

PRESENTATION  
TO  
BLACK BROADCASTERS GROUP

RADIO 1987 NAB CONVENTION  
ANAHEIM, CALIFORNIA

RHODY BOSLEY - V.P. RADIO SALES & MARKETING  
ALAN TOBKES - V.P. RADIO SALES DEVELOPMENT

**ARBITRON RATINGS**  
**RADIO**

## AGENDA

- 0 HISTORICAL PERSPECTIVE
- 0 CURRENT PROCEDURES
- 0 RESULTS
- 0 COMPETITIVE
- 0 FUTURE

**ARBITRON RATINGS  
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## HISTORICAL

PRIOR TO 1982 ARBITRON UTILIZED A TELEPHONE RETRIEVAL SYSTEM FOR MEASURING BLACK LISTENING.

AFTER SEVERAL YEARS OF TESTING ALTERNATIVE METHODOLOGIES ARBITRON INTRODUCED A DIFFERENTIAL SURVEY TREATMENT TECHNIQUE IN WINTER 1982 TO BE USED WITH ITS CURRENT DIARY.

## COUNCIL REACTIONS

WHILE UNDERSTANDING THE NEED FOR TELEPHONE RETRIEVAL, THE POSITION OF THE COUNCIL IS TO RECOMMEND AGAINST THE PRACTICE OF MIXING METHODOLOGIES WITHIN A SINGLE SURVEY. AS SUCH, EFFORTS SHOULD BE MADE TO IMPROVE THE CURRENT DIARY TECHNIQUE SO THAT IT CAN ONE DAY REPLACE THE TELEPHONE RETRIEVAL TECHNIQUE.

THE COUNCIL AGREED THAT TELEPHONE RETRIEVAL IS NECESSARY AT THIS POINT AND ENCOURAGED ARBITRON TO IMPROVE THE TECHNIQUE WHILE SEEKING A DIARY REPLACEMENT. IN THIS REGARD, THE COUNCIL WAS PLEASED WITH ARBITRON'S DECISION TO INCREASE THE NUMBER OF TELEPHONE RETRIEVAL CONTACTS BEGINNING WITH THE JANUARY 1979 SURVEY. (NOVEMBER 1978)

ARBITRON REVIEWED ITS MARKETING PLAN TO EFFECT THE IMPLEMENTATION OF DST-BLACK WITH THE WINTER 1982 SURVEY. ARBITRON MUST COMMUNICATE CLEARLY AND FULLY WITH A MARKETPLACE THAT MAY BE SOMEWHAT EMOTIONAL BASED ON INCOMPLETE INFORMATION OR UNDERSTANDING.

THE COUNCIL URGED ARBITRON TO CONTINUE ON ITS PROGRAM FOR DST IMPLEMENTATION AT THE EARLIEST POSSIBLE DATE. (DECEMBER 1980)

**ARBITRON RATINGS**  
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HISTORICAL  
(CONTINUED)

ARBITRON REVIEWED AGAIN WITH THE COUNCIL THE FIVE YEARS OF RESEARCH THAT HAS GONE INTO ITS DECISION TO IMPLEMENT DIFFERENTIAL SURVEY TREATMENT FOR THE BLACK POPULATION IN 1982. IN ADDITION, ARBITRON REVEALED ITS DECISION TO MAINTAIN HIGH DENSITY BLACK AREAS FOR THE FIRST FULL YEAR OF DIFFERENTIAL SURVEY TREATMENT. THIS DECISION, THEY BELIEVE, WILL ENABLE THE RESEARCH COMMUNITY TO BETTER TRACK THE NEW METHODOLOGY.

THE ARBITRON RADIO ADVISORY COUNCIL EXPRESSES SATISFACTION WITH ARBITRON'S DECISION TO KEEP HIGH DENSITY BLACK AREAS AS A GEOGRAPHIC CONTROL FOR THE FIRST FULL YEAR OF ARBITRON'S IMPLEMENTATION OF THE DIFFERENTIAL SURVEY TREATMENT TECHNIQUE.

