



Public Radio Today

How America Listens to Public Radio

2007 Edition

INFORMATION FOR BROADCASTERS, AGENCIES AND ADVERTISERS |

Public Radio Today

2007 Edition

Featuring new format ratings and audience information across America from the Fall 2006 Arbitron survey of radio listening to these leading public radio formats:

- News/Talk
- News-Classical
- Classical Music
- Jazz
- News-Music
- Adult Album Alternative (AAA)/Eclectic
- News-Jazz
- Variety Music

Presented by Arbitron Marketing Communications: Edited by Ron Rodrigues. Written/Researched by Jeff Green. Art Directed by Stephanie Wai Lee. Designed by Kelli Hill. Copyedited/Proofread by Kathy Weisse, Anne-Laure Brousseau. News/Media Communications by Jessica Benbow. Data Researched by Ken Campanile, Arbitron Syndicated Standards & Analysis.

Contents

Introduction: How America Listens to Public Radio	4
What's New in This Edition	5
Top Format Winners	7
Public Radio Ratings Story Lines of the Year	8
How to Read the Format Pages	9
Glossary	10
Public Radio Formats	12
News/Talk	13
News-Classical	16
Classical Music	19
Jazz	22
News-Music	25
Adult Album Alternative (AAA)/Eclectic	28
News-Jazz	31
Variety Music	34
Scarborough Qualitatives	37
Household Characteristics	38
Vehicle Purchase Plans	39
Investment Practices	40
Political Profiles	41
Consumer Product Choices	42
Other Format Preferences of Public Radio Listeners	44

National Radio Listening Trends	45
Public Radio Reaches All Ages	46
Hour-by-Hour Listening	48
Public Radio Listening Location: Weekdays	49
Public Radio Listening Location: Weekends	50
Public Radio Listening Location by Men and Women	51
Public Radio Listening Location—In Detail	52
Public Radio Listening by Time of Day	53
Public Radio Formats Ranked by Audience Share	54
Public Radio Formats Ranked by Audience Share by Region	55
Sources	58

Introduction: How America Listens to Public Radio

Welcome to *Public Radio Today 2007 Edition*—an in-depth look at the listening activity to eight major public radio formats: News/Talk, News-Classical, Classical Music, Jazz, News-Music, Adult Album Alternative (AAA)/Eclectic, News-Jazz and Variety.

In addition to audience statistics about public radio listeners overall, you'll find detailed listening breakouts for each of eight formats, including Average Quarter-Hour (AQH) Share of the total public radio audience and its weekly reach in terms of total listeners, segmentation of audience composition by age, proportion of listening by each format's primary listeners (P1s) and their average age, time spent listening (TSL) by demographic, educational levels, income by household, gender balance, ratings by both daypart and geographic region, and listening by location (at-home, in-car, at-work or other place).

Public Radio Today 2007 also includes Scarborough consumer qualitative data to present a comprehensive profile of public radio listening across America. This in-depth profile is drawn with information on public radio listeners' employment, children in the household, automobile preferences and purchasing behaviors, investments and financial services, political activities, business-to-business buying decisions, and spending patterns on groceries, media and technology. Also included is an index ranking of radio formats—commercial and noncommercial—to which public radio listeners give their attention.

In all, this study provides valuable insight on the evolving relationship between public radio and its listener base. After reading Arbitron's *Public Radio Today 2007*, you'll see that public radio is a vibrant, relevant and growing part of so many Americans' lives.

We thank these major public radio organizations for helping us shape this study and invite you to visit their Web sites to learn more about their contributions to public radio:

- Radio Research Consortium (www.rrconline.org)
- American Public Media (www.publicradio.org)
- National Public Radio (www.npr.org)
- Public Radio International (www.pri.org)

If you have questions or comments about this study, please contact Ron Rodrigues, Marketing Communications, Arbitron Inc. (ron.rodrigues@arbitron.com). Media inquires should be directed to Jessica Benbow, Arbitron Inc. (jessica.benbow@arbitron.com).

What's New in This Edition

More Detailed Analyses

Public Radio Today 2007 offers an analysis of audience listening patterns and demographics of eight leading public radio formats, including News/Talk, News-Classical, Classical Music, Jazz, News-Music, Adult Album Alternative (AAA)/Eclectic, News-Jazz and Variety Music.

Within this year's individual format reports, you'll see that we've provided the percentage of the overall actual listening to a particular format by region. We believe this change furnishes a more useful and reliable estimate of behavior than indexes of the likelihood of each format's regional appeal. You'll also see more analyses for all of these formats, including notation of trends observed over the past two years, to provide perspective on audience listening shifts.

Expanded Scarborough Consumer Data

The 2007 *Public Radio Today* provides an expanded view of Scarborough Research insights into household factors, including marital status, number of children at home, employment and home ownership.

In addition, consumer information on public radio listeners' vehicle ownership and purchase intentions are featured, including the kinds of cars they drive, what they plan to buy in the next 12 months and their dealership selection criteria.

Also provided are updated reviews of investments held in households of public radio listeners, along with financial services used.

With the 2008 presidential campaign on the horizon and many other political campaigns underway or coming up, you'll be sure to find useful our expanded information on how public radio listeners vote—in all levels of elections from local to state to national—as well as our findings on their party affiliations.

(continued on next page)

What's New in This Edition

You'll also see information on the buying characteristics of public radio listeners, including their online purchase behavior across numerous categories, household grocery spending, wireless/cell phone service preferences, intentions to acquire various technologies and influence on business-to-business purchases.

Moreover, in this edition for the first time, we've included other format preferences of public radio listeners to help you understand both their commercial and noncommercial radio interests.

New Reports: Format Rankings by Region, Story Lines

Additional rankings appear in this new edition, namely, rankings of public radio format popularity overall and across eight regions nationally. We've also added an informative new snapshot, "Public Radio Story Lines of the Year," detailing some of the key trends taking place in public radio listening, both overall and for certain formats on the move either up or down. Finally, we've moved our comprehensive overview of the national trends in public radio listening to the end of this report, accompanied by a summary analysis within each section.

Top Format Winners

News/Talk Still Commands Nearly Half of Public Radio Listening

With only a slight decline in ratings between Fall 2005 and 2006 (from 44.8% of public radio listening to 43.6%), News/Talk comes close to generating more listening than all other formats put together. At nearly 14 million listeners, News/Talk has almost twice the weekly reach of the second-strongest format, News-Classical. Not only is News/Talk dominant, it also attracts a compelling audience: A remarkable 72% of its listeners are college graduates, and over half live in households earning at least \$75,000 per year.

News-Classical Strengthens Grip as No. 2 Format

Combining the public radio strongholds of information and music, News-Classical improved from a 20.6% share to 21.1% between Fall 2005 and 2006, and it also registered growth in every daypart, not to mention a 14% cume increase. News-Classical is the No. 1 format in both the South Atlantic and South Central regions. At 76%, News-Classical boasts the highest proportion of listening from its primary listeners (P1s) among all public radio formats.

AAA/Eclectic Sees Strong Growth

Between Fall 2005 and 2006, the Adult Album Alternative (AAA)/Eclectic format benefited from a robust 17% improvement in weekly reach—the second-largest growth of all public radio formats. Combined with an extra 15 minutes of time spent listening, AAA/Eclectic advanced from 4.6% to 5.1% of public radio listening. Time Spent Listening (TSL) was up a full hour among Adults 18-34 and improved 30 minutes among 25-54s, offsetting declines of 30-minutes with 12-24s and 35-64s. Overall, every segment of the day gained audience share except afternoons, which held steady. These increases were led by surges in mornings (with a growth rate of 21%) and middays (the format's strongest daypart, up 9%), while weekends climbed (18%).

News-Music Enjoys Gains Across All Dayparts

With its weekly share of public radio listening improving from 5.7% to 6.0%, the News-Music format scored growth in each daypart, as well as on weekends, thanks to a 12% rise in weekly listeners and increased TSL among its 25-54 and 35-64 audiences.

Variety Music Scores Big Cume Increase

Variety Music increased its audience reach 20% between Fall 2005 and 2006—the largest percentage of all public radio formats, leading to a slight improvement in its overall share of public radio listening from 1.9% to 2%.

Public Radio Ratings Story Lines of the Year

Public Radio Expands Its Weekly Reach with Virtually Everyone

Public radio's weekly reach grew from 10.5% to 11.2% of the U.S. population between Fall 2005 and 2006—a 7% annual growth rate. Increases occurred across all demographic groups, primarily among those 55 and older. Within the 55-64 age segment, the weekly reach for men was up 11%, while women gained 10%. Among Adults 65+, both men and women showed a 9% increase.

Between Fall 2005 and 2006, cume ratings for public radio listening increased across every time of day in every demographic, both male and female, except that ratings for Teen boys were unchanged overall. While cume ratings for Teen girls gained a surprising 15%, generally the older the age group, the bigger the growth. Cume ratings advanced 4% to 5% with 35-44s, while cume ratings for Adults 55+ escalated between 9% to 11% overall and in the 10% range during mornings, middays, afternoons and weekends.

Public Radio Time Spent Listening Holds Its Own

Of the eight formats covered in this report, only three experienced any decline in overall weekly time spent listening. However, none of those with declining TSL lost more than 15 minutes per week, and all three also benefited from significant gains of 10% to 20% in weekly reach. It's worth noting that TSL slippage is not uncommon for stations having a surge in cume, owing to the influx of new (and often less loyal) listeners. While half of the public radio formats faced TSL declines among their 18-34 listeners, half actually generated gains among 25-54s.

Public Radio Listeners Are Financially Committed

Though only six percent of U.S. households give money to public radio, 17% of public radio listeners donate each year. Thirty-eight percent of those who contribute give \$35-\$100, while 37% of public radio donors—nearly an equal amount—give at least \$100 per year.

(continued on next page)

Public Radio Ratings Story Lines of the Year

Public Radio Listeners' Interest in Most Consumer Electronics Is Falling

The good news overall for public radio broadcasters is that public radio listeners are now less motivated to buy consumer electronics that are alternatives to radio, with the exception of satellite radio, in which public radio listener interest has grown slightly. In general, the purchase intentions of these listeners have dropped sharply for MP3 players, HDTVs, computers and digital cameras.

Public Radio Listeners Pursue the Finer Things Online

With income and educational levels well above the national average, public radio listeners are a high-efficiency target for numerous product categories. The public radio audience is far more likely than the general public to buy discretionary goods online, including artistic pursuits of all kinds, as well as wine, flowers, travel and technology.

Jazz Listeners Become More Affluent, More Educated

The number of Jazz listeners having at least some college education rose 3% between Fall 2005 and 2006 to nearly 37%. The best news is that the percentage of public radio Jazz listeners living in households earning \$75,000 or more per year soared from 32% to 38% during that time—a huge one-year increase—while those in households delivering less than \$25,000 annually fell sharply from 16% to 11%. Though its ratio of men listeners slipped 1% between Fall 2005 and 2006, Jazz has taken over as the public radio format with the highest percentage of men listeners.

How to Read the Format Pages

The eight formats examined in this report are ranked in order of their 12+ Average Quarter-Hour (AQH) Share of the national audience, starting with the most popular format.

To avoid any misunderstanding of the audience composition of youth-oriented formats, please note that the "Education" statistic includes only listeners 18 or older.

In the information on home ownership, the term "Other" refers to the percentage of that format's listeners who neither own nor rent, but live in someone else's residence.

The "Audience Composition" information breaks out the total percentage of a format's audience within various age groups. The "Audience Share by Region" information breaks out the share each format generates of all listening across various regions.

For additional terms and definitions, please see the following "Glossary."

Glossary

Average Quarter-Hour Persons (AQH Persons)

The average number of persons listening to a particular station for at least five minutes during a 15-minute period.

Average Quarter-Hour Rating (AQH Rating or AQH PUR)

The Average Quarter-Hour Persons estimate expressed as a percentage of the population being measured.

$$\frac{\text{AQH Persons}}{\text{Population}} \times 100 = \text{AQH Rating (\%)}$$

Cume Persons

The total number of different persons who tune in to a radio station during the course of a daypart for at least five minutes.

Cume Rating or Cume PUR

The Cume Persons audience expressed as a percentage of all persons estimated to be in the specified demographic group.

$$\frac{\text{Cume Persons}}{\text{Population}} \times 100 = \text{Cume Rating (\%)}$$

Format Share

The percentage of those listening to radio in the Metro who are listening to a particular radio station format.

$$\frac{\text{AQH Persons to a specific format}}{\text{AQH Persons to all formats}} \times 100 = \text{Share (\%)}$$

Index

A numerical comparison of one percentage to another, with 100 being the norm.

P1—First Preference Listening

Persons who listen to one radio station more than any other are P1 listeners for that station.

Time Spent Listening (TSL)

An estimate of the amount of time the average listener spent with a station (or total radio) during a particular daypart. This estimate, expressed in hours and minutes, is reported for the Metro only.

$$\frac{\text{Quarter-Hours in a time period} \times \text{AQH Persons}}{\text{Cume Audience}} = \text{TSL}$$

Public Radio Formats

Public radio stations cover a wide variety of news, entertainment, music and cultural genres. The programming format of a public station, like that of a commercial station, largely determines the kind of audience it attracts as well as characteristics such as time spent listening.

You will notice that the formats listed in Arbitron's *Public Radio Today* differ from those listed in commercial radio versions of *Radio Today*. This is because the contrasting nature of public and commercial programming has led to radio formats that are distinctively public or commercial. The eight formats examined in this study are the leading formats in public radio programming. Their definitions were supplied to Arbitron by the public radio research and programming consortia noted in the "Introduction" (see page 4). An additional distinction is that each format definition provided by the consortia was based on a station's programming during the Monday-Friday, 6AM-7PM dayparts.

The following public radio formats appear in descending order of their popularity—a ranking based on weekly cume listeners.

News/Talk

News/Talk features a heavy concentration of local, regional and global news, in the form of magazine features, analysis and live-breaking news. Its wide range of programming encompasses interviews, studio discussions with guests, listener participation (via e-mail and phone) and live broadcasts of town hall meetings.

Far and away the dominant public radio format with more than 43% of public radio listeners, News/Talk has a 12+ audience share and reach that's twice as large as the next strongest format; its cume increased 6% between Fall 2005 and 2006. Nearly 68% of News/Talk's audience was at least 45 years old in Fall 2006, up almost 3% from the previous year. However, in Fall 2006 those in the 55-64 age group eclipsed the 45-54 segment to become the format's largest age group. Each demographic segment between age 12 and 44 decreased as a percentage of News/Talk's total audience; all of the format's growth was among those 55 or older. News/Talk has a more even split among its 45+ listener groups (45-54, 55-64 and 65+) than any other format in this study. Although men slightly outnumber women, News/Talk is one of the stronger formats reaching women.

*Note: Due to rounding, totals may differ.
Source: MaximiSer® Plus National Regional Database, Fall 2006.*

AQH Share of Total Listeners

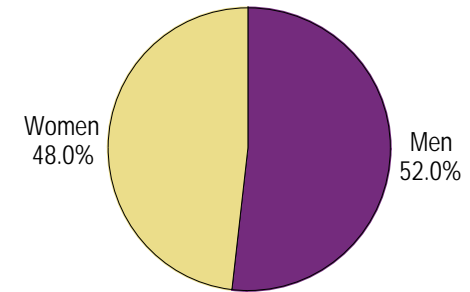
FA05	44.8%
FA06	43.6%

Weekly Listeners 12+

13,945,700
Format Cume

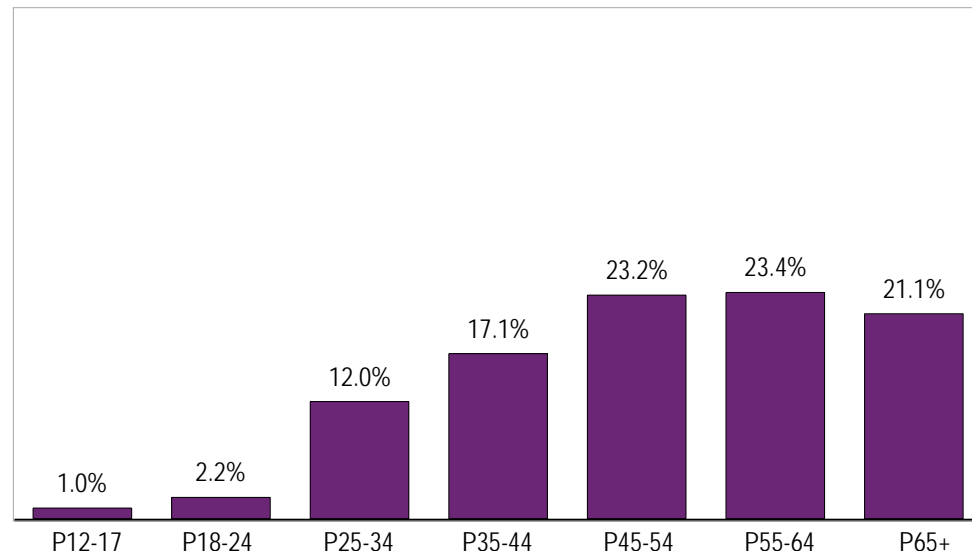
Listeners 18+

Mon-Sun, 6AM-Mid



Audience Composition

Percent of Format Audience by Demographic
Mon-Sun, 6AM-Mid



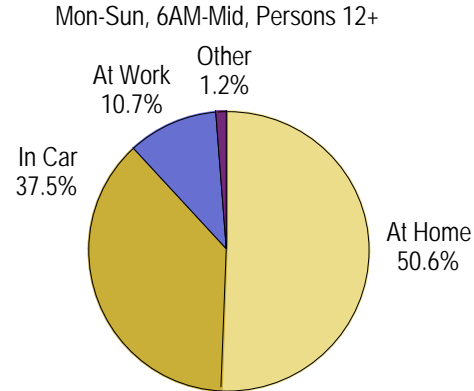
News/Talk continued ►

News/Talk

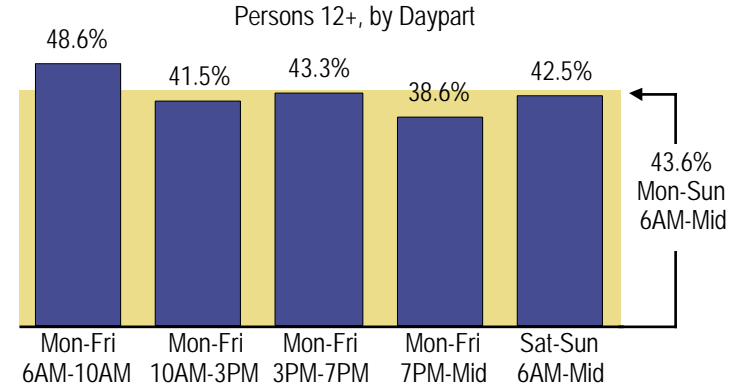
Overall, News/Talk's share slipped modestly from 44.8% to 43.6%, with all dayparts down incrementally; most of the decline came equally from each daypart between 6AM-7PM. At-home is the preferred listening location, up slightly from Fall 2005—and now comprises more than half News/Talk's tune-in. However, the format has a higher percentage of its listening taking place in-car than any other format.

