

Public Radio Today

Public Radio Today

How America Listens to Public Radio

2009 Edition

Public Radio Today

2009 Edition

Featuring new format ratings and audience information across America from the Fall 2008 Arbitron survey of radio listening to these leading public radio formats:

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

Presented by Arbitron Marketing Communications

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Introduction: How America Listens to Public Radio

Public radio continues to be a vibrant, relevant and growing part of many Americans' lives. Public radio stations and their program suppliers are meeting the challenges of a crowded media landscape by taking full advantage of technological innovations, including podcasting, Internet streaming and HD Radio® multicasting.

Public Radio Today 2009 is an in-depth look at the listening activity to the eight most popular public radio formats representing the Fall 2008 Diary and October-November-December PPM survey periods: News/Talk, News-Classical, Classical Music, News-Music, Jazz, Adult Album Alternative (AAA)/Eclectic, News-Jazz and Variety Music.

In addition to audience statistics about public radio listeners overall, you'll find detailed audience breakouts for each of these 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, time spent listening (TSL) by demographic, educational levels, income by household, gender balance, ratings by daypart and geographic region and listening by location (at-home vs. out-of-home).

Public Radio Today 2009 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' marital status, home ownership, employment, automobile dealer preferences, credit card usage, food product choices, online shopping interests, event attendance and home improvement investments.

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)

Introduction: How America Listens to Public Radio

Public Radio Today 2009 Edition is produced by Arbitron Inc.:

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Updated Detailed Analyses

Public Radio Today 2009 offers an analysis of audience listening patterns and demographics of the eight most popular public radio formats: including News/Talk, News-Classical, Classical Music, News-Music, Jazz, Adult Album Alternative (AAA)/Eclectic, News-Jazz and Variety Music.

Within this year's individual format reports, you'll see that we've provided notation of trends observed over the past two or more years (the last *Public Radio Today* study was published in 2007), to provide perspective on audience listening shifts.

Continuing with a popular feature, we are again including an updated "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.

PPM Data Integrated for the First Time

The Arbitron Portable People Meter™ System measured listening behavior in several major Metro areas during Fall 2008. For the first time in this report, audience estimates and other audience information from PPM™ markets is included along with Diary-based data. PPM coverage for Fall 2008 tracked listening activity in (alphabetically) Chicago, Dallas-Ft. Worth, Los Angeles, Middlesex-Somerset-Union, Nassau-Suffolk (Long Island), New York, Philadelphia, Riverside-San Bernardino, San Francisco and San Jose. These markets account for about 24% of the nationwide 12+ population. Owing to PPM measurement disruptions as a result of Hurricane Ike in October 2008, Houston-Galveston data were not available for this study. The exclusion affected several prominent public radio stations including News-Music KPFT, Variety KTSU and News-Classical KUHF.

What Have We Learned About the PPM System So Far?

In our experience of measuring radio listening using the PPM System, certain characteristics stand in contrast to what we have observed using Diary measurement—the typical listener in the PPM system is exposed to nearly twice as many radio stations in a given week and uses radio on far more occasions than what is typically reported in the diary. The increase in the number of occasions is usually offset by a lower amount of time spent listening per occasion in the PPM service than in the Diary. However, we have not seen consistent patterns in the amount of reported listening to a particular radio format or by particular demographic groups in the PPM service when compared to the Diary; these statistics can vary widely by market.

(continued on next page)

What's New in This Edition

6+ PPM vs. 12+ Diary Demographics

The PPM system has the added benefit of measuring 6+ demographics vs. the 12+ demographics measured by the Arbitron Diary. Because *Public Radio Today* incorporates both PPM and Diary data, we include 12+ demographics only.

In-Home, Out-of-Home Locations Referenced

The Portable People Meter detects listening in two distinct locations: “at home” and “away from home,” while Diary-based methodology discerns specific out-of-home locations such as “in-car,” “at work” or “other” location. To be consistent across all markets, this report breaks down the distribution of listeners tuning in either “at-home” or “out-of-home.”

New Scarborough Consumer Data

Public Radio Today 2009 includes several new Scarborough consumer summaries of particular purchasing and lifestyle behaviors, including credit card usage, events attended, automobile dealer preferences, food product choices, items shopped for online and home improvement investments.

Formats Ranked by Audience Share by Demographic

In addition to format rankings by region, *Public Radio Today 2009* is now listing the leading formats ranked by key demographic segments, including teens and adults 18-24, 25-34, 35-44, 45-54, 55-64 and 65+. As you might expect, there are some significant differences in format appeal according to age group.

Market Conditions and Other Factors Make Trends Difficult to Track

There were several important factors affecting the ratings data between Fall 2006 and Fall 2008: There is a two-year gap from the previous *Public Radio Today* and this report, which could account for some larger-than-typical shifts in the data trends. The 2008 presidential election likely accounted for some of the increase in reported listening to certain formats. Portable People Meter data were included for the first time, tracking exposure to radio in several major markets. With data from Houston-Galveston excluded, owing to disruptions from Hurricane Ike, data from a few important public radio stations are not represented in this report. Combined, these factors make trending analysis for the period between Fall 2006 and 2008 very difficult. Users of this study should consider the data as presented accordingly.

News/Talk Delivered Nearly Half of All Public Radio Listening in 2008

Spurred by strong interest in the 2008 Presidential election, public News/Talk expanded its weekly share of public radio listening from 44% to 48% between Fall 2006 and 2009—a 10% growth rate over that two-year span. That share, combined with its 16 million listeners, gives News/Talk more than twice the impact of the next strongest format. While News/Talk attracts more than 52% of all public radio listening in morning drive, every major daypart saw significant increases in listening, led by evenings (up 12.4%), middays (+12%) and afternoon drive (+11.8%). News/Talk experienced audience share increases in six of the eight census regions, including New England (nearly doubling to 4.7%), as well as the South Atlantic, South Central, East North Central, West North Central and Mountain territories (see Page 16 to see which states are part of a particular region). Nearly 60% of 35-44 public radio consumers listened to News/Talk. No other age group was as interested in one public radio format.

Classical Programming Posts 6% Improvement

The only fulltime music format to increase its audience, Classical Music generated growth of more than 6% between Fall 2006 and 2008, up from 13% to 14%, ranking the format third-most-popular in public radio. The 100 stations programming Classical fulltime delivered nearly 5 million listeners each week in Fall 2008, a 15% increase of almost 640,000 from two years earlier and more than 1 million above Fall 2005. And Classical was the only music-related format to show an improvement in audience share in middays.

News-Music Increases Audience Share

Rising from 6.0% to 6.2% of all public radio listening between Fall 2006 and 2008, News-Music enjoyed its largest share growth in the South Atlantic, where its audience more than doubled, improving News-Music's rank from seventh to fourth. News-Music has the longest time spent listening among the 12-24 age group of all the formats, and is tied with News-Classical for No. 1 in TSL among Adults 18-34.

News-Classical Tops in Time Spent Listening

At 6 hours and 30 minutes per week, News-Classical now demonstrates longer overall time-spent-listening than any other public radio presentation, moving ahead of News/Talk. Despite a dip in its overall ratings, News-Classical experienced a larger audience share increase in the East North Central region between Fall 2006 and 2008 than any other format, and a larger improvement in the West North Central region than any other music-related programming.

Jazz Generates Gains With Young Listeners

Jazz's share of Adults 18-24 was up 66% to more than 5% of all public radio listeners. Jazz was the only format where time spent listening actually increased among those between the ages of 12-24, up 9% per week. Data show that 45-54 and 65+ jazz buffs also delivered incremental growth.

AAA/Eclectic Picks Up With Adults 55-64

In terms of total quarter-hours devoted to AAA/Eclectic, the percentage given by those between the ages of 55-64 soared from 10% of the format's make-up to nearly 18% between Fall 2006 and 2008. That 74% increase was the single largest jump in audience composition among any demographic segment for any format in this report.

News-Jazz Fans Go to School, Improve Upper-Income Growth

More than 90% of News-Jazz listeners had attended or graduated from college in Fall 2008, up from 84% in Fall 2006. The proportion of News-Jazz consumers living in households generating at least \$75,000 per year skyrocketed at a rate of 17% to nearly 48% between Fall 2006 and 2008. Seventy percent of News-Jazz listeners reside in households producing at least \$50,000 in annual income, up from less than 65% in Fall 2006.

Variety Music Listeners Get an "A" In College Education, Listening Location Shifts

The proportion of Variety Music consumers who have earned a degree rose sharply from 39% to nearly 46% between Fall 2006 and 2008—a nearly 17% growth rate and the most of any format covered in this study. Meanwhile, Variety's at-home tune-in surpassed out-of-home listening during that time frame, rising from 48% to 51% during that time period—the only format other than Jazz to change the majority of listening by location.

Public Radio Audience Rises 5%

The percentage of the U.S. population that depends on public radio each week increased from 11% in Fall 2006 to 12% in 2008—a growth rate of 5% (and 12% above public radio's 10.5% cume rating in Fall 2005). Thanks to a unique mix of news, music and cultural programming, public radio stations are frequently among the most-listened-to stations in markets around the country. The percentage of Americans listening to public radio grew for almost everyone regardless of time of day, age or gender. Public radio's weekly reach increased in 14 of the 15 main demographic categories in this report, especially among Women 18-24 and 35-44, with both up 11% from Fall 2006 to 2008.

Increased Appeal Among Teens

While the lion's share of public radio listening comes from Adults 35+, the greatest increases seen between Fall 2006 and 2008 came from teen boys and girls, whose cume ratings were up 37% and 21%, respectively. Data suggest that listening by teens increased significantly across all dayparts by as much as 50%.

Older Men and Women Pace Adult Growth

Most other demographics also posted major growth across various dayparts: During weekdays, cume ratings among Men 25-34 rose 19% in afternoons, while those for Men 35-44 improved 13% in middays and 12% in evenings. Cume ratings among Men 55-64 were up 12% in middays and 13% in evenings. Women 35-44 registered ratings growth of 9% in mornings, 13% in middays, 14% in afternoons and 28% in evenings. Both Men and Women 65+ delivered 9% ratings growth in afternoons.

At-Home, Away-From Home Weekday Morning Ratings Now Equal

One notable shift between Fall 2006 and 2008 is that at-home weekday average quarter-hour ratings were just as strong in Fall 2008 as those out-of-home between 8AM and noon, whereas in 2006, away-from-home listening was higher during that time period. In-home AQH ratings increased 0.1% during the 8AM hour, while out-of-home decreased by the same amount from 9AM to noon. Meanwhile, at-home listening to public radio started at 4AM in Fall 2008, an hour earlier than two years prior.

Public Radio Ratings Story Lines of the Year

Public Radio Listeners Take Care of Their Homes

A significantly higher percentage of public radio listeners are homeowners than the general public, and they are protective of their investment. Whether it's sprucing up the landscaping, launching a remodeling project or making an addition, public radio consumers spend more—and sometimes much more—than the average person on their homes. That's good news for a wide variety of underwriting or sponsoring retailers seeking to grow their businesses.

Public Radio Consumers Are Active Online Shoppers

The pattern has been consistent for years: public radio listeners are comfortable buying products and services online, much more so than the general population. And when it comes to high-end or discretionary purchases, public radio listeners are particularly ready to embrace the Internet. For the many public radio stations that stream online, their sponsors and underwriters can be one click away.

Listeners to Public Radio Seek Healthy Foods

Organic foods, nuts, energy bars, yogurts and other nutritious products score big with public radio listeners compared to the typical American consumer. These food choices—attributable to public radio's listeners' interest in a quality lifestyle, emphasis on education and advantage of affluence—suggest that they are receptive to messages and opportunities for self-improvement, fitness and improved overall health.

Some Notes About the Format Pages

Some Notes About 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.

The “Education” chart and gender ratios include only listeners 18 or older. In the information on home ownership, the term “Other” refers to the percentage of a format’s listeners who neither own nor rent, but live in someone else's residence.

The “Audience Composition” information shows how each demographic subset contributes to that format’s total audience. The “Audience Share by Region” information indicates the share of public radio audience that format generates compared to the other public formats’ share in that region.

For additional terms and definitions, please see the following “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. In PPM markets those five minutes need not be consecutive.

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 week 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.

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.

Public News/Talk features a heavy concentration of local, regional and global news, in the form of magazine features, analysis and live-breaking news. Represented by 321 stations, its wide range of programming encompasses interviews, studio discussions with guests, listener participation (via phone, e-mail and social networking) and live broadcasts of town hall meetings.

Far and away the dominant public radio format (and getting stronger) with nearly half of public radio listeners, News/Talk has a 12+ audience share and reach that's more than twice as large as the next strongest format. It commands nearly 48% of all public radio quarter-hours of listening, up from 43.6% in Fall 2006, or a 9.9% growth rate over those two years. Close to 16 million consumers listened to public News/Talk each week in Fall 2008, a gain of almost 2 million or 14.1% from Fall 2006. It's a mature audience that's growing older: The segment of News/Talk's audience that's at least 45 years old rose from 68-70% between Fall 2006 and 2008. However, more than 58% of 35-44s listen to News/Talk; no other age group is as interested in one public radio format.

Note: Due to rounding, totals may differ.
Source: TAPSCAN Web, Fall 2008

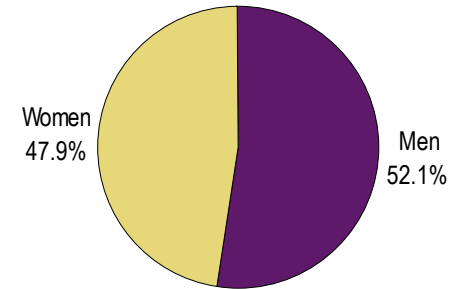
AQH Share of All Public Radio Listening

FA05	44.8%
FA06	43.6%
FA08	47.9%

Weekly Listeners 12+

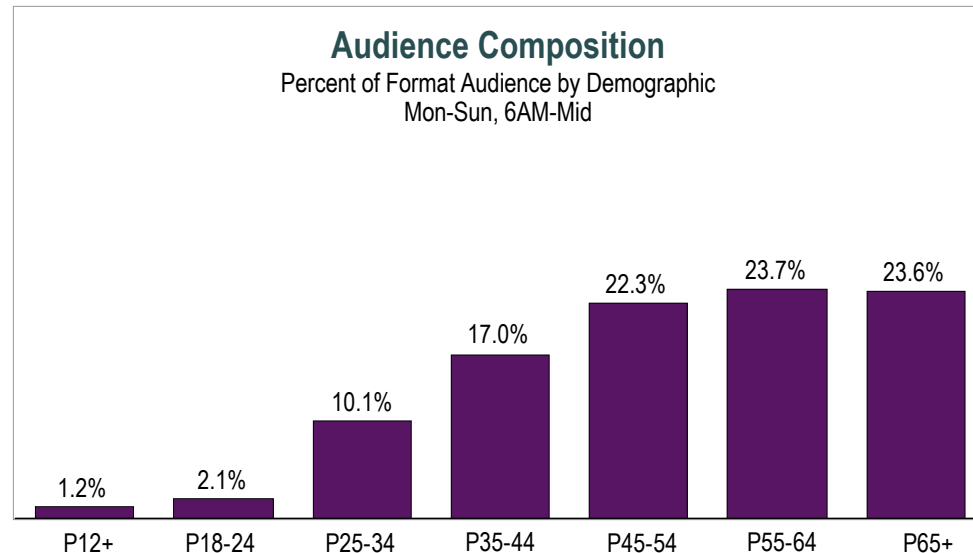
15,919,600
Format Cume

Listeners 12+ Mon-Sun, 6AM-Mid



Audience Composition

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



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Not only is public News/Talk the dominant presentation among all public radio offerings, it also attracts more than twice as many listeners in every major daypart as any other format. The format delivered significant quarter-hour share increases in listening during all key dayparts between Fall 2006 and 2008, led by evenings, middays and afternoon drive (all up 12%). News/Talk does best in morning drive, when it attracts more listening than all other public radio formats. That's the highest share of tune-in of all programming for any particular time of the week.

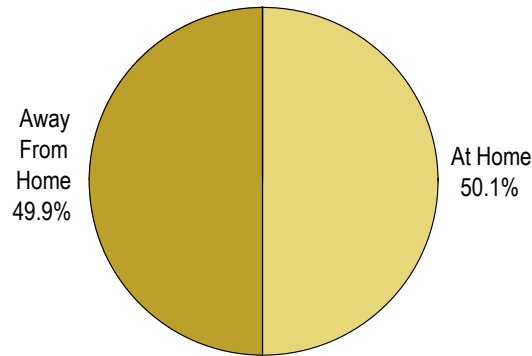
Listening by location to News/Talk is almost precisely balanced between in-home and out-of-home, with the latter's proportion gaining slightly from Fall 2006.

Public News/Talk is the leading format in every census region of the U.S. except for the South Central region. News/Talk experienced audience share increases in six of the eight national regions. The format particularly benefits from numerous successful stations in markets such as Chicago, Cleveland, Dallas-Ft. Worth, Denver, Los Angeles, Miami-Ft. Lauderdale-Hollywood, Philadelphia, Salt Lake City-Ogden-Provo, San Diego, San Francisco, Seattle-Tacoma, St. Louis and Washington, DC.

