

Long Live Rock

Is PPM The Key To The Rock Revival?

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ARBITRON

Agenda

- Just how well are Rock based formats doing in PPM?
 - » Rank positions
 - » PPM Vs. diary comparisons
- Why is Rock thriving in Houston and Philadelphia
 - » Employment
 - » Income
 - » Heavy diaries (100+ quarter-hours to one station)
- A look back at top Rock stations in diary markets (2004 Jacobs Summit presentation)
 - » What can we hypothesize about Rock in markets yet to go PPM



Just How Well Is Rock Doing In PPM Markets?

Rocks Ranking In PPM, Houston Men 18+

Outlet	Format	AQH Persons
KKRW-FM	Classic Rock	16,300
KTBZ-FM	Alternative	15,000
KLTN-FM	Mexican Regional	13,500
KOVE-FM	Spanish Adult Hits	10,700
KODA-FM	Adult Contemporary	9,900
KMJQ-FM	Urban Adult Contemporary	9,800
KHMX-FM	Hot Adult Contemporary	9,800
KILT-FM	Country	9,500
KTRH-AM	News Talk Information	9,200
KBXX-FM	Rhythmic Contemporary Hit Radio	9,100

Source: Arbitron Houston PPM August 2007 Men 18+, M-S 6a-12m

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Rocks Ranking In PPM, Houston Persons 18-34

Outlet	Format	AQH Persons
KTBZ-FM	Alternative	11,700
KLTN-FM	Mexican Regional	11,400
KBXX-FM	Rhythmic Contemporary Hit Radio	9,900
KLOL-FM	Spanish Contemporary	9,700
KRBE-FM	Pop Contemporary Hit Radio	9,700
KOVE-FM	Spanish Adult Hits	7,700
KHMX-FM	Hot Adult Contemporary	6,800
KQQK-FM	Spanish Contemporary	6,400
KPTY-FM	Rhythmic Contemporary Hit Radio	5,800
KILT-FM	Country	5,800

Source: Arbitron Houston PPM August 2007, M-S 6a-12m

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Rocks Ranking In PPM, Houston Persons 25-54

Outlet	Format	AQH Persons
KKRW-FM	Classic Rock	17,500
KODA-FM	Adult Contemporary	15,200
KTBZ-FM	Alternative	14,800
KMJQ-FM	Urban Adult Contemporary	13,600
KOVE-FM	Spanish Adult Hits	13,300
KHMX-FM	Hot Adult Contemporary	12,600
KLTN-FM	Mexican Regional	12,600
KRBE-FM	Pop Contemporary Hit Radio	11,400
KKBQ-FM	Country	11,300
KLOL-FM	Spanish Contemporary	10,800

Source: Arbitron Houston PPM August 2007, M-S 6a-12m

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Rocks Ranking In PPM, Philadelphia Men 18+

Outlet	Format	AQH Persons
WMGK-FM	Classic Rock	16,600
KYW-AM	All News	16,500
WBEB-FM	Adult Contemporary	15,400
WMMR-FM	Album Oriented Rock	14,400
WRFF-FM	Alternative	12,700
WOGL-FM	Classic Hits	12,700
WPHT-AM	Talk/Personality	11,700
WIP-AM	All Sports	11,200
WXTU-FM	Country	9,700
WDAS-FM	Urban Adult Contemporary	9,700

Source: Arbitron Philadelphia PPM August 2007 Men 18+, M-S 6a-12m

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Rocks Ranking In PPM, Philadelphia Persons 18-34

Outlet	Format	AQH Persons
WRFF-FM	Alternative	13,100
WMMR-FM	Album Oriented Rock	9,400
WBEB-FM	Adult Contemporary	8,900
WRDW-FM	Rhythmic Contemporary Hit Radio	7,600
WIOQ-FM	Pop Contemporary Hit Radio	6,200
WPHI-FM	Rhythmic Contemporary Hit Radio	6,100
WUSL-FM	Urban Contemporary	5,600
WBEN-FM	Adult Hits	5,200
WMGK-FM	Classic Rock	5,100
WXTU-FM	Country	5,000

Source: Arbitron Philadelphia PPM August 2007, M-S 6a-12m

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Rocks Ranking In PPM, Philadelphia Persons 25-54

Outlet	Format	AQH Persons
WBEB-FM	Adult Contemporary	21,500
WMGK-FM	Classic Rock	16,700
WDAS-FM	Urban Adult Contemporary	16,700
WMMR-FM	Album Oriented Rock	16,200
WRFF-FM	Alternative	13,700
WXTU-FM	Country	13,100
WOGL-FM	Classic Hits	12,200
KYW-AM	All News	11,700
WBEN-FM	Adult Hits	11,600
WIP-AM	All Sports	8,100