HOWEVER, THE COUNCIL FEELS, ALONG WITH SEVERAL OTHER INDUSTRY GROUPS, NOTABLY THE RAB GOALS COMMITTEE, THAT IT IS PREMATURE FOR ARBITRON TO INCORPORATE DIFFERENTIAL SURVEY TREATMENT ON A NATIONWIDE BASIS.

RATHER, THE COUNCIL SUGGESTS ARBITRON ROLLOUT DIFFERENTIAL SURVEY TREATMENT IN SELECTED MARKETS - A PRECEDENT SET BY ARBITRON IN THE INTRODUCTION OF EXPANDED SAMPLE FRAME AND QUARTERLY MEASUREMENT.

PERHAPS THOSE MARKETS WITH ETHNIC CONTROLS WHICH RECEIVE A WINTER BOOK WOULD BE A GOOD TEST FOR 1982, THOSE TOP 50 MARKETS WITH ETHNIC CONTROLS IN 1983, AND ALL MARKETS BY 1984.

**ARBITRON RATINGS**  
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HISTORICAL  
(CONTINUED)

WHILE THE COUNCIL APPLAUDS ARBITRON'S EFFORTS TO BETTER REPORT ETHNIC LISTENING, BOTH BLACK AND HISPANIC, THE COUNCIL FEELS DIFFERENTIAL SURVEY TREATMENT, THOUGH IT SHOWS GREAT PROMISE, REQUIRES ADDITIONAL TESTING AND REFINEMENT BEFORE IT IS EMPLOYED ON A NATIONWIDE BASIS. (AUGUST 1981)

THE ARBITRON RADIO ADVISORY COUNCIL RE-AFFIRMS THE "SEATTLE RESOLUTION" OF AUGUST 1981, CONCERNING DST. (DECEMBER 1981)

THE ARBITRON RADIO ADVISORY COUNCIL URGES ARBITRON TO PROVIDE BOTH THE BRC RADIO COMMITTEE AND THE RAB GOALS COMMITTEE WITH THE TEST RESULTS NEEDED TO FULLY DETERMINE THE EFFECTIVE OF A \$5 PREMIUM IN HOUSEHOLDS WHERE THERE IS A BLACK MALE (18-34). THESE TESTS HAVE PREVIOUSLY BEEN DEFINED BY THE RAB GOALS COMMITTEE AND ARE ESSENTIAL IN MEASURING THE TOTAL EFFECTS OF DST. (MAY 1982)

THE ARBITRON RADIO ADVISORY COUNCIL RECOGNIZES THAT DST AMONG BLACKS WILL INCREASE RETURN RATES AND PRODUCE A MORE REPRESENTATIVE SAMPLING DISTRIBUTION. HOWEVER, ARBITRON'S ANALYSIS OF LISTENING CHANGES TO ALL MARKET RADIO STATIONS IN THE SPRING '82 PERIOD ONLY INCLUDED ONE MARKET. THE ARBITRON RADIO ADVISORY COUNCIL SUGGESTS FURTHER ANALYSIS BE DONE IN SEVERAL MARKETS OF VARIOUS SIZE. ADDITIONALLY, THE ARBITRON RADIO ADVISORY COUNCIL FEELS THAT LOWER PREMIUMS SHOULD BE FURTHER TESTED AS THERE IS CONSIDERABLE CONCERN AS TO THE INFLUENCE OF A \$5 PREMIUM ON LISTENING LEVELS. (AUGUST 1982)

**ARBITRON RATINGS**  
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HISTORICAL  
(CONTINUED)

THE ARBITRON RADIO ADVISORY COUNCIL RECOGNIZES THE FACT THAT BLACK DIFFERENTIAL SURVEY TREATMENT PRODUCES IMPROVED SAMPLING REPRESENTATION AMONG THAT SEGMENT OF THE POPULATION, BUT REMAINS CONCERNED OVER THE POSSIBLE EFFECT OF INCREASED PREMIUMS ON POTENTIAL LISTENING.