*Note: Due to rounding, totals may differ.
Source: TAPSCAN Web, Fall 2008*

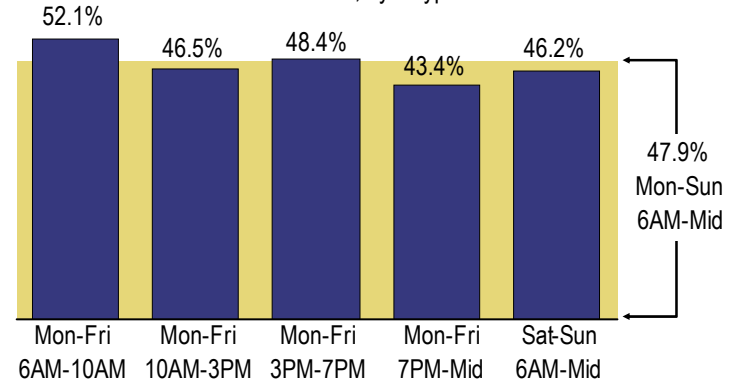
AQH Share of Listening by Location

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



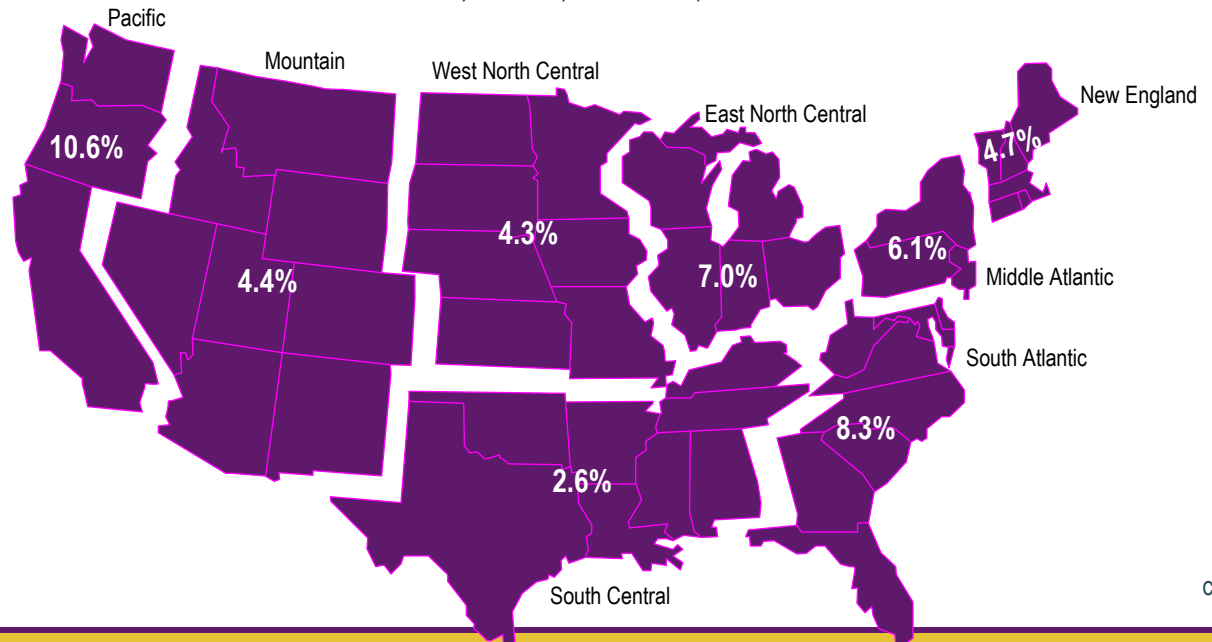
News/Talk Share of All Public Radio Listening

Persons 12+, by Daypart



Audience Share by Region

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

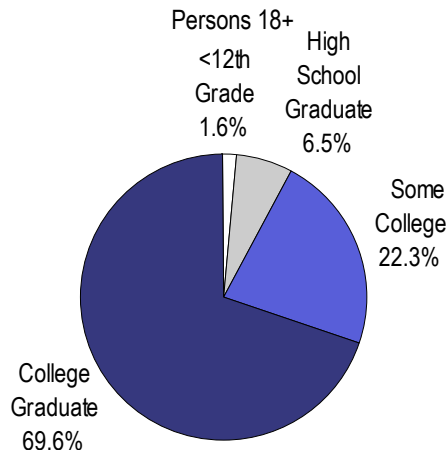


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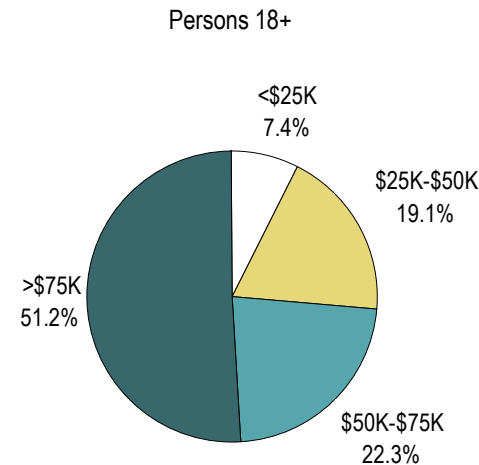
Public News/Talk continues to have public radio's most-educated listeners: Nearly 70% hold a college degree or better, and almost 92% have attended college. Those figures are far stronger than all commercial radio formats and all other public radio programming. Better than half of News/Talk listeners live in households earning \$75,000 or more per year. Almost 74% are in households generating at least \$50,000. Both figures are tops among all public radio formats. Nearly three-quarters of News/Talk's audience resides in households earning at least \$50,000, more than any other format in this study.

At 6.5 hours per week, time spent listening to public News/Talk is second-longest of all formats, trailing only News-Classical. Each age group saw a 45-minute lower figure in Fall 2008 from what we saw in 2006 except those listeners between 18-34, whose TSL was 1 hour and 15 minutes less (-22%) each week. News/Talk has the longest TSL of all formats among 35- to 64-year-olds, and is tied with News-Music for the most listening time among adults between 25-54.

Education

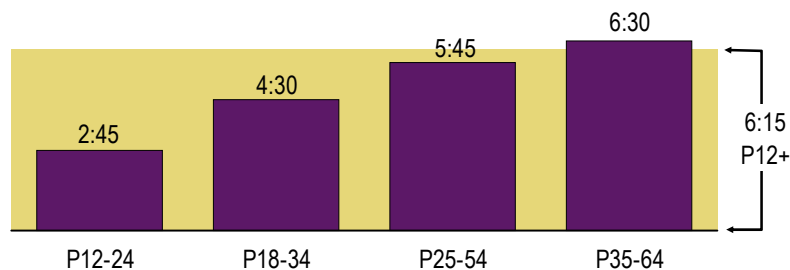


Household Income



Time Spent Listening by Demographic

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



Note: Due to rounding, totals may differ.
Source: TAPSCAN Web, Fall 2008

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 Monday-Friday 6AM-7PM airtime playing classical music.

With 263 stations, News-Classical reaches nearly 6.6 million listeners each week, scoring 20.2% of all quarter-hours of public radio listening, far more than any other music-related public radio format. While News-Classical's audience is more evenly divided between adult men and women than any other format, its slightly stronger preference among women gives it the second-highest ratio of adult women listeners to men among all formats in this report.

The composition of News-Classical listenership has grown steadily, if slightly older, with those 55+ accounting for nearly 60% of its tune-in during Fall 2008. Correspondingly, adults between 35-54 years old made up 30% of its consumers, down from 32% over the same time period. News-Classical draws more than a third of its listenership from those 65+, second-highest to Classical. A full quarter of all public radio listening done by Adults 65+ goes to News-Classical.

Note: Due to rounding, totals may differ.
Source: TAPSCAN Web, Fall 2008

AQH Share of All Public Radio Listening

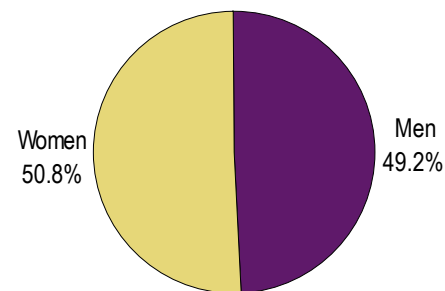
FA05	20.6%
FA06	21.1%
FA08	20.2%

Weekly Listeners 12+

6,557,000
Format Cume

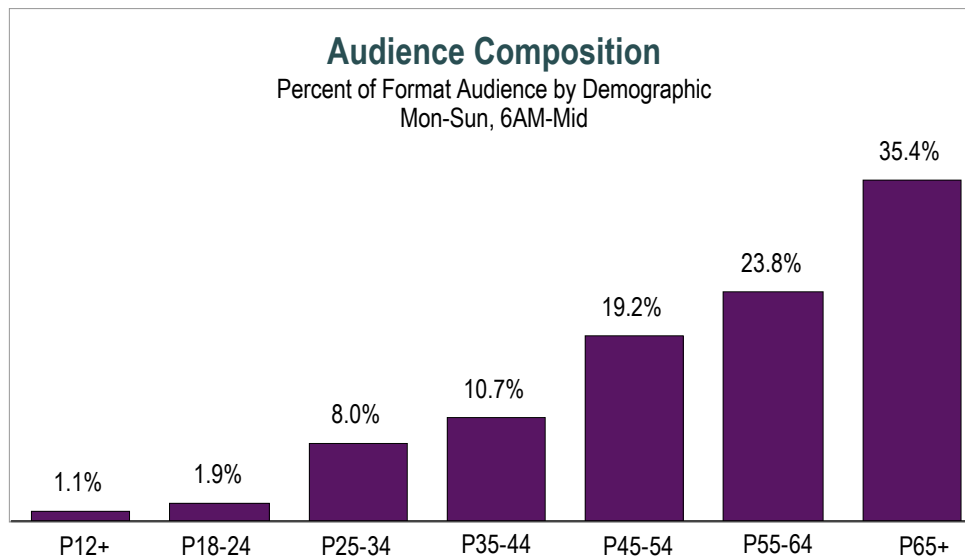
Listeners 12+

Mon-Sun, 6AM-Mid



Audience Composition

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



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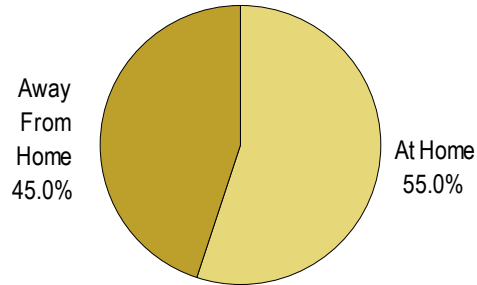
News-Classical draws 55% of its total quarter-hours of listening from at-home tune-in, a proportion which is higher than any other format except Classical. Morning drive is the highest-rated for News-Classical, which saw modest decreases in audience share in every daypart from Fall 2006 to 2008, though mornings held up well overall, down just 4%. Afternoon drive remains the No. 2 daypart, and both drivetimes outperform News-Classical's overall 12+ ratings. Weekends are the third-strongest, with middays moving ahead of evenings in total share.

News-Classical continues its claim as public radio's No. 1 format in the South Central region, and ranks as the second-most-popular in the New England, South Atlantic, East North Central and West North Central areas. The format enjoyed a larger audience share increase in the East North Central region between Fall 2006 and 2008 than any other format, and a larger improvement in the West North Central area than any other music-related programming. News-Classical also saw share growth in the West North Central and Pacific territories. One will find important News-Classical stations in markets such as Atlanta, Boston, Cleveland, Detroit and Tampa-St. Petersburg-Clearwater.

*Note: Due to rounding, totals may differ.
Source: TAPSCAN Web, Fall 2008*

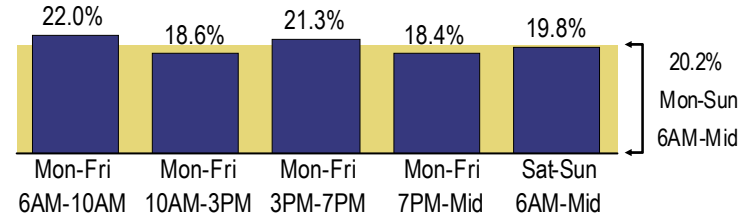
AQH Share of Listening by Location

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



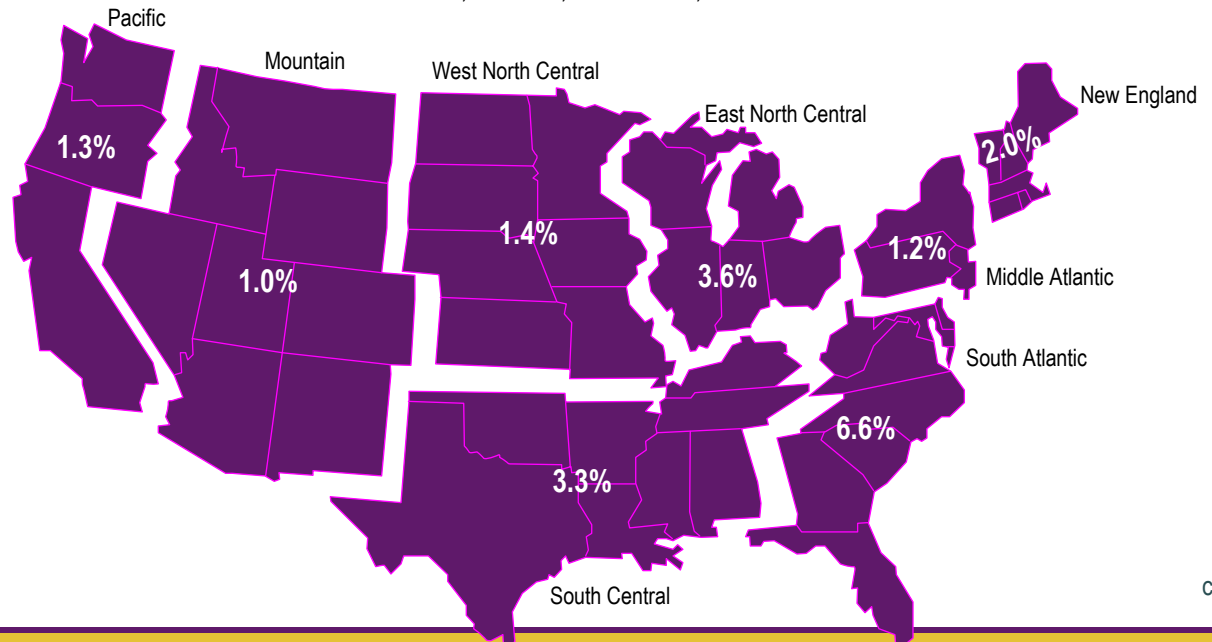
News-Classical Share of All Public Radio Listening

Persons 12+, by Daypart



Audience Share by Region

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



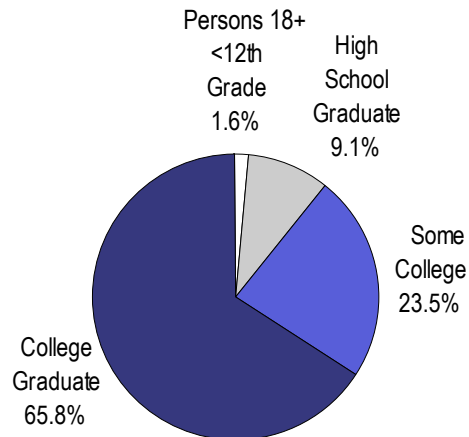
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News-Classical listeners are well-educated; nearly 90% of News-Classical listeners have attended college. Nearly two-thirds of News-Classical listeners held at least an undergraduate degree in Fall 2008.

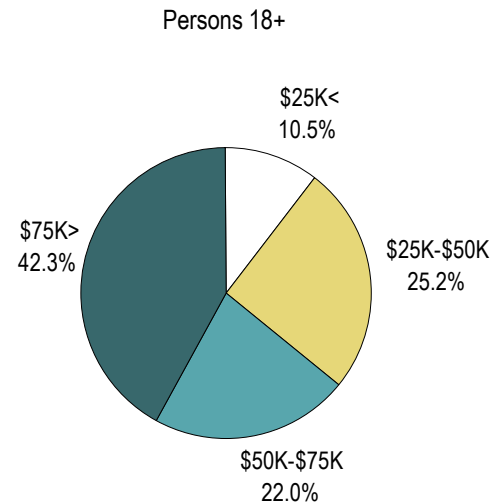
Almost two-thirds of News-Classical's audience live in households earning at least \$50,000 annually, and some 42% are in households generating \$75,000 or more. News-Classical was among four formats to show an increase in the proportion of its audience in the \$75,000-and-up segment.

At 6 hours and 30 minutes per week, News-Classical now enjoys longer overall time spent listening than any other public radio presentation, moving ahead of News/Talk. Compared to Fall 2006, News-Classical documented in 2008 a higher TSL among Adults 18-34 years old by 15 minutes—one of only two formats to post growth in that demographic—and is tied with News-Music for the longest TSL among 18-34s. It ranks tied for second-highest in TSL with 35- to 64-year-olds.

Education

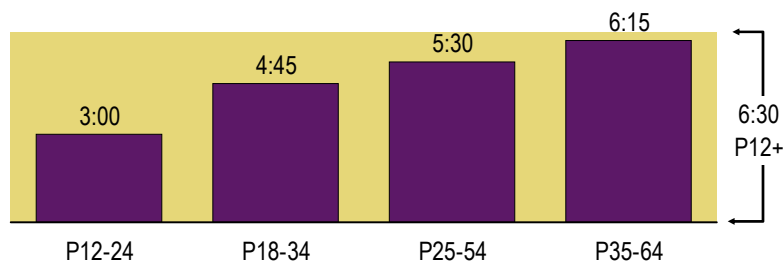


Household Income



Time Spent Listening by Demographic

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



Note: Due to rounding, totals may differ.
Source: TAPSCAN Web, Fall 2008

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 total quarter-hour share of public radio listening grew noticeably between Fall 2006 and 2008, from 12.9% to 13.7%—the only pure music format to register growth during that time period. Classical ranks as public radio's third-most-popular programming, ranking it twice as big as the next strongest approach. One hundred public radio stations program Classical Music fulltime, delivering nearly 5 million listeners each week in Fall 2008, an 15% increase of almost 640,000 from two years earlier and more than 1 million above Fall 2005.

