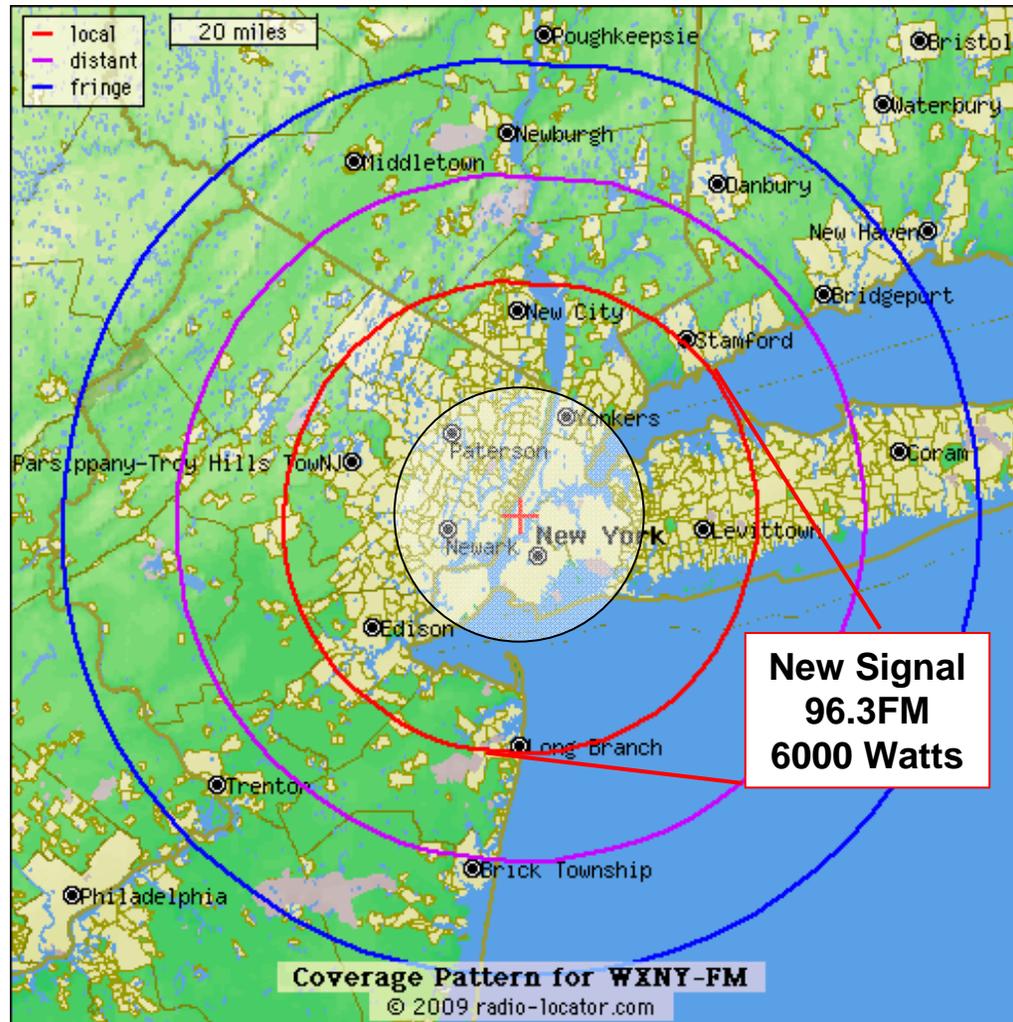
Spanish Tropical "La X" New York Moves from Weaker Signal at 105.9 FM...