TEST RESULTS PRESENTED BY ARBITRON TO DATE DO NOT COMPLETELY DISPEL THIS NOTION; HOWEVER, THE TEST PROPOSED BY ARBITRON IN SPRING OF 1983 SHOULD YIELD ADDITIONAL INFORMATION WHICH IS NEEDED TO ASSESS THE EFFECTS OF INCREASED PREMIUMS BOTH AT THE CURRENT AND REDUCED LEVELS. THE COUNCIL URGES ARBITRON TO MAKE THE RESULTS OF THIS TEST KNOWN TO ALL INDUSTRY RESEARCH GROUPS AS QUICKLY AS POSSIBLE. (DECEMBER 1982)

THE ARBITRON RADIO ADVISORY COUNCIL RESOLVES THAT ARBITRON NOT RELEASE TO AGENCIES OR STATIONS THE BOOK "QUESTIONS AND ANSWERS ON BLACK DIFFERENTIAL SURVEY TREATMENT" UNTIL THE FINAL RESEARCH ON DST IS REVIEWED AND APPROVED FOLLOWING THE SPRING 1983 SURVEY. (DECEMBER 1982)

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RACE/ETHNICITY QUESTION

"WOULD YOU CLASSIFY YOUR HOUSEHOLD AS BLACK, WHITE OR OTHER?"

THIS QUESTION ASKED IN DIARY PLACEMENT CALLS TO DETERMINE RACE AND/OR ETHNICITY CORRESPONDS WITH THE QUESTION ASKED IN THE 1980 DECENNIAL CENSUS. THE SAME QUESTION WILL BE ASKED IN THE 1990 DECENNIAL CENSUS, PROVIDING CONSISTENCY OF MEASUREMENT OVER TIME.

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## BLACK CONTROL CRITERIA

THE METRO POPULATION AGED 12+ MUST INCLUDE: 10% OR MORE BLACK  
OR A MINIMUM OF 150,000 BLACKS 12+.

PRESENTLY 95 STANDARD AND CONDENSED MARKETS QUALIFY FOR BLACK  
WEIGHTING.

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## HIGH DENSITY BLACK AREAS (HDBA)

IF A MARKET QUALIFIES FOR BLACK ETHNIC CONTROL PROCEDURES, THE MARKET IS SUBSEQUENTLY ELIGIBLE TO HAVE HIGH DENSITY BLACK AREA (HDBA) SAMPLING UNITS ESTABLISHED WITHIN THE METRO. COUNTIES IN A RADIO MARKET METRO WHICH RECEIVE BLACK ETHNIC CONTROLS WILL BE EXAMINED FOR THE ESTABLISHMENT OF HDBA'S USING THE FOLLOWING CRITERIA:

1. THE COUNTY POPULATION AGED 12+ MUST BE AT LEAST 10% BLACK, OR THE COUNTY MUST HAVE 150,000 OR MORE BLACK POPULATION AGED 12+.
2. THE COUNTY MUST HAVE A ZIP CODE THAT IS AT LEAST 35% BLACK. THE HDBA WILL CONSIST OF ALL ZIP CODES IN THE COUNTY THAT ARE 35% OR MORE BLACK.
3. THE PROPOSED HDBA MUST HAVE ENOUGH POPULATION AS A PROPORTION OF THE TOTAL METRO TO BE ALLOCATED A MINIMUM IN-TAB TARGET OF AT LEAST NINE DIARIES. ADDITIONALLY, THE NON-HDBA PORTION OF THE COUNTY MUST HAVE ENOUGH POPULATION AS A PROPORTION OF THE TOTAL METRO TO BE ALLOCATED A MINIMUM IN-TAB TARGET OF AT LEAST NINE DIARIES.

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## BLACK DIFFERENTIAL SURVEY TREATMENT

IN METROS QUALIFYING FOR BLACK ETHNIC CONTROLS, HOUSEHOLDS IDENTIFIED AS "BLACK" RECEIVE THE FOLLOWING DST:

1. IF THE HOUSEHOLD INCLUDES A BLACK MALE AGED 18-34, AND THERE ARE FOUR OR FEWER PERSONS 12+ IN THE HOUSEHOLD, EACH PERSON IN THE HOUSEHOLD RECEIVES A \$5 PREMIUM WITH THE DIARY. IF THE HOUSEHOLD INCLUDES A BLACK MALE, AGED 18-34, AND HAS MORE THAN FOUR PERSONS 12+, A \$2 PREMIUM IS SENT WITH EACH DIARY.
2. IF THE HOUSEHOLD IS WITHOUT A BLACK MALE 18-34, A \$1 PREMIUM IS SENT WITH EACH DIARY AND A SECOND \$1 PREMIUM IS SENT WITH A FOLLOW-UP LETTER.
3. THREE (3) FOLLOW-UP CONTACTS ARE MADE WITH EACH HOUSEHOLD.

