



Public Radio Today

Public Radio Today

How America Listens to Public Radio Stations

2005 Edition

Introduction

Public Radio Today offers you a glimpse into the world of noncommercial radio and its listeners. Currently, there are approximately 950 public radio stations represented among the 13,800 total radio stations in the country.

Public radio consists of noncommercial stations that air programs from a variety of sources including their local communities, National Public Radio, Public Radio International and American Public Media. Funding for these stations is derived from the community, listeners, corporations and businesses, and from public foundations.

Public Radio Today illustrates the demographic characteristics of noncommercial radio listeners. This first-time study examines public radio from both national and regional perspectives, outlining its strength as a medium and analyzing listening behavior for six of the most common public radio formats. This study is offered as part of Arbitron's ongoing commitment to providing radio stations, agencies, advertisers and sponsors with information and insights about America's radio audiences.

From listening locations to format preferences, Arbitron invites you to explore this fascinating snapshot of how Americans spend time with public radio!

Arbitron expresses its appreciation to the following organizations for their participation in producing *Public Radio Today*:

- American Public Media
- National Public Radio
- Public Radio International
- Radio Research Consortium

This first edition of *Public Radio Today* study is dedicated to Tom Church, the founder of the Radio Research Consortium, who passed away in March. Tom was a true visionary who saw the value of research for the public radio marketplace.

Alan Tobkes
Manager, Public Radio
Arbitron Inc.
May 2005

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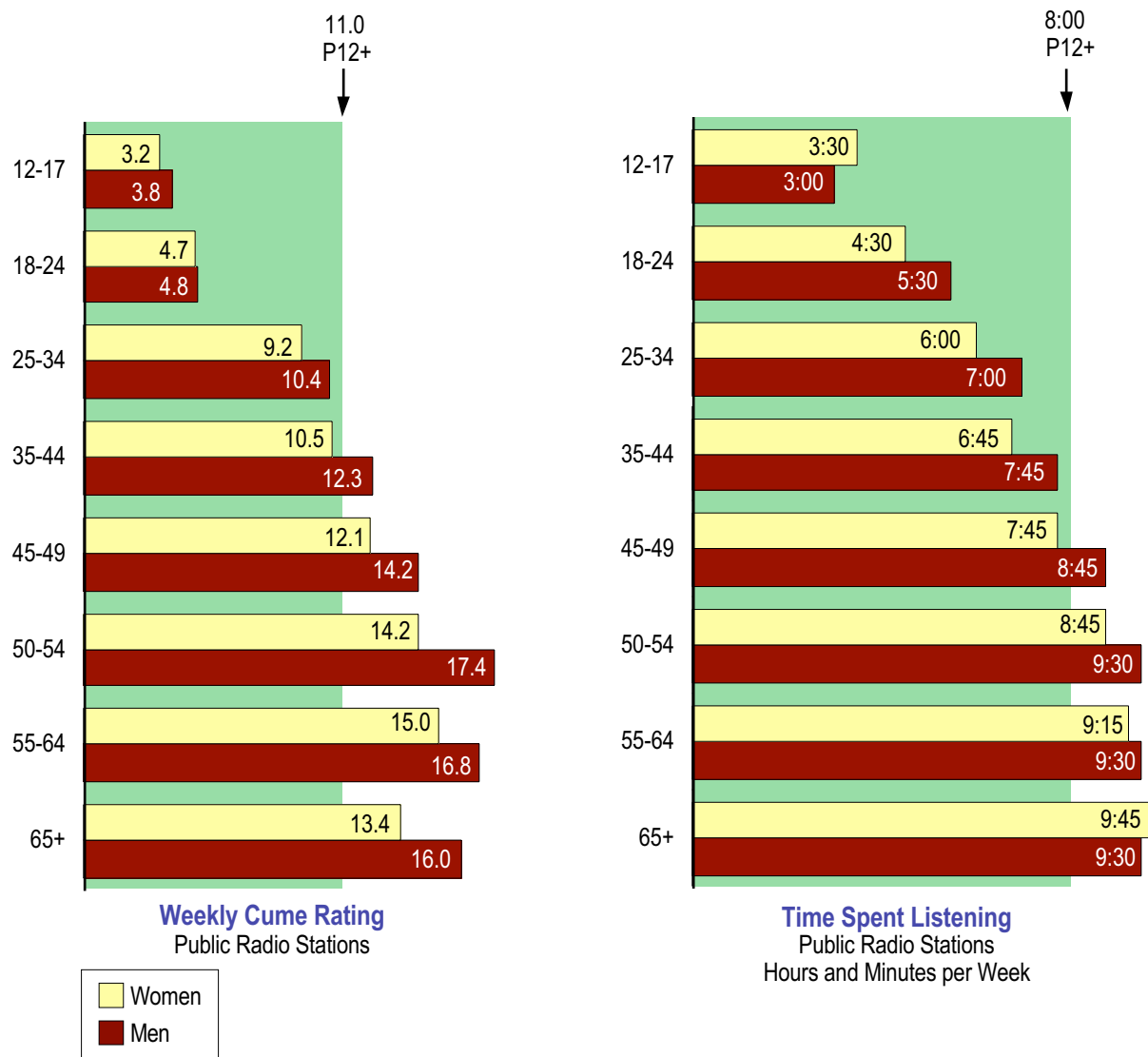
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Public Radio Reaches All Ages