News/Talk's largest share of public radio listeners is in the Pacific region, where it generates a fourth of its total national audience, while the combined Atlantic regions deliver more than a third of its ratings. News/Talk is the No. 1 format in the Pacific, Mountain, West North Central, East North Central and Middle Atlantic areas. It's tied for No.1 in New England, ranking second in the South Central and South Atlantic territories.

AQH Share of Listening by Location

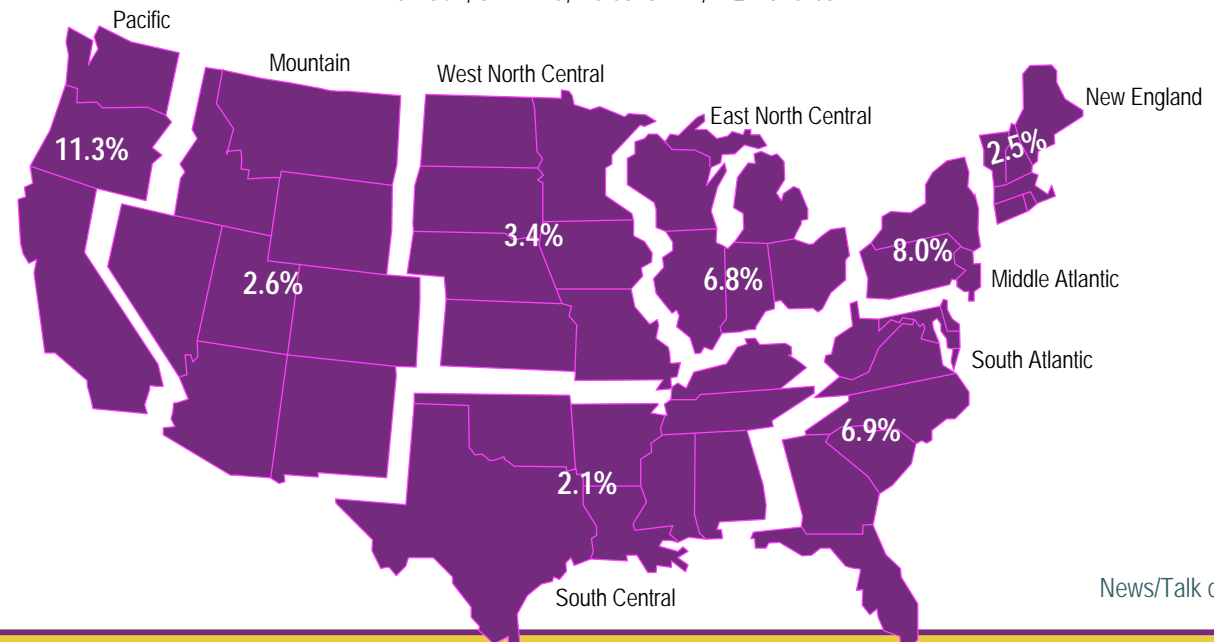


News/Talk's Share of All Public Radio Listening



Audience Share by Region

Mon-Sun, 6AM-Mid, Persons 12+, AQH Shares



Note: Due to rounding, totals may differ.
Source: MaximiSer® Plus National Regional Database, Fall 2006.

News/Talk continued ►

News/Talk

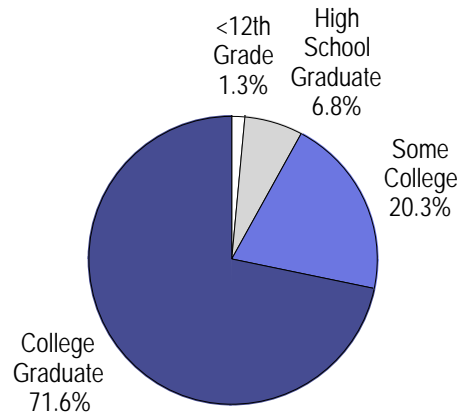
News/Talk has radio's best-educated listeners: More than 71% hold a college degree and 90% have attended college—and those figures dwarf all commercial radio formats. The number of those listeners living in households earning \$75,000 or more rose from 50% to nearly 53% between Fall 2005 and 2006; News/Talk is the only public radio format where more than half of its listeners are in this upper-income tier. Moreover, nearly 75% are in households earning at least \$50,000; that's also higher than any other public radio format.

Time spent listening for News/Talk listeners held steady overall between Fall 2005 and 2006, with 18-34s gaining 15 minutes and 25-54s and 35-64s both losing a quarter-hour. The proportion of listening by News/Talk's primary audience climbed from 70% to 74% during that time frame, which gives News/Talk the second-highest proportion of P1 listeners of all public formats.

Average Age of P1 Listeners
52
Proportion of Listening from P1s
74%

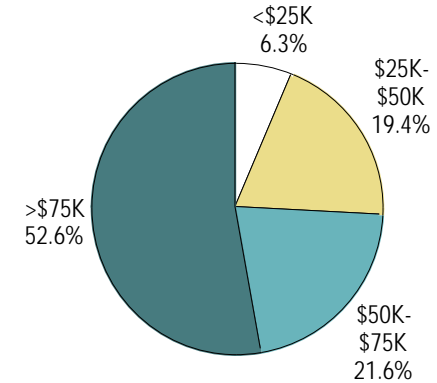
Education

Persons 18+



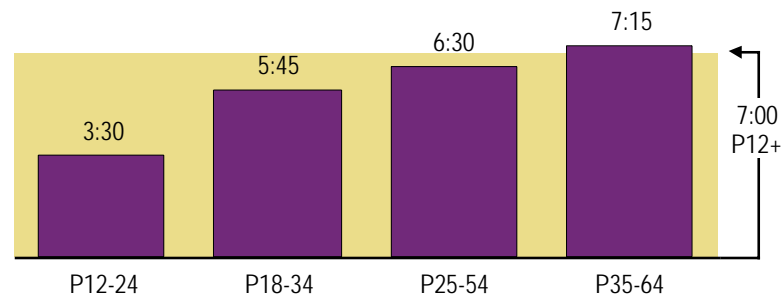
Household Income

Persons 18+



Time Spent Listening by Demographic

(Hours:Minutes)
Mon-Sun, 6AM-Mid



Note: Due to rounding, totals may differ.
Source: MaximiSer® Plus National Regional Database, Fall 2006.

News-Classical

News-Classical stations devote at least 30% of airtime to news, public affairs or talk programming *or* carry NPR newsmagazines. In addition, these stations spend at least 30% of their airtime playing classical music.

While News-Classical reached nearly 14% more people between Fall 2005 and 2006 to seven million listeners per week (third-best improvement of all formats), it lost 30 minutes of time spent listening among 12-24s and 18-34s and 15 minutes among 25-54s and 35-64s. Despite those TSL declines across every age group, the format's cume growth helped boost News-Classical's overall share from 20.6% to 21.1% over that time.

The News-Classical audience is more evenly split between men and women than any other public radio format, with women gaining a tiny majority between Fall 2005 and 2006. The format's audience grew slightly older, with the 55+ age groups gaining from 55% to 57% during that time period; those increases came particularly at the expense of the 35-44 age group. More than 75% of News-Classical's audience is over 45, and 57% are at least 55. Only Classical has a higher percentage of its listeners being 55 or older.

Note: Due to rounding, totals may differ.
Source: MaximiSer® Plus National Regional Database, Fall 2006.

AQH Share of Total Listeners

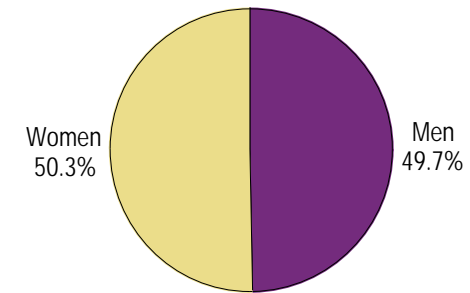
FA05	20.6%
FA06	21.1%

Weekly Listeners 12+

6,999,200
Format Cume

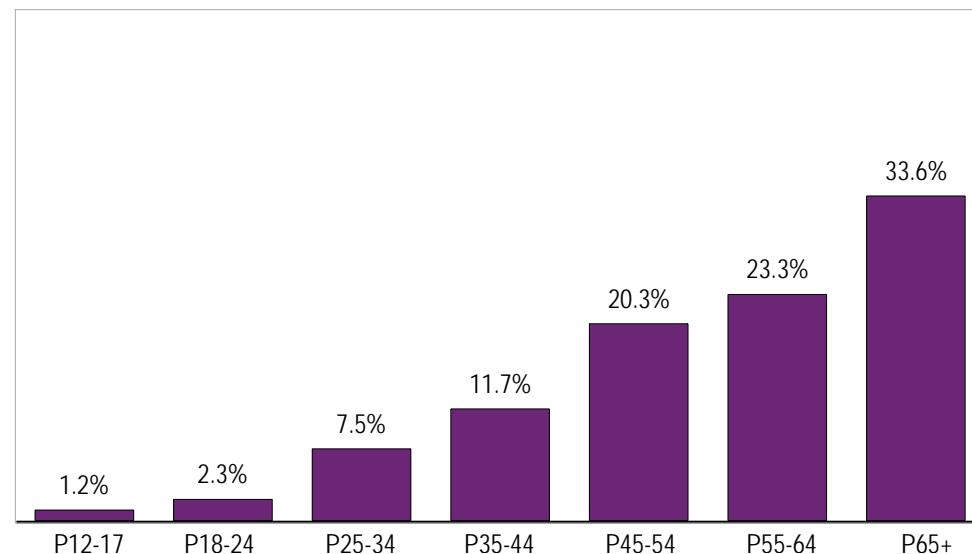
Listeners 18+

Mon-Sun, 6AM-Mid



Audience Composition

Percent of Format Audience by Demographic
Mon-Sun, 6AM-Mid



News-Classical continued ▶

News-Classical

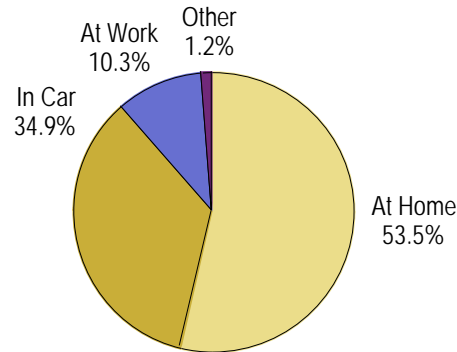
Though more than half of News-Classical's share of listening occurs at home, in-car represents more than a third of its total listening, second-highest to News/Talk. However, of all the formats in this study, News-Classical has the lowest percentage of its audience tuning in at work.

News-Classical and News-Music were the only two formats to gain audience share in every daypart. News-Classical's largest gains occurred in afternoons and on weekends, when it picked up a half-share in both. Its weekend ratings are closer to the format's full-week share than any other news-driven public radio format. The format receives the highest proportion of its ratings from its primary listeners (76%) of all the formats in this study.

News-Classical is the No.1 format in the South Atlantic and South Central regions, which together generate more than half of its national audience; only News-Jazz gets a more concentrated share of its audience from two regions. News-Classical format is tied for first in the New England region, second in the East North Central area and third in the West North Central territory.

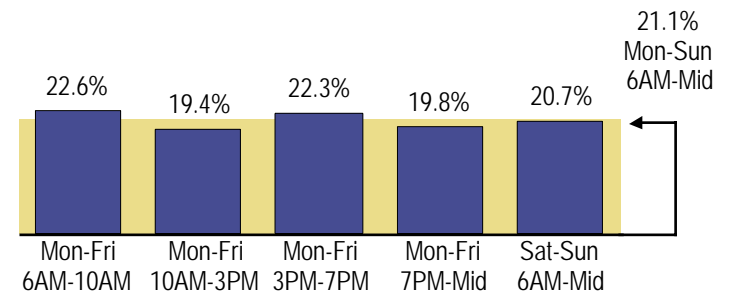
AQH Share of Listening by Location

Mon-Sun, 6AM-Mid, Persons 12+



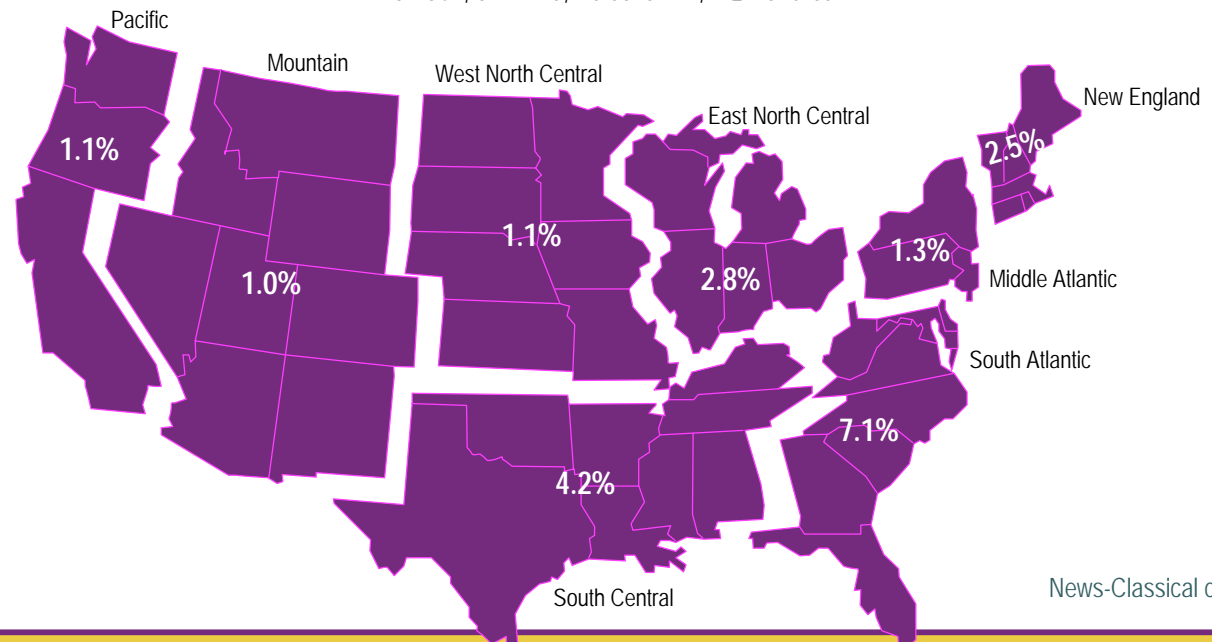
News-Classical Share of All Public Radio Listening

Persons 12+, by Daypart



Audience Share by Region

Mon-Sun, 6AM-Mid, Persons 12+, AQH Shares



Note: Due to rounding, totals may differ.
Source: MaximiSer® Plus National Regional Database, Fall 2006.

News-Classical continued ►

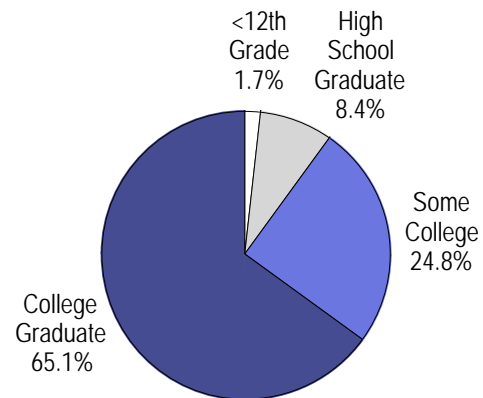
News-Classical

The educational profile of News-Classical listeners in Fall 2006 remained almost identical to the previous year, with nearly two-thirds having a college degree; that's second-highest to News/Talk. However, the income levels of News-Classical listeners rose noticeably in the \$75,000+ segment, climbing 3%; only Jazz saw a higher increase in this income group. Nearly two-thirds of News-Classical listeners live in households generating at least \$50,000 annually; that's third-best of all formats in this report.

Average Age of P1 Listeners
55
Proportion of Listening from P1s
76%

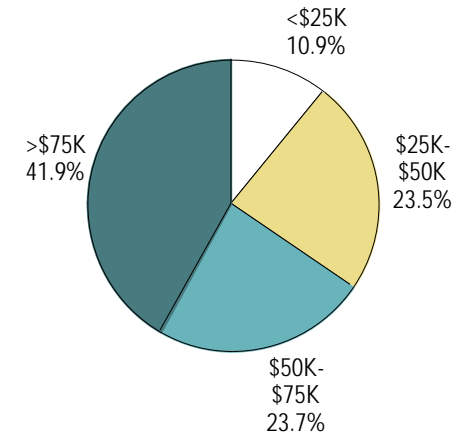
Education

Persons 18+



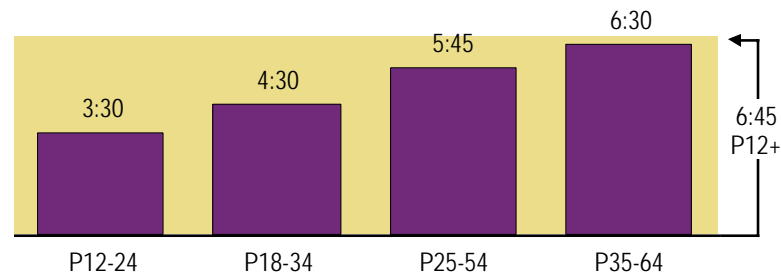
Household Income

Persons 18+



Time Spent Listening by Demographic

(Hours:Minutes)
Mon-Sun, 6AM-Mid



Note: Due to rounding, totals may differ.
Source: MaximiSer® Plus National Regional Database, Fall 2006.