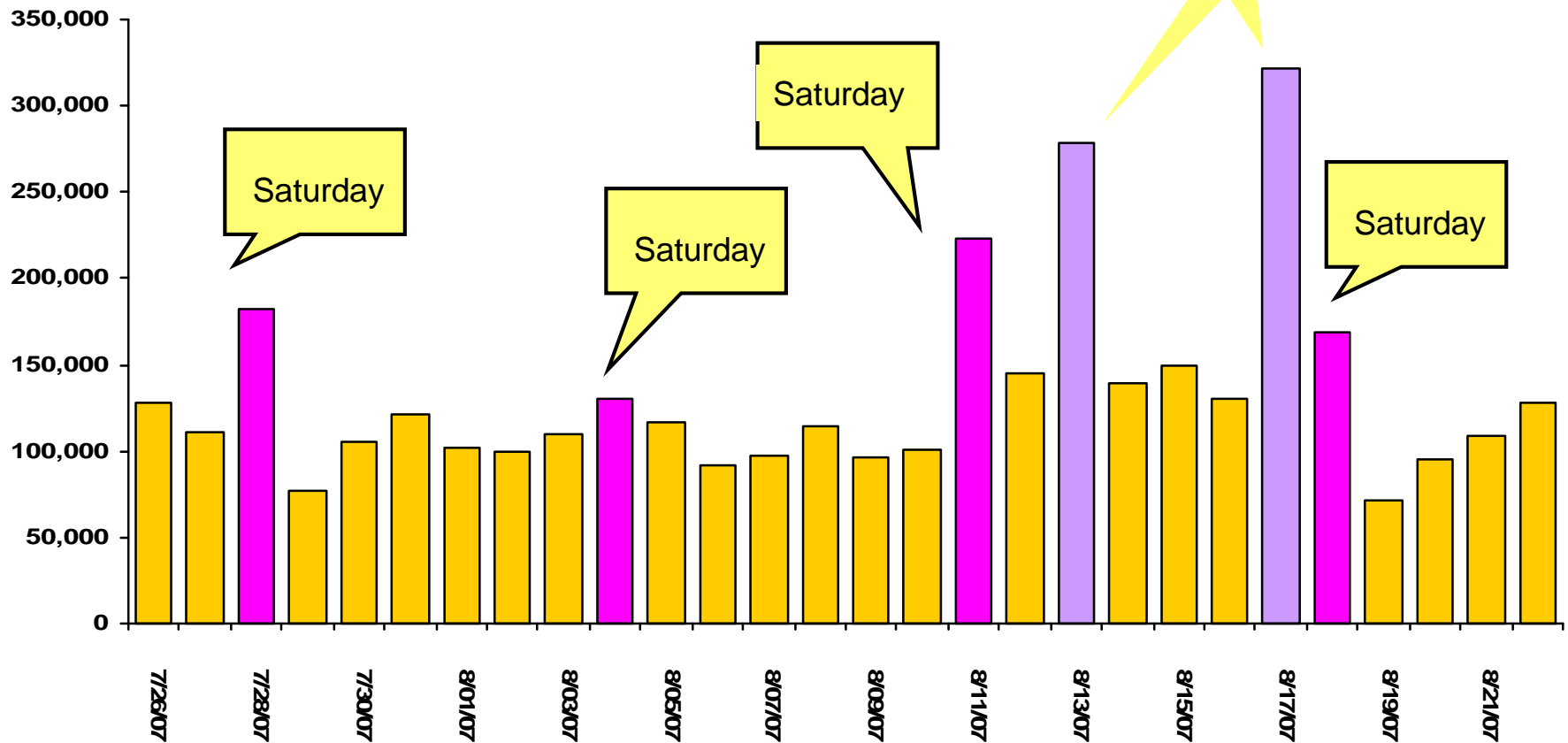
Source: Arbitron Philadelphia PPM August 2007, M-S 6a-12m

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WYSP-FM Rock Weekends

Persons 6+ cume





Rock Ratings Comparison *PPM Vs. Diary*

Rock Ratings Comparison Diary Vs. PPM

Houston PPM - Radio

Fall 2005 PPM vs. Fall 2005 Diary

Persons 12+

Houston Metro

M-Su 6A-12Mid

Outlet	Format	PPM	Diary
		AQH	AQH
KIOL-FM	Album Oriented Rock	0.2	0.2
KKRW-FM	Classic Rock	0.5	0.4
KTBZ-FM	Alternative	0.5	0.5

Share of listening has gone up but ratings have stayed roughly the same

Houston PPM - Radio

Fall 2005 PPM vs. Fall 2005 Diary

Persons 18-34

Houston Metro

M-Su 6A-12Mid

Outlet	Format	PPM	Diary
		AQH	AQH
KIOL-FM	Album Oriented Rock	0.3	0.3
KKRW-FM	Classic Rock	0.5	0.4
KTBZ-FM	Alternative	1.0	0.9

Rock Ratings Comparison Diary Vs. PPM

Houston PPM - Radio

Fall 2005 PPM vs. Fall 2005 Diary

Persons 25-54

Houston Metro

M-Su 6A-12Mid

<u>Outlet</u>	<u>Format</u>
KIOL-FM	Album Oriented Rock
KKRW-FM	Classic Rock
KTBZ-FM	Alternative