The gender balance in Classical Music's appeal among 18+ adults is slightly more male since the last report, but the format still leans more female than any other public radio programming.

Note: Due to rounding, totals may differ.
Source: TAPSCAN Web, Fall 2008

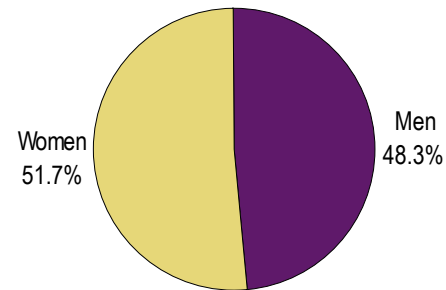
AQH Share of All Public Radio Listening

FA05	13.1%
FA06	12.9%
FA08	13.7%

Weekly Listeners 12+

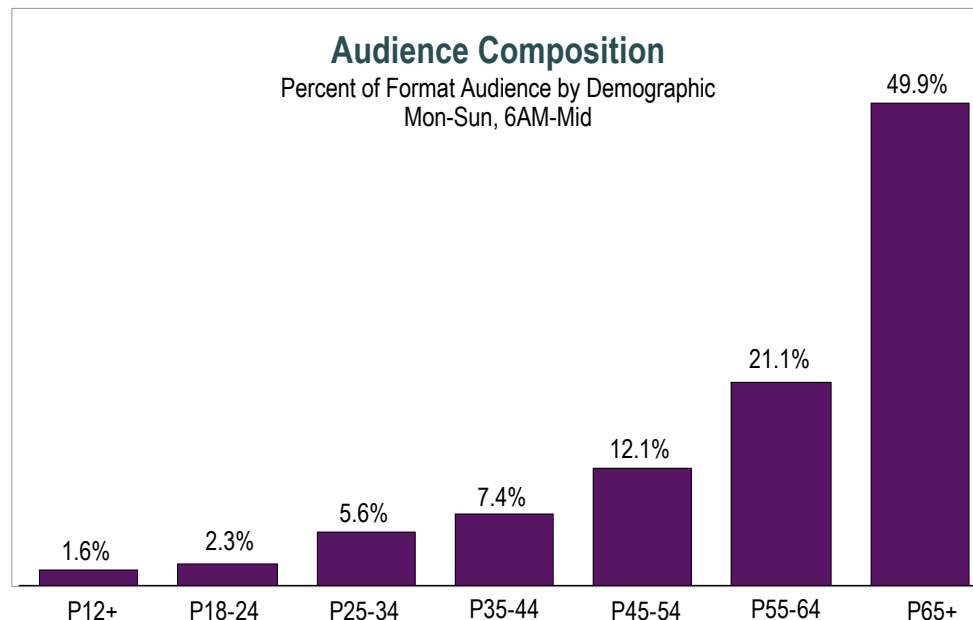
4,865,300
Format Cume

Listeners 12+ Mon-Sun, 6AM-Mid



Audience Composition

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



continued ►

Classical Music

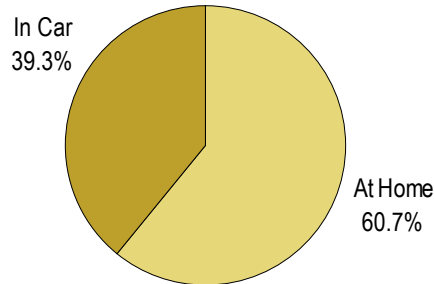
Nearly 61% of all quarter-hours of listening devoted to Classical is enjoyed at home, which is a higher proportion than any other format in this study. Classical's best ratings occur in evenings, followed by middays, when it is the only music-related format to show an improvement in audience share. Classical also registered share increases in every key daypart between Fall 2006 and 2008, especially on weekends, where its audience expanded at a rate of more than 10% during that two-year period. Mornings were stronger, too, gaining at a rate of 8% during that same time frame.

While Classical is public radio's second-most-popular format in the Middle Atlantic and Pacific regions, it has its highest share performance in the South Atlantic. The format is fueled by the popularity of Classical stations in markets such as Charlotte-Gastonia-Rock Hill; Denver-Boulder; Los Angeles; Miami-Ft. Lauderdale-Hollywood; Minneapolis-St. Paul; Norfolk-Virginia Beach-Newport News; Philadelphia; Phoenix; Sacramento; and Washington, DC. All of Classical's ratings growth between Fall 2006 and 2008 came in two territories: the South Atlantic, where its share nearly doubled, and in the Pacific sector, which posted a 36% increase over that time frame.

*Note: Due to rounding, totals may differ.
Source: TAPSCAN Web, Fall 2008*

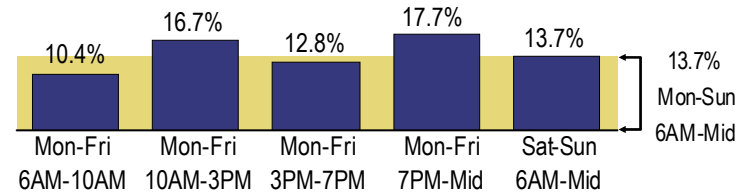
AQH Share of Listening by Location

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



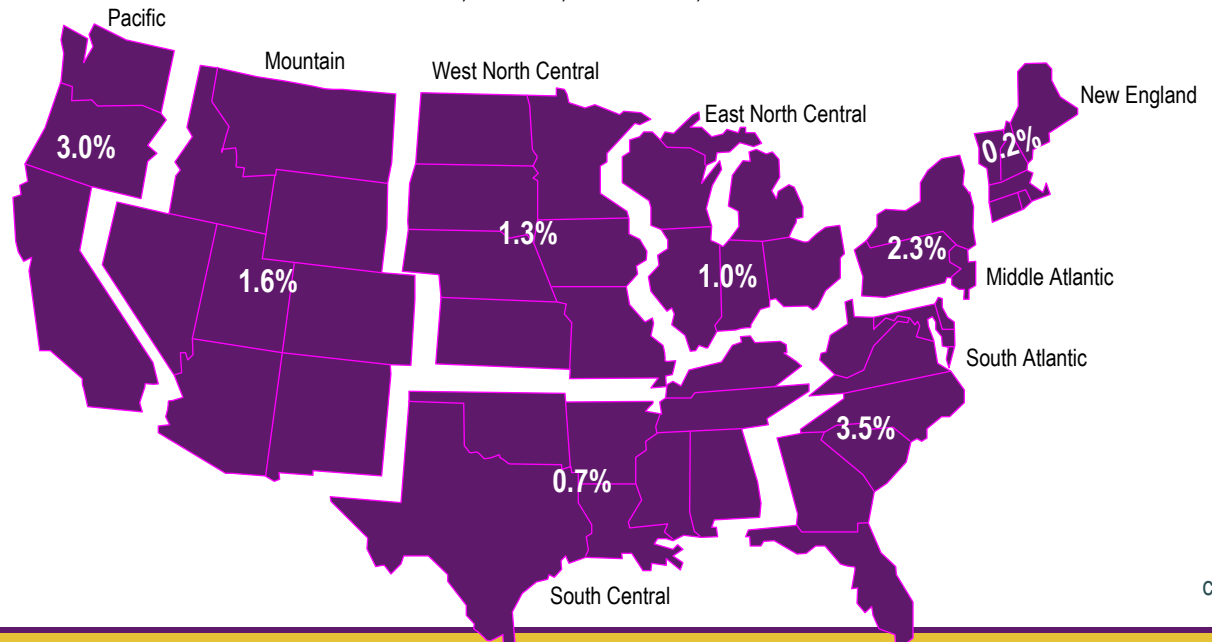
Classical Share of All Public Radio Listening

Persons 12+, by Daypart



Audience Share by Region

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



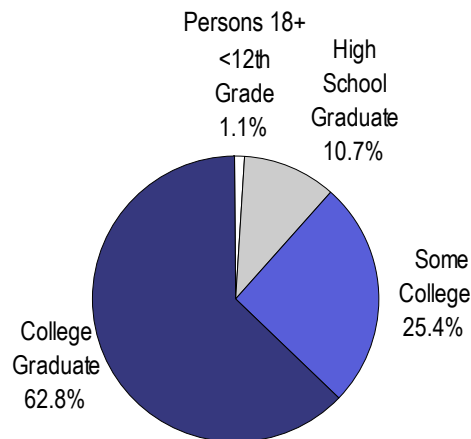
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Classical Music

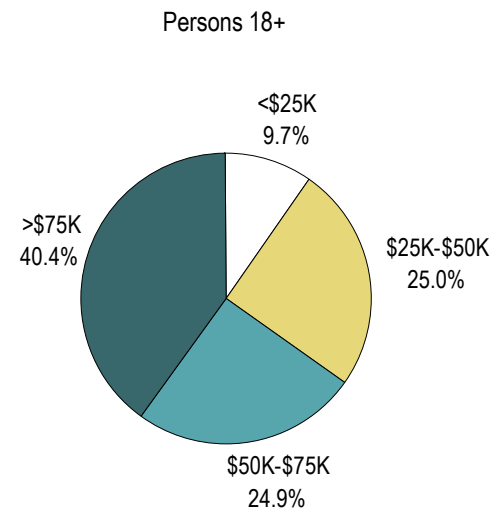
Among the four music-driven public radio formats, Classical is the leader in the percentage of its audience that has earned a college diploma, and nearly 90% of its listeners have either some level of post-secondary education or degree. Nearly all Classical listeners (99%) have at least completed high school—a remarkable statistic no other format, public or commercial, can match.

That education pays dividends: The Classical audience is growing more affluent, as the percentage of those living in households producing income of \$50,000 or more per year grew from 61% to 65% between Fall 2006 and 2008. That's a larger improvement than all other formats except News-Jazz. Impressively, the majority of that growth came in the \$75,000+ segment, up from 37% to 40% during that period.

Education

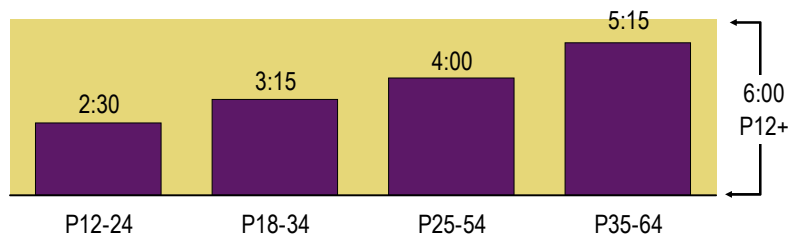


Household Income



Time Spent Listening by Demographic

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



Note: Due to rounding, totals may differ.
Source: TAPSCAN Web, Fall 2008

News-Music 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.

Moving up from fifth to fourth in audience share among the eight formats in this report, News-Music increased its stake of public radio listening from 6.0% of all quarter-hours in Fall 2006 to 6.2% in 2008, having represented 5.7% in 2005. There are 154 stations programming this format, delivering nearly 2.3 million listeners each week, an increase of nearly 300,000 from Fall 2006. Some of the top markets with a News-Music station include Baltimore; Chicago; Denver-Boulder; Norfolk-Virginia Beach-Newport News; Portland, OR; Tampa-St. Petersburg-Clearwater; and Washington, DC. News-Music was one of three formats to register share growth since that time, along with News/Talk and Classical.

Adults 45-64 comprise 52% of the News-Music audience. Adult men solidly outnumber adult women in terms of gender balance, more so than other news-driven formats.

*Note: Due to rounding, totals may differ.
Source: TAPSCAN Web, Fall 2008*

AQH Share of All Public Radio Listening

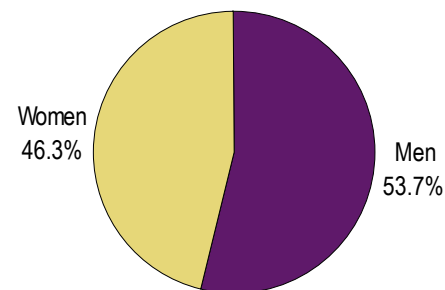
FA05	5.7%
FA06	6.0%
FA08	6.2%

Weekly Listeners 12+

2,280,700
Format Cume

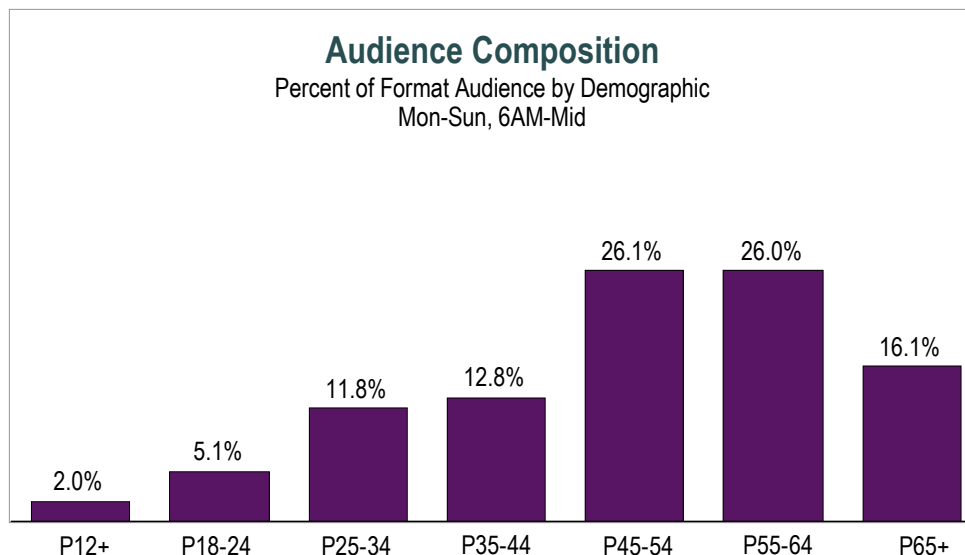
Listeners 12+

Mon-Sun, 6AM-Mid



Audience Composition

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



continued ►

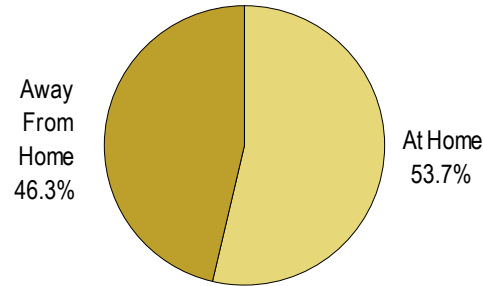
News-Music

The majority of quarter-hours dedicated to News-Music takes place at home, and that proportion grew from 50% to 54% between Fall 2006 and 2008—the largest increase in at-home tune-in of all formats in this report. News-Music gets its highest audience share during mornings and weekends, and it was during weekends where the format’s share expanded the most between Fall 2006 and 2008. Listening also grew in mornings, afternoons and evenings, all in equal increments. It is the only programming that outperforms its full-week share during mornings, afternoons and weekends.

While 42% of News-Music stations are located in the Mountain and Pacific census regions, the format gained audience share in five of the eight national regions between Fall 2006 and 2008. News-Music’s biggest listening share takes place in the South Central and Mountain regions, but its largest share growth occurred in the South Atlantic, where News-Music’s audience more than doubled, moving its rank from seventh to fourth among the eight formats in this study. It was one of two music formats, along with Classical, to demonstrate an increase in audience share in the Mountain territory.

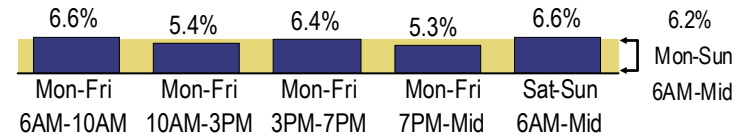
AQH Share of Listening by Location

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



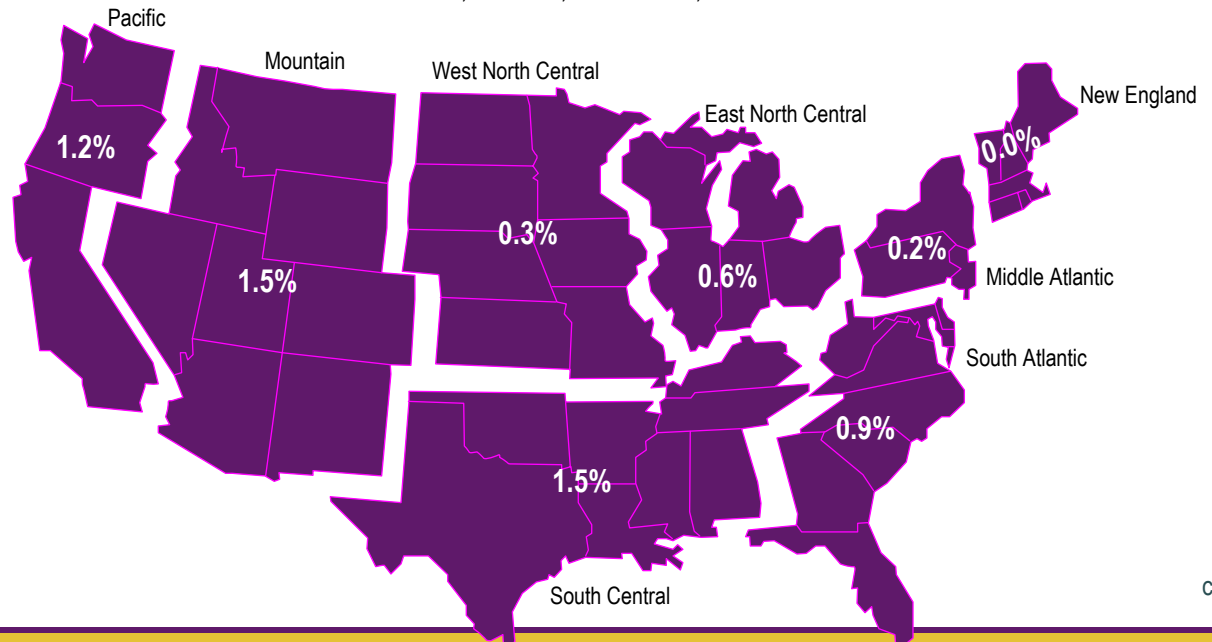
News-Music Share of All Public Radio Listening

Persons 12+, by Daypart



Audience Share by Region

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



Note: Due to rounding, totals may differ.
Source: TAPSCAN Web, Fall 2008

continued ►

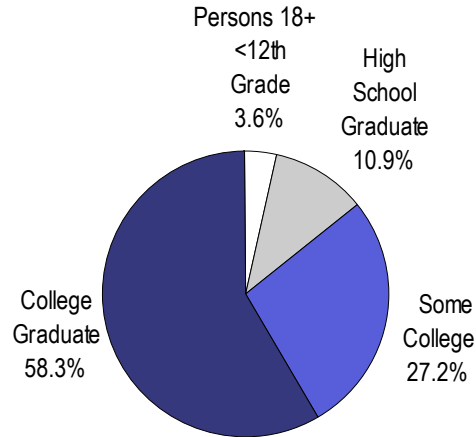
News-Music

The vast majority of News-Music listeners—more than 85%—have either attended college or graduated with a degree. The proportion of those who have earned a college diploma jumped from 53% to more than 58% between Fall 2006 and 2008, a growth pace matched only by Variety Music listeners.