Classical Music

The hallmark of classical music is its quality; it is written by a composer for performance by a group of musicians, with each instrument's part carefully specified. Most classical music is performed in the European tradition by orchestras, choirs, chamber music groups, opera companies and symphonies. The Classical Music radio format, in addition to its distinctive programming, may also include artist interviews and musical puzzles and games.

Classical Music's ratings held relatively steady between Fall 2005 and 2006, with its 12+ share slipping only slightly from 13.15% to 12.9% of the public radio audience. Its weekly cume grew 10% during that time frame to 4.2 million—third best of all public radio formats. However, the modest decline can be attributed to an overall 15-minute dip in time spent listening, notably in the 25-54 and 35-64 age groups. Interestingly, TSL among 12-24s actually rose 30 minutes per week; Classical Music is the only format to gain TSL in this age segment.

AQH Share of Total Listeners

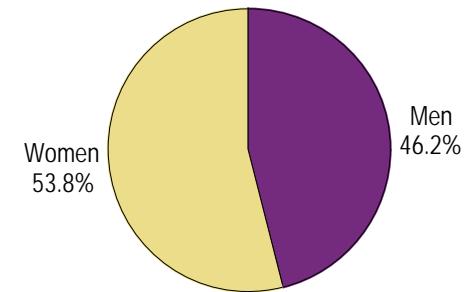
FA05	13.1%
FA06	12.9%

Weekly Listeners 12+

4,227,100
Format Cume

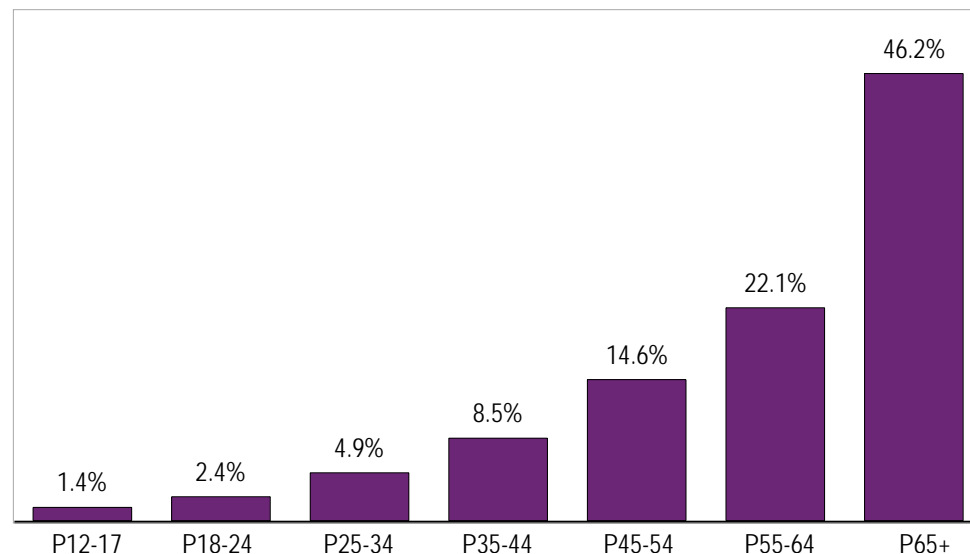
Listeners 18+

Mon-Sun, 6AM-Mid



Audience Composition

Percent of Format Audience by Demographic
Mon-Sun, 6AM-Mid



*Note: Due to rounding, totals may differ.
Source: MaximiSer® Plus National Regional Database, Fall 2006.*

Classical Music continued ►

Classical Music

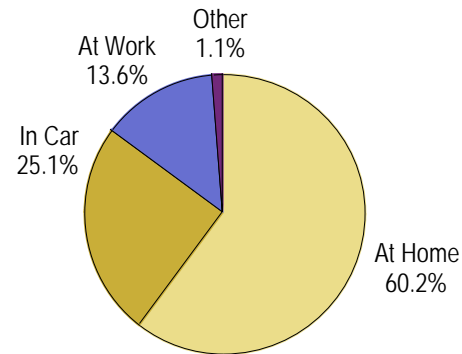
As with News-Classical, Classical has more women than men listeners, but Classical has the highest percentage of women within its total audience of all the formats in this report. Classical also has a concentration of the oldest listeners of all public formats, with 68% being at least 55 years old, and more than 46% over 65. Only 17% of Classical listeners are under 45.

Sixty percent of Classical listening takes place at home, and that's more than any other public radio format. Conversely, Classical has the lowest percentage of listening done in-car of all public presentations. Classical's weekend ratings are nearly as strong as its full-week numbers, and the format does best in weekday evenings and far better in dayparts outside of mornings.

Classical earns its strongest ratings in the Middle Atlantic, Mountain, Pacific and West North Central regions, where it ranks No. 2 among all public formats, and it is the third-most popular format in the East North Central and South Atlantic areas. Overall, Classical's ratings are more balanced across the various regions of the U.S. than other formats.

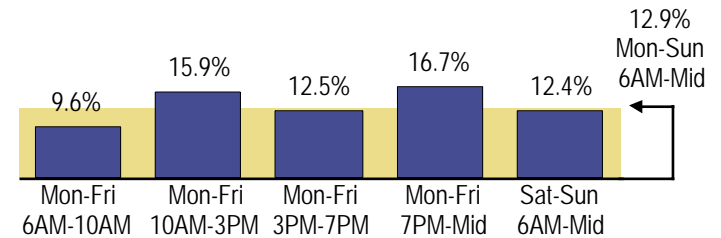
AQH Share of Listening by Location

Mon-Sun, 6AM-Mid, Persons 12+



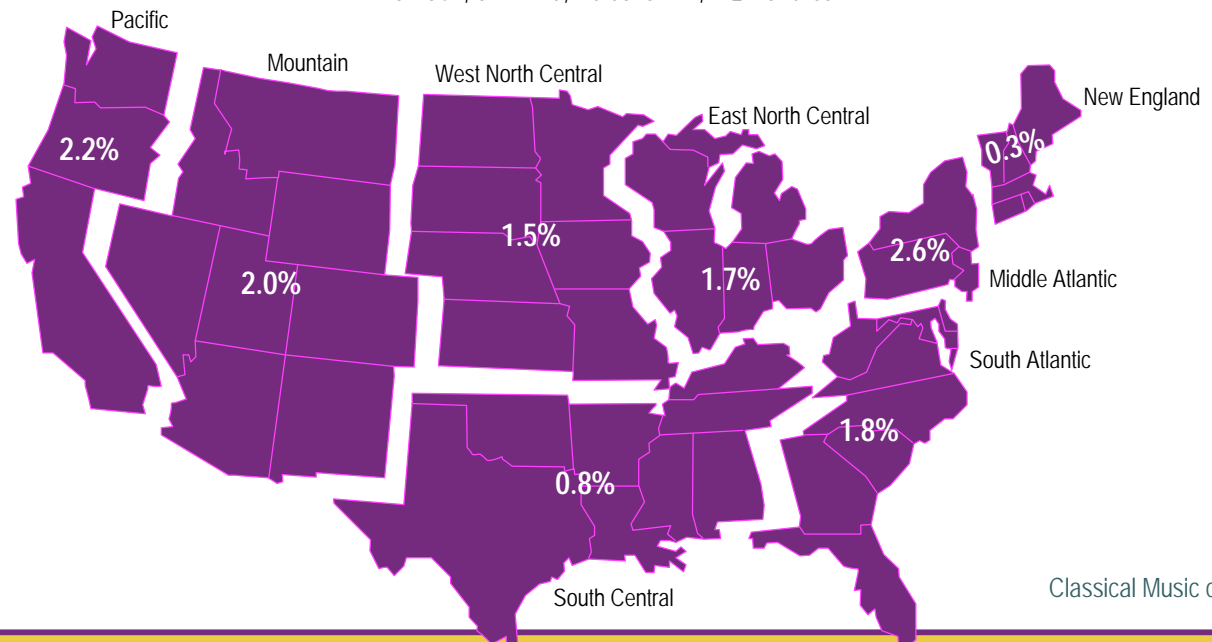
Classical Share of All Public Radio Listening

Persons 12+, by Daypart



Audience Share by Region

Mon-Sun, 6AM-Mid, Persons 12+, AQH Shares



Note: Due to rounding, totals may differ.
Source: MaximiSer® Plus National Regional Database, Fall 2006.

Classical Music continued ►

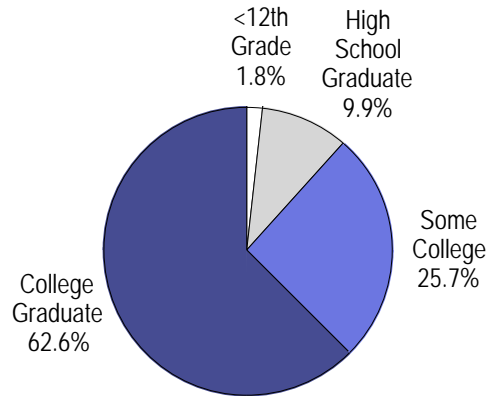
Classical Music

The proportion of Classical's audience coming from its primary listeners held steady at 72% between Fall 2005 and 2006. Nearly 90% have attended college and almost 63% have earned a college diploma, a slight improvement over 2005. While the percentage of Classical listeners living in households earning \$75,000 or more was the same in both Fall 2005 and 2006, the \$25,000-\$50,000 segment rose from 25% to 27% of the Classical audience during that time.

Average Age of P1 Listeners
58
72%
Proportion of Listening from P1s

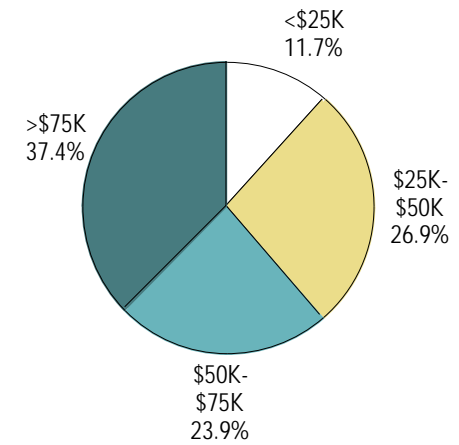
Education

Persons 18+



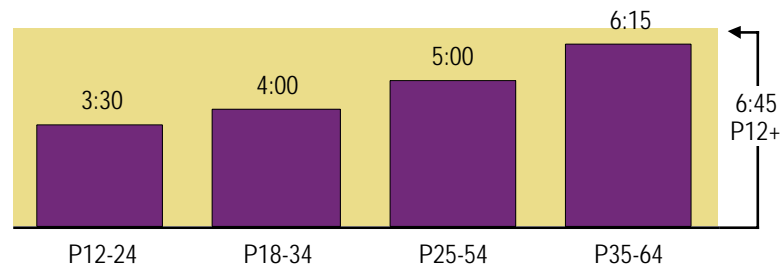
Household Income

Persons 18+



Time Spent Listening by Demographic

(Hours:Minutes)
Mon-Sun, 6AM-Mid



Note: Due to rounding, totals may differ.
Source: MaximiSer® Plus National Regional Database, Fall 2006.

Jazz

Rooted in musical traditions from West Africa, America (Gospel) and Europe (Harmony), jazz music is characterized by strong rhythmic patterns, syncopation, polyrhythms, spontaneity, improvisation and emotion. Jazz styles might include Traditional, Swing, Big Band, Be-Bop, Smooth and Latin Jazz. The variety of Jazz in public radio is far wider than that heard on commercial Jazz stations.

The Jazz format notched a 5% increase in audience reach between Fall 2005 and 2006 and captured a 15-minute increase in overall time spent listening. However, a TSL erosion in the 12-34 segment contributed to a 6.3% to 6.2% share trend over that time period. Specifically, TSL fell a full hour among the 12-24 listeners, who then made up only 4% of the Jazz radio audience, down from 6% the previous year.

AQH Share of Total Listeners

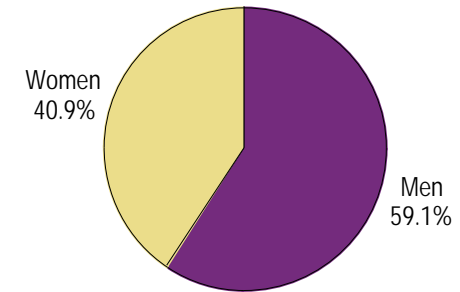
FA05	6.3%
FA06	6.2%

Weekly Listeners 12+

2,461,900
Format Cume

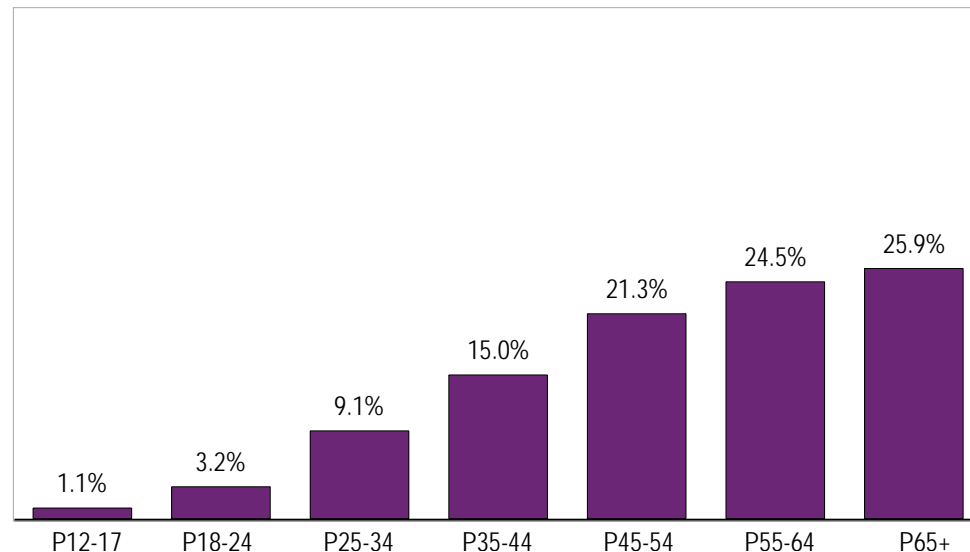
Listeners 18+

Mon-Sun, 6AM-Mid



Audience Composition

Percent of Format Audience by Demographic
Mon-Sun, 6AM-Mid



Note: Due to rounding, totals may differ.
Source: MaximiSer® Plus National Regional Database, Fall 2006.

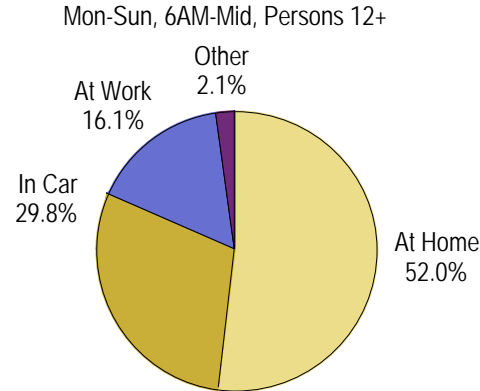
Jazz continued ►

Jazz

Though its ratio of men slipped 1% between Fall 2005 and 2006, Jazz has taken over as the format with the highest percentage of men listeners. Its audience also edged slightly older, with those 55 and above comprising more than half of the Jazz public radio audience. Primary listeners represented only 59% of the format's total audience in Fall 2006. That was a 5% decrease from the previous year and is the second-lowest P1 percentage of all public radio programming, suggesting a diverse but perhaps less loyal following.

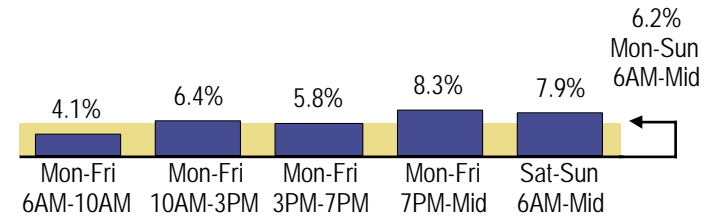
The largest shift in listening-by-location for Jazz is at work, which grew more than 1% between Fall 2005 and 2006, with most of that gain coming from at-home tune-in, which still accounts for more than half of all Jazz listening. Jazz's share of all public radio listening is at its lowest in mornings, rising more than 50% in middays and doubling in evenings. While most public radio format shares are not as high on weekends as their full-week numbers, the reverse is true for Jazz. Its weekend ratings are 27% better than its full-week share and that weekend increase is larger than any other public radio format.

AQH Share of Listening by Location



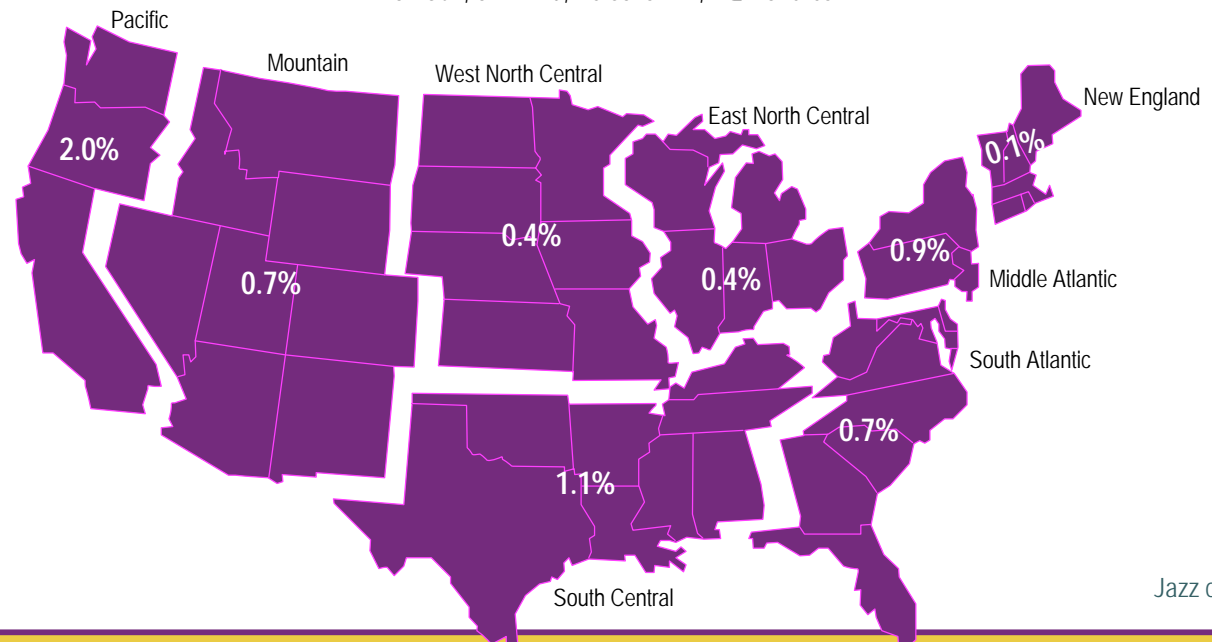
Jazz Share of All Public Radio Listening

Persons 12+, by Daypart



Audience Share by Region

Mon-Sun, 6AM-Mid, Persons 12+, AQH Shares



Note: Due to rounding, totals may differ.
Source: MaximiSer® Plus National Regional Database, Fall 2006.