PPM Diary

<u>AQH</u>	<u>AQH</u>
0.3	0.3
0.6	0.6
0.6	0.5

Rock Ratings Comparison Diary Vs. PPM

Philadelphia PPM - Radio

11/30/06-1/10/07 PPM vs. Fall 2006 Diary

Persons 12+

Philadelphia Metro

M-Su 6A-12Mid

<u>Outlet</u>	<u>Format</u>	PPM	Diary
		<u>AQH</u>	<u>AQH</u>
WMGK-FM	Classic Rock	0.4	0.5
WMMR-FM	Album Oriented Rock	0.6	0.6

Philadelphia PPM - Radio

11/30/06-1/10/07 PPM vs. Fall 2006 Diary

Persons 18-34

Philadelphia Metro

M-Su 6A-12Mid

<u>Outlet</u>	<u>Format</u>	PPM	Diary
		<u>AQH</u>	<u>AQH</u>
WMGK-FM	Classic Rock	0.4	0.4
WMMR-FM	Album Oriented Rock	1.1	1.1

Rock Ratings Comparison Diary Vs. PPM

Philadelphia PPM - Radio

11/30/06-1/10/07 PPM vs. Fall 2006 Diary

Persons 25-54

Philadelphia Metro

M-Su 6A-12Mid

<u>Outlet</u>	<u>Format</u>
WMGK-FM	Classic Rock
WMMR-FM	Album Oriented Rock

PPM

Diary

AQH

0.5

AQH

0.8

0.9

0.9



How Did Rock Maintain Diary Ratings?

Rolling Stone Article

Is it the sample?

R&R

Rock Radio Bounces Back

Ratings are up, new stations are on the air - what's driving rock's return?
By Steve Knopper

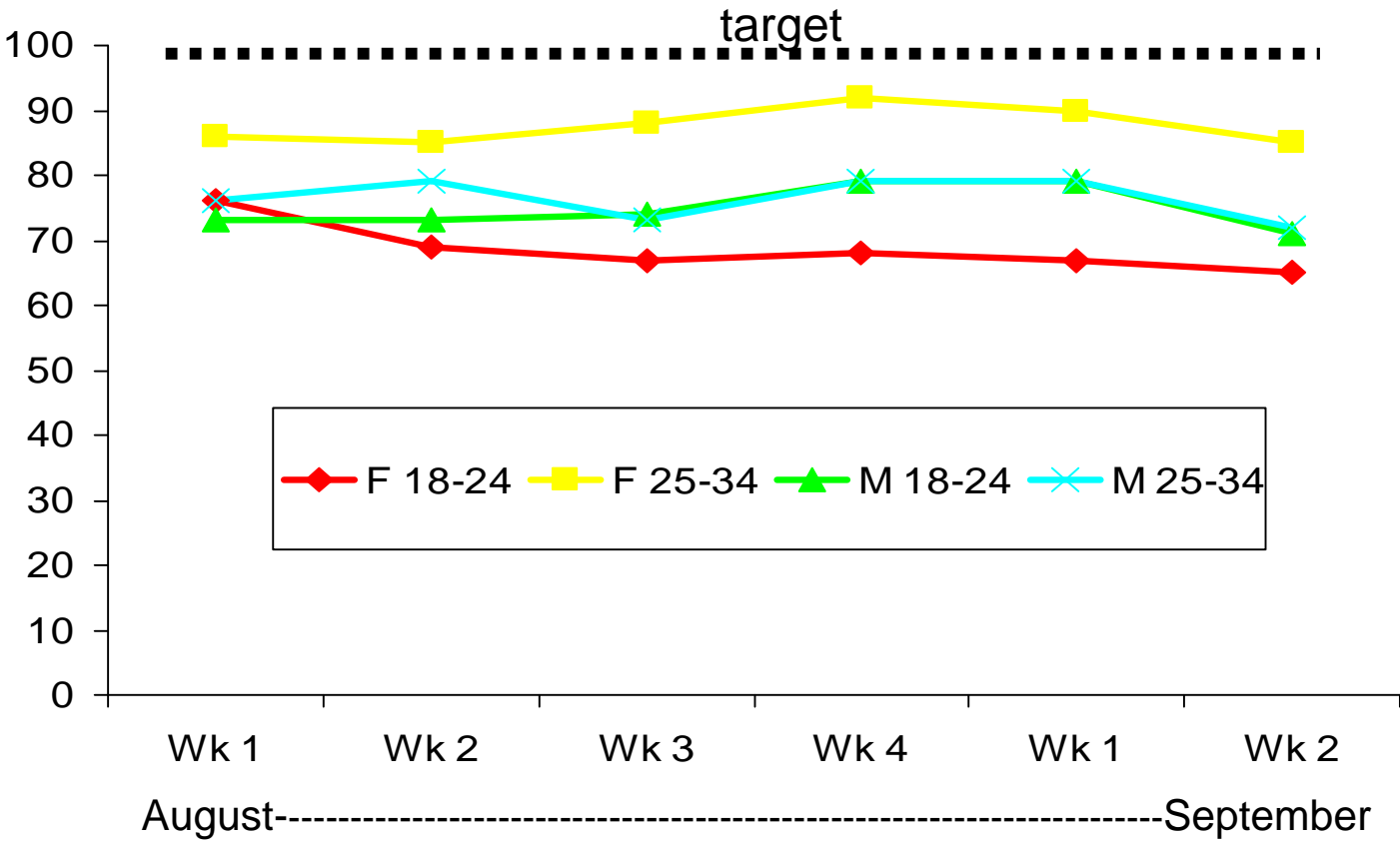
BILL WESTON, PROGRAM director for the Philadelphia hard-rock station WMMR, had to rub his eyes when he saw the ratings in April. His once-popular station, which plays Aerosmith, Velvet Revolver and "everything that rocks," was languishing at Number Six, but suddenly it jumped to Number Three - with an astonishing 89.4 percent more listeners. And even better, the station's rival, adult-