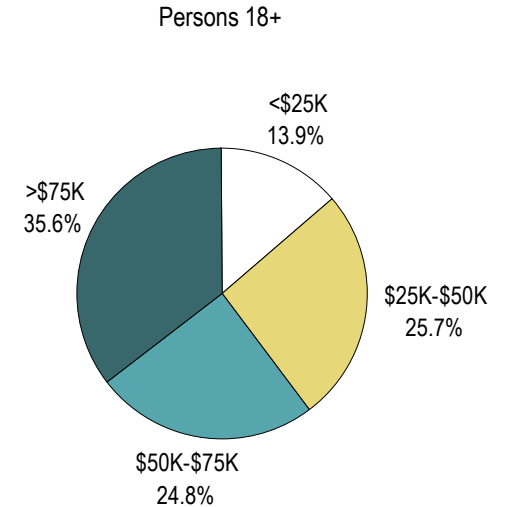
More than 60% of adult News-Music listeners live in households earning \$50,000 per year or more, and nearly 36% are in households generating at least \$75,000 or more annually.

News-Music is tied for second-longest time spent listening among adults between 35-64 years old. The data indicate this demo devoted 30 minutes more TSL per week to the format than the News-Music audience as a whole. News-Music is tied with News-Classical for No. 1 in TSL among 18-34s.

Education

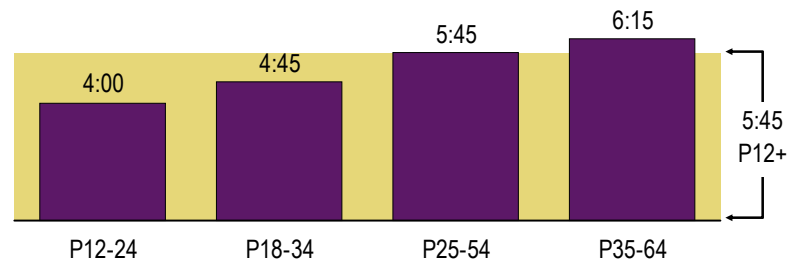


Household Income



Time Spent Listening by Demographic

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



Note: Due to rounding, totals may differ.
Source: TAPSCAN Web, Fall 2008

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 the remaining commercial Jazz stations, and like its commercial brethren, the public radio Jazz format also lost ground in quarter-hour audience share between Fall 2006 and 2008, declining from 6.2% to 4.1%, in part from a decline in time spent listening across all age groups and a loss of listening among Adults 35-44. Nonetheless, Jazz's 38 stations attract nearly 2.2 million consumers per week.

Although the percentage of listening by adult men outnumbers adult women by a 55%/45% margin, during the period between Fall 2006 and 2008 the proportion of women tuning in to Jazz increased more than 4%.

The format's share of 18-24s was up to more than 5%, yet slightly more than half of all Jazz listening is done by those 55 years old or above.

Note: Due to rounding, totals may differ.
Source: TAPSCAN Web, Fall 2008

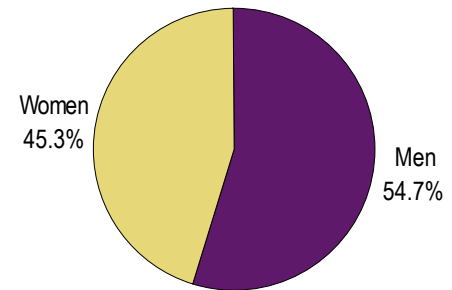
AQH Share of All Public Radio Listening

FA05	6.3%
FA06	6.2%
FA08	4.1%

Weekly Listeners 12+

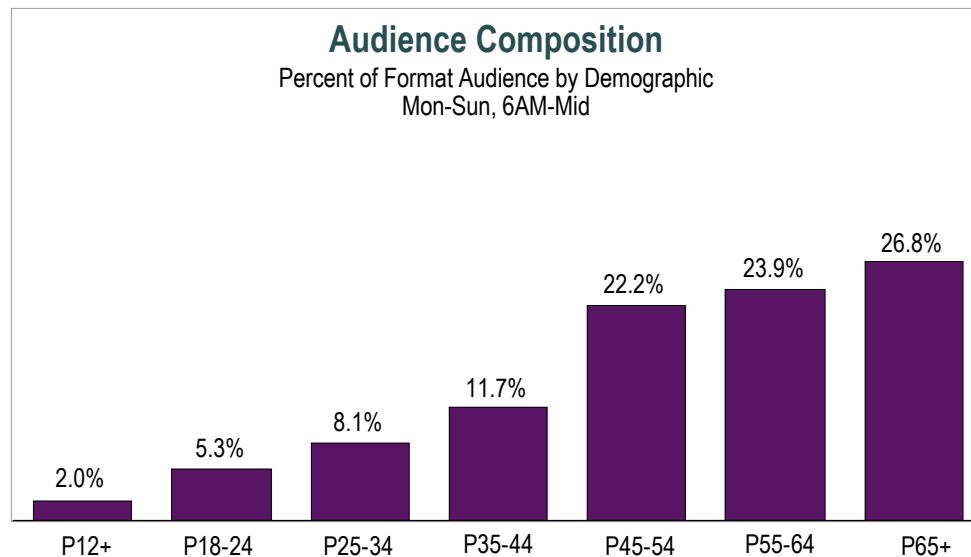
2,196,600
Format Cume

Listeners 12+ Mon-Sun, 6AM-Mid



Audience Composition

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



continued ►

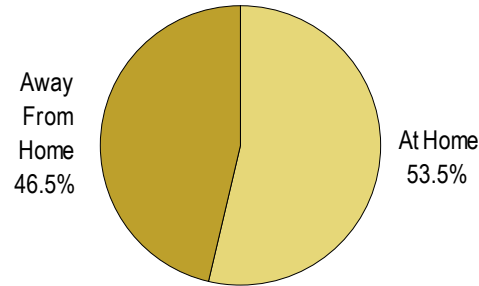
The Jazz format is now appreciated more at home than away from home, ranking first among contemporary music stations for its proportion of tune-in taking place at home. In fact, Jazz's at-home listening grew from 48% to nearly 54% between Fall 2006 and 2008—a far larger quarter-hour increase than any other format in this report.

Jazz radio's tradition of generating its best shares in middays, and especially evenings and weekends, continued in Fall 2008; each of those dayparts outperformed the format overall.

Despite the ratings decline, Jazz notched modest audience increases in the West North Central and Mountain regions, and posted its highest audience share in the Pacific and Mountain territories.

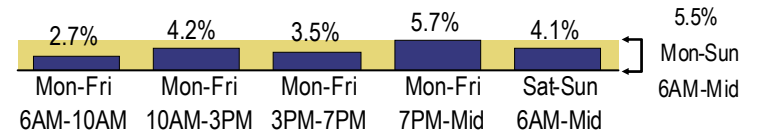
AQH Share of Listening by Location

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



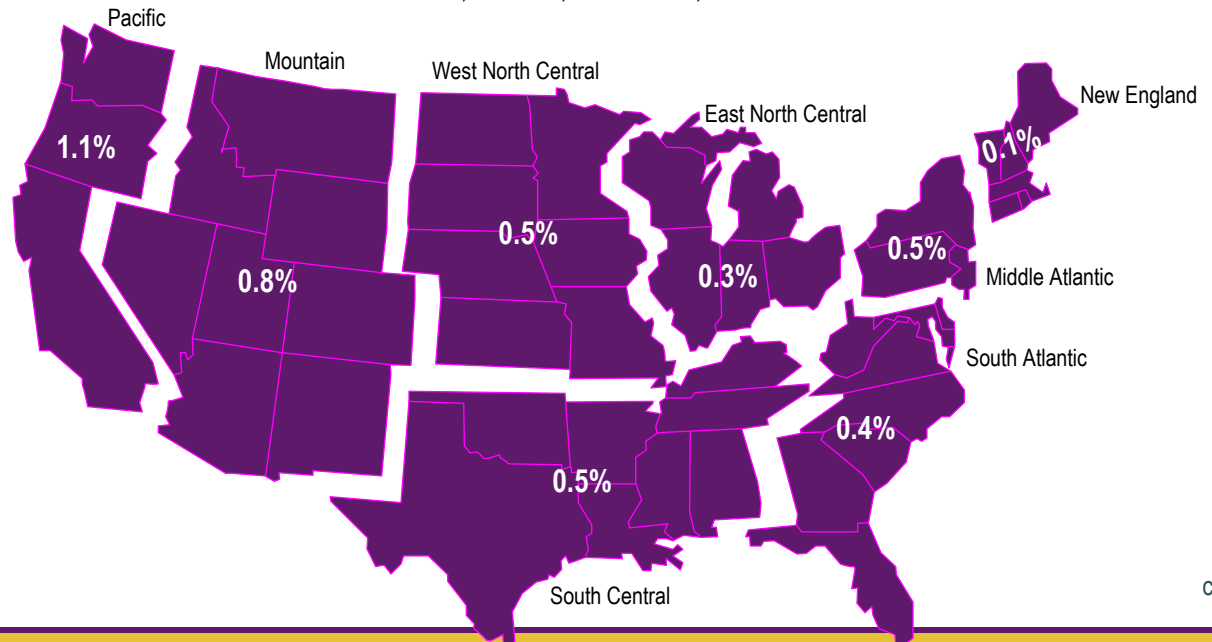
Jazz Share of All Public Radio Listening

Persons 12+, by Daypart



Audience Share by Region

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



Note: Due to rounding, totals may differ.
Source: TAPSCAN Web, Fall 2008

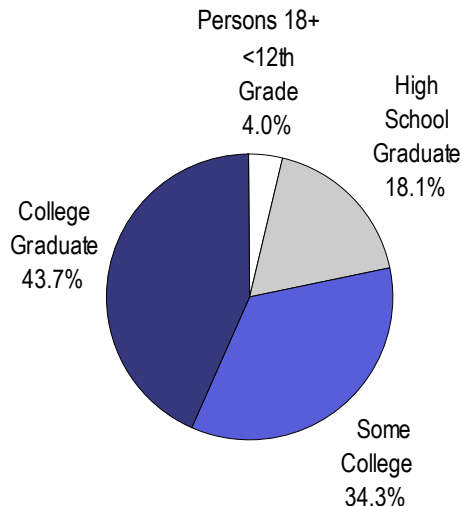
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Nearly 80% of all public radio Jazz listeners have attended college or received a degree, and the percentage of those with a college diploma increased from 42% to 44% between Fall 2006 and 2008. Concurrently, the proportion of those with at least a high school diploma rose from 94% to 96%.

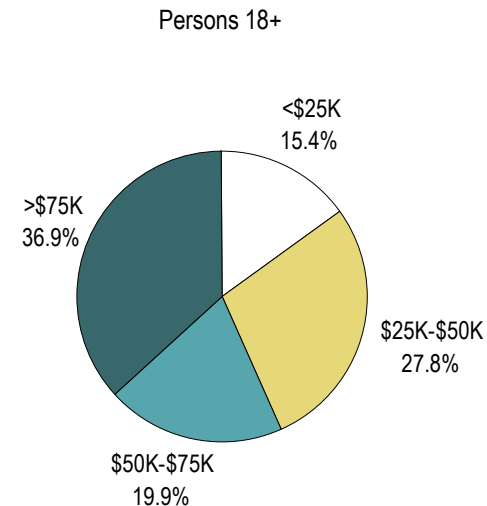
More than 56% of Jazz consumers live in households generating at least \$50,000 in income per year, and almost 37% reside in households with income of \$75,000 annually or more.

As noted earlier, the decline in overall ratings for Jazz between Fall 2006 and 2008 resulted chiefly from a 30% lower figure in reported time spent listening. However, there was one bright spot: Jazz was the only format where figures for time spent listening actually increased among those between the ages of 12-24, up 15 minutes per week. And Jazz has the most consistent amount of listening reported across key age groups of any format.

Education

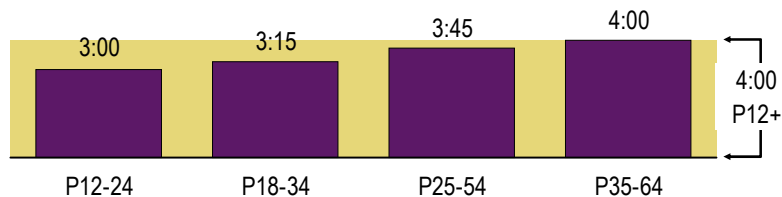


Household Income



Time Spent Listening by Demographic

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



Note: Due to rounding, totals may differ.
Source: TAPSCAN Web, Fall 2008

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, often with numerous presenters with unique shows. Stylistically, AAA/Eclectic stations may play acoustic rock, blues, roots, Americana, folk, bluegrass, ambient and world music. The format reaches more than 1.7 million consumers each week, representing 3.9% of all quarter-hours given to public radio listening.

The audience composition of America's 68 AAA/Eclectic stations skews considerably younger than the other formats in this study, with nearly 26% of its listeners under 35 years old and the highest proportion of 18-34s, 25-34s and 35-44s of all formats in this report. It is also the most male-leaning format, with 60% of tune-in coming from adult men. Despite AAA/Eclectic's appeal to younger consumers, 35-54 adults compromise nearly half of the format's total listening. However, AAA/Eclectic saw its percentage of adults between 55-64 years old soar from 10% of the format's make-up to nearly 18% between Fall 2006 and 2008.

Note: Due to rounding, totals may differ.
Source: TAPSCAN Web, Fall 2008

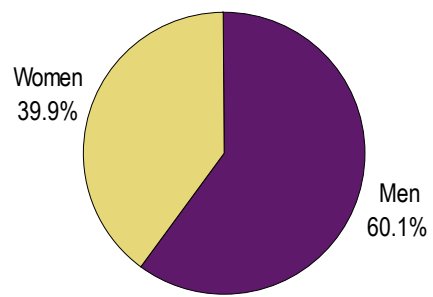
AQH Share of All Public Radio Listening

FA05	4.6%
FA06	5.1%
FA08	3.9%

Weekly Listeners 12+

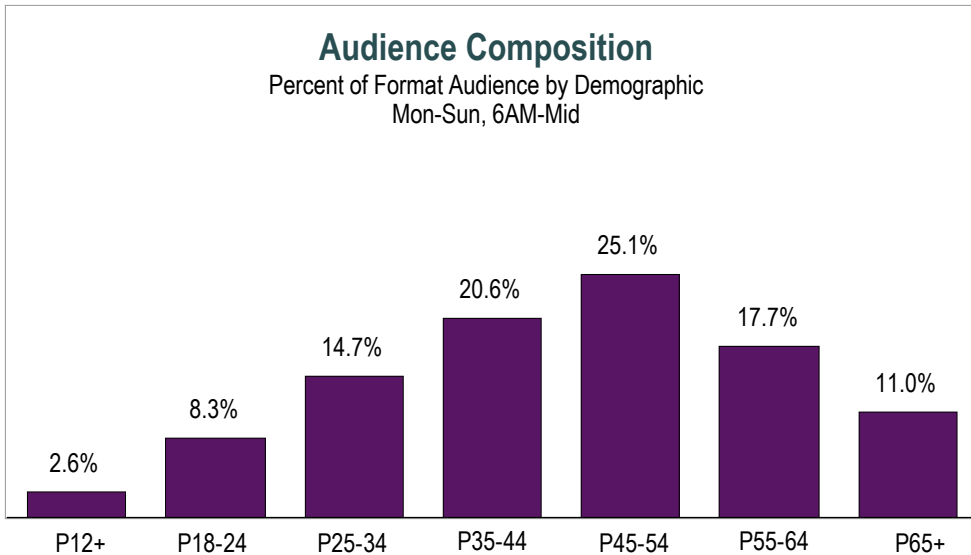
1,722,100
Format Cume

Listeners 12+ Mon-Sun, 6AM-Mid



Audience Composition

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



continued ►

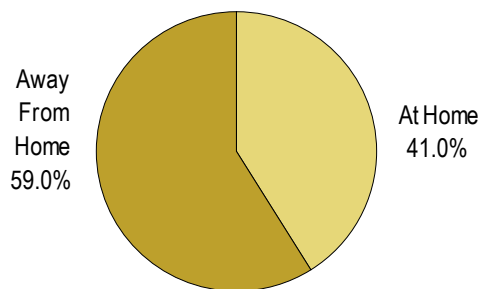
Adult Album Alternative (AAA)/Eclectic

Of all eight formats in this report, AAA/Eclectic has by far the highest proportion of quarter-hour listening taking place away from home, whether at work, in-car or some other place, and the only format with more than 50% of total tune-in out-of-home. At-home listening, however, did increase from 39% to 41% between Fall 2006 and 2008.