Jazz continued ►

Jazz

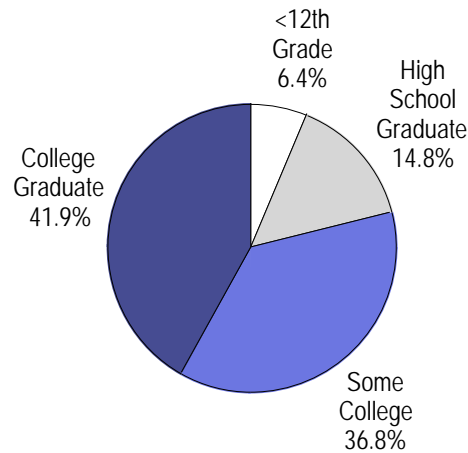
Public radio Jazz gets almost a third of its ratings from the Pacific region, where it is the third-most-popular public radio format. Nearly 80% of its listeners have attended or graduated from college, with those having at least some college education rising 3% between Fall 2005 and 2006 to nearly 37%. The best news is that the percentage of public radio Jazz listeners living in households earning \$75,000 or more per year soared from 32% to 38% during that time—a huge one-year increase—while those in households delivering less than \$25,000 annually fell sharply from 16% to 11%.

Average Age of P1 Listeners
52

59%
 Proportion of Listening from P1s

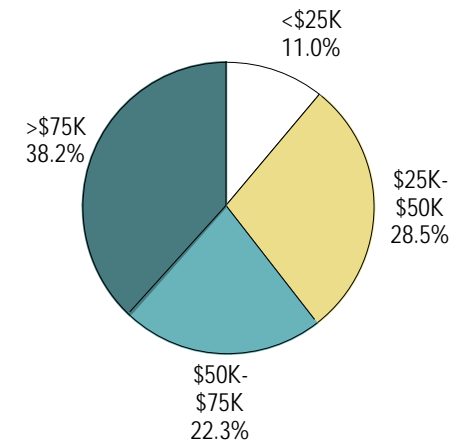
Education

Persons 18+



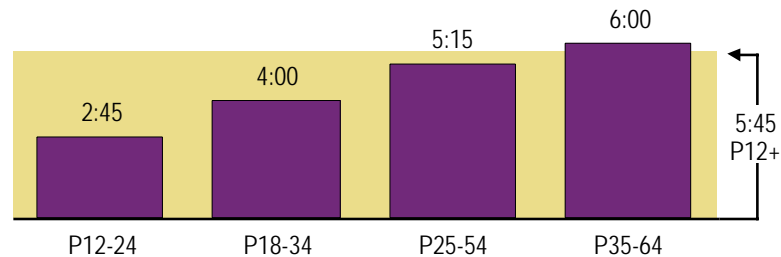
Household Income

Persons 18+



Time Spent Listening by Demographic

(Hours:Minutes)
 Mon-Sun, 6AM-Mid



Note: Due to rounding, totals may differ.
 Source: MaximiSer® Plus National Regional Database, Fall 2006.

News-Music

This format dedicates at least 30% of airtime to news, public affairs or talk programming *or* NPR newsmagazines. In addition, News-Music stations spend at least 30% of their airtime with a mix of music formats (such as Classical, Jazz, AAA/Eclectic, popular), typically with no single music format dominating that time.

News-Music stations closely resemble the listener profile of public radio News/Talk stations in terms of male-female listener ratio and demographic balance. News-Music overall grew from a 5.7% share of public radio listening to 6.0% between Fall 2005 and 2006, with audience share increases across all times of day and weekends, especially middays, when News-Music's ratings rose 12%. Accounting for the improvement was a 12% growth in audience reach and a 15-minute increase in time spent listening.

AQH Share of Total Listeners

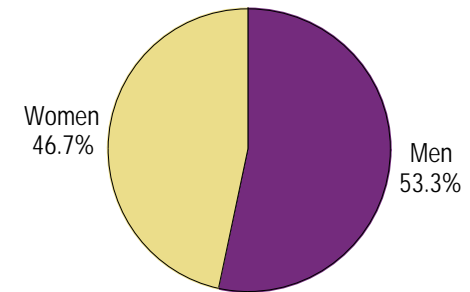
FA05	5.7%
FA06	6.0%

Weekly Listeners 12+

2,012,600
Format Cume

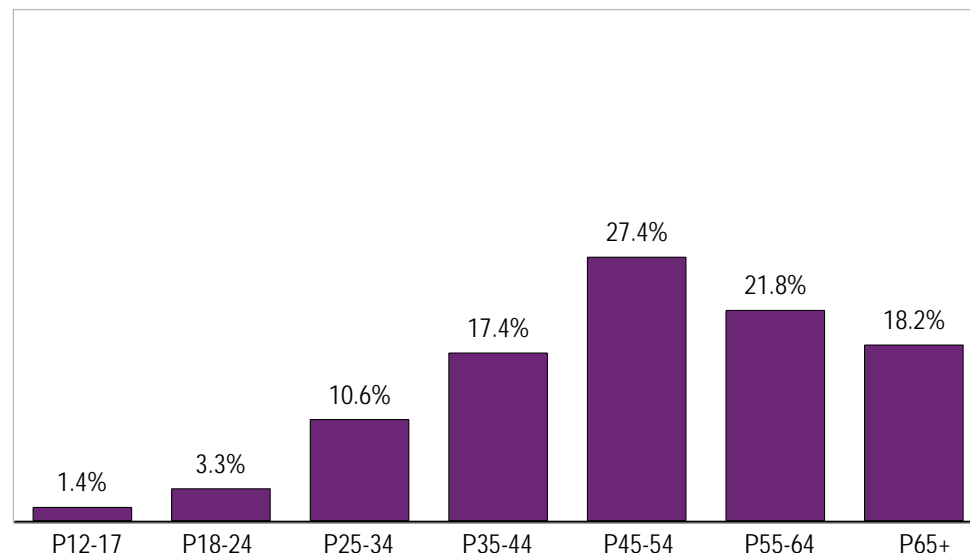
Listeners 18+

Mon-Sun, 6AM-Mid



Audience Composition

Percent of Format Audience by Demographic
Mon-Sun, 6AM-Mid



Note: Due to rounding, totals may differ.
Source: MaximiSer® Plus National Regional Database, Fall 2006.

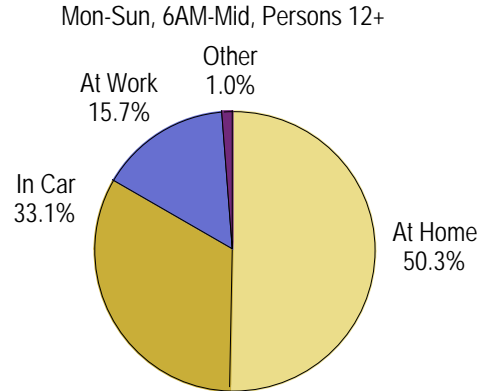
News-Music continued ▶

News-Music

The News-Music audience is shifting slightly older, as the percentage of those 45 years and above rose 4% between Fall 2005 and 2006. During that time, the shift is seen in notable TSL changes: Adults 35-64 listened 30 minutes more per week and the 25-54 age group was up a quarter-hour, while 18-34s lost 30 minutes and 12-24s dropped 45 minutes. The proportion of listening from News-Music's primary audience climbed from 69% to 73%, giving News-Music the third-highest P1 percentage of all public radio formats.

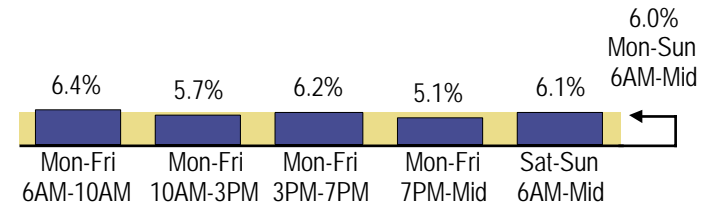
Half of all listening to News-Music takes place at home, though in-car grew slightly to account for a third of the format's listening in 2006. News-Music ranks as the third-most-popular public radio format in the South Central and Mountain regions; it is tied for third the in New England area.

AQH Share of Listening by Location



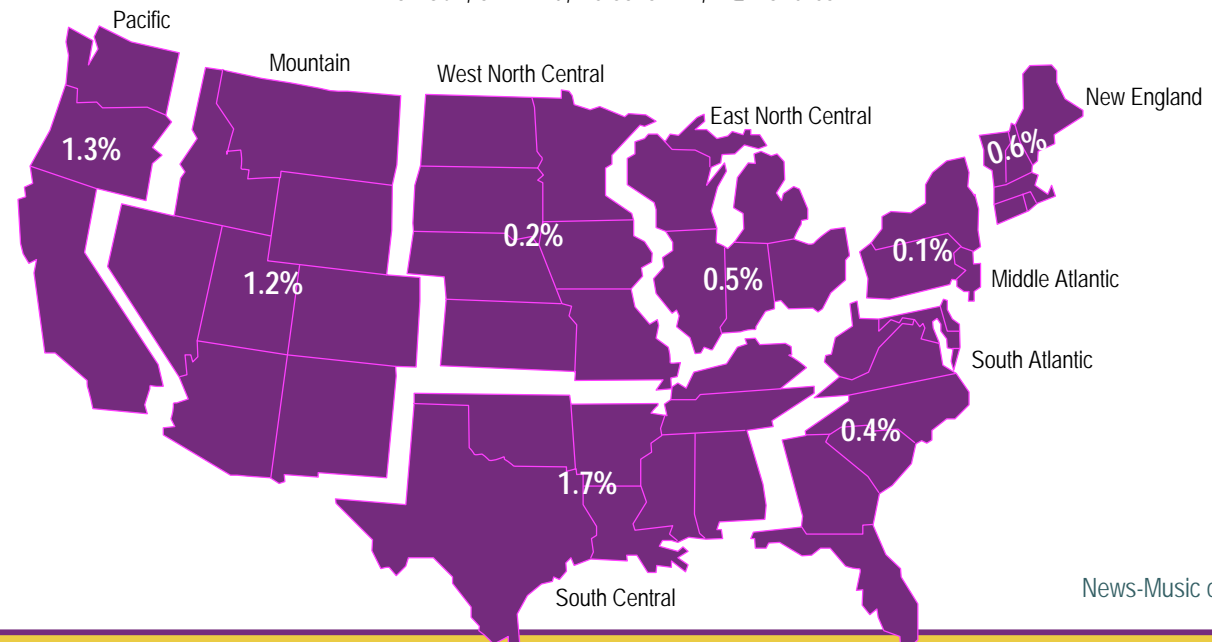
News-Music Share of All Public Radio Listening

Persons 12+, by Daypart



Audience Share by Region

Mon-Sun, 6AM-Mid, Persons 12+, AQH Shares



Note: Due to rounding, totals may differ.
Source: MaximiSer® Plus National Regional Database, Fall 2006.

News-Music continued ►

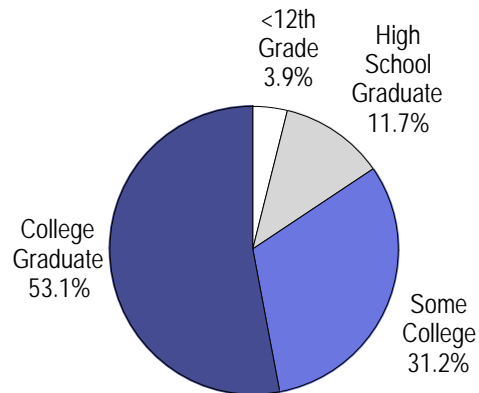
News-Music

More than 84% of News-Music adult listeners have at least attended college, though the percentage of listeners with college degrees decreased from 61% to 53% between Fall 2005 and 2006. The segment of News-Music listeners in households earning under \$25,000 grew 3% to represent 15% of the audience in 2006, though the format's \$75,000+ audience remained stable at a substantial 37%.

Average Age of P1 Listeners
52
<hr/>
73%
Proportion of Listening from P1s

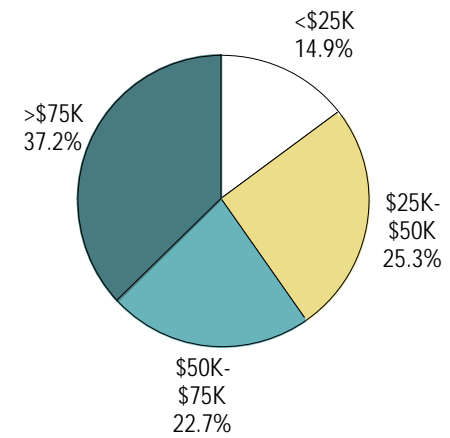
Education

Persons 18+



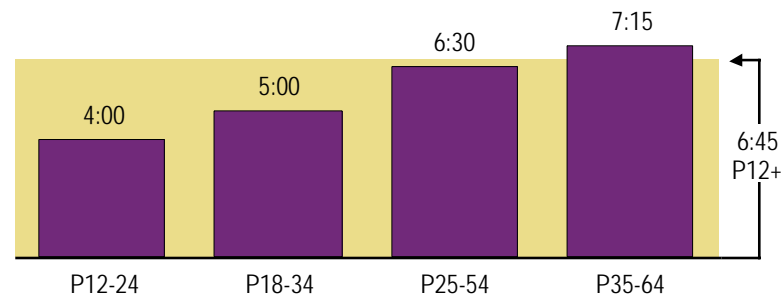
Household Income

Persons 18+



Time Spent Listening by Demographic

(Hours:Minutes)
Mon-Sun, 6AM-Mid



Note: Due to rounding, totals may differ.
Source: MaximiSer® Plus National Regional Database, Fall 2006.

Adult Album Alternative (AAA)/Eclectic

While there are many commercial AAA (aka "Triple A") stations, public radio's AAA/Eclectic stations are usually less mainstream than their commercial counterparts—certainly less so than hit radio formats offering broader, deeper and more diverse playlists. Stylistically, AAA/Eclectic stations may play acoustic rock, blues, roots, Americana, folk, bluegrass, ambient and world music. Though the average age of AAA/Eclectic primary listeners (P1s) grew 3 years older between Fall 2005 and 2006 to 45 years old, the format still can claim to have the youngest listeners among the principal public radio formats.

The AAA/Eclectic format's audience composition consolidated noticeably in the middle adult demographics between Fall 2005 and 2006, with the 25-44 age group rising from 38% to 44%, as the 12-24 audience slipped from 12% to 10%, and 45-54s declined from 31% to 27%. There also was a notable increase in the ratio of women listening, up from 40% to 43%.

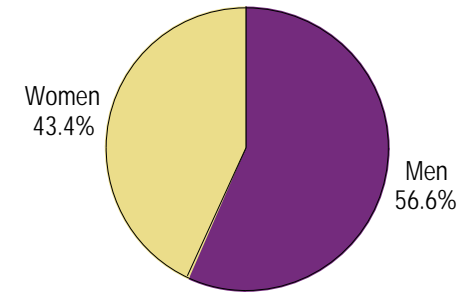
AQH Share of Total Listeners

FA05	4.6%
FA06	5.1%

Weekly Listeners 12+

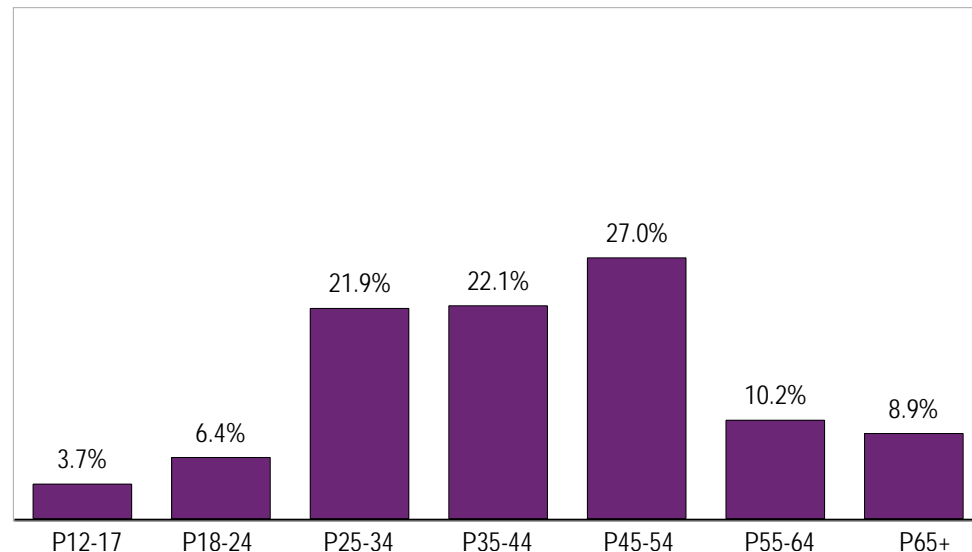
1,825,400
Format Cume

Listeners 18+ Mon-Sun, 6AM-Mid



Audience Composition

Percent of Format Audience by Demographic
Mon-Sun, 6AM-Mid



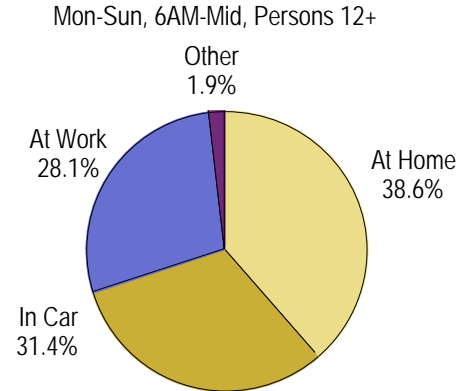
*Note: Due to rounding, totals may differ.
Source: MaximiSer® Plus National Regional Database, Fall 2006.*

AAA/Eclectic continued ►

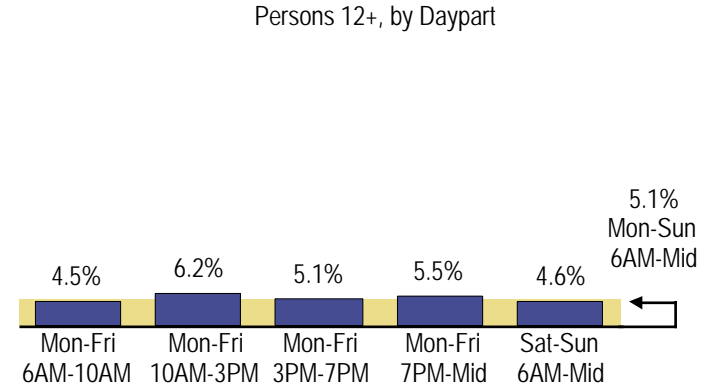
Adult Album Alternative (AAA)/Eclectic

Though at-home is still the leading location, AAA/Eclectic listeners are more likely to be listening away from home than those of any other public radio format. At-work listening, up slightly from the previous year, earned 28% of the format's listening time—best of all public formats. The Middle Atlantic territory, where AAA/Eclectic ranks third in ratings for public radio programming, is by far the format's strongest region.

