

Public Radio Today 2013

How America Listens to Radio



How America Listens to Public Radio

Public radio continues to be a vibrant and relevant part of many Americans' lives. The stations we evaluated for this study broadcast unique programming to over 32 million weekly listeners nationwide. Public radio is also 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 2013 is an in-depth look at the listening activity to the nine most popular public radio formats representing the Fall 2012 Diary and October-November-December 2012 PPM survey periods: News/Talk/Information, Classical Music, News-Classical, Album Adult Alternative (AAA), Jazz, News-AAA, News-Music, 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 formats, including Average Quarter-Hour (AQH) Share of the total public radio audience and its weekly reach in terms of total listeners (Cume), segmentation of audience composition by age, time spent listening (TSL) by demographic, education levels, income by household, gender composition, ratings by daypart, state-by-state index, and listening by at-home vs. out-of-home locations.

Public Radio Today 2013 also includes Scarborough consumer data to present a comprehensive consumer profile of public radio listening across America. This in-depth profile is drawn with information on public radio listeners' household characteristics and consumption behaviors among several popular product categories.

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

American Public Media americanpublicmedia.publicradio.org

National Public Radio www.npr.org

Public Radio International www.pri.org

Radio Research Consortium www.rrconline.org

Public Radio Today and all ratings, data, and other content contained in this report are protected under United States copyright and trademark laws, international conventions, and other applicable laws. You may not quote, reference, link to, frame, copy, modify, distribute, publicly display, broadcast, transmit, or make any commercial use of any portion of this report, including any ratings, data, or other content.

Arbitron clients can access the full *Public Radio Today 2013* study at my.arbitron.com

PPM ratings are based on audience estimates and are the opinion of Arbitron and should not be relied on for precise accuracy or precise representativeness of a demographic or radio market.

Public Radio Thrives With Significant Portion of the U.S. Population

- During the Fall 2012 rating period covered by this year's study, over 32 million people, about 12% of the 12+ population, listened to a public radio station in an average week. Some 1,247 rated radio stations (AM, FM, streamed, and HD Radio) were evaluated for this year's report.
- In an environment of increased media choices, time spent listening to public radio has held steady in recent years. For example, when compared to the prior year edition of *Public Radio Today*, time spent listening in this year's study either remained the same or improved in 11 of 14 key age/gender categories.
- Public radio's popularity among younger audiences continues to grow—it reached record numbers of 18-24 Men and 25-34 Men in Spring 2012, and the medium reaches over 17% of older men.
- The public News/Talk/Information format accounts for more than a third of all rated public stations and now, for the first time this year, accounts for more than half of all public radio listening. The format is most popular in the PPM markets but it's the No. 1 format in Diary markets as well. Listeners to this format are better educated and live in a greater number of high income households than the listeners to any other public or commercial radio format.
- Classical remains the second most popular public radio format. As public Classical stations assume the mantle from commercial stations, the format's popularity continues to grow in PPM markets.
- Public radio's most popular music format, Album Adult Alternative (AAA), along with News-AAA, continues to capture nearly 10% of all public radio listening.

About *Public Radio Today* 2013

Public Radio Today 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:

- Format definitions are supplied to Arbitron by the public radio organizations listed on Page 2.
- The Arbitron TASPCAN™ National Regional Database, Fall 2012, includes quantitative radio audience information from across the United States.
- Scarborough data in this report are from the company's National USA+ Study, Release 2, 2012.

Some Other Items to Consider When Comparing Editions of *Public Radio Today*

Several important factors affected radio ratings data in this and recent years:

We did not publish a *Public Radio Today* study in 2008 (representing the 2007 data year), which could account for some larger-than-typical shifts in the data trends between 2006 and 2008.

PPM data were included for the first time in the 2009 report, and the number of PPM measured markets was expanded in the 2010 and 2011 reports.

As a result of Hurricane Ike in 2008, data from Houston were not represented in the 2009 report.

Due to the aftereffects of Hurricane Irene in 2011, data from Hartford-New Britain-Middletown were not represented in the 2012 report.

Public Radio Today 2013 is published by Arbitron Inc.