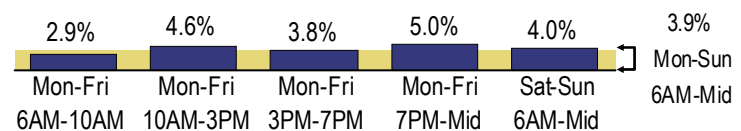
AAA/Eclectic's format share is highest during weekday evenings when, along with middays and weekends, it outperforms its overall audience ratings.

The Middle Atlantic is where AAA/Eclectic receives its highest audience share, with more than twice the tune-in as in any other region where the format is presented. Despite overall ratings declines between Fall 2006 and 2008, AAA/Eclectic's share of audience actually grew slightly in the South Atlantic, and was virtually the same in the South Central and Pacific regions.

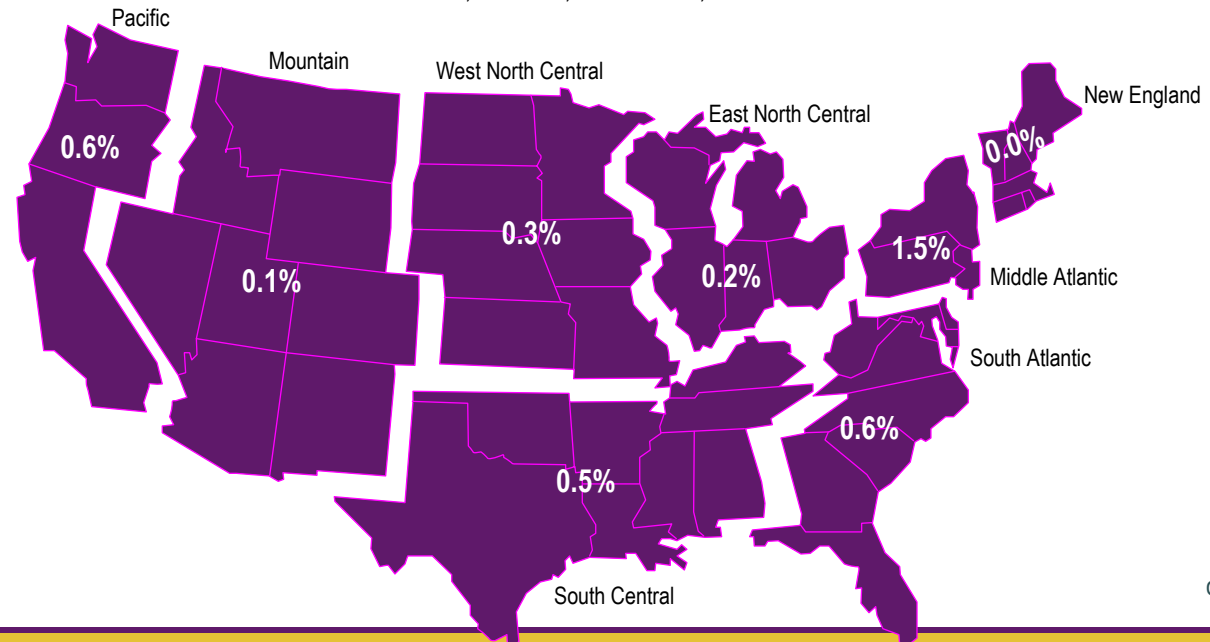
AQH Share of Listening by Location
Mon-Sun, 6AM-Mid, Persons 12+



AAA/Eclectic 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: TAPSCAN Web, Fall 2008

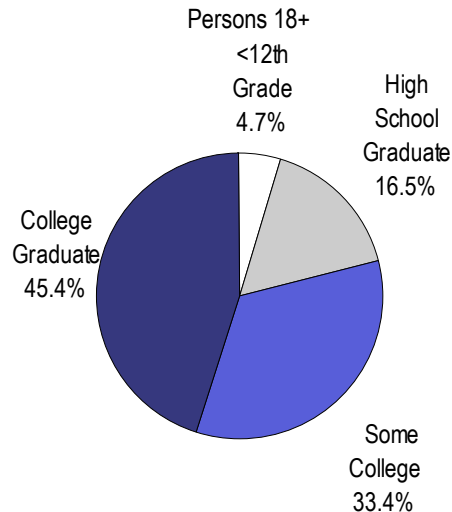
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Adult Album Alternative (AAA)/Eclectic

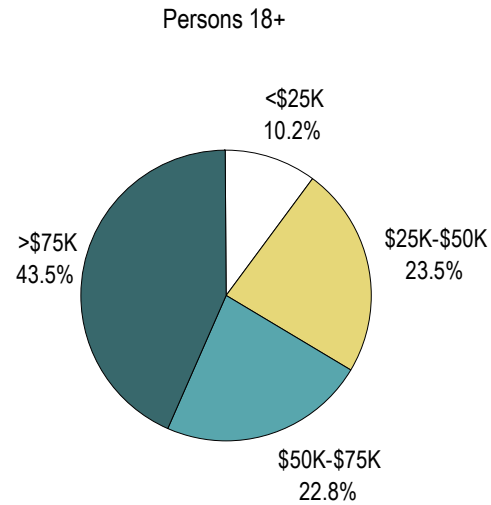
Consumers of AAA/Eclectic are well-educated, with nearly 80% having attended or graduated from college and more than 45% holding a degree. Approximately two-thirds of AAA/Eclectic listeners reside in households producing income of \$50,000 or more per year, with nearly 44% living in households generating at least \$75,000 annually—No. 1 among the four full-music formats.

Time spent listening to AAA/Eclectic is higher among 12- to 24-year-olds than any other programming covered in this study other than News-Music. However, as with many public radio formats, TSL to AAA/Eclectic was lower in 2008.

Education

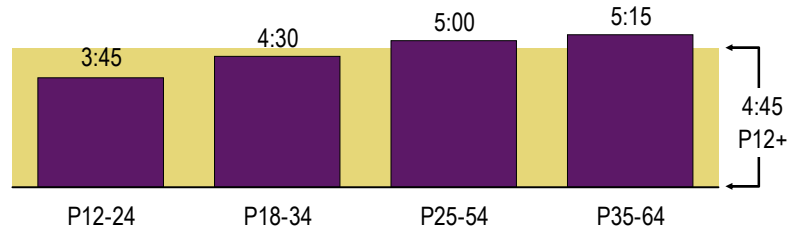


Household Income



Time Spent Listening by Demographic

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



Note: Due to rounding, totals may differ.
Source: TAPSCAN Web, Fall 2008

More than 900,000 consumers each week enjoy News-Jazz programming, which dedicates at least 30% of its airtime to news, public affairs or talk content or carries NPR newsmagazines. In addition, these stations devote at least 30% of their airtime presenting jazz music. America's 20 News-Jazz stations are primarily in the Middle Atlantic, South Atlantic and South Central regions, and together deliver 2.8% of all quarter-hour listening to public radio.

News-Jazz attracts an older audience, with 52% of its listeners aged 55 or above, a proportion ranking No. 1 among contemporary music presentations. Nearly 76% of News-Jazz listeners are at least 45 years old. The percentages of adults in the 45-54, 55-64 and 65+ groups is more balanced than any music-related format.

With the lowest teen composition of any programming in this study, News-Jazz is essentially tied with Classical for the smallest proportion of 12-34s in its listenership (less than 10%). While adult men listeners to News-Jazz outnumber adult women by slightly more than 4%, that margin has been halved between Fall 2006 and 2008. Like its Jazz counterpart, News-Jazz has gained appeal among women.

*Note: Due to rounding, totals may differ.
Source: TAPSCAN Web, Fall 2008*

AQH Share of All Public Radio Listening

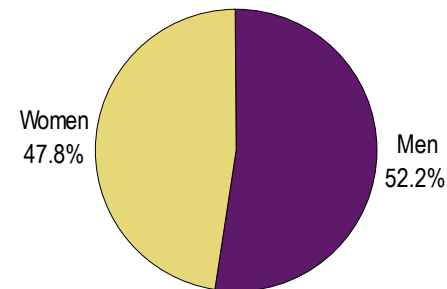
FA05	3.0%
FA06	2.5%
FA08	2.8%

Weekly Listeners 12+

906,200
Format Cume

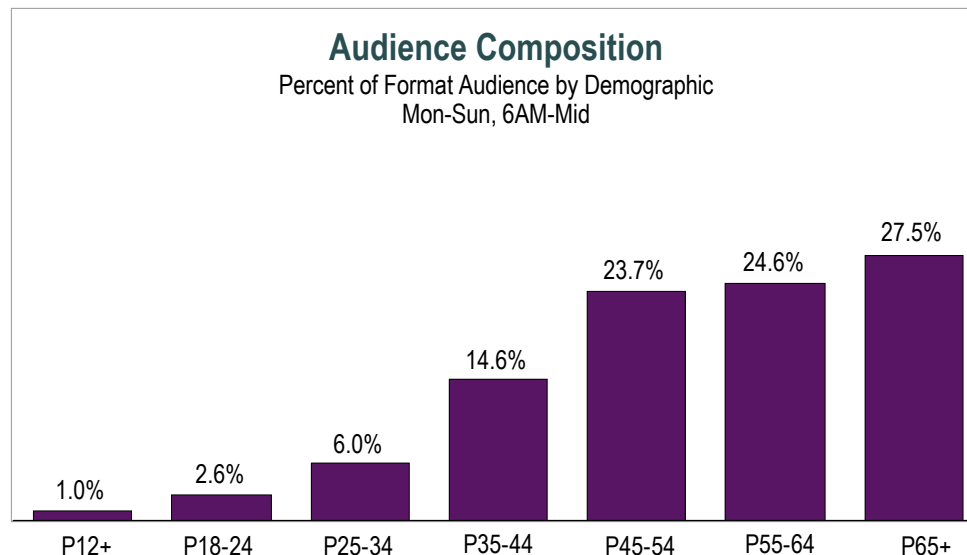
Listeners 12+

Mon-Sun, 6AM-Mid



Audience Composition

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



continued ►

The majority of News-Jazz listening occurs at home, more so than any other format except Classical and News-Classical. The 54%/46% ratio of at-home vs. out-of-home tune-in remained consistently steady between Fall 2006 and 2008.

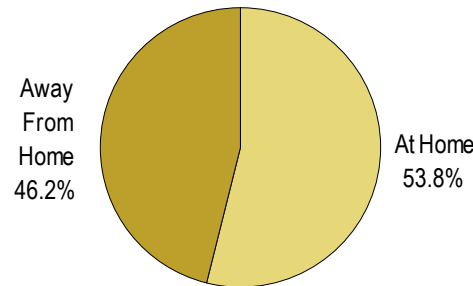
News-Jazz generates reliable quarter-hour shares regardless of time of day during the week, with a spread of only 0.4 share points from its heaviest to lightest listening periods—a narrower margin than any other format in this report. News-Jazz scores its highest format shares in afternoons and evenings, when it outperforms its full-week ratings. It also matches its overall ratings in mornings and weekends. While the format basically equalled its shares from Fall 2006 to 2008 during the day, it did see some decline in evenings and more so on weekends.

This is a highly regionalized format, as more than half of News-Jazz stations broadcast in the Middle Atlantic and South Atlantic areas, a figure that increases to 70% when the South Central region is included. Nearly half of the format's ratings come from the Pacific territory, followed closely by the Middle Atlantic. Those two areas generate 84% of all News-Jazz listening.

*Note: Due to rounding, totals may differ.
Source: TAPSCAN Web, Fall 2008*

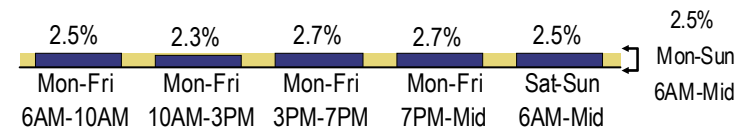
AQH Share of Listening by Location

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



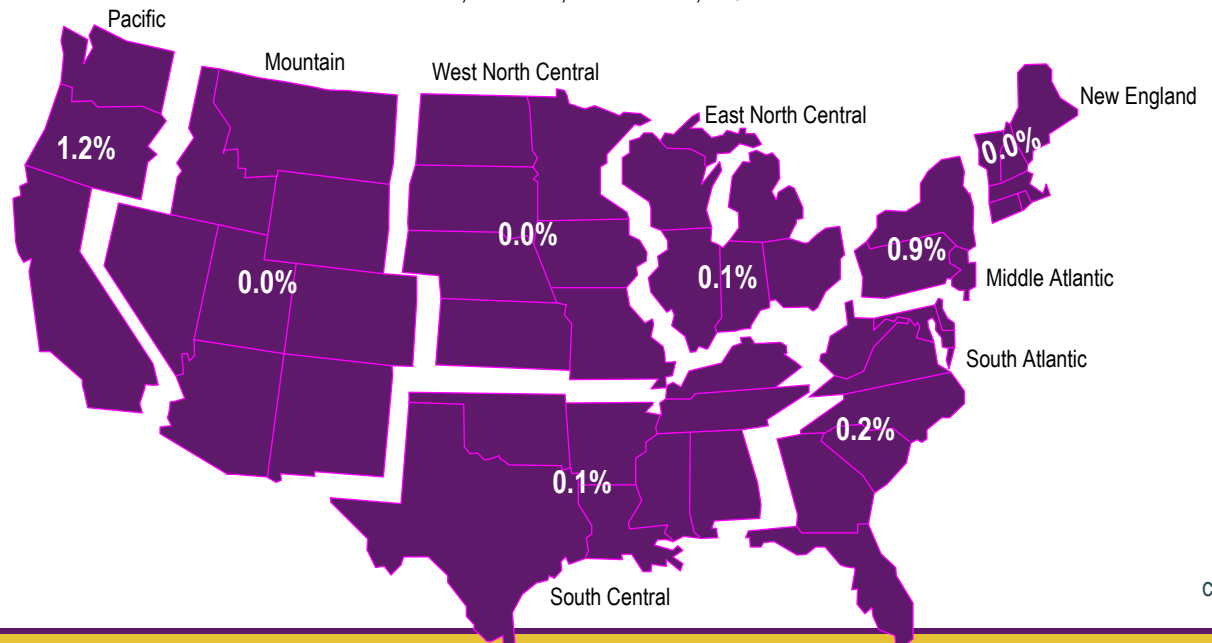
News-Jazz Share of All Public Radio Listening

Persons 12+, by Daypart



Audience Share by Region

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



continued ►

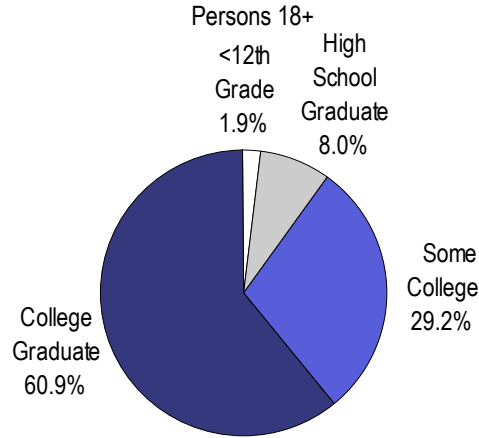
More than 90% of News-Jazz listeners had attended or graduated from college in Fall 2008, up from 84% in Fall 2006. That's a bigger increase in upper-level education than any other format in this study. The total proportion of college-educated News-Jazz listeners to its overall audience ranks second-best to News/Talk. About 61% had a college degree in Fall 2008, up from less than 58% two years prior.

That major increase in the segment of News-Jazz listeners with college degrees is also reflected in income performance. The proportion of News-Jazz consumers living in households generating at least \$75,000 per year skyrocketed from 41% to nearly 48% between Fall 2006 and 2008—a 17% jump. No other format came close to that level of growth. Seventy percent of News-Jazz listeners reside in households producing at least \$50,000 in annual income, ranking the format No. 2 in that category, up from fourth-most in Fall 2006.

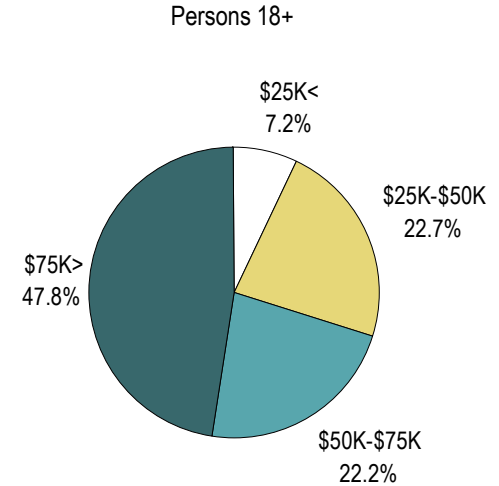
News-Jazz was the only one of the eight formats in this report to maintain a steady level of time spent listening between Fall 2006 and 2008. News-Jazz's TSL among Adults 35-64—tied for second-highest—actually increased 15 minutes per week—the only format to do so.