ROCK ON WMMR DJ Pierre Robert in Philadelphia. His station's ratings have surged.

But many rock programmers can't hide their enthusiasm after viewing the ratings bursts in Philadelphia and Houston. "It's really a shot in the arm," says Doug Podell, program manager for Detroit's hard-rock station WRIF. "[Under the old system] Arbitron couldn't capture the eighteen-to-thirty-five-year-old male adult. They were very, very elusive. They weren't very passionate about filling out the diary. Now you can get 'em."

Houston DDI 18-34 Years-Old August and September



Ranking of Demos by Rating Points PPM Houston

Demographic	M-S 6a-12m AQH Ratings
Men 35-44	14.5
Men 44-54	13.1
Men 25-34	11.9
Men 18-24	11.4
Women 35-44	9.7
Women 25-34	8.9
Women 55-64	8.8
Men 55-64	8.7
Women 45-54	8.2
Women 18-24	7.8

PPM August 2007 Persons 6+

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Ranking of Demos by Rating Points PPM Philadelphia

Demographic	M-S 6a-12m AQH Rating
Men 55-64	13.4
Men 35-44	12.5
Men 44-54	12.1
Women 18-24	11.3
Women 45-54	11.3
Men 25-34	10.9
Women 55-64	10
Women 35-44	8.6
Men 18-24	8.2
Women 25-34	8.2