AQH Share of Listening by Location

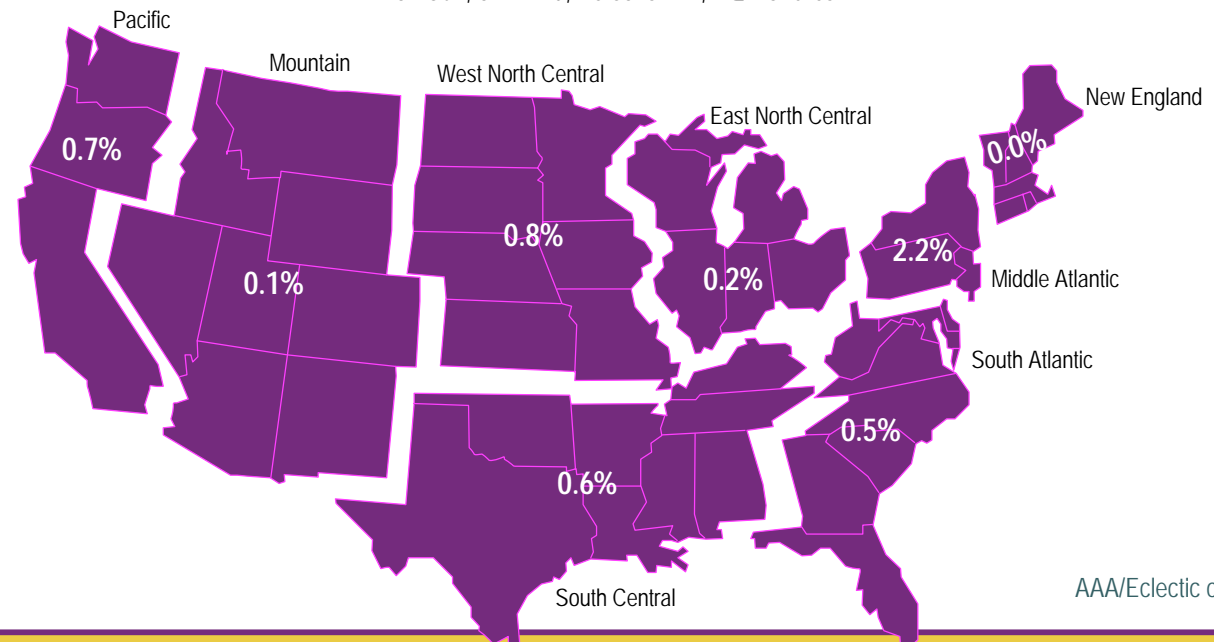


AAA/Eclectic Share of All Public Radio Listening



Audience Share by Region

Mon-Sun, 6AM-Mid, Persons 12+, AQH Shares



Note: Due to rounding, totals may differ.
Source: MaximiSer® Plus National Regional Database, Fall 2006.

AAA/Eclectic continued ►

Adult Album Alternative (AAA)/Eclectic

More than 83% of the AAA/Eclectic audience has attended college. Among listeners to public radio's music formats, the audience for AAA/Eclectic has the highest percentage living in households earning annually at least \$25,000, and 69% earn \$50,000+.

Between Fall 2005 and 2006, AAA/Eclectic benefited from a robust 17% improvement in weekly reach—the second-largest growth of all public radio formats. Combined with added TSL of 15 minutes, AAA/Eclectic advanced from 4.6% to 5.1% of public radio listening. TSL was up a full hour among Adults 18-34 and improved 30 minutes among 25-54s, offsetting 30-minute declines with 12-24s and 35-64s. Overall, every segment of the day gained audience share except afternoons, which held steady. The increases were led by a surge in mornings (with a growth rate of 21%) and middays (the format's strongest daypart, up 9%), while weekends climbed (18%).

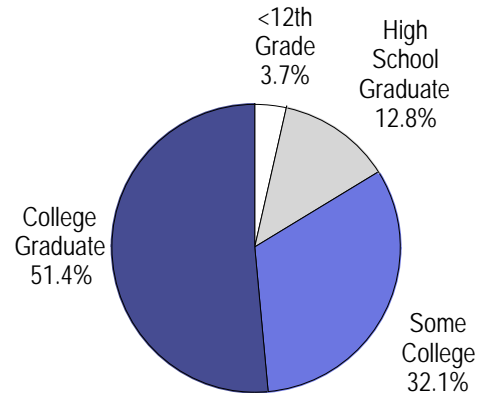
Seventy-one percent of AAA/Eclectic's ratings in Fall 2006 came from the format's P1s, up 3% from 2005.

Average Age of P1 Listeners
45
Proportion of Listening from P1s
71%

*Note: Due to rounding, totals may differ.
Source: MaximiSer® Plus National Regional Database, Fall 2006.*

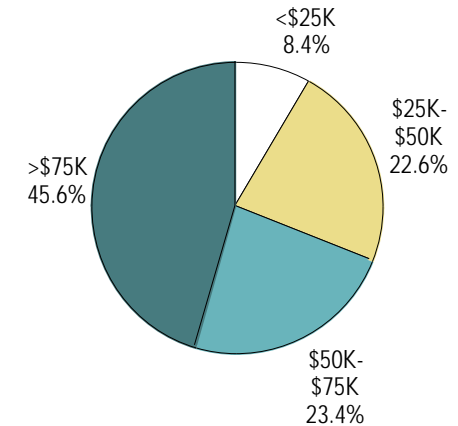
Education

Persons 18+



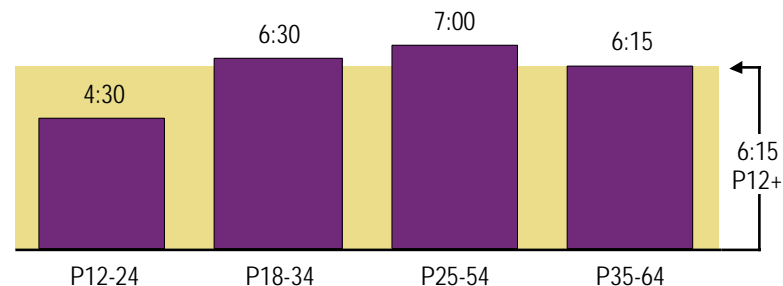
Household Income

Persons 18+



Time Spent Listening by Demographic

(Hours:Minutes)
Mon-Sun, 6AM-Mid



News-Jazz

Just as in Fall 2005, slightly more than one million people each week listened during Fall 2006 to the News-Jazz format, which dedicates at least 30% of its airtime to news, public affairs or talk programming, or carries NPR newsmagazines. In addition, these stations devote at least 30% of their airtime presenting jazz music. News-Jazz stations are mostly located in the Middle Atlantic, South Atlantic and South Central regions.

Though time spent listening overall held steady at nearly 6 hours per week, the format's 12+ weekly share of public radio listening slipped from 3% to 2.8%, owing to declines in TSL among 12-24s and 18-34s of 15 minutes and 30 minutes, respectively. News-Jazz's share of public radio listening improves in afternoons and evenings, and the format earns its best ratings on weekends, when it scores 25% higher ratings—a 3.5% share—than its full-week average.

*Note: Due to rounding, totals may differ.
Source: MaximiSer® Plus National Regional Database, Fall 2006.*

AQH Share of Total Listeners

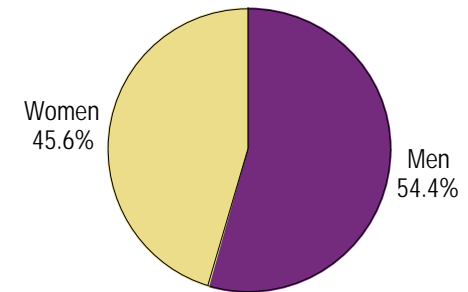
FA05	3.0%
FA06	2.8%

Weekly Listeners 12+

1,098,200
Format Cume

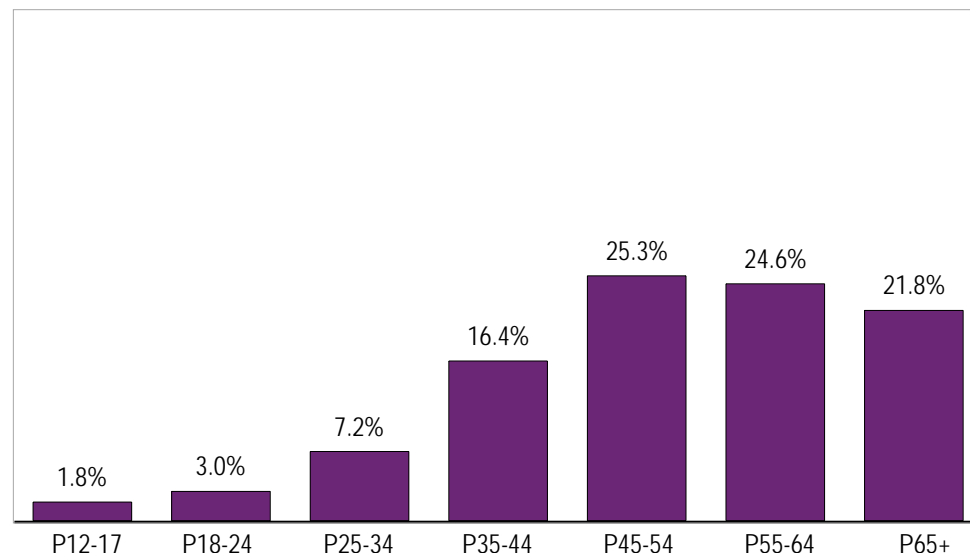
Listeners 18+

Mon-Sun, 6AM-Mid



Audience Composition

Percent of Format Audience by Demographic
Mon-Sun, 6AM-Mid



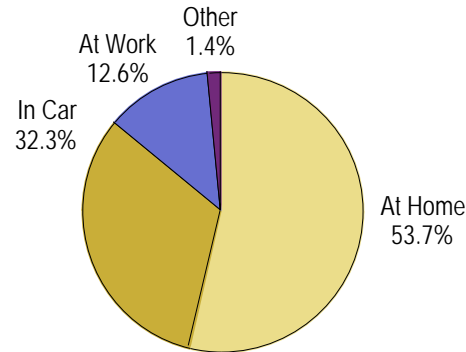
News-Jazz continued ►

News-Jazz

News-Jazz has a more even balance of male and female listeners than the Jazz format, though men still outnumber women by a 54%/46% ratio. News-Jazz's listenership is increasingly centering more on the 35-64 segment, which made up 66% of the format's total audience composition in Fall 2006, up from 63% a year prior. Two-thirds of News-Jazz's ratings come from its primary listeners. Like the Jazz format, at-work's share of News-Jazz listening did grow, in this case even more noticeably (from 10 to 13%), primarily at the expense of at-home tune-in.

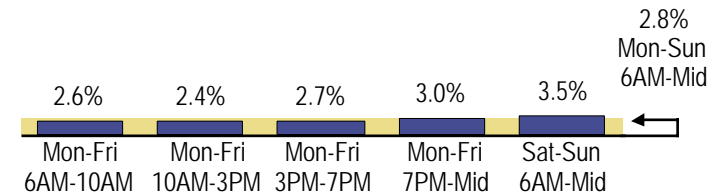
AQH Share of Listening by Location

Mon-Sun, 6AM-Mid, Persons 12+



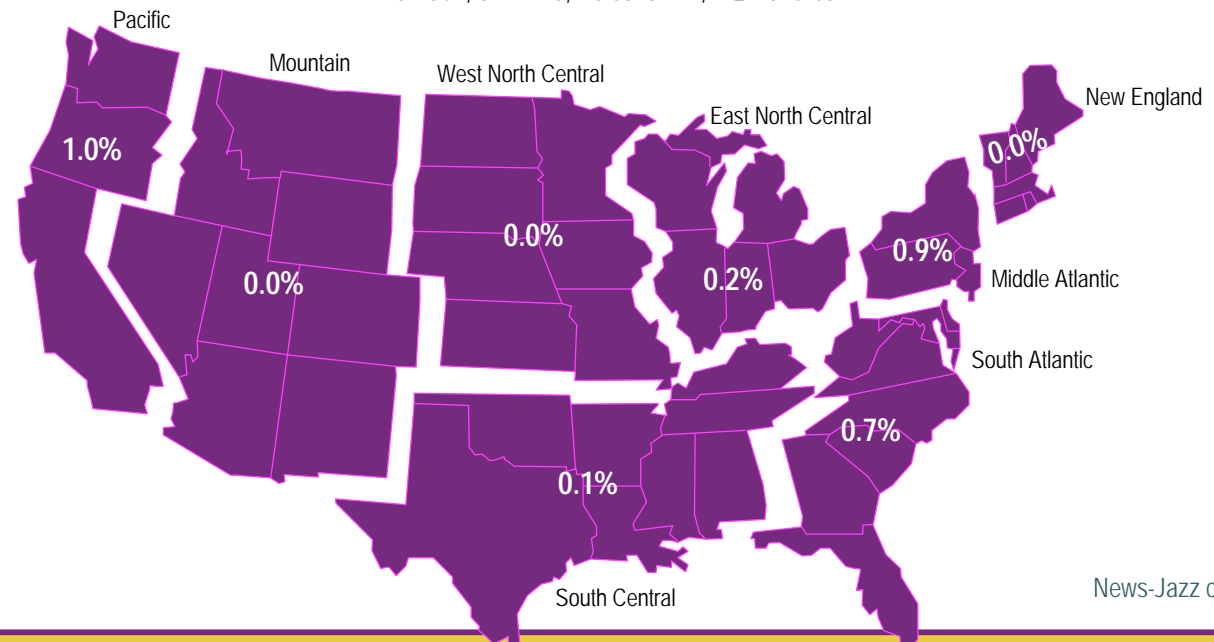
News-Jazz Share of All Public Radio Listening

Persons 12+, by Daypart



Audience Share by Region

Mon-Sun, 6AM-Mid, Persons 12+, AQH Shares



Note: Due to rounding, totals may differ.
Source: Maximizer® Plus National Regional Database, Fall 2006.

News-Jazz continued ►

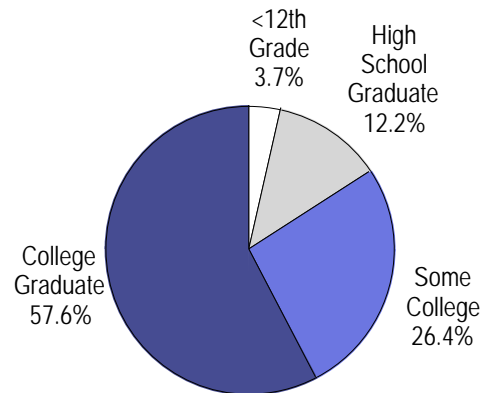
News-Jazz

A higher percentage of News-Jazz listeners (58%) have a college degree than listeners of most other public radio formats, and 84% have at least attended college. Nearly 65% of News-Jazz listeners live in households earning at least \$50,000 per year.

Average Age of P1 Listeners
54
Proportion of Listening from P1s
66%

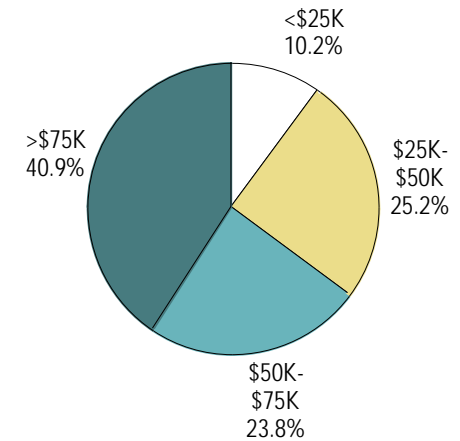
Education

Persons 18+



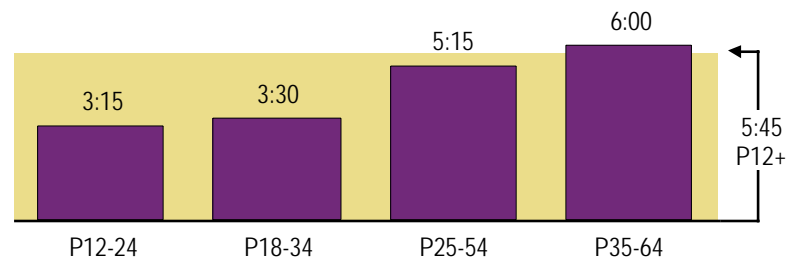
Household Income

Persons 18+



Time Spent Listening by Demographic

(Hours:Minutes)
Mon-Sun, 6AM-Mid



*Note: Due to rounding, totals may differ.
Source: MaximiSer® Plus National Regional Database, Fall 2006.*

Variety Music

Variety Music features programming segments that do not adhere to one specific format or style, but offer instead a mix of programming music genres. Listeners to Variety Music outlets represent a wider spectrum of age groups than those of other public radio formats, perhaps due to the variety of music styles played on these stations. The Variety Music approach can be heard in all regions of the country, and it delivers its largest audiences in the New England and South Central areas.