*Note: Due to rounding, totals may differ.
Source: TAPSCAN Web, Fall 2008*

Education

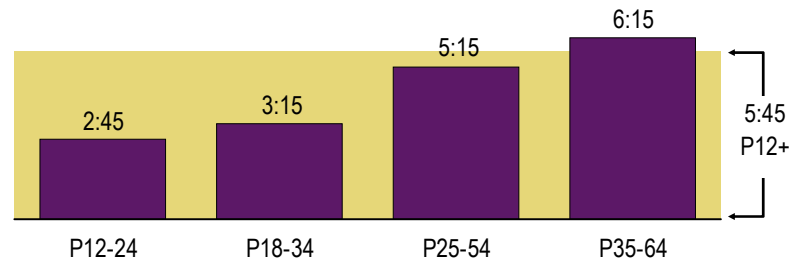


Household Income



Time Spent Listening by Demographic

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



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. There are 52 Variety Music stations, which together deliver nearly 800,000 listeners each week and account for 1.7% of all quarter-hours of public radio listening.

Along with AAA/Eclectic, the Variety Music format has a core appeal among Adults 45-54, who comprise a quarter of its audience. However, listeners to Variety Music outlets represent a wider spectrum of age groups than those of other public radio formats, perhaps owing to the variety of music styles played on these stations. Nearly three-quarters of Variety Music consumers are between 25-54 years old. Although almost 84% of Variety Music listeners are under 65, that older age group rose from less than 13% to more than 16% of its listenership. Variety Music listeners turned somewhat older between 2006 and 2008, with the proportion of Adults 35+ rising from 72% to 78% during that two-year span.

At a 58%/42% ratio, the listener ratio of adult men to women who favor Variety Music is higher than for any format other than AAA/Eclectic.

AQH Share of All Public Radio Listening

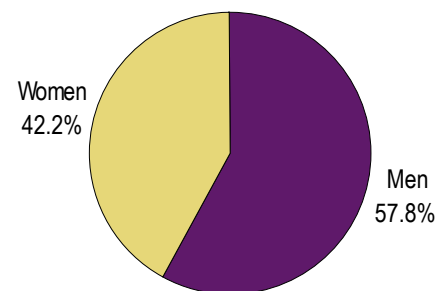
FA05	1.9%
FA06	2.0%
FA08	1.7%

Weekly Listeners 12+

799,200
Format Cume

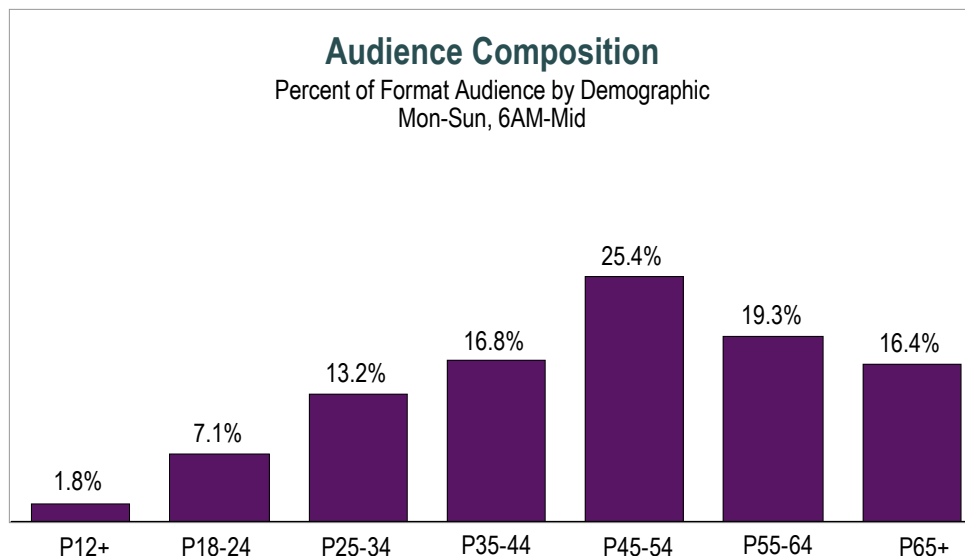
Listeners 12+

Mon-Sun, 6AM-Mid



Audience Composition

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



Note: Due to rounding, totals may differ.
Source: TAPSCAN Web, Fall 2008

continued ►

Variety Music

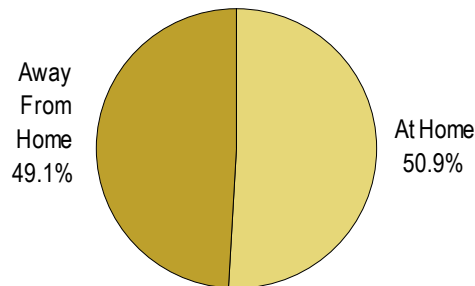
The amount of listening to Variety Music is split nearly equally between at-home and away from home. However, at-home tune-in surpassed out-of-home listening between Fall 2006 and 2008, rising from 48% to 51% during that time period—the only format other than Jazz to change the majority of listening by location. It is second-only to News/Talk in its location balance.

As evenings deliver the strongest quarter-hour shares for the three other music-intensive formats in this report, they do so as well for Variety Music. Middays and weekends also outperform Variety Music's full-week average share.

Heard in every region of the country, Variety Music generates by far its largest audience in the New England area, where the format ranks No. 1 among contemporary public radio music choices.

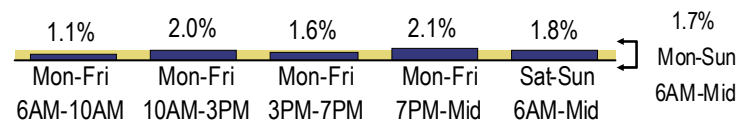
AQH Share of Listening by Location

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



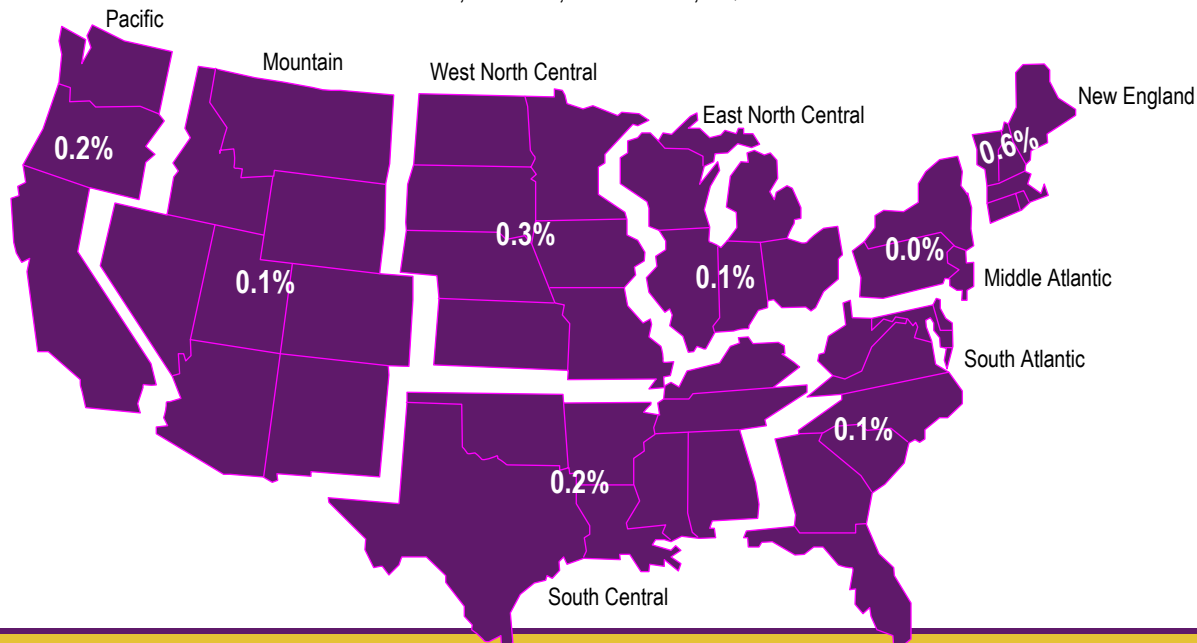
Variety Music Share of All Public Radio Listening

Persons 12+, by Daypart



Audience Share by Region

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



Note: Due to rounding, totals may differ.
Source: TAPSCAN Web, Fall 2008

continued ►

Variety Music

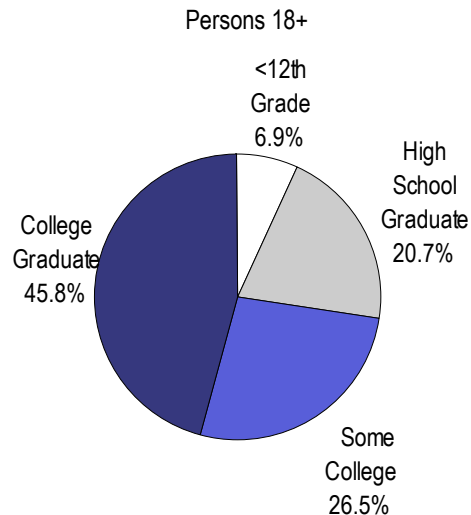
More than 72% of Variety Music listeners have gone to college, and the proportion of the format's listeners who have earned a degree rose sharply from 39% to nearly 46% between Fall 2006 and 2008—a nearly 17% growth rate and by far the largest increase of any format covered in this study.

Variety Music listeners are also generating more income, as the percentage of those living in households producing at least \$50,000 per year increased from 54% to 56% over that two-year period. The majority of that growth occurred in the \$75,000+ category, where the percentage of those Variety Music listeners residing in households earning that much or more expanded slightly.

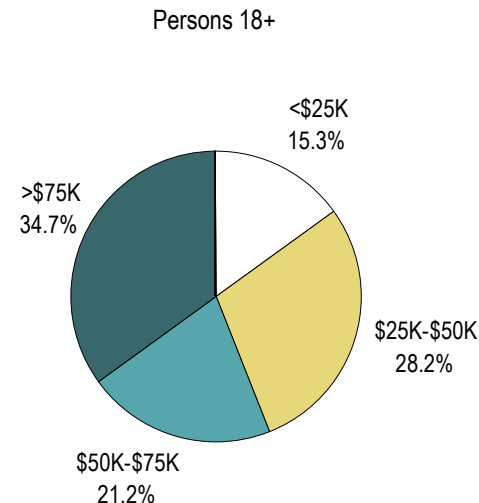
While figures for time spent listening to nearly all public radio formats were lower between Fall 2006 and 2008, Variety Music fared better than most in Fall 2008, with statistics showing 17 quarter-hours vs. 19 in 2006 (-11%). Reflecting its appeal across all age groups, Variety Music held up well among those aged 12-24 and Adults 35-64 years old. Next to Jazz, Variety Music has the most consistent amount of listening each week across the key age groups.

*Note: Due to rounding, totals may differ.
Source: TAPSCAN Web, Fall 2008*

Education

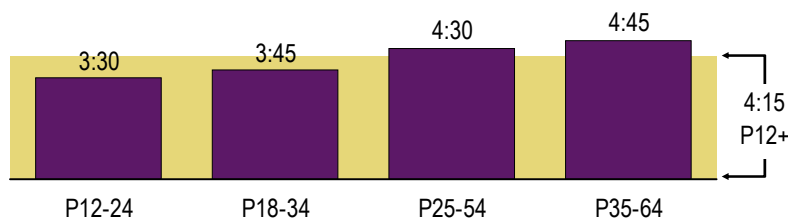


Household Income



Time Spent Listening by Demographic

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



Scarborough Qualitatives

The 2009 *Public Radio Today* provides an expanded view of Scarborough Research insights into household factors, including marital status, employment and home ownership. You'll also find:

- Credit Card Usage
- Events Attended/Places Visited
- Automobile Dealer Preferences
- Food Product Choices
- Items Shopped for on the Internet
- Home Improvement

Household Characteristics

Married, With Money to Spend

Public radio listeners are less likely to have children living at home. An estimated 63% of adult public radio listeners are married, compared to 57% of the American population as a whole, making public radio consumers 11% more likely to be married than the national adult average. Their likelihood of being either widowed or legally separated rose 9% against the norm between the *Public Radio Today Fall 2006* report and the release of this study. Just 21% of listeners to public radio are single, vs. 25% of adults overall.

Nearly 55% of adult public radio listeners are employed fulltime, compared to 49% of the general adult population. Approximately 78% of adult public radio listeners live in a household that owns its residence, compared to 72% of the national population, making them an ideal target for sponsorships and underwriting opportunities from home improvement stores (see Page 46), insurance companies, home furnishing outlets, mortgage firms and a variety of home services such as security, landscaping, pest control, cleaning, etc. Just 19% of listeners to public radio rent their residences, while 3% live with others.

Source: Scarborough Research, Scarborough USA+, Release 2, 2008
An index of 100 is average.

Scarborough Qualitative—Household Characteristics

Marital Status	Index
Married	111
Widowed	82
Legally Separated	70
Divorced	105
Never Married (Single)	81

Employment Status	Index
Employed Full Time (35 Hours or More)	111

Own or Rent Residence	Index
Own (78%)	109
Rent (19%)	80
Other (3%)	63



Credit Card Usage

As the economic recovery continues, underwriters and sponsors look for a strong qualitative audience to which they can market their brands and businesses. One of the strengths of public radio listeners is that many live in households with annual incomes well above the national average, and therefore it's not surprising to see these consumers using major credit cards more than the general public.

Nearly 85% of adult public radio consumers have used a credit card in the past three months, compared to 76% of all adults. Listeners to public radio prefer using VISA to MasterCard by a large margin: 63% have used VISA, while 44% have used MasterCard, followed by American Express (20%) and Discover (14%). In another sign of their affluence, public radio consumers are 55% more likely than the general population to have made a purchase with an American Express card. Almost 23% have used a major department store credit card in the past 90 days.

Scarborough Qualitative—Credit Card Usage

Credit Card Usage	Index
Any American Express (Blue/Gold/Green/Platinum)	155
Any VISA (Gold/Platinum/Other VISA)	115
Any MasterCard (Gold/Platinum/Other MasterCard)	115
Any credit card	111
Gasoline Credit Card	108
Major department store credit card	107
Discover	104
Other major credit card	94
None	64

Source: Scarborough Research, Scarborough USA+, Release 2, 2008
An index of 100 is average.



Events Attended/Places Visited

As you can see from the table, public radio listeners are avid supporters of the fine arts. They are more than twice as likely as the general population to have attended at least one symphony orchestra performance or opera in the past 12 months, and are 91% more likely to have visited an art museum exhibit; one in four have done so.

During the same time frame, nearly a third (32%) of adult public radio listeners have attended live theater, making them 55% more likely to do so than the average consumer. And it's not only classical music, musicals, plays and paintings that attract the attention of public radio fans: one in seven (14%) have attended a rock concert in the past year.

As you'll see in the report on "Items Shopped for on the Internet" (Page 45), public radio consumers are above-average online purchasers of tickets to cultural events in general, as well as to movies and sporting events.

Scarborough Qualitative—Events Attended/Places Visited

Events Attended/Places Visited	Index
Symphony concert, opera, etc.	225
Art museum	191
Live theater	155
Rock concert	125
Country music concert	89
R&B/rap/hip-hop concert	85

Source: Scarborough Research, Scarborough USA+, Release 2, 2008
An index of 100 is average.



Automobile Dealer Preferences

How do public radio listeners make decisions about where they will go to buy or lease a new car? And how do they compare with car buyers in general? According to Scarborough data, price-value was the number one criterion used by adult public radio listeners for their household's most recent auto purchase, listed as important to 28% of them.

Mentioned next-most-often by public radio consumers was "selection of makes/models," given by 20% of public radio listeners. And public radio listeners are 24% more likely than the typical person to regard location as a primary reason for selecting a dealer.

Although hybrid vehicles account for only 1% of all car sales, public radio consumers are more than twice as likely as the general population to live in a household that owns or leases a hybrid.

Scarborough Qualitative—Auto Dealer Preferences

Primary reasons used a dealer to buy/lease last new vehicle (household)	Index
Location	124
Selection of makes/models	118
Price-value	116
Service	111
Reputation of dealer	109
Other reason	102
Warranty	99
Financing through dealer	89
Percent of households that own or lease a hybrid vehicle	212

Source: Scarborough Research, Scarborough USA+, Release 2, 2008
An index of 100 is average.



Food Product Choices

Public radio listeners are nutrition-minded, as a correlation between healthy eating and public radio listening can be seen through the following Scarborough data. In the past 30 days, 30% of adult listeners to public radio bought organic food, making them 59% more likely to choose organics than the general U.S. population. An estimated 23% bought energy/nutrition bars, while 54% purchased yogurt; both higher than the national average. Public radio listeners are also heavier consumers of nuts, decaffeinated coffee and tea.

At the other end of the scale, public radio listeners, who tend to be older than the overall population, are less likely to purchase items popular with children, such as candy, processed meat, packaged cookies and, of course, baby food.

Scarborough Qualitative—Food Product Choices

Food Product Purchased by Public Radio Listeners (past 30 days)	Index
Any organic food	159
Energy bars/nutrition bars	119
Nuts	119
Yogurt (not frozen)	115
Decaffeinated coffee	114
Tea (bags or loose)	108
Regular coffee	106
Salsa	104
Ready-to-eat cereal	103
Ice cream, frozen juice bars, frozen yogurt	99
Pretzels, chips, popcorn	99
Tortillas	98
Frozen dinners/meals	97
Candy	95
Packaged cookies	93
Packaged meat (ham, sausage, bacon, hot dogs, lunch meat)	93
Iced tea mix	82
Baby food	80

Source: Scarborough Research, Scarborough USA+, Release 2, 2008
An index of 100 is average.