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## SAMPLING MADE SIMPLE

STEP 1: ARBITRON RECEIVES MARKET STATISTICS POPULATION DATA  
ENABLING IT TO QUALIFY METRO AREA FOR BLACK CONTROL

STEP 2: METRO COUNTIES ARE EXAMINED TO DETERMINE BLACK  
POPULATION PENETRATION

STEP 3: HIGH DENSITY BLACK AREA IS ESTABLISHED BY EXAMINING ZIP  
CODE POPULATION DATA FROM DONNELLEY MARKETING  
INFORMATION SERVICES

STEP 4: APPROXIMATE SAMPLE TARGETS FOR HDBA ARE DETERMING BY  
APPLYING HDBA % OF COUNTY AGAINST ENTIRE COUNTY SAMPLE  
TARGET

STEP 5: MONITORING OF CONSENT AND RETURN RATES BY PHASE ALLOWS  
FOR FUTURE PLANNING OF SAMPLE ALLOCATION

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TRENDS OF IN-TAB SAMPLE

|                    | <u>SPRING</u><br><u>1986</u> | <u>SUMMER</u><br><u>1986</u> | <u>FALL</u><br><u>1986</u> | <u>WINTER</u><br><u>1987</u> | <u>SPRING</u><br><u>1987</u> |
|--------------------|------------------------------|------------------------------|----------------------------|------------------------------|------------------------------|
| <u>NEW YORK</u>    |                              |                              |                            |                              |                              |
| BLACK              | 644                          | 583                          | 597                        | 597                          | 433                          |
| TOTAL              | 3,318                        | 3,117                        | 3,607                      | 3,630                        | 3,330                        |
| INDEX              | 93                           | 89                           | 81                         | 80                           | 63                           |
| <u>LOS ANGELES</u> |                              |                              |                            |                              |                              |
| BLACK              | 280                          | 295                          | 320                        | 296                          | 294                          |
| TOTAL              | 2,627                        | 2,749                        | 3,387                      | 3,066                        | 2,875                        |
| INDEX              | 87                           | 88                           | 80                         | 82                           | 87                           |
| <u>CHICAGO</u>     |                              |                              |                            |                              |                              |
| BLACK              | 633                          | 735                          | 714                        | 753                          | 629                          |
| TOTAL              | 3,141                        | 3,883                        | 4,237                      | 4,310                        | 3,706                        |
| INDEX              | 107                          | 101                          | 88                         | 91                           | 88                           |
| <u>DALLAS</u>      |                              |                              |                            |                              |                              |
| BLACK              | 330                          | 292                          | 273                        | 317                          | 258                          |
| TOTAL              | 2,447                        | 2,364                        | 2,613                      | 2,553                        | 2,347                        |
| INDEX              | 101                          | 92                           | 75                         | 89                           | 79                           |
| <u>ATLANTA</u>     |                              |                              |                            |                              |                              |
| BLACK              | 256                          | 425                          | 433                        | 410                          | 341                          |
| TOTAL              | 1,682                        | 2,194                        | 2,332                      | 2,207                        | 1,938                        |
| INDEX              | 67                           | 86                           | 84                         | 84                           | 80                           |

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## BLACK PROPORTIONALITY

THIS IS DEFINED AS THE RATIO OF % OF BLACK DIARIES TO % OF BLACK POPULATION. BLACK PROPORTIONALITY CAN BE CALCULATED BOTH WITHIN THE ENTIRE METRO AREA AND WITHIN THE HDBA. A PROPORTIONALITY INDEX OF 100 MEANS THE % OF IN-TAB SAMPLE IS IN EXACT PROPORTION TO THE POPULATION.