Variety Music increased its audience reach 20% between Fall 2005 and 2006—the largest percentage of all public radio formats, leading to a slight improvement of its overall share of public radio listening from 1.9% to 2%. The reason it wasn't higher can be traced to a slight overall decline in time spent listening during that time period, from 5 hours per week to 4 hours 45 minutes. Although the 25-54 age group added 15 minutes per week, the 12-24 segment fell 75 minutes and the 35-64 segment slipped 30 minutes.

*Note: Due to rounding, totals may differ.
Source: MaximiSer® Plus National Regional Database, Fall 2006.*

AQH Share of Total Listeners

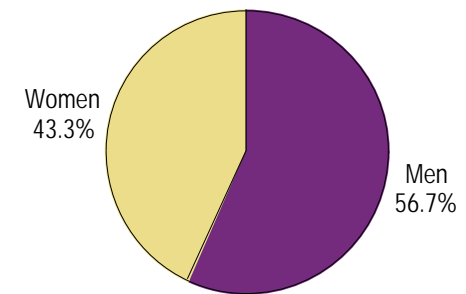
FA05	1.9%
FA06	2.0%

Weekly Listeners 12+

938,200
Format Cume

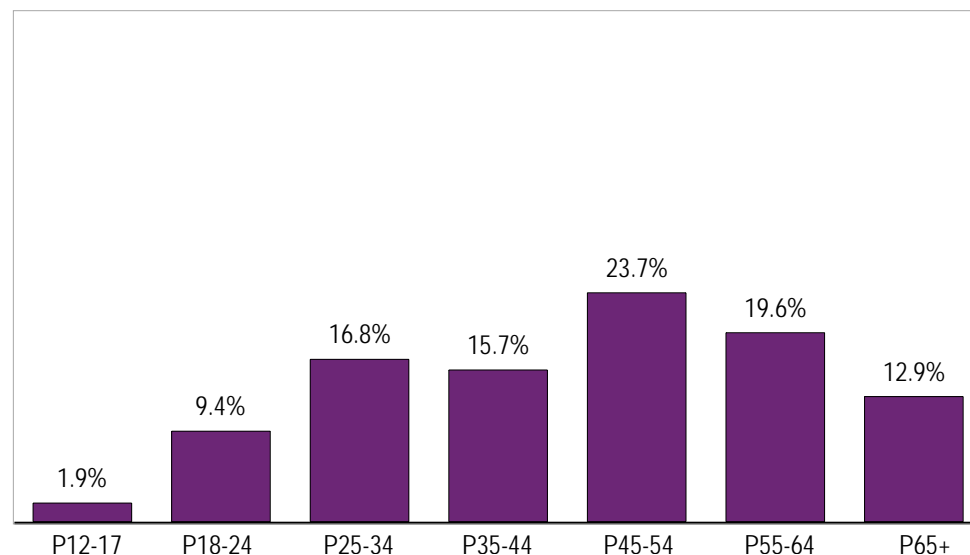
Listeners 18+

Mon-Sun, 6AM-Mid



Audience Composition

Percent of Format Audience by Demographic
Mon-Sun, 6AM-Mid



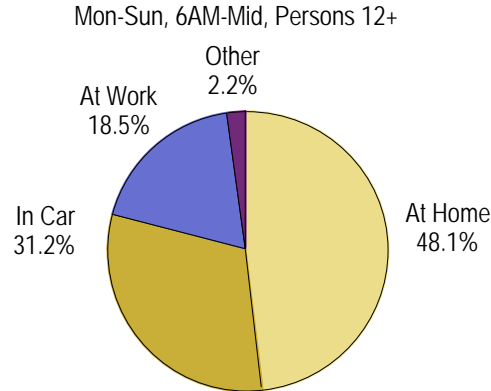
Variety Music continued ►

Variety Music

The overall dip in TSL is certainly not uncommon when a format generates many new, and perhaps less devoted, listeners. This influx of new listeners also can be seen in the proportion of listening from the format's primary audience, which dropped from 60% to 55%—the lowest percentage of all public radio formats in this report. Of note is that the average age of Variety Music's primary listeners grew from 47 years old to 50 between Fall 2005 and 2006.

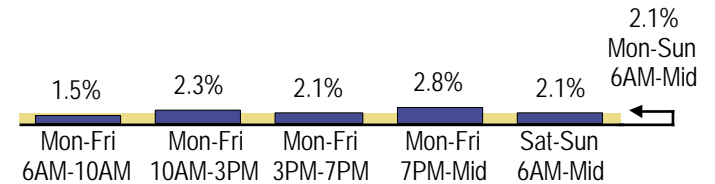
Variety enjoys its largest share of public radio listening in evenings with 2.8%—that's 40% above its full-week numbers. At-work tune-in slipped below 50% between Fall 2005 and 2006, with in-car's share of Variety listening rising from 27% to 31%—the same as AAA/Eclectic.

AQH Share of Listening by Location



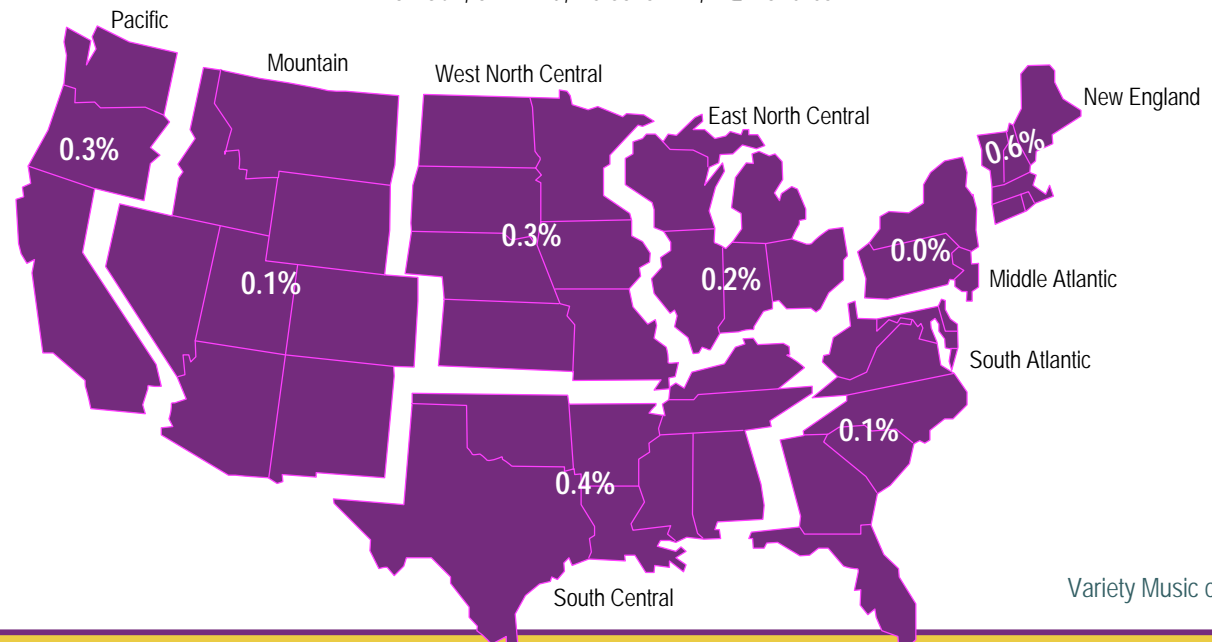
Variety Music Share of All Public Radio Listening

Persons 12+, by Daypart



Audience Share by Region

Mon-Sun, 6AM-Mid, Persons 12+, AQH Shares



Note: Due to rounding, totals may differ.
Source: MaximiSer® Plus National Regional Database, Fall 2006.

Variety Music continued ►

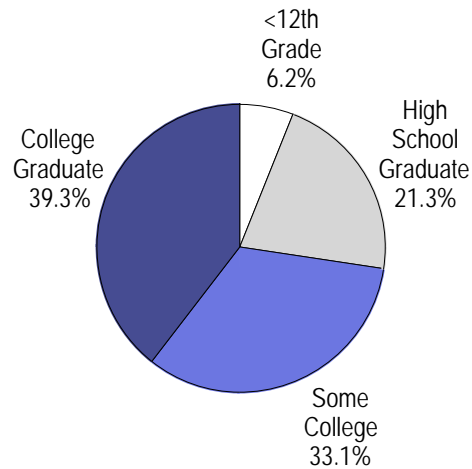
Variety Music

More than 72% of Variety Music listeners have at least attended college, and nearly 40% have a degree. That figure is down from 47% between Fall 2005 and 2006; but again, that is likely attributable to the large influx of new listeners. The good news is that the percentage of Variety Music listeners living in households earning \$75,000 or more rose from 30% to 33% during that time frame.

Average Age of P1 Listeners
47
Proportion of Listening from P1s
55%

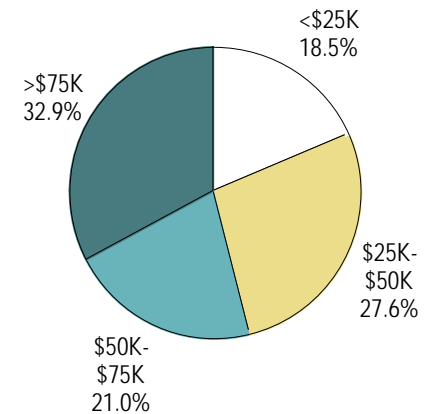
Education

Persons 18+



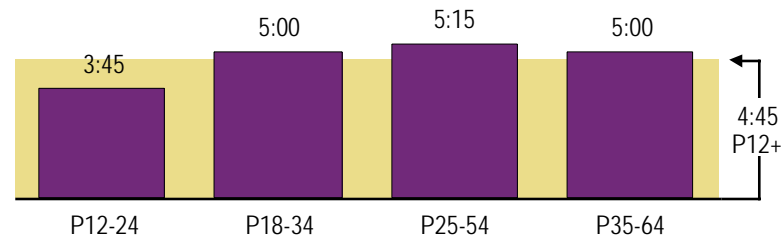
Household Income

Persons 18+



Time Spent Listening by Demographic

(Hours:Minutes)
Mon-Sun, 6AM-Mid



Note: Due to rounding, totals may differ.
Source: MaximiSer® Plus National Regional Database, Fall 2006.

Scarborough Qualitatives

The 2007 *Public Radio Today* provides an expanded view of Scarborough Research insights into household factors, including marital status, number of children at home, employment and home ownership. You'll also find:

- Vehicle ownership and purchase intentions
- Financial investments
- Political leanings
- Select consumer buying characteristics
- Other format preferences

Household Characteristics

Empty Nest, Full Buying Power

Public radio listeners are more mature, and therefore are less likely to have children living at home. However, between 2005 and 2006, the index of public radio listeners without children shifted from 113 in 2005 to 111 in 2006. Additionally, the index of public radio listeners with 3 or more children went from 63 in 2005 to 71 in 2006.

Public radio listeners are more likely than average to be employed full time and nearly 80% own their own home, making them an ideal target group for sponsorships and underwriting opportunities from home improvement stores, insurance companies, home furnishings, mortgage firms and myriad home services, such as security, landscaping, pest control, cleaning, etc.

Scarborough Qualitative—Household Characteristics

Marital Status	Index
Married	110
Widowed	73
Legally Separated	61
Divorced	106
Never Married (Single)	84

Children 17 and Under in Household	Index
None	111
One	90
Two	87
Three or More	71

Employment Status	Index
Employed Full Time (35 Hours or More)	112
Employed Part Time (Less Than 35 Hours)	100
Not Employed	83

Own or Rent Residence	Index
Own (78%)	110
Rent (20%)	81
Other (2%)	53

Source: Scarborough Research, Scarborough USA+, Release 2, 2006
(Current Six Months Only).

An index of 100 is average.



Vehicle Purchase Plans

In the Driver's Seat

Public radio listeners are 15% more likely than the national average to be part of a household that has bought a car—new, used, or leased—in the past year. They are also 19% more likely to own 2 cars. Between 2005 and 2006, their reasons for choosing a dealership were less guided by any after-market considerations—service, financing options and warranties—and have continued to be driven by convenience and integrity issues, including selection, dealer location, price-value and dealer reputation.

Public radio stations should regard foreign-car dealerships—especially those offering luxury and larger-sized models—as relevant underwriters or sponsors. Among public radio listeners planning to buy a new car in the next 12 months, only 28% expect to spend under \$20,000 and more than 28% plan to spend \$30,000+.

From 2005 to 2006, the number of public radio listeners in households planning to buy or lease a new car soared 17%, with the largest jumps in the luxury cars (up 31%) and full-size cars (up 33%) while compacts dropped 17%. However, if gas prices remain at record-highs, compact purchase plans will surely rebound.

Source: Scarborough Research, Scarborough USA+, Release 2, 2006 (Current Six Months Only).

An index of 100 is average.

Scarborough Qualitative—Vehicle Purchase Plans

Kinds of Cars Public Radio Listeners Drive	Foreign Index	Domestic Index
Luxury	169	91
Vans	147	88
Large	143	85
Sport/Utility/Special Purpose	137	93
Midsize	134	83
Compact	128	93
Subcompact	122	76
Trucks	99	77
Other	—	76

Public Radio Listeners' Auto Dealership Selection Criteria*	Index
Selection of Makes/Models	122
Location	122
Price-Value	118
Reputation of Dealer	111
Service	105
Other Reason	105
Financing Through Dealer	92
Warranty	90

* Regarding dealers selling new vehicles (not leased or used vehicles).

Vehicle Public Radio Households Plan to Buy/Lease in the Next 12 Months*	Target Population
Any New Vehicle	3,079,460
Midsize Car	653,156
Sport Utility Vehicle (SUV)	647,325
Luxury Vehicle (Any Size)	501,233
Compact Car	354,608
Pickup Truck	324,882
Van or Minivan	311,650
Full-Size Car	286,606

* New or leased vehicle.



Investment Practices

The Buck Starts Here

Even more so than in the prior year, listeners to public radio are far more likely than the general public to own stocks, bonds, property and related investments and securities. Nearly 70% of public radio listeners have at least one form of investment and 43% hold stocks or stock options. That makes banks, mortgage companies, credit card services, brokerage firms, financial consultants and vacation/retirement property marketers prime candidates for underwriting and sponsorships of public radio stations.

Public radio listeners have become increasingly active in 401(k) contributions, online banking and home equity loans, and slightly less so in CDs and auto loans since the 2005 report. Their high level of use of some of the most common resources such as debit cards (59%), savings accounts (72%) and checking accounts (90%) remained unchanged.

Source: Scarborough Research, Scarborough USA+, Release 2, 2006 (Current Six Months Only).

An index of 100 is average.

Scarborough Qualitative—Investment Practices

Investments Held in Households of Public Radio Listeners	Index
Money Market Funds	152
Mutual Funds	151
Bonds	144
Second Home or Real-Estate Property	141
Stock or Stock Options	138
Any Investment	126
Other Security or Investment	124
None	69

Financial Services Used by Public Radio Listeners	Index
Keogh Plan	214
Money Market Account	150
Individual Retirement Account (IRA)	147
Online Bill Paying	138
Online Banking	137
Home Equity Loan	136
401(k) Plan	133
Home Mortgage	131
Certificates of Deposit (CDs)	123
24-Hour Teller Card (ATM)	123
Home Improvement Loan	117
Debit Card	110
Auto Loan	103
Savings Account	108
Checking Account	107
Personal Loan	86



Political Profiles

Running From the Poll Position

From presidential campaigns to municipal candidates and issues, public radio listeners are a powerful and active political force: They are 8% more likely than average American adults to be registered to vote, and 15% more likely to show up at the polling place to cast their votes during presidential elections. This index is slightly higher in 2006 than it was in the previous year. Eighty-one percent of public radio listeners say they always vote in presidential elections, and 60% say they always vote in statewide elections.

While the percentage of public radio listeners who identify themselves as Democrats (32%) outnumbers those who say they are Republicans (26%), the Democrats' edge is not overwhelming. However, among the public radio listeners who claim to be Independents (30%), there is a big difference in allegiance: 50% are more likely to favor the Democrats' side than Independents in general, giving the Democrats an overall 44%-33% edge. It's no wonder public radio offers more programming of interest to Democrats than does commercial Talk radio.

Source: Scarborough Research, Scarborough USA+, Release 2, 2006 (Current Six Months Only).

An index of 100 is average.

Scarborough Qualitative—Political Profiles

How Public Radio Listeners Vote in Presidential Elections	Index
Always	115
Sometimes	71
Never	62

How Public Radio Listeners Vote in Statewide Elections	Index
Always	126
Sometimes	93
Never	62

How Public Radio Listeners Vote in Local Elections	Index
Always	119
Sometimes	107
Never	68

Public Radio Listeners' Party Affiliations	Index
Democratic Party	110
Republican Party	90
Independent	107
Independent, But Feel Closer to Democratic Party	150
Independent, But Feel Closer to Republican Party	110
None of These	69



Consumer Product Choices

The Finer Things

Grocery purchases of public radio listeners were stable between 2005 and 2006, except for a 14% increase in the \$125-\$199 categories, from the year before. In the media sector, the public radio audience was less motivated than the general population to buy consumer electronics, except for satellite radio in which interest grew slightly.

Scarborough Qualitative—Consumer Product Choices

Consumer Online Purchase Behavior	Index
Cultural Event Tickets	214
Airline Tickets	176
Books	172
Wine	171
Other Travel Reservations (Hotel, Auto Rental, etc.)	168
Consumer Electronics	165
CDs, Tapes or Other Music	158
Computer Hardware/Software	158
Flowers	158
Movie Tickets	155
Insurance	146
Office Supplies	144
Medicine/Prescriptions	143
Pet Supplies	142
Clothing or Accessories	138
Any Internet Purchase Past 12 Months	137
Sporting Event Tickets	135
Health and Beauty Items	132
Toys or Games	114
Sports Logo Apparel	108

Grocery Spending Among Public Radio Listeners' Households*	Index
Less than \$30	85
\$30-\$49	92
\$50-\$74	94
\$75-\$99	101
\$100-\$124	99
\$125-\$149	107
\$150-\$199	109
\$200 or more	101
Groceries, Candy or Other Food Items	127

* Spent in the past week.