- Ron Rodrigues, Arbitron Marketing/*Radio Today* Editor
- Jeff Green and Lauren Virshup, Arbitron Data Research
- Jenny Tsao, Scarborough Data Research
- Randy Brooks and Amy Law, Art Direction
- Christine Powers, Copy Editor

Inquiries about Public Radio Today

Public radio clients should direct inquiries to Chris Meinhardt:
(chris.meinhardt@arbitron.com)

Inquiries from journalists should go to Kim Myers: (kim.myers@arbitron.com)

Other inquiries should go to Ron Rodrigues: (ron.rodrigues@arbitron.com)

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.

Most of the formats featured in Arbitron *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 nine 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 on Page 2. Each station's format was determined based on the station's programming during the Monday-Friday, 6AM-7PM dayparts. Nationwide, 1,247 public radio stations met the Arbitron Minimum Reporting Standards (up from 1,235 last year), and those data were included in the 2013 study.

Some Notes About the Format Pages

The "Education" and "Household Income" charts only include responses from persons age 18 or older. The "Audience Composition" information shows how each age group contributes to that format's total audience. For additional terms and definitions, please see the Glossary on the preceding page.

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+

Format	Share %
NTI	51.7
Classical	15.3
News-Classical	13.8
AAA	6.3
Jazz	4.0
News-AAA	3.3
News-Music	3.0
News-Jazz	2.0
Variety Music	1.3

Public Radio Formats Ranked by Availability Among All Public Radio Listening

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

Format	Number of Stations
NTI	435
News-Classical	218
Classical	188
AAA	151
News-AAA	72
Jazz	65
News-Music	59
Variety Music	40
News-Jazz	19
Total	1,247

About Arbitron & Scarborough

Arbitron Inc. (NYSE: ARB) is an international media and marketing research firm serving the media—radio, television, cable and out-of-home; the mobile industry; as well as advertising agencies and advertisers around the world. Arbitron's businesses include: measuring network and local market radio audiences across the United States; surveying the retail, media and product patterns of U.S. consumers; providing mobile audience measurement and analytics in the United States, Europe, Asia and Australia; and developing application software used for analyzing media audience and marketing information data. The Company has developed the Portable People Meter™ (PPM™) and the PPM 360™, new technologies for media and marketing research. Arbitron's headquarters and its world-renowned research and engineering organizations are located in Columbia, Maryland.

Scarborough (www.scarborough.com, info@scarborough.com) measures American life. Its consumer insights reflect shopping patterns, media usage across platforms, and lifestyle trends for adults. Media professionals and marketers use Scarborough insights to make smarter marketing/business decisions on things like ad placement, multicultural targeting, and sponsorship opportunities. The company's core syndicated consumer insight studies in 77 Top-Tier Markets, its Multi-Market Study and its national USA+ Study are Media Rating Council (MRC) accredited. Other products and services include Scarborough Mid-Tier Local Market Studies, Hispanic Studies, and Custom Research Solutions. Scarborough measures 2,000 consumer categories and serves a broad client base that includes marketers, advertising agencies, print and electronic media (broadcast and cable television, radio stations), sports teams and leagues, and out-of-home media companies. Surveying more than 210,000 adults annually, Scarborough is a joint venture between Arbitron Inc. and The Nielsen Company.



arbitron.com

arbitrontraining.com

my.arbitron.com

RSS-13-09105 Printed in the USA.

Portable People Meter™ and PPM™ are marks of Arbitron Inc. HD Radio® is a registered trademark of iBiquity Digital Corp. TAPSCAN™ is a registered mark of TAPSCAN Inc., used under license. Facebook® is a registered trademark of Facebook Inc. Twitter® is a registered trademark of Twitter Inc.

Any brand names, product names, and/or titles used in this presentation are trademarks, trade names and/or copyrights of their respective holders. All images are used for purposes of demonstration only, and the entities associated with the products shown in those images are not affiliated with Arbitron in any way, nor have they provided endorsements of any kind. No permission is given to make use of any of the above, and such use may constitute an infringement of the holder's rights.