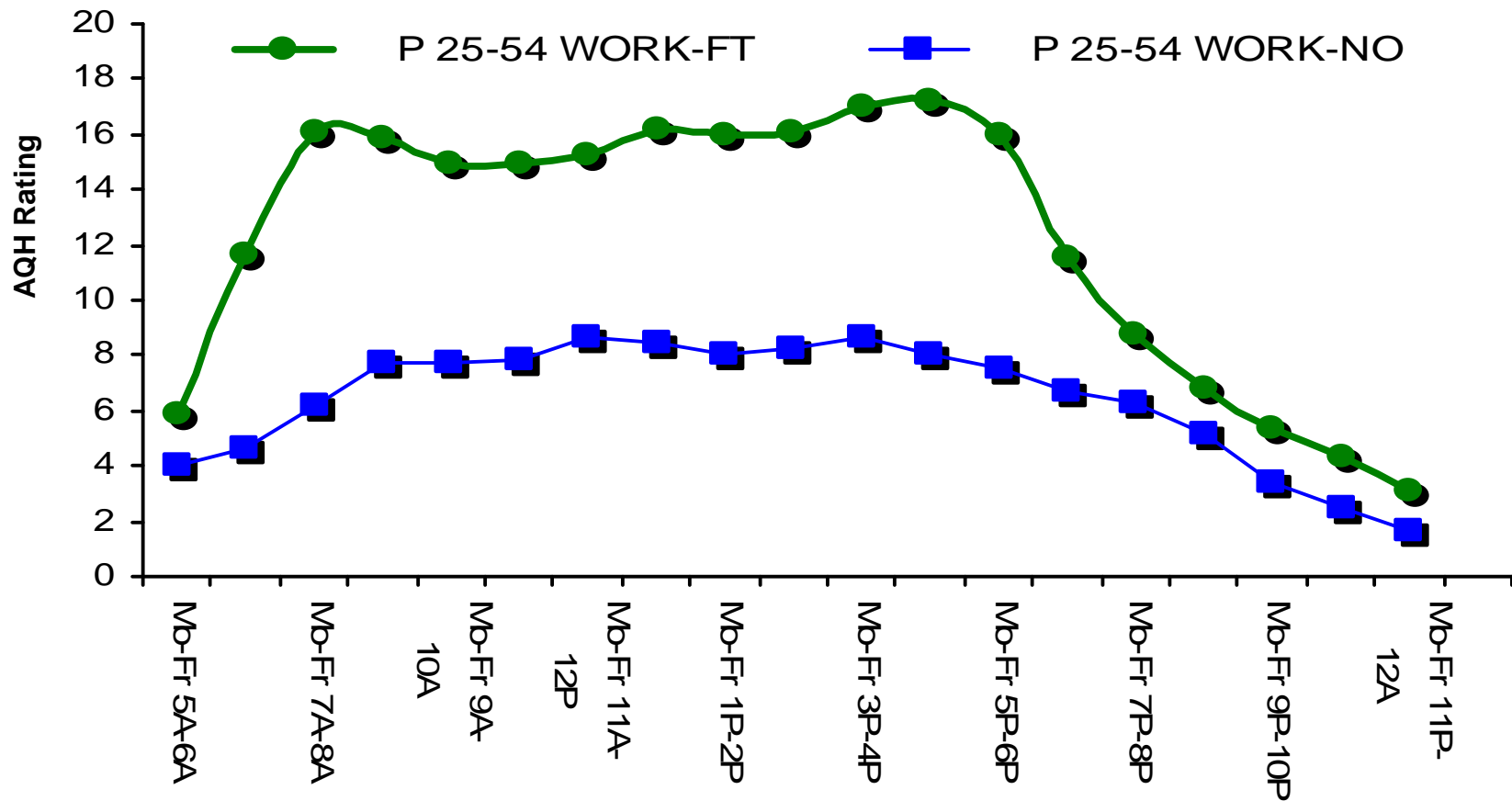
PPM August 2007 Persons 6+

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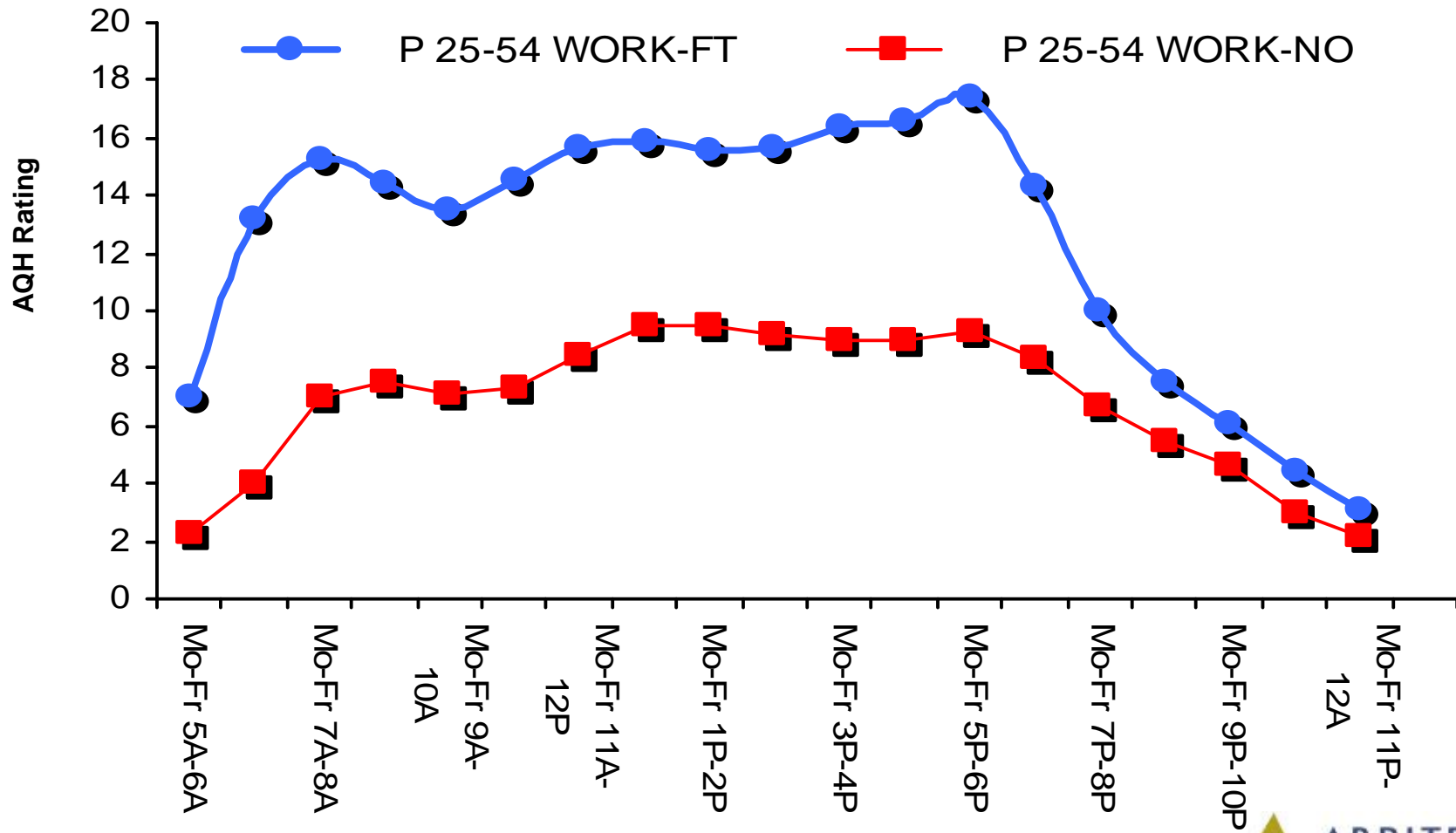