PROPORTIONALITY MAY BE AFFECTED BY THE FOLLOWING:

1. CONSENT RATES
2. RETURN RATES
3. DST AND FOLLOW-UP TREATMENTS AMONG NON-ETHNIC HOUSEHOLDS
4. STARTING SAMPLES

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BLACK PROPORTIONALITY INDEX

| <u>RANGE</u> | <u>NUMBER OF MARKETS</u> |      | <u>PERCENT</u> |       |
|--------------|--------------------------|------|----------------|-------|
| 101+         | 1                        | (4)  | 1%             | (5%)  |
| 91-100       | 17                       | (19) | 18%            | (23%) |
| 81-90        | 19                       | (23) | 20%            | (27%) |
| 71-80        | 18                       | (25) | 19%            | (30%) |
| 61-70        | 20                       | (8)  | 21%            | (10%) |
| LESS THAN 61 | 20                       | (5)  | 21%            | (6%)  |

AVERAGE MARKET PROPORTIONALITY 73.3% (81.6%)

( ): SPRING 1986

SOURCE: SPRING 1987

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BLACK SAMPLE PERFORMANCE TREND

|                      | <u>SPRING 1986</u> <sup>1</sup> | <u>SPRING 1987</u> <sup>2</sup> | <u>SPRING 1987</u> <sup>3</sup> |
|----------------------|---------------------------------|---------------------------------|---------------------------------|
| PROPORTIONALITY      | 81.6                            | 75.1                            | 73.3                            |
| BLACK DIARIES MAILED | 449                             | 436                             | 400                             |
| TOTAL DIARIES MAILED | 2,702                           | 2,679                           | 2,504                           |
| BLACK IN-TAB         | 180                             | 176                             | 162                             |
| TOTAL IN-TAB         | 1,131                           | 1,196                           | 1,125                           |
| BLACK POPULATION %   | 20.6                            | 20.5                            | 19.7                            |
| BLACK RETURN RATE    | 41.9                            | 42.0                            | 41.7                            |
| OTHER RETURN RATE    | 46.2                            | 49.7                            | 50.0                            |

<sup>1</sup>84 MARKETS WITH BLACK CONTROLS SPRING 1986

<sup>2</sup>SAME 84 MARKETS SPRING 1987

<sup>3</sup>95 MARKETS WITH BLACK CONTROLS SPRING 1987

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## CONCLUSIONS

NON-ETHNIC SAMPLE PERFORMANCE CONTINUES TO IMPROVE, PARTICULARLY IN THE AREA OF RETURN RATE. THIS HAS CAUSED BLACK PROPORTIONALITY TO DECLINE. IN THAT BLACK RETURN RATES HAVE REMAINED FAIRLY CONSISTENT SPRING 1986 TO SPRING 1987 THE LOSSES ARE APPARENTLY DUE MORE TO DIARIES NOT REACHING BLACK HOUSEHOLDS.

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ARBITRON BLACK IN-TAB PENETRATION  
TOP 100 METROS RANKED BY PERCENT BLACK  
IN UNIVERSE

(ARBITRON EMPLOYS BLACK CONTROL IN 96 MARKETS)

|                            | <u>BLACK<br/>UNIVERSE</u> | <u>SPRING 1987<br/>IN-TAB</u> | <u>PROPORTION-<br/>ALITY INDEX</u> |
|----------------------------|---------------------------|-------------------------------|------------------------------------|
| 1. MEMPHIS                 | 38.0                      | 33.5                          | 88                                 |
| 2. NEW ORLEANS             | 30.6                      | 29.5                          | 96                                 |
| 3. CHARLESTON, SC          | 29.8                      | 21.5                          | 72                                 |
| 4. RICHMOND                | 28.4                      | 28.2                          | 99                                 |
| 5. BATON ROUGE             | 27.9                      | 23.9                          | 86                                 |
| 6. MOBILE                  | 27.7                      | 25.5                          | 92                                 |
| 7. NORFOLK                 | 27.6                      | 19.4                          | 70                                 |
| *8. COASTAL NORTH CAROLINA | 27.3                      | 17.3                          | 63                                 |
| *9. COLUMBIA, SC           | 27.0                      | 26.7                          | 99                                 |
| 10. BIRMINGHAM             | 26.4                      | 21.4                          | 81                                 |
| 11. RALEIGH-DURHAM         | 25.6                      | 17.7                          | 69                                 |
| 12. WASHINGTON, DC         | 25.6                      | 21.9                          | 86                                 |
| 13. BALTIMORE              | 23.4                      | 17.6                          | 75                                 |
| 14. ATLANTA                | 22.0                      | 17.6                          | 80                                 |
| 15. JACKSONVILLE           | 21.4                      | 11.5                          | 54                                 |
| 16. NEW YORK               | 20.5                      | 13.0                          | 63                                 |
| 17. CHARLOTTE              | 19.5                      | 14.7                          | 75                                 |
| 18. DETROIT                | 19.4                      | 19.2                          | 99                                 |
| 19. CHICAGO                | 19.2                      | 17.0                          | 89                                 |
| 20. HOUSTON-GALVESTON      | 18.7                      | 12.8                          | 68                                 |