Source: radio-locator.com



... to a Stronger Signal at 96.3 FM with Spanish Contemporary Format

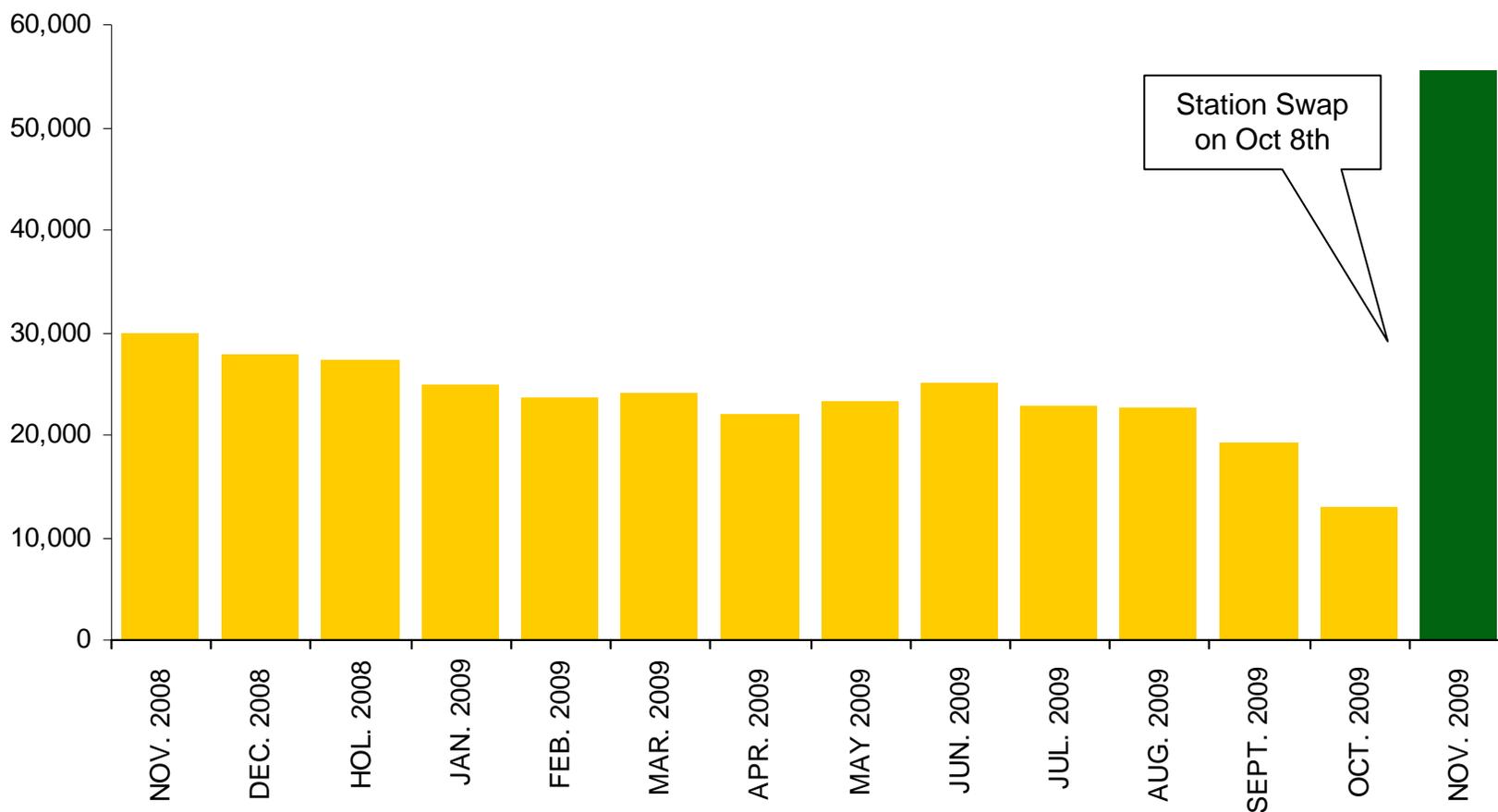


Source: radio-locator.com



Univision's "La X" Surges in PPM Data with New Signal on 96.3FM

Univision moves from 105.9 to 96.3 in a station swap with WQXR



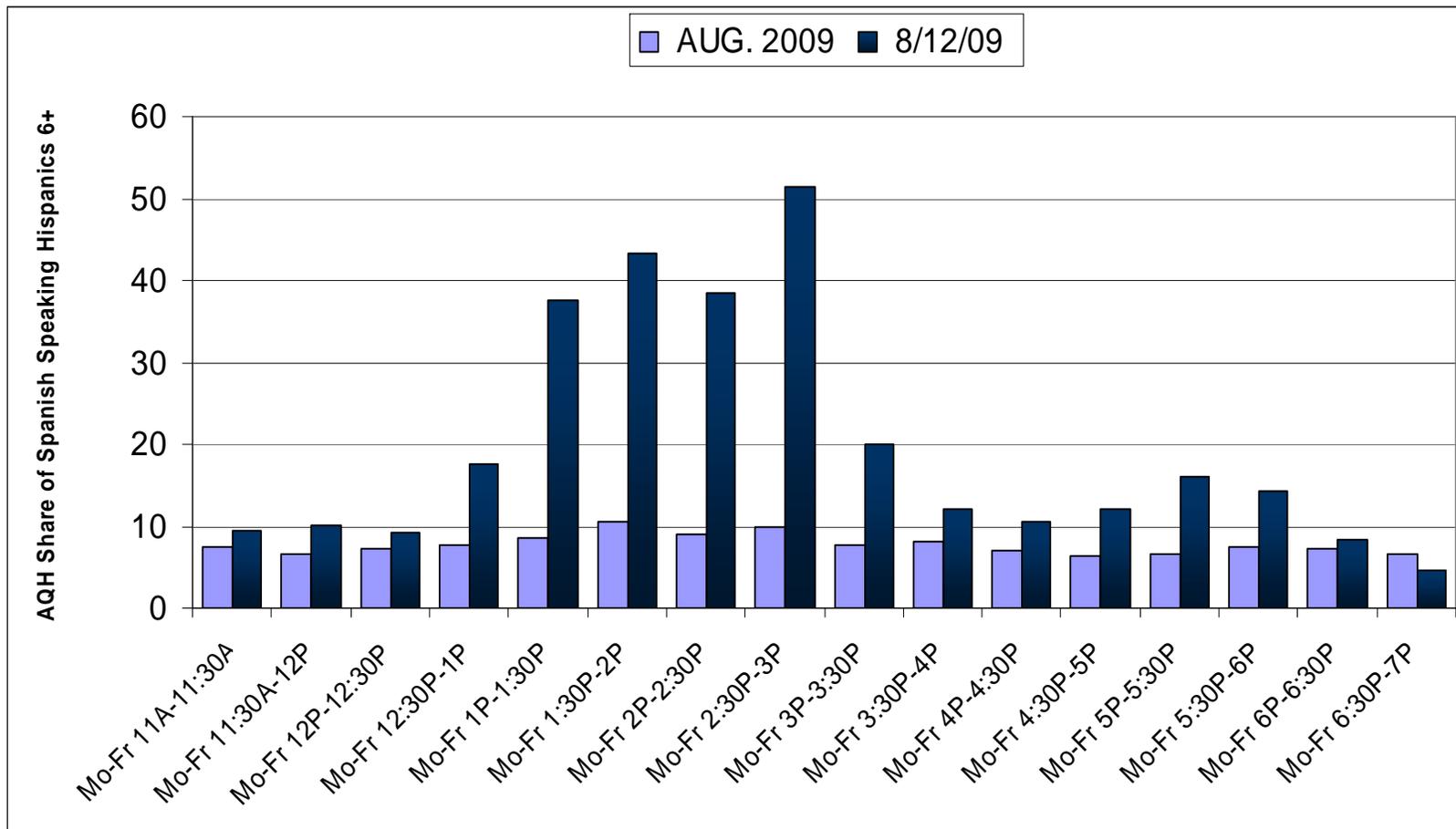
PPM, New York Metro, Mon-Sun 6am-12Mid, Adults 12+, AQH Persons on WCAA-FM (WXNY-FM in Nov 09)





Soccer Delivers a 50-Share in L.A. for the Mexico vs. USA Match on August 12th

KLYY-FM & KDLD-FM in Los Angeles / AQH Share for Hispanic 6+ (Spanish Dominant)



Los Angeles Metro, PPM, August 09, AQH Share for Spanish Speaking Hispanics on KLYY-FM & KDLD-FM / M-F 11a-7p vs Wednesday Aug 12, 2009





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Get the Latest PPM Information Each Month with the PPM Client Update

The screenshot shows the Arbitron website interface. At the top left is the Arbitron logo. To its right are navigation links: investors, newsroom, about Arbitron, careers, events, training & support, who to call, site index, and home. Below these is a search bar with the text "search for:" and a "go" button. The date "Friday, December 18th, 2009" is displayed. A vertical navigation menu on the left includes: PPM HOME, PPM MARKETS & SURVEY INFORMATION, PPM RADIO RATINGS SERVICE, PPM SOFTWARE, TRAINING & SUPPORT, OPPORTUNITIES FOR TV, and WHO TO CONTACT. The main content area features a purple header for "The Portable People Meter NEXT GENERATION ELECTRONIC RATINGS™". Below this is a featured article titled "Access the Latest Information from the December PPM Client Update" dated 12.7.09, with a "more news..." link. A "Featured" section titled "DMA Estimates For PPM Markets" includes a map of the United States and text explaining that Arbitron now produces radio DMA estimates in its PPM markets, with a link to "this PDF". On the right, a "PPM Markets" sidebar lists: Baltimore, Denver-Boulder, Pittsburgh, PA, St. Louis, and Tampa-St. Petersburg-Clearwater, with a "more markets..." link. A red circle highlights a "Monthly Updates" sidebar containing links for "Latest Monthly PPM Client Update" and "PPM Clients: Opt-In to Receive PPM Updates".

- Live via Web
 - » No Travel
 - » No Cost
- Monthly Presentations
 - » Planned for the first Monday after each PPM data release
- One Hour Session
 - » 2p-3p ET
 - » 1p-2p CT
 - » Noon-1p MT
 - » 11a-Noon PT





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Thank you!

For more information, please contact:

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