Significantly Higher Ratings For Those Employed Full Time During The Work Day

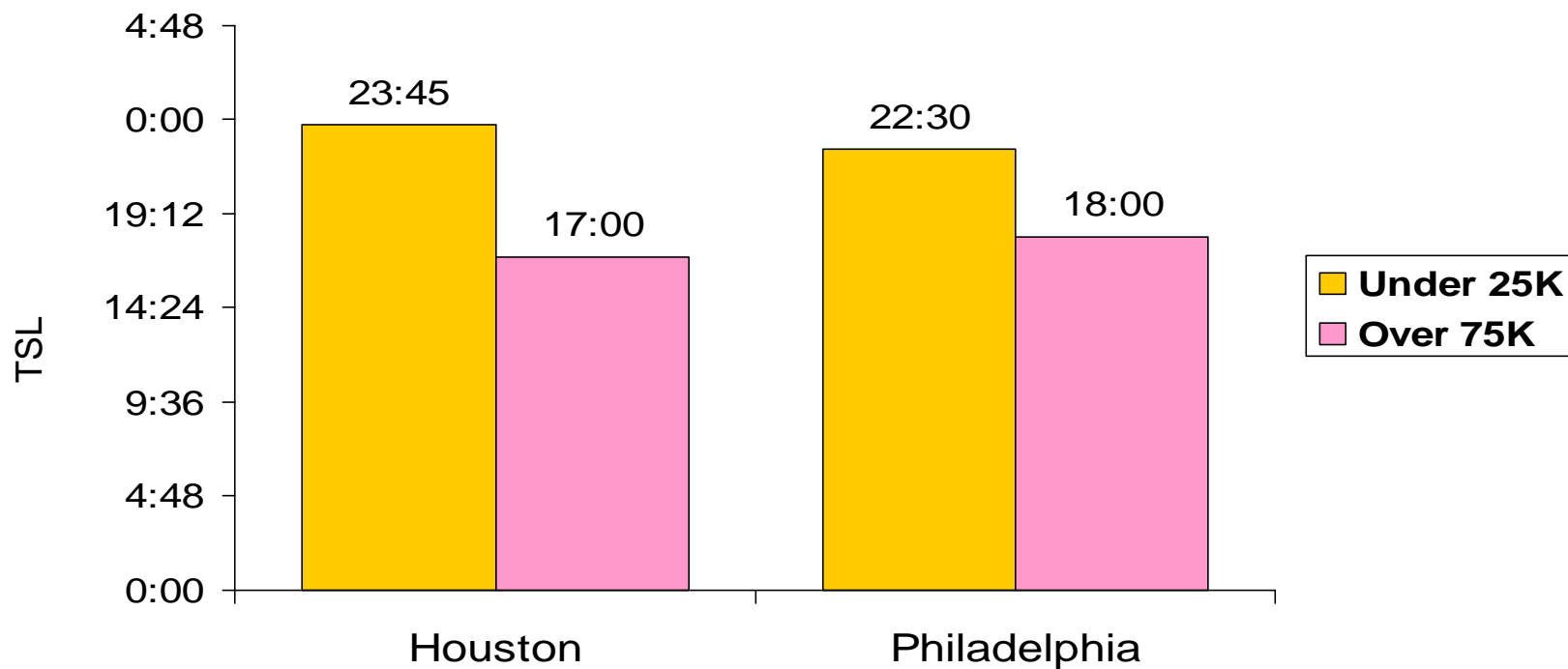
Philadelphia Persons 25-54
Hour-by-Hour AQH Rating by Employment Status



Houston, Persons 25-54 Hour-by-Hour AQH Rating by Employment Status



In The Diary Service Lower Income HHs Generate Higher TSL



Persons 18+ M-S 6a-12m last 4 diary surveys

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Income/Employment Ratings Matrix

Monday-Friday 6a-7p

	Houston 18+		Philadelphia 18+	
	Full Time	Not	Full Time	Not
	Employed	Employed	Employed	Employed
Under 25K	16.7	8.9	15.4	8.0
25K-50K	16.8	8.2	17.9	9.5
50K-75K	14.9	9.8	19.2	10.6
75K+	16.5	8.6	14.5	10.3

PPM data based on August 2007

Rock Stations Tend To Have A Lower Percentage Of Heavy Diaries

<i>Station</i>	<i>% of Cume over 100 Quarter-Hours</i>
KHPT	2.8
KTBZ	4.1
KKRW	4.4
WBEN	5
WMGK	5.9
WMMR	6.5
KLTN-FM	10.1
KMJQ	10.7
WDAS	13

Heavy Diary TSL Explains Nearly All the PPM vs. Diary AQH Difference

PPM and Diary AQH PUR* Ratings
with 25+ Hours Station Credit Removed

	Diary	PPM	Index
Total Persons 12+	9.0	8.7	97
Black 12+	11.2	9.8	88
Other 12+	8.3	8.5	102
Hispanic 12+	10.8	7.0	65

**Persons Using Radio*

Philadelphia Metro, June 2007 PPM vs. Fall 2006 Diary, Mon-Sun 6AM-Mid, Persons 12+
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What Makes a Rock Station Number One?