Source: Scarborough Research, Scarborough USA+, Release 2, 2006
(Current Six Months Only).

An index of 100 is average.



Continued ►

Consumer Product Choices

The purchasing forecast for the next 12 months decreased for MP3 players, HDTVs, computers and digital cameras. Purchasing intent also declined for cell phones, which already are owned by nearly 75% of public radio listeners. There was an increase of interest in satellite TV subscriptions and video game systems, but the interest is still below the national average.

Public radio listeners are business decision makers, controlling all types of corporate purchasing. Between 2005 and 2006, their role in buying moved slightly more towards strategic decisions—such as travel and convention arrangements, personnel services and company health care programs—and slightly away from back-end operations—such as equipment, software, IT, deliveries, and telephone/communication services. However, their influence on all technology-driven budgets remains well above the norm.

Source: Scarborough Research, Scarborough USA+, Release 2, 2006
(Current Six Months Only).

An index of 100 is average.

Scarborough Qualitative—Consumer Product Choices

Wireless/Cell Phone Carriers Used by Public Radio Listeners	Index
Qwest Wireless®	127
Verizon Wireless	125
Virgin Mobile USA	119
Cingular Wireless	109
T-Mobile	108
Sprint Nextel	99
None	84

Public Radio Listeners Plan to Acquire These Technologies in the Next 12 Months	Index
Satellite Radio Subscription (Sirius, XM)	120
High-Definition Television (HDTV)	116
Computer	102
MP3 Player	100
Digital Camera	100
Digital Video Recorder (TiVo®, etc.)	93
Satellite TV Subscription	92
Wireless/Cellular Service for Self	89
Wireless/Cellular Service for Other Household Member	85
Video Game System	82

Business-to-Business Buying Decisions of Public Radio Listeners	Index
Business Travel or Convention Arrangements	164
Information Technology (Network/Internet)	159
Computer Hardware/Software	152
Temporary Personnel Services	152
Company Health Care Programs	151
Office Furniture	145
Telephone and Communication Equipment	139
Office Equipment (Photocopier, Fax Machine, etc.)	137
Company Gifts for Customers or Employees	132
Telephone and Communication Services	131
Office Supplies	128
Overnight Delivery Services	125



Other Format Preferences of Public Radio Listeners

Public radio listeners share their radio time among a wide variety of formats that fall within both the spectrum of public radio programming and the world of commercial radio. Beyond the most popular public radio and speech formats, several contemporary music formats score well among public radio listeners, indexing far above the national average, namely, Adult Album Alternative, New AC/Smooth Jazz, Alternative and Adult Hits.

Scarborough Qualitative—Other Format Preferences of Public Radio Listeners

Other Format* Preferences of Public Radio Listeners	Index
Educational	870
Jazz	862
Classical	649
Variety	596
Adult Album Alternative (AAA)	388
News/Talk/Information	314
Easy Listening	207
Talk/Personality	190
All News	173
Ethnic	167
All Sports	152
Adult Standards	150
New AC/Smooth Jazz	149
Alternative	129
Adult Hits	122
Soft AC	121

Other Format* Preferences of Public Radio Listeners	Index
Oldies	111
Religious	108
Adult Contemporary	106
Classic Hits	106
Classic Rock	103
Hot AC	98
Album Oriented Rock	93
Contemporary Christian	86
Contemporary Inspirational	86
Active Rock	76
Urban AC	76
Country	64
Gospel	64
Pop CHR	63
Rhythmic CHR	60
Urban Contemporary	58

* At least 3% of the public radio audience listens to the format.

Source: Scarborough Research, Scarborough USA+, Release 2, 2006
(Current Six Months Only).

An index of 100 is average.



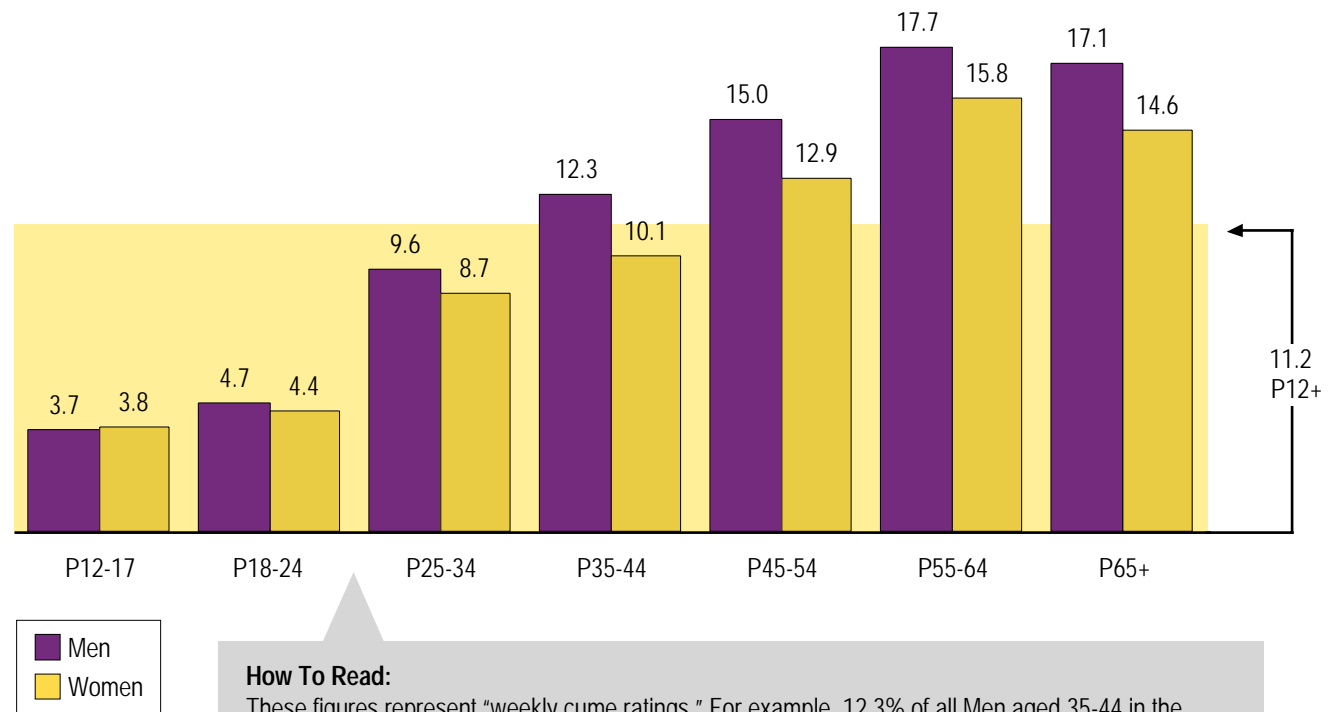
National Radio Listening Trends

This section details nationwide listening trends among public radio audiences. You'll see their listening patterns traced by age and gender, on an hour-by-hour basis and according to listening location. Also presented are informative new format rankings by audience share and geographic region. In these pages you can see that from dawn to dusk, on weekdays and weekends, at home or away, public radio is a vibrant and integral part of its listeners' lives.

Public Radio Reaches All Ages

People of all ages listen to public radio each week. The great bulk of public radio listening comes from Adults 35+, though slightly more men than women listen to public radio. Overall, public radio expanded its weekly reach from 10.5% to 11.2% between Fall 2005 and 2006—a 7% annual growth rate. There were increases across all demographic groups, primarily among those 55 and older. Within the 55-64 age segment, the weekly reach for men was up 11%, while women gained 10%. Among Adults 65+, both men and women delivered a 9% increase.

Weekly Cume Rating
Percent of Population That Tunes in to Public Radio



How To Read:

These figures represent “weekly cume ratings.” For example, 12.3% of all Men aged 35-44 in the United States tune in to the radio at least once during an average week, between the hours of 6AM and Midnight, Monday through Sunday. The yellow background represents the average of all Americans, at least 12 years old, who listen to public radio at least once during the week. With that background, you can then see how radio reaches various demographic groups compared to the national average.

Source: MaximiSer® Plus National Regional Database, Fall 2006, Mon-Sun, 6AM-Mid.

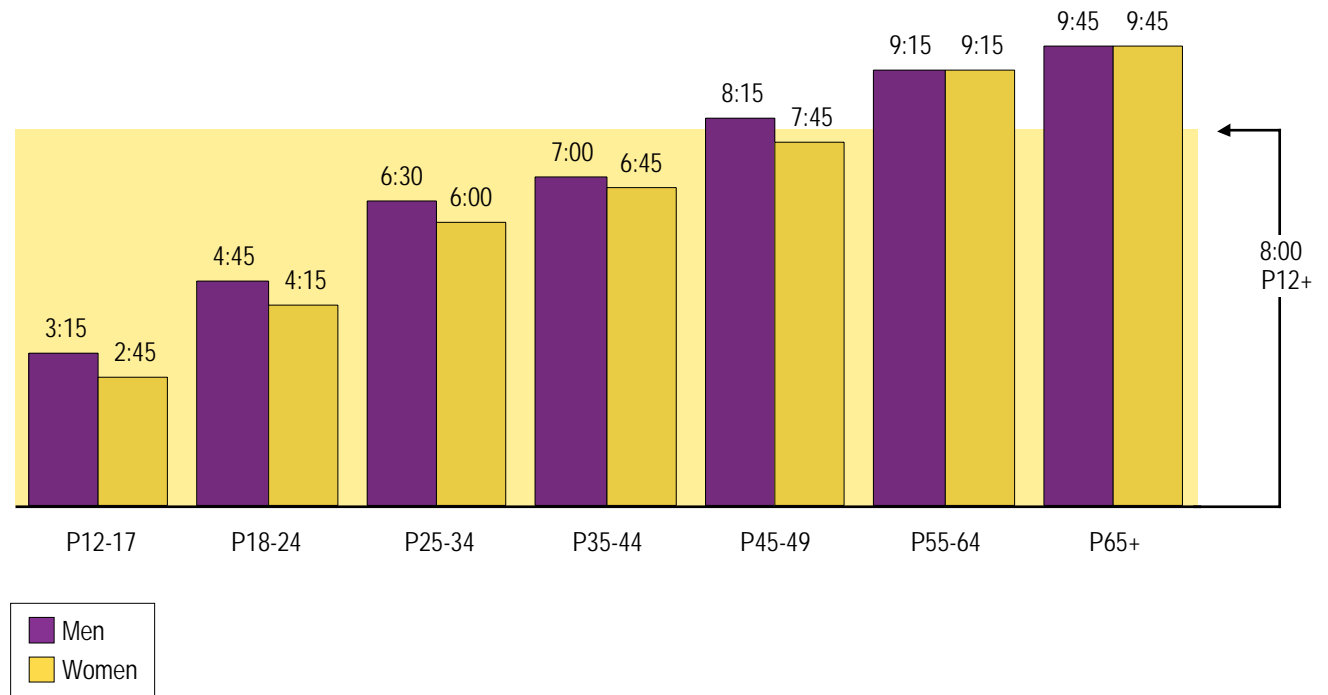
Continued ►

Public Radio Reaches All Ages

The average amount of time spent listening to public radio held steady at 8 hours per week between Fall 2005 and 2006, with time spent listening rising steadily as the audience grows older. Men 65+ showed the best improvement, rising 30 minutes per week, followed by Teen boys, up 15 minutes. Women showed virtually no TSL change overall except a small decrease among the 45-54 segment, and a 30-minute drop among Teen girls. Among men, there was a 45-minute TSL decline among 18-24s, and a modest slippage among those 35-64.

Time Spent Listening to Public Radio

Hours:Minutes per Week



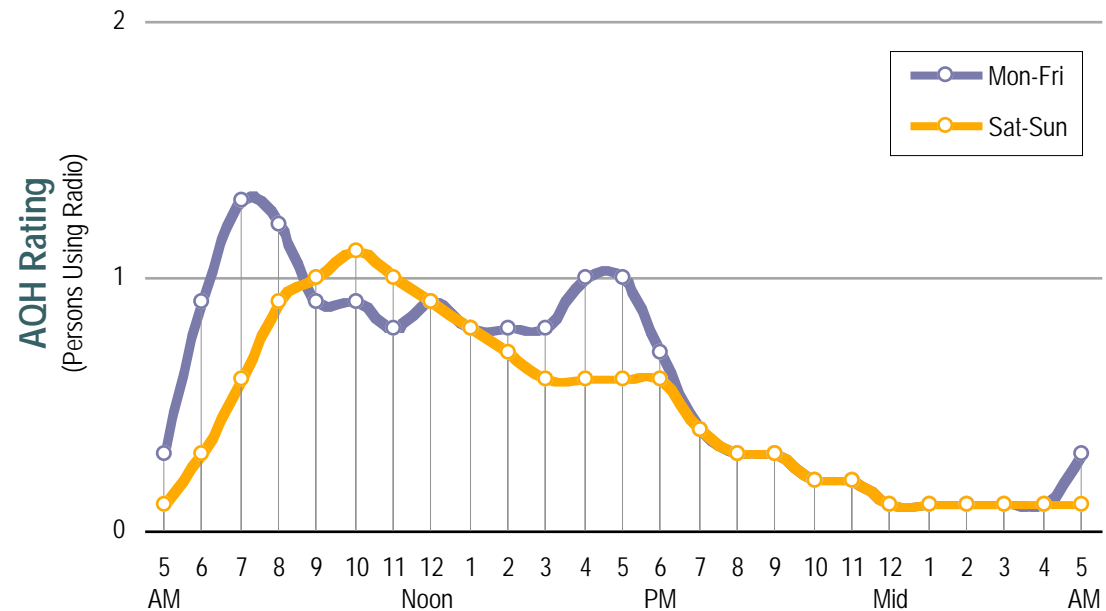
Source: MaximiSer® Plus National Regional Database, Fall 2006, Mon-Sun, 6AM-Mid.

Hour-by-Hour Listening

This chart illustrates a familiar pattern in which public radio listening kicks in during the week at 6AM and peaks between 7AM and 9AM. Listening remains strong throughout the workday and rises between 4PM and 6PM as workers seek to hear the news of the day on their commute home before they shift to evening activities.

Weekend listening to public radio gets started slightly later—weekends outperform weekdays from 9AM to noon—and the rest of the time earns equal or close to what weekdays deliver, except between 4PM and 6PM.

Hour-by-Hour Listening, AQH Rating



Source: MaximiSer® Plus National Regional Database, Fall 2006, Mon-Sun, 5AM-5AM.

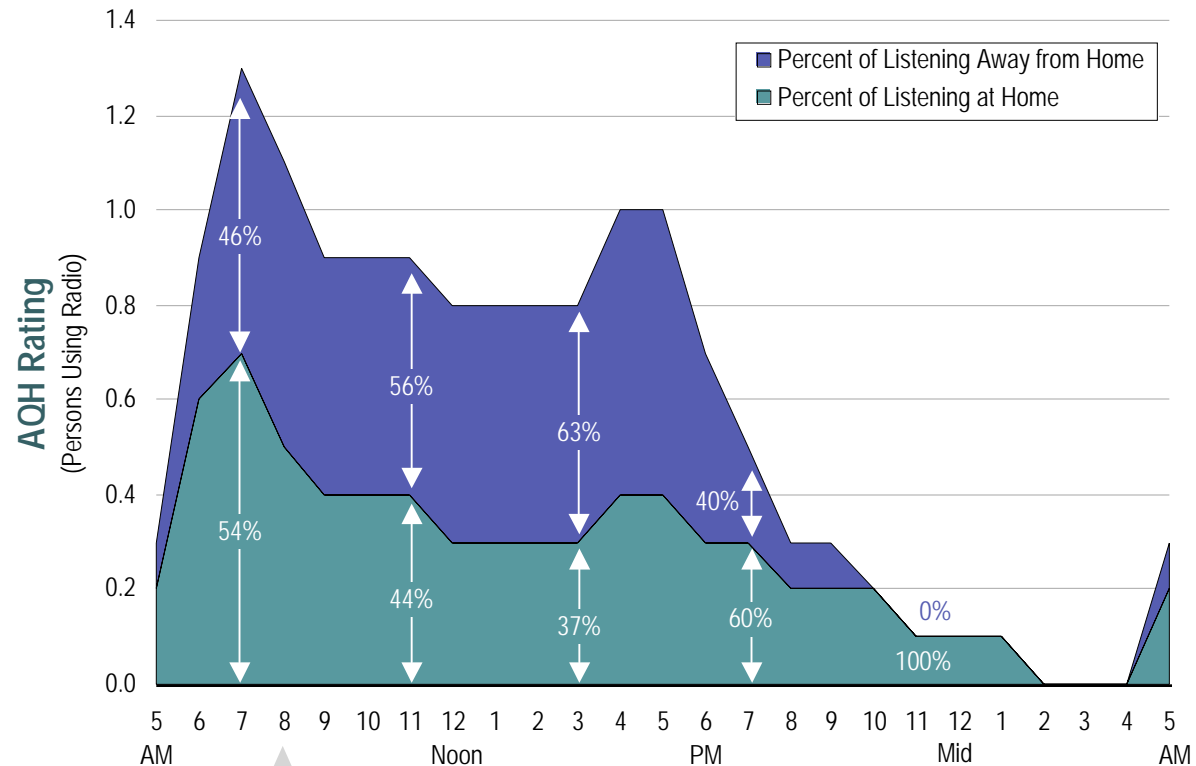
Public Radio Listening Location: Weekdays

For 11 hours each weekday between 8AM and 7PM, more public radio listening takes place away from home, accompanying listeners in the car, at work or some other location. Radio's unique advantage as *the* on-the-go medium is its ability to reach people wherever they are, and for advertisers, to most directly influence purchasing decisions. Away-from-home public radio listening peaks between noon and 4PM, when 63% of public radio tune-in is somewhere other than at home.

Between Fall 2005 and 2006, at-home Average Quarter-Hour weekday ratings increased from 0.5% to 0.6% in the 6AM hour, and from 0.3% to 0.4% in the 6AM, 4PM and 5PM hours. However, away-from-home AHQ ratings remained the same, giving at-home a slightly higher percentage of overall listening during those 4 hours in Fall 2006 than in the previous year.