Items Shopped for on the Internet

Continuing a trend reflected in past editions of *Public Radio Today*, public radio listeners are still more comfortable shopping for products and services online than the U.S. population as a whole. This is especially true with respect to high-end or discretionary items such as travel, wine, consumer electronics and computer hardware/software.

More than a third of adult public radio listeners shopped for books and airline tickets during the past year, and a third of them shopped online for clothing or accessories. Nearly 20% shopped for computer hardware/software, while 16% shopped for consumer electronics.

Convenient access to consumer products through the Internet by public radio consumers can be seen by their acceptance of shopping online for tickets of all kinds, as well as for books, music, medicine, flowers and other items.

While 9% of adults overall listened to radio online in the past 30 days, 13% of public radio consumers tuned in on the Internet, making them much more likely to do so than the general population.

Scarborough Qualitative—Items Shopped Online

Consumer Online Purchase Behavior	Index
Cultural event tickets	186
Wine	157
Airline tickets	155
Other travel destinations (hotels, auto rental, etc.)	152
Books	150
Consumer electronics	150
Computer hardware/software	147
Office supplies	139
CDs, tapes or other music	136
Flowers	135
Medicine/prescriptions	134
Other products or services	130
Movie tickets	127
Clothing or accessories	125
Sporting event tickets	125
Health and beauty items	123
Pet supplies	120
Insurance	118
Vehicle (car, truck, SUV, etc.)	118
Groceries, candy or other food item	117
Toys or games	115
Sports logo apparel	110
Did not shop online	70



Source: Scarborough Research, Scarborough USA+, Release 2, 2008
An index of 100 is average.

Home Improvement

As noted earlier, not only do 78% of public radio listeners own their own residences, they also take care of them, as well. These consumers are 6% more likely than the average person to put money back into their homes. Well more than half of public radio listeners—an estimated 59% of those Adults 18+—live in a household that has spent money on some form of home improvement in the past 12 months. Public radio listening households spent a total of more than \$30 billion.

More than 32% undertook remodeling projects, while 26% funded landscaping efforts and 10% invested in an addition to their homes. What makes public radio listeners particularly valuable is that they are 37-74% more likely than the average consumer to spend \$10,000 or more on landscaping (174 index or 74% more likely), major additions (137 index or 37% more likely) or remodeling (147 index or 47% more likely). Listeners to public radio also index far above the norm in moderate landscaping expenditures and smaller remodeling initiatives.

Scarborough Qualitative—Home Improvement

Home Improvement	Index
Landscaping (any amount spent) (26%)	112
All home improvements (any amount spent) (59%)	106
Remodeling (any amount spent) (32%)	105
Major Addition (any amount spent) (10%)	98

Landscaping	Index
\$7,500-\$9,999	189
\$10,000 or more	174
\$5,000-\$7,499	172
\$3,000-\$4,999	154
\$1,000-\$2,999	145
\$500-\$999	113
Under \$500	97

Major Additions	Index
\$10,000 or more	137
\$7,500-\$9,999	109
\$5,000-\$7,499	98
\$3,000-\$4,999	92
\$1,000-\$2,999	91
Any major addition; \$500-\$999	74
Under \$500	81

Remodeling	Index
\$10,000 or more	147
\$7,500-\$9,999	123
\$1,000-\$2,999	111
\$3,000-\$4,999	107
\$5,000-\$7,499	104
\$500-\$999	94
Under \$500	87

Source: Scarborough Research, Scarborough USA+, Release 2, 2008
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 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.

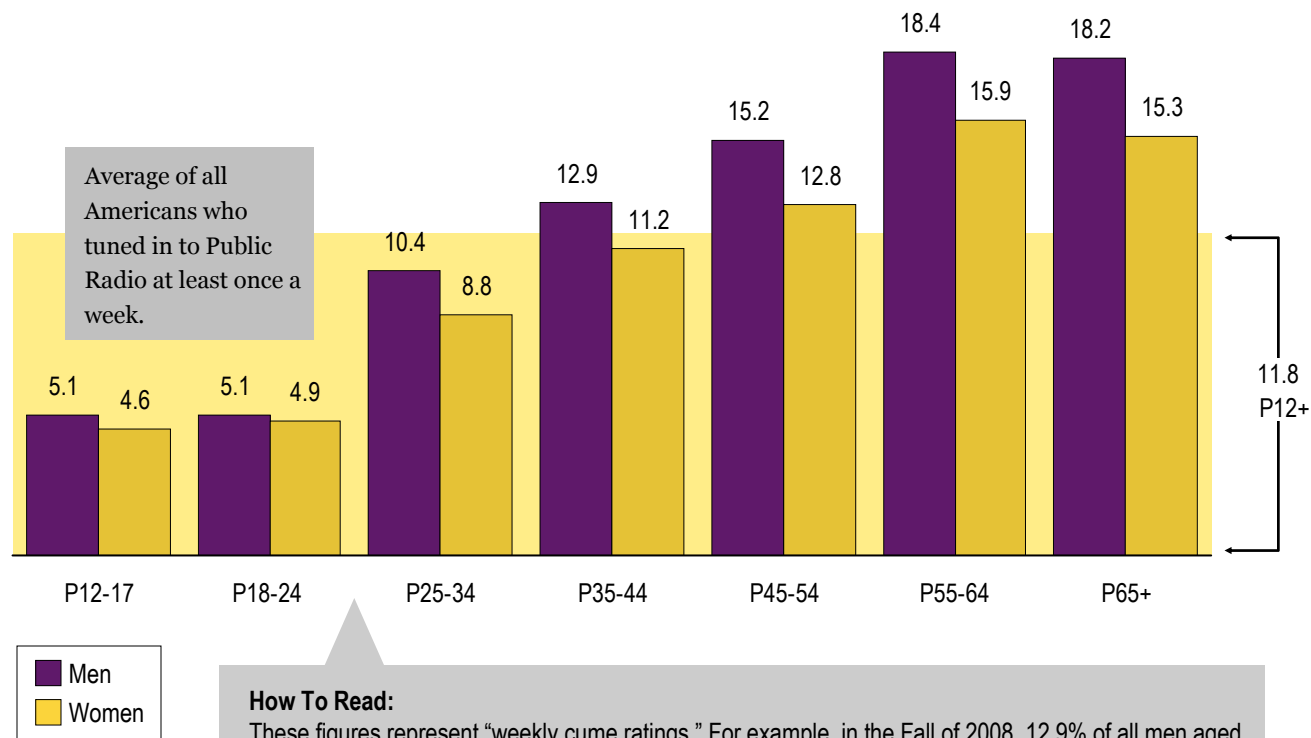
Public Radio Reaches All Ages

People of all ages listen to public radio each week, with the proportion of men slightly outnumbering women.

Overall, public radio continued to expand its weekly reach, rising from 11.2% to 11.8% of the U.S. population over that two-year period, 12% ahead of its 10.5% come rating in Fall 2005. Moreover, the weekly reach increased in 14 of the 15 demographic cells in this report, especially among Women 18-24 and 35-44, with both up 11% from Fall 2006 to 2008, and Men 18-24 and 25-34; both groups gained more than 8%.

While the lion's share of public radio listening comes from Adults 35+, the greatest increases between Fall 2006 and 2008 came from teen boys and girls, whose come ratings were up 37% and 21%, respectively. The only come rating to decrease was among women 45-54, and that difference was incremental. The demographic groups with the highest reach are Men 55-65 and 65+, followed by women in those same age cells.

Weekly Come Rating
Percent of Population That Tunes In to Public Radio



How To Read:

These figures represent "weekly come ratings." For example, in the Fall of 2008, 12.9% of all men aged 35-44 in the United States tuned in to public 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 public radio reaches various demographic groups compared to its national average.

Note: Due to rounding, totals may differ.
Source: TAPSCAN Web, Fall 2008

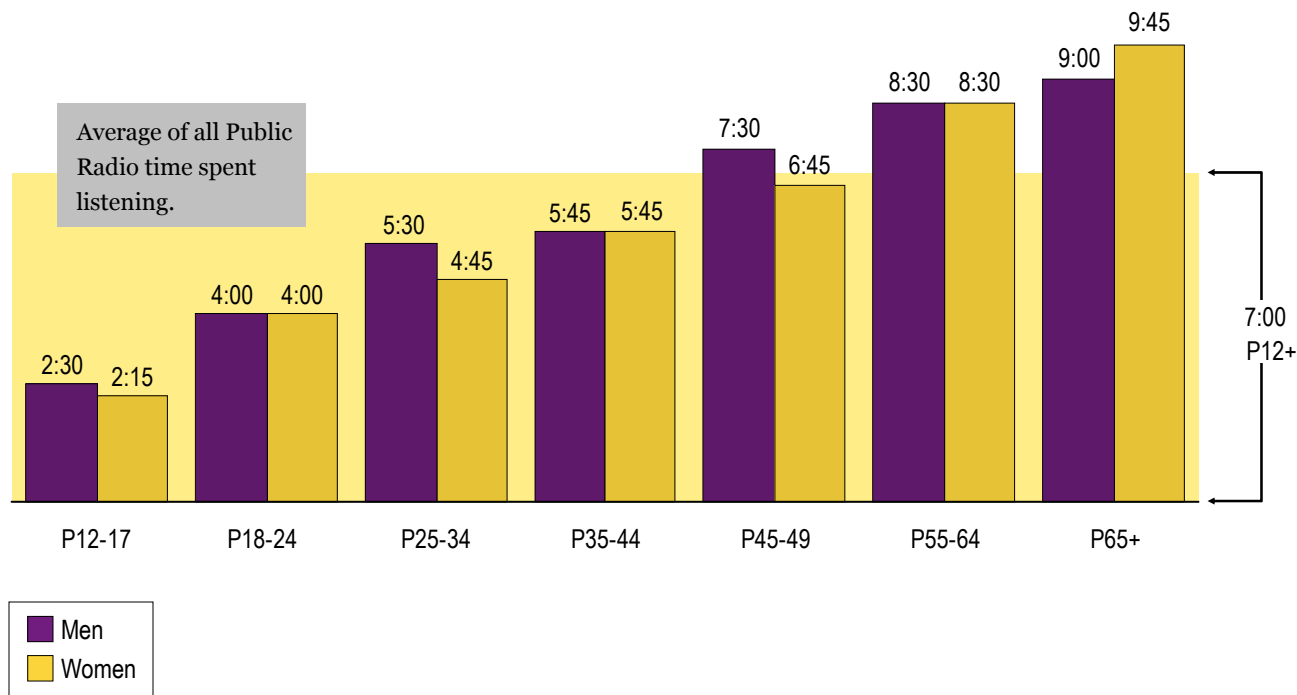
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Public Radio Reaches All Ages

As the chart shows, older public radio consumers spend more time listening than anyone else, a pattern that's been consistent for years. Overall, men listen to public radio at slightly higher levels than do women.

Time Spent Listening to Public Radio

Hours:Minutes per Week



Note: Due to rounding, totals may differ.
Source: TAPSCAN Web, Fall 2008

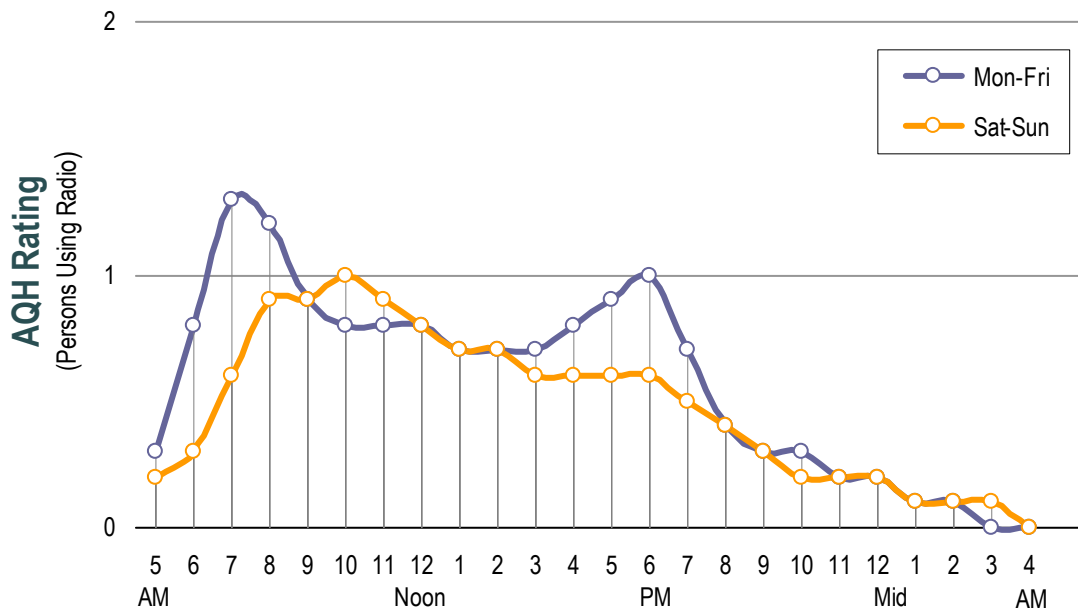
Hour-by-Hour Listening

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 3PM and 6PM as employed listeners head home.

Weekend listening to public radio gets started slightly later—weekends outperform weekdays from 10AM to noon—a phenomenon similar to what occurs with listening to commercial radio.

Reflecting radio's ability to deliver a consistent audience level year after year, the average quarter-hour rating for public radio changed very little between Fall 2006 and 2008.

Hour-by-Hour Listening, AQH Rating



Note: Due to rounding, totals may differ.
Source: TAPSCAN Web, Fall 2008

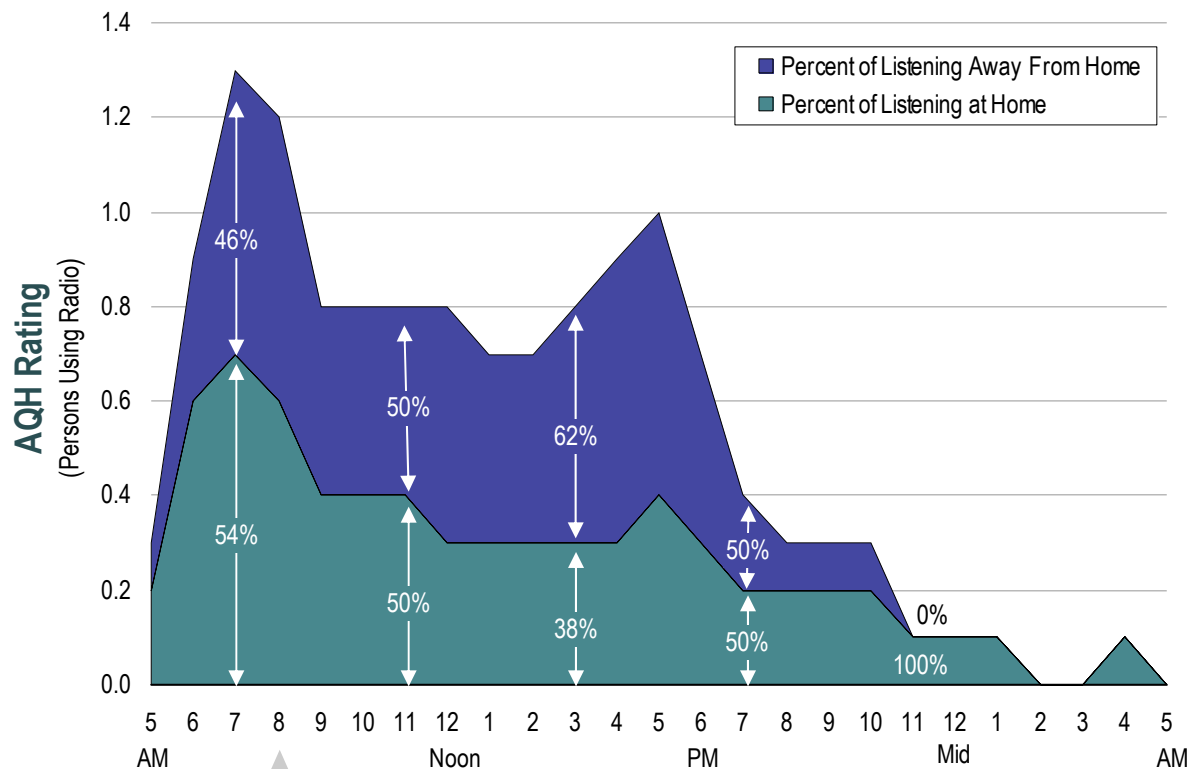
Public Radio Listening Location: Weekdays

For seven hours each weekday between noon and 7PM, the majority of 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 sponsors and underwriters to most directly influence image and purchasing decisions. Away-from-home weekday public radio listening peaks at 4PM, when 67% of radio tune-in occurs somewhere else.

One notable shift between Fall 2006 and 2008 is that at-home weekday ratings were just as strong in Fall 2008 as those out-of-home between 8AM and noon, whereas in 2006, away-from-home listening was higher during that time period. In-home ratings increased 0.1% during the 8AM hour, while out-of-home decreased by the same amount from 9AM to noon. Meanwhile, at-home listening to public radio in Fall 2008 started at 4AM, an hour earlier than two years prior.

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 0.8 percent of the 12+ population listened to public radio for at least five minutes. Of those who had listened, 44% had tuned in at home and 56% had listened somewhere else.