2004 Jacobs/R&R Study



Ranking of Demos by Rating Points Diary Markets 2004

Demographic	Winter '04
Men 45-49	16.9
Men 35-44	16.7
Men 50-54	16.4
Men 25-34	16.1
Men 55-64	16.1
Women 45-49	15.3
Women 50-54	15.3
Women 55-64	14.9
Women 35+	14.9
Women 25-34	14.6
Men 65+	14.3
Women 65+	14.3
Women 18-24	13.6
Men 18-24	13.5
Girls 12-17	11.0
Boys 12-17	8.1

Key Rock Demos
on Top

2004 Jacobs/R&R Study

Source: Arbitron Format Trends Report, Total U.S.*, All Locations, FA98-WI04, Mon-Sun 6AM-Mid, Persons 12+
*Based on all continuously measured Metros



Number One Rock Stations

Persons 18-49

Station	Specific Format	Metro
KQRS-FM	Classic Rock	Minneapolis-St. Paul, MN
WNCX-FM	Classic Rock	Cleveland, OH
WFYV-FM	Classic Rock	Jacksonville, FL
WGRF-FM	Classic Rock	Buffalo-Niagara Falls, NY
WEZX-FM	Classic Rock	Wilkes Barre-Scranton, PA
KGGO-FM	Classic Rock	Des Moines, IA
WIBA-FM	Classic Rock	Madison, WI
KROQ-FM	Modern Rock	Los Angeles, CA
WRIF-FM	Rock	Detroit, MI
KSHE-FM	Rock	St. Louis, MO
WDVE-FM	Rock	Pittsburgh, PA
WEBN-FM	Rock	Cincinnati, OH
WLZR-FM	Rock	Milwaukee-Racine, WI
WHJY-FM	Rock	Providence-Warwick-Pawtucket, RI
WFBQ-FM	Rock	Indianapolis, IN
WCCC-FM	Rock	Hartford-New Britain-Middletown, CT
KMOD-FM	Rock	Tulsa, OK
KRZR-FM	Rock	Fresno, CA
WONE-FM	Rock	Akron, OH
KLAQ-FM	Rock	El Paso, TX
KHTQ-FM	Rock	Spokane, WA

What do these stations have in common?

2004 Jacobs/R&R Study

Number One Rock Stations

Strength of the Persons 25-44 Cell

Metro	Percent	Index*
Los Angeles, CA	38.5%	114
Minneapolis-St. Paul, MN	37.1%	110
Indianapolis, IN	36.3%	108
El Paso, TX	35.1%	104
Madison, WI	35.0%	104
Fresno, CA	34.9%	104
Jacksonville, FL	34.6%	102
Detroit, MI	34.5%	102
Des Moines, IA	34.4%	102
Cincinnati, OH	34.0%	101
Milwaukee-Racine, WI	33.4%	99
St. Louis, MO	32.9%	98
Tulsa, OK	32.9%	97
Providence-Warwick-Pawtucket, RI	32.8%	97
Hartford-New Britain-Middletown, CT	32.2%	96
Akron, OH	32.1%	95
Spokane, WA	31.9%	95
Cleveland, OH	31.7%	94
Buffalo-Niagara Falls, NY	30.6%	91
Pittsburgh, PA	29.5%	87
Wilkes Barre-Scranton, PA	29.0%	86

Not all top Rock markets have strong P25-44 cells

U.S. Average = 100

2004 Jacobs/R&R Study

* Metro vs. total U.S. population

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Number One Rock Stations

Combined Black and Hispanic Populations, Persons 25-44

Metro	Percent	Index
El Paso, TX	85.1%	213
Fresno, CA	57.4%	144
Los Angeles, CA	55.2%	138
Jacksonville, FL	27.9%	70
Detroit, MI	26.1%	65
Hartford-New Britain-Middletown, CT	24.2%	61
Cleveland, OH	24.1%	60
Milwaukee-Racine, WI	23.9%	60
St. Louis, MO	21.0%	53
Indianapolis, IN	19.0%	48
Buffalo-Niagara Falls, NY	16.5%	41
Tulsa, OK	16.1%	40
Providence-Warwick-Pawtucket, RI	13.8%	34
Cincinnati, OH	13.7%	34
Akron, OH	12.9%	32
Minneapolis-St. Paul, MN	11.2%	28
Pittsburgh, PA	9.8%	24
Des Moines, IA	9.4%	24
Madison, WI	8.9%	22
Wilkes Barre-Scranton, PA	6.7%	17
Spokane, WA	5.5%	14