\* = ARBITRON EXCLUSIVE MARKET FOR SPRING 1987

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## BIRCH METHODOLOGY

ETHNIC MARKETS: A THREE DIMENSIONAL MODEL IS EMPLOYED:  
AGE/SEX, SAMPLING UNIT AND RACE. BLACK WEIGHTING CONTROLS ARE  
APPLIED IN ALL MARKETS WHERE 10% OR MORE OF THE POPULATION IS  
BLACK AND THE BLACK POPULATION IS 60,000 OR GREATER.

NO REFERENCES ARE MADE TO THE CREATING OF HIGH DENSITY BLACK  
AREAS OR TO ANY DIFFERENTIAL SURVEY TREATMENTS FOR BLACKS.

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COMPARISON OF BLACK IN-TAB REPRESENTATION  
TOP 10 METROS  
SPRING 1987

|                   | ARBITRON<br><u>UNIVERSE</u> | BIRCH<br><u>UNIVERSE</u> | ARBITRON<br><u>IN-TAB</u> | BIRCH<br><u>IN-TAB</u> |
|-------------------|-----------------------------|--------------------------|---------------------------|------------------------|
| NEW YORK          | 20.5                        | 16.7                     | 13.0                      | 10.5                   |
| LOS ANGELES       | 10.2                        | 9.8                      | 10.2                      | 8.1                    |
| CHICAGO           | 19.2                        | 19.3                     | 17.0                      | 16.5                   |
| SAN FRANCISCO     | 8.1                         | 8.0                      | 8.1                       | 5.1                    |
| PHILADELPHIA      | 18.7                        | 18.9                     | 15.8                      | 15.6                   |
| DETROIT           | 19.4                        | 19.5                     | 19.2                      | 16.0                   |
| BOSTON            | 4.8                         | 5.0                      | 2.9                       | 3.9                    |
| HOUSTON-GALVESTON | 18.7                        | 18.9                     | 12.8                      | 13.9                   |
| WASHINGTON        | 25.6                        | 25.1                     | 21.8                      | 19.4                   |
| DALLAS-FT. WORTH  | 14.1                        | 14.1                     | 11.0                      | 12.1                   |

BLACK PROPORTIONALITY IS HIGHER IN ARBITRON IN 7 OF THE TOP 10 MARKETS.

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## AUDIENCE COMPARISONS

IN EXAMINING SHARE LEVELS AMONG SOME 50 RADIO STATIONS IN TOP 10 MARKETS WHICH PROGRAM TOTALLY OR PARTIALLY TO BLACKS, ARBITRON SHOWS HIGHER LEVELS IN ABOUT 40% OF THE CASES. BIRCH SHOWS HIGHER SHARE LEVELS THAN ARBITRON FOR THE TOP RANKED BLACK STATION IN THE EACH MARKET.

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## FUTURE ACTIONS

- O RE-EXAMINATION OF DST PROCEDURES
- O ESTABLISHMENT OF AUTOMATED SYSTEM TO MONITOR SAMPLE PERFORMANCE
- O INVESTIGATION OF BLACK LISTENING PATTERNS THROUGH ARBITRON APPLICATION SYSTEMS
- O GENERIC RELEASES ON BLACK RADIO

WHAT DO BLACK BROADCASTERS WANT TO SEE FROM ARBITRON???

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