Note: Due to rounding, totals may differ.
Source: TAPSCAN Web, Fall 2008

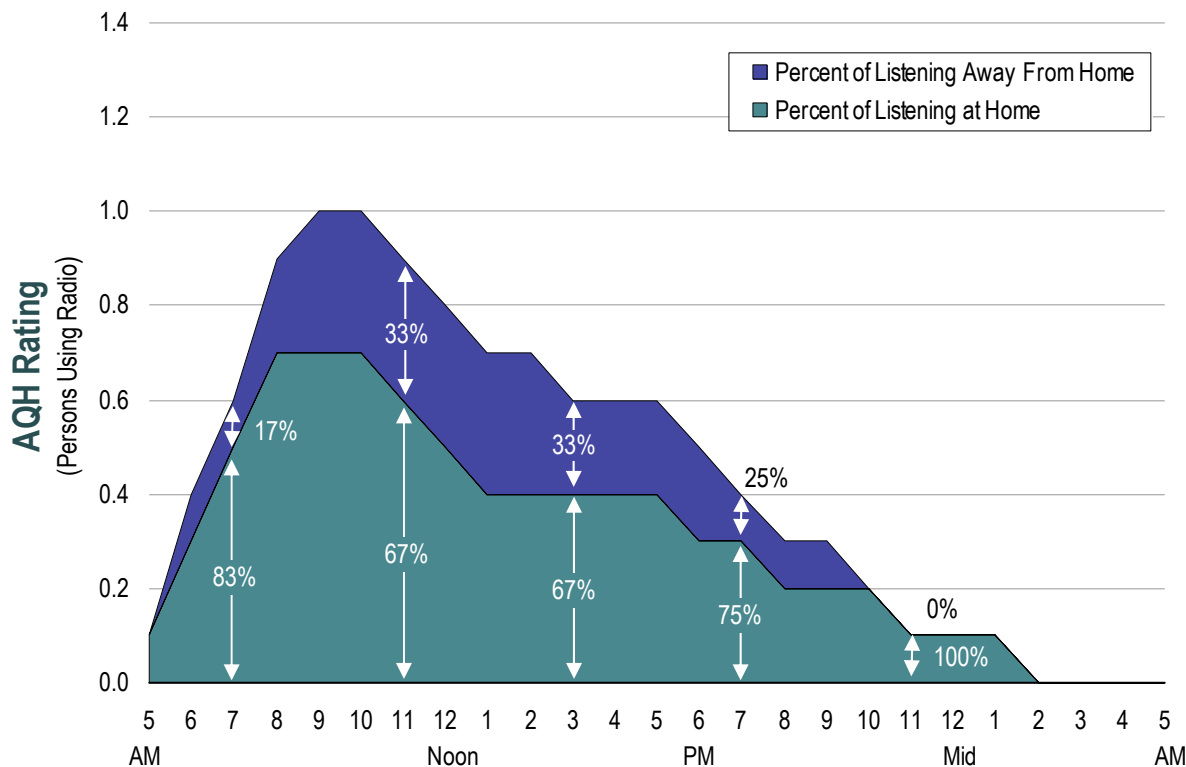
Public Radio Listening Location: Weekends

With no commute or substantial at-work listening, most public radio tune-in on the weekend occurs in the home. In fact, throughout a typical weekend day, except between 1-3PM, 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*. Between 8AM-5PM, and again in the 7PM hour, at-home weekend ratings are higher than at-home tune-in is during the workweek.

Weekend ratings to public radio peaks in the 8AM-10AM hours. Total tune-in and by location between Fall 2006 and 2008 remained relatively steady, with at-home ratings scoring the same figures except for 0.1% decreases during the 10AM, 1PM, 6PM and 2AM hours. Away-from-home ratings were identical except for a 0.1% slippage in the 10AM hour.

Weekend Listening, AQH Rating

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



Note: Due to rounding, totals may differ.
Source: TAPSCAN Web, Fall 2008

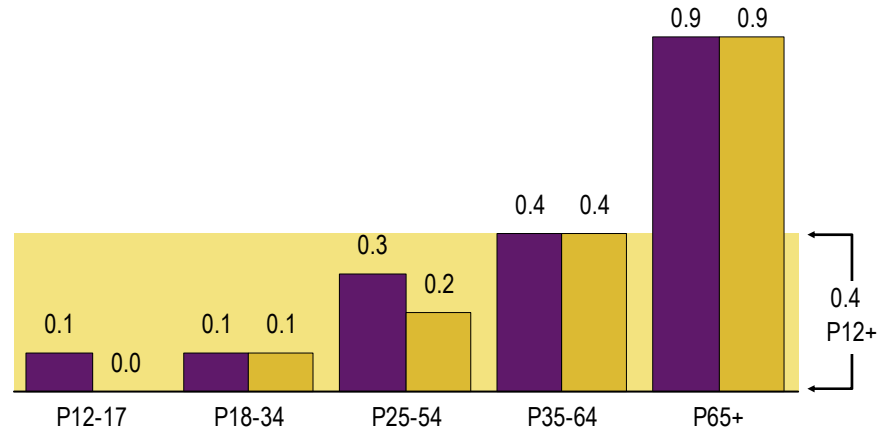
Public Radio Listening Location by Men and Women

Ratings for at-home listening to public radio are far higher among those 65 years old or above than for any other age groups. Listening to public radio at home is virtually identical between men and women, with teen males and Men 25-34 years old providing a slightly larger audience than women in the same age groups. Between Fall 2006 and 2008, at-home ratings were the same except for a 0.1 decline among Women 25-34 and a similar increase among Women 65+.

In terms of away-from-home listening, public radio's ratings are higher among adult men than adult Women, regardless of age. Between Fall 2006 and 2008, public radio experienced a 0.1% loss among Women 18-34 listening out-of-home. Quarter-hour figures also declined 0.1% with Men 25-54, 35-64 and 65+, restoring the ratings for men in those age groups to the same levels as they were in Fall 2005.

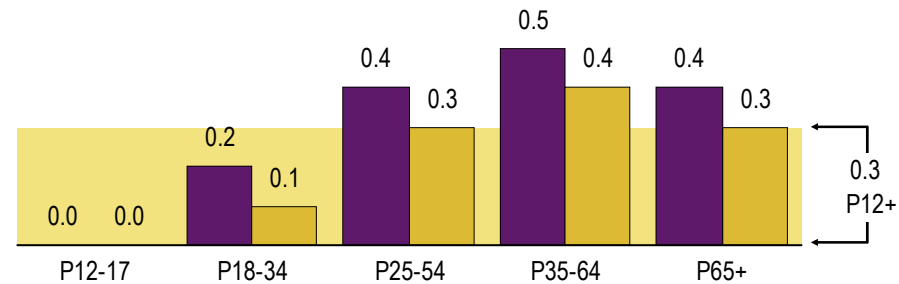
At-Home Listening for Men and Women

Total Week, AQH Rating



Away-from-Home Listening for Men and Women

Total Week, AQH Rating



Note: Due to rounding, totals may differ.
Source: TAPSCAN Web, Fall 2008

Public Radio Listening Location—At Home vs. Away From Home

While at-home listening is self-explanatory, away-from-home listening takes many forms: in-car, at-work and “other” listening, which includes locations such as at the gym, a friend’s house or at a picnic in the park.

Between Fall 2006 and 2008, the overall ratio of at-home public radio listening to away-from-home tune-in remained almost unchanged. During weekdays, the shift was more noticeable, with at-home picking up 2% in mornings, 3% in middays and nearly 1% in afternoons. Meanwhile, the proportion of public radio listening taking place away from home gained nearly 4% during weekday evenings and almost 2% during weekend daytime hours.

Distribution of AQH Radio Listeners by Listening Location

Persons 12+

	Home	Away From Home
Mon-Sun 6AM-Mid	52.7%	47.3%
Mon-Fri 6AM-10AM	54.3%	45.7%
Mon-Fri 10AM-3PM	43.0%	57.0%
Mon-Fri 3PM-7PM	38.5%	61.5%
Mon-Fri 7PM-Mid	65.7%	34.3%
Weekend 10AM-7PM	62.5%	37.5%

Note: Due to rounding, totals may differ.
Source: TAPSCAN Web, Fall 2008

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 demographics 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.

Just as public radio increased its cume ratings between Fall 2006 and 2008 among nearly every demo group, the percentage of the U.S. population listening to public radio grew again between Fall 2006 and 2008 for almost everyone regardless of time of day, age or gender.

Most other demographics also posted major growth: During weekdays, ratings among Men 25-34 rose 13% in afternoon, while those for Men 35-44 improved 13% in middays and 12% in evenings. Ratings among Men 55-64 were up 12% in middays and 13% in evenings. Women 35-44 registered ratings growth of 9% in mornings, 13% in middays, 14% in afternoons and 28% in evenings. Both Men and Women 65+ delivered 9% ratings growth in afternoons. Weekly reach among Men and Women 65+ advanced 12% and 10%, respectively, in evenings.

Note: Due to rounding, totals may differ.
Source: TAPSCAN Web, Fall 2008

Public Radio's Reach by Daypart

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	2.2	1.0	2.0	1.2	2.3	5.1
	W	1.8	0.1	1.8	1.1	2.1	4.6
P18-24	M	2.1	2.1	2.1	1.4	2.4	5.1
	W	2.1	2.0	2.1	1.4	2.4	4.9
P25-34	M	6.1	4.2	6.2	3.0	4.8	10.4
	W	5.1	3.8	5.0	2.5	4.2	8.8
P35-44	M	8.5	5.4	8.2	3.7	6.4	12.9
	W	7.1	5.3	6.7	3.2	5.8	11.2
P45-54	M	9.7	6.8	9.5	4.8	8.6	15.2
	W	7.8	6.2	7.9	3.7	7.3	12.8
P55-64	M	11.1	9.6	11.5	5.9	11.9	18.4
	W	9.6	8.8	10.0	4.8	10.5	15.9
P65+	M	9.5	11.1	10.4	5.5	12.8	18.2
	W	8.3	10.3	8.7	4.4	10.6	15.3

Public Radio Formats Ranked by Audience Share and Availability

Public Radio Formats Ranked by Audience Share Among All Public Radio Listening

Mon-Sun, 6AM-Mid, AQH Persons 12+, Fall 2008

Format	Share
News Talk	47.9%
News-Classical	20.2%
Classical	13.7%
News-Music	6.2%
Jazz	4.1%
AAA (Adult Album Alternative)/Eclectic	3.9%
News-Jazz	2.5%
Variety Music	1.7%

Public Radio Formats Ranked by Availability Among All Public Radio Listening

Mon-Sun, 6AM-Mid, AQH Persons 12+, Fall 2008

Format	Number of Stations
News Talk	321
News-Classical	263
News-Music	154
Classical	100
AAA (Adult Album Alternative)/Eclectic	68
Variety Music	52
Jazz	38
News-Jazz	20

Note: Due to rounding, totals may differ.
Source: TAPSCAN Web, Fall 2008

Public Radio Formats Ranked by Audience Share by Region

Public Radio Formats Ranked by Audience Share by Region

Figures noted are listening shares of all public radio listening across all regions
 Mon-Sun, 6AM-Mid, AQH Persons 12+, Fall 2008

New England

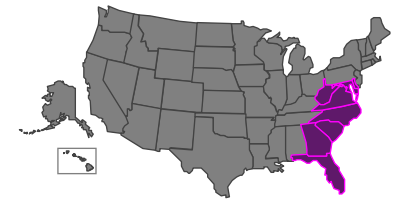
News/Talk	4.7%
News-Classical	2.0%
Variety Music	0.6%
Classical	0.2%
Jazz	0.1%
AAA/Eclectic	0.0%
News-Jazz	0.0%
News-Music	0.0%

Middle Atlantic

News/Talk	6.1%
Classical	2.3%
AAA/Eclectic	1.5%
News-Classical	1.2%
Jazz	0.9%
News-Jazz	0.5%
News-Music	0.2%
Variety Music	0.0%

South Atlantic

News/Talk	8.3%
News-Classical	6.6%
Classical	3.5%
News-Music	0.9%
AAA/Eclectic	0.6%
Jazz	0.4%
News-Jazz	0.2%
Variety Music	0.1%



Note: Due to rounding, totals may differ.
 Source: TAPSCAN Web, Fall 2008

continued ►

Public Radio Formats Ranked by Audience Share by Region

Public Radio Formats Ranked by Audience Share by Region

Figures noted are listening shares of all public radio listening across all regions
 Mon-Sun, 6AM-Mid, AQH Persons 12+, Fall 2008

East North Central

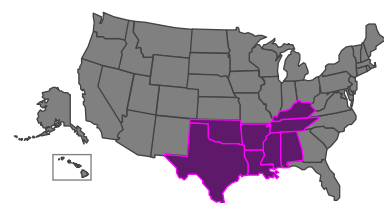
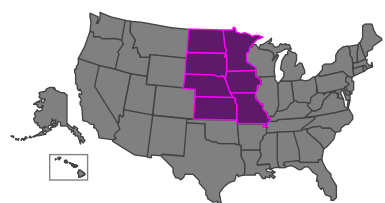
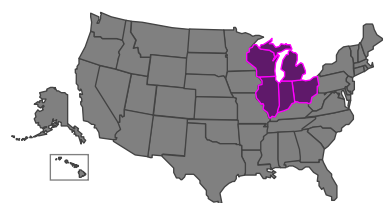
News/Talk	7.0%
News-Classical	3.6%
Classical	1.0%
News-Music	0.6%
Jazz	0.3%
AAA/Eclectic	0.2%
News-Jazz	0.1%
Variety Music	0.1%

West North Central

News/Talk	4.3%
News-Classical	1.4%
Classical	1.3%
Jazz	0.5%
AAA/Eclectic	0.3%
News-Music	0.3%
Variety Music	0.3%
News-Jazz	0.0%

South Central

News-Classical	3.3%
News/Talk	2.6%
News-Music	1.5%
Jazz	0.7%
AAA/Eclectic	0.5%
Jazz	0.5%
Variety Music	0.2%
News-Jazz	0.1%



Note: Due to rounding, totals may differ.
 Source: TAPSCAN Web, Fall 2008

continued ►

Public Radio Formats Ranked by Audience Share by Region

Public Radio Formats Ranked by Audience Share by Region

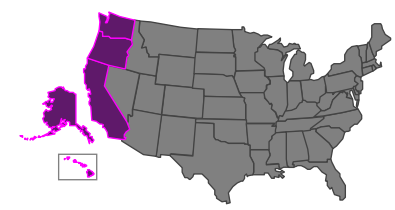
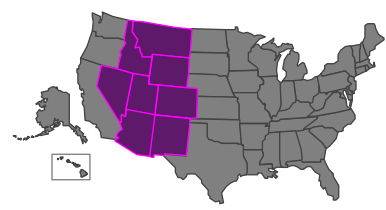
Figures noted are listening shares of all public radio listening across all regions
 Mon-Sun, 6AM-Mid, AQH Persons 12+, Fall 2008

Mountain

News/Talk	4.4%
Classical	1.6%
News-Music	1.5%
News-Classical	1.0%
Jazz	0.8%
AAA/Eclectic	0.1%
Variety	0.1%
News-Jazz	0.0%

Pacific

News/Talk	10.6%
Classical	3.0%
Jazz	1.3%
News-Music	1.2%
News-Classical	1.2%
News-Jazz	1.1%
AAA/Eclectic	0.6%
Variety	0.2%



Note: Due to rounding, totals may differ.
 Source: TAPSCAN Web, Fall 2008

Public Radio Formats Ranked by Audience Share by Demographic

Public Radio Formats Ranked by Audience Share by Demographic

Figures noted are share of listening to formats within each demographic group. Mon-Sun, 6AM-Mid, AQH Persons 12+, Fall 2008

Persons 12-17

News/Talk	41.9%
Classical	15.7%
News-Classical	15.7%
News-Music	9.2%
AAA/Eclectic	7.4%
Jazz	6.1%
Variety Music	2.2%
News-Jazz	1.5%

Persons 18-24

News/Talk	36.1%
News-Classical	14.3%
AAA/Eclectic	11.7%
Classical	11.7%
News-Music	11.5%
Jazz	8.0%
Variety Music	4.3%
News-Jazz	2.4%

Persons 25-34

News/Talk	52.7%
News-Classical	17.5%
Classical	8.3%
News-Music	7.9%
AAA/Eclectic	6.2%
Jazz	3.6%
Variety Music	2.4%
News-Jazz	1.6%

Persons 35-44

News/Talk	58.2%
News-Classical	15.4%
Classical	7.2%
AAA/Eclectic	5.7%
News-Music	5.6%
Jazz	3.4%
News-Jazz	2.6%
Variety Music	2.0%

Persons 45-54

News/Talk	51.6%
News-Classical	18.8%
Classical	8.0%
News-Music	7.8%
AAA/Eclectic	4.7%
Jazz	4.4%
Variety Music	2.8%
News-Jazz	2.0%

Persons 55-64

News/Talk	49.0%
News-Classical	20.7%
Classical	12.4%
News-Music	6.9%
Jazz	4.2%
AAA/Eclectic	3.0%
News-Jazz	2.6%
Variety Music	1.4%

Persons 65+

News/Talk	39.4%
News-Classical	25.0%
Classical	23.8%
Jazz	3.9%
News-Music	3.5%
News-Jazz	2.4%
AAA/Eclectic	1.5%
Variety Music	1.0%

Note: Due to rounding, totals may differ.
Source: TAPSCAN Web, Fall 2008

Owing to rounding characteristics, certain figures may not equal a total of 100%

Public Radio Today 2009 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 TAPSCAN™ Web National Regional Database, Fall 2008, which includes quantitative radio audience information from every market surveyed by Arbitron in the United States.

Scarborough USA+, Release 2, 2008, gathered from more than 220,000 interviews with adults, aged 18 and over, in the country's top 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. Public radio stations have utilized the Scarborough service in a variety of ways, including underwriting, membership drives, promotional development and growing listener loyalty.

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