} Percent of Metro stations that are "Spanish" format

El Paso: 41%

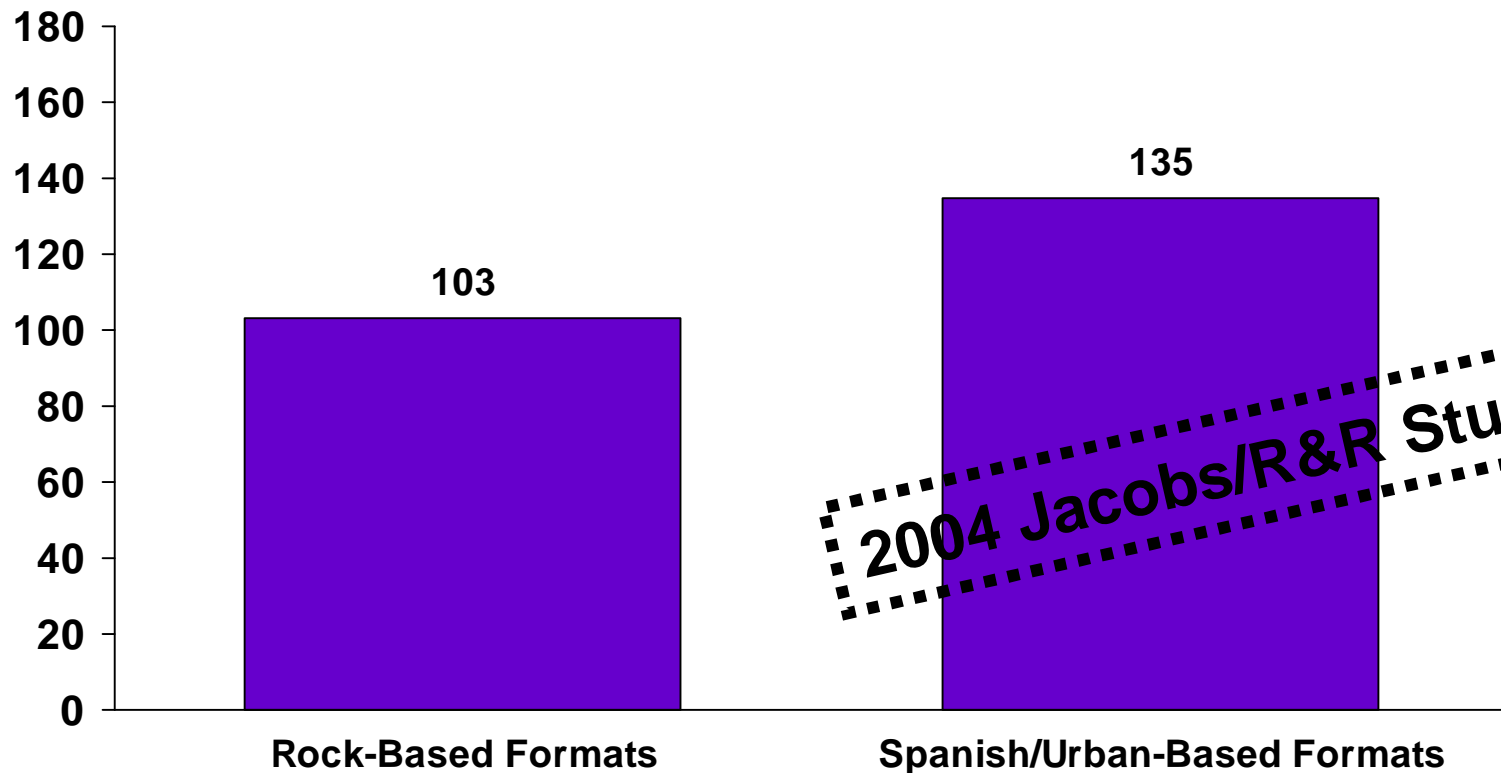
Fresno: 46%

Los Angeles: 34%

2004 Jacobs/R&R Study

Spanish and Urban Stations Now Occupy Top Rank Positions

Number of Top Five Stations by Format, Top 100 Markets



Source: Arbitron Format Trends Report, Total U.S.*, All Locations, FA98-WI04, Mon-Sun 6AM-Mid, Persons 18-49
*Based on all continuously measured Metros

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Summary

- In the major buying demos Rock stations sit on top of the ranker in PPM markets.
- Rocks success (thus far) is more the result of a shift around the format and not the growth of the format (in ratings)
- Rocks core audience, male and employed full-time is very important for PPM success.
- Rock on a whole doesn't appear to rely heavily on lower income or heavy listening diaries in the diary world which is to the formats advantage when the switch to PPM is made.
- Urban and Hispanic stations in the diary world occupy a number of the top positions in key demos for Rock. Any change in those formats are likely to improve Rocks rank position.
- Past performance is no guarantee of future success in other markets

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