Weekday Listening, AQH Rating

Persons Using Radio
Mon-Fri, Total Day (5AM-5AM)



How to Read:

The graphs on this page and next page show how listening location makes up radio listening during the course of a typical weekday and weekend day. For example, during the 11AM hour on this chart, about 0.9 percent of the 12+ population listened to public radio for at least five minutes. Of those who had listened, about two-thirds listened away from home.

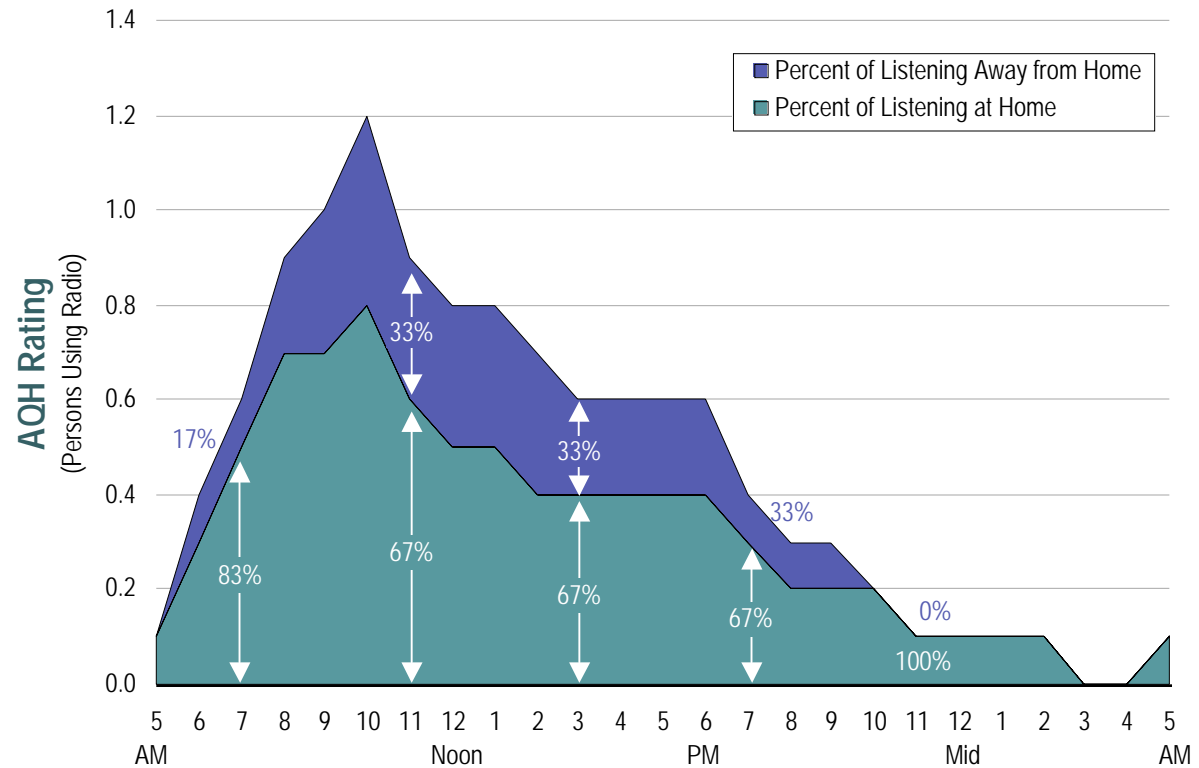
Source: MaximiSer® Plus National Regional Database, Fall 2006, Mon-Fri, 5AM-5AM.

Public Radio Listening Location: Weekends

With no commute or substantial at-work listening, most public radio listening on the weekend occurs in the home. Throughout a typical weekend day, generally no less than 60% of all listening to public radio occurs at home. Some of public radio's most popular feature shows are programmed on weekends, including Tom and Ray Magliozzi's *Car Talk*, Michael Feldman's *Whad'ya Know* and Garrison Keillor's *A Prairie Home Companion*. Weekend listening to public radio peaks in the 10AM hour.

Weekend Listening, AQH Rating

Persons Using Radio
Sat-Sun, Total Day (5AM-5AM)



Source: MaximiSer® Plus National Regional Database, Fall 2006, Sat-Sun, 5AM-5AM.

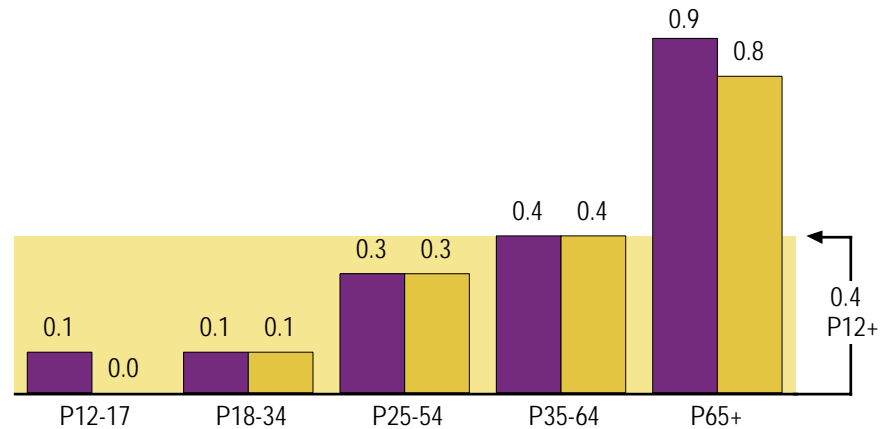
Public Radio Listening Location by Men and Women

Listening to public radio at home is virtually identical between men and women. The only changes between Fall 2005 and 2006 was a one-tenth percent decrease in Teen girls and a similar increase among Men 65+.

In terms of away-from-home listening, ratings for Men 25+ are slightly higher, and grew more so between Fall 2005 and 2006, as men picked up an additional one-tenth AQH ratings point among the 25-54, 35-64 and 65+ demographic groups.

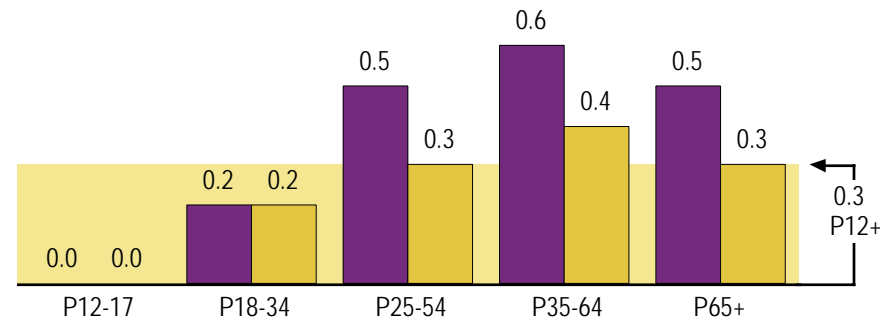
At-Home Listening for Men and Women

Total Week, AQH Rating



Away-from-Home Listening for Men and Women

Total Week, AQH Rating



Source: MaximiSer® Plus National Regional Database, Fall 2006, Mon-Sun, 6AM-Mid.

Public Radio Listening Location—In Detail

While at-home listening is self-explanatory, away-from-home listening takes many forms: in-car, at-work and “other” listening (some examples of “other” locations include listening while at the gym, a friend’s house or a picnic). It should come as no surprise that at-work listening peaks during the Monday-Friday, 10AM-3PM daypart and is at its lowest during the Monday-Friday, 7PM-Midnight daypart.

Public radio listening by location is very stable, and there were very few shifts in listening between Fall 2005 and 2006—less than a single percent change in any location or daypart. The only adjustment to even that minor degree occurred in at-home listening from 3PM to 7PM, which climbed almost a point to nearly match at-home’s midday share of public radio listening.

Distribution of AQH Radio Listeners by Listening Location

Persons 12+

	Home	Car	Work	Other
Mon-Sun 6AM-Mid	52.0%	34.0%	12.7%	1.3%
Mon-Fri 6AM-10AM	52.2%	36.5%	10.6%	0.8%
Mon-Fri 10AM-3PM	39.9%	31.1%	27.6%	1.4%
Mon-Fri 3PM-7PM	37.8%	48.0%	13.1%	1.2%
Mon-Fri 7PM-Mid	69.5%	25.2%	3.9%	1.4%
Weekend 10AM-7PM	64.3%	29.9%	3.9%	1.9%

Fast Fact:

It’s well known that radio is the only mass medium that easily adapts to all key listening locations. But exactly what is “other” as a listening location? If you’re listening to the radio while visiting a friend’s house (or a beach or park), working out at the gym or waiting in a doctor’s office, you’re in an “other” location. It should be noted that “at-work” listening, while frequently thought of as “office” listening, can encompass many other work locations, such as a vehicle (if you happen to drive for a living), retail outlet, factory or construction site.

Source: MaximiSer® Plus National Regional Database, Fall 2006.

Public Radio Listening by Time of Day

People in different age groups listen to public radio at different times. Listening times peak for most men and women during weekday mornings between 6AM and 10AM and in the afternoons from 3PM to 7PM. Older demos tend to listen most during the midday daypart. Public radio listening is higher on weekends among 12- to 24-year-olds and with those 55 and older. In general, a higher percentage of men than women listen to public radio, particularly with the 55+ demo groups.

Between Fall 2005 and 2006, cume ratings for public radio listening increased across every time of day in every demographic, both male and female, except Teen boys, who were unchanged overall. While cume ratings for Teen girls gained a surprising 15%, generally the older the age group, the bigger the growth. Cume ratings advanced 4% to 5% with 35-44s, while cume ratings for Adults 55+ escalated between 9% to 11% overall and in the 10% range during mornings, middays, afternoons and weekends.

Source: MaximiSer® Plus National Regional Database, Fall 2006.

Public Radio's Reach by Daypart

Mon-Sun, 6AM-Mid
Cume Ratings

		Mon-Fri 6AM-10AM	Mon-Fri 10AM-3PM	Mon-Fri 3PM-7PM	Mon-Fri 7PM-Mid	Sat-Sun 6AM-Mid	Mon-Sun 6AM-Mid
P12-17	M	1.8	0.6	1.5	0.8	1.9	3.7
	W	1.6	0.6	1.5	0.8	1.8	3.8
P18-24	M	2.1	2.0	2.2	1.5	2.3	4.7
	W	1.9	1.8	1.9	1.2	2.2	4.4
P25-34	M	5.8	3.8	5.5	2.9	4.8	9.6
	W	5.3	3.9	4.9	2.4	4.4	8.7
P35-44	M	8.1	4.8	7.6	3.3	6.4	12.3
	W	6.5	4.7	5.9	2.5	5.5	10.1
P45-54	M	9.5	6.4	9.3	4.5	9.0	15.0
	W	8.1	6.1	7.8	3.6	7.9	12.9
P55-64	M	10.9	8.6	10.8	5.2	11.8	17.7
	W	9.5	8.6	9.8	4.8	10.6	15.8
P65+	M	9.5	10.7	9.5	4.9	12.1	17.1
	W	7.8	9.7	8.0	4.0	10.2	14.6

Public Radio Formats Ranked by Audience Share

Public Radio Formats Ranked by Audience Share

Mon-Sun, 6AM-Mid, AQH Persons 12+, Fall 2006

Format	Share
News Talk	43.6%
News-Classical	21.1%
Classical	12.9%
Jazz	6.2%
News-Music	6.0%
AAA (Adult Album Alternatives)/Eclectic	5.1%
News-Jazz	2.8%
Variety	2.0%

Source: MaximiSer® Plus National Regional Database,
Fall 2006.

Public Radio Formats Ranked by Audience Share by Region

Public Radio Formats Ranked by Audience Share by Region

Mon-Sun, 6AM-Mid, AQH Persons 12+, Fall 2006

New England

News-Classical	2.5%
News/Talk	2.5%
News-Music	0.6%
Variety	0.6%
Classical	0.3%
Jazz	0.1%
AAA/Eclectic	0.0%
News-Jazz	0.0%

Middle Atlantic

News/Talk	8.0%
Classical	2.6%
AAA/Eclectic	2.2%
News-Classical	1.3%
Jazz	0.9%
News-Jazz	0.9%
News-Music	0.1%
Variety	0.0%

South Atlantic

News-Classical	7.1%
News/Talk	6.9%
Classical	1.8%
Jazz	0.7%
News-Jazz	0.7%
AAA/Eclectic	0.5%
News-Music	0.4%
Variety	0.1%



Source: MaximiSer® Plus National Regional Database, Fall 2006.

Continued ►

Public Radio Formats Ranked by Audience Share by Region

Public Radio Formats Ranked by Audience Share by Region

Mon-Sun, 6AM-Mid, AQH Persons 12+, Fall 2006

East North Central

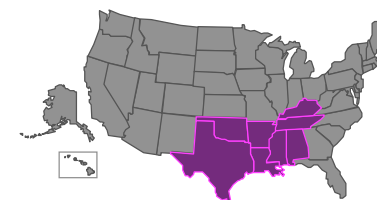
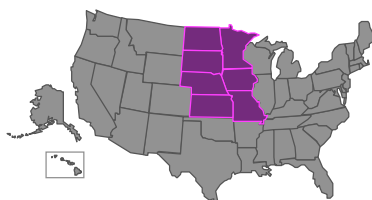
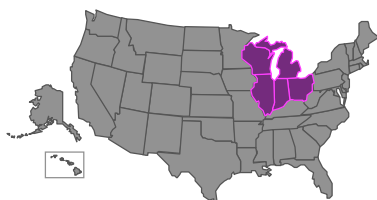
News/Talk	6.8%
News-Classical	2.8%
Classical	1.7%
News-Music	0.5%
Jazz	0.4%
AAA/Eclectic	0.2%
News-Jazz	0.2%
Variety	0.2%

West North Central

News/Talk	3.4%
News-Classical	1.1%
Classical	1.5%
AAA/Eclectic	0.8%
Jazz	0.4%
Variety	0.3%
News-Music	0.2%
News-Jazz	0.0%

South Central

News-Classical	4.2%
News/Talk	2.1%
News-Music	1.7%
Jazz	1.1%
Classical	0.8%
AAA/Eclectic	0.6%
Variety	0.4%
News-Jazz	0.1%



Source: MaximiSer® Plus National Regional Database, Fall 2006.

Continued ►

Public Radio Formats Ranked by Audience Share by Region

Public Radio Formats Ranked by Audience Share by Region

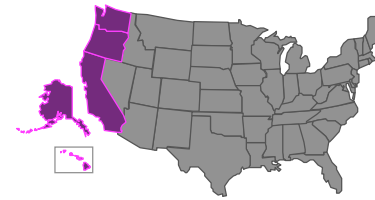
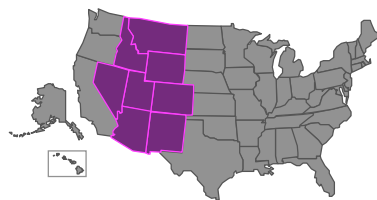
Mon-Sun, 6AM-Mid, AQH Persons 12+, Fall 2006

Mountain

News/Talk	2.6%
Classical	2.0%
News-Music	1.2%
News-Classical	1.0%
Jazz	0.7%
AAA/Eclectic	0.1%
Variety	0.1%
News-Jazz	0.0%

Pacific

News/Talk	11.3%
Classical	2.2%
Jazz	2.0%
News-Music	1.3%
News-Classical	1.1%
News-Jazz	1.0%
AAA/Eclectic	0.7%
Variety	0.3%



Source: MaximiSer® Plus National Regional Database, Fall 2006.

Sources

Public Radio Today 2007 contains radio listening and consumer behavior statistics for listeners to public radio stations in the United States. Data for the charts and graphs in this edition come from these sources:

- Arbitron's Maximizer® Plus National Regional Database, Fall 2006, which includes quantitative radio audience information from every market surveyed by Arbitron in the United States
- Scarborough USA+, Release 2, 2006, gathered from more than 220,000 interviews with adults, age 18 and over, in 81 of the country's largest markets. Scarborough's reports examine a variety of characteristics, including demographics, socioeconomic characteristics, lifestyle activities, online and offline consumer habits, local market shopping patterns and product usage as well as media behavior
- Key organizations of the public radio industry, which have provided the format definitions used in this report. We thank these four organizations for helping us shape this study. To learn more about their contributions to public radio, we invite you to visit their Web sites: Radio Research Consortium (www.rrconline.org), American Public Media (www.publicradio.org), National Public Radio (www.npr.org) and Public Radio International (www.pri.org)

We invite your questions and feedback. Please send your comments on Arbitron's *Public Radio Today* to Ron Rodrigues (ron.rodrigues@arbitron.com). For press inquiries, please contact Jessica Benbow (jessica.benbow@arbitron.com). For inquiries and comments from public radio stations, program suppliers and underwriters, please contact Chris Meinhardt (chris.meinhardt@arbitron.com) or (770) 668-5411).

Public Radio Today 2007 Edition is produced by Arbitron Inc.:

- Ron Rodrigues (Marketing Communications), Editor
- Jeff Green, Writer/Research
- Ken Campanile (Syndicated Standards & Analysis), Data Research
- Stephanie Wai Lee (Marketing Communications), Art Direction
- Kelli Hill (Marketing Communications), Design & Layout
- Kathy Weisse, Anne-Laure Brousseau (Marketing Communications), Copyediting/Proofreading



New York

142 West 57th Street
New York, New York 10019-3300
(212) 887-1300

Chicago

222 South Riverside Plaza
Suite 630
Chicago, Illinois 60606-6101
(312) 542-1900

Atlanta

9000 Central Parkway
Suite 300
Atlanta, Georgia 30328-1639
(770) 668-5400

Los Angeles

10877 Wilshire Blvd.
Suite 1400
Los Angeles, California 90024-4341
(310) 824-6600

Dallas

13355 Noel Road
Suite 1120
Dallas, Texas 75240-6646
(972) 385-5388

Washington/Baltimore

9705 Patuxent Woods Drive
Columbia, Maryland 21046-1572
(410) 312-8000

RSS-07-00545 7/07 Printed in the USA.

MaxiSer® Plus is a mark of Arbitron Inc.

www.arbitron.com