Battle of the Sexes

The number of people listening to public radio weekly is fairly consistent across genders for people 18-49, with Men 18+ tuning in just slightly more than Women 18+. Interestingly, the gender gap widens among people ages 50+, with far more men tuning in to public radio than women. For men, share of public radio listening (17.4 percent) peaks among 50- to 54-year-olds. For women, listening peaks (15 percent) among those in the 55-64 age bracket.

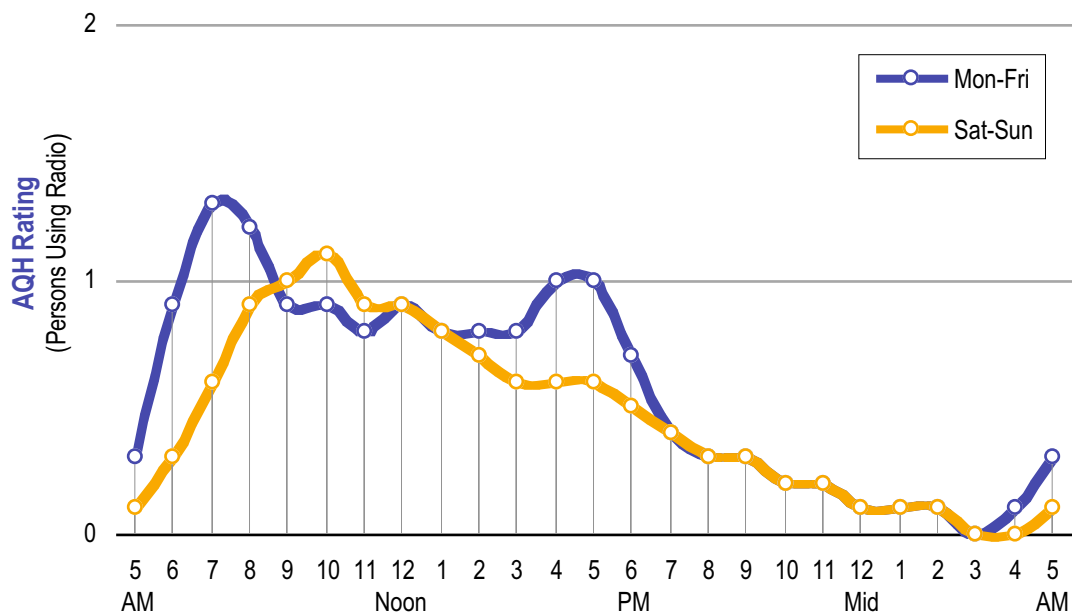


Source: Maximizer® Plus National Regional Database, Spring 2004, Mon-Sun, 6AM-Mid.

Hour-by-Hour Listening

Timing Is Everything

Public radio listening turns in its strongest performance from 7AM to 9AM weekdays, after which it declines slightly. It then remains steady throughout the day until the evening hours, when it begins to taper off. Peak listening times on Saturday and Sunday are from around 8AM until 1PM. Listening is lowest on both weeknights and weekend nights from 12Midnight to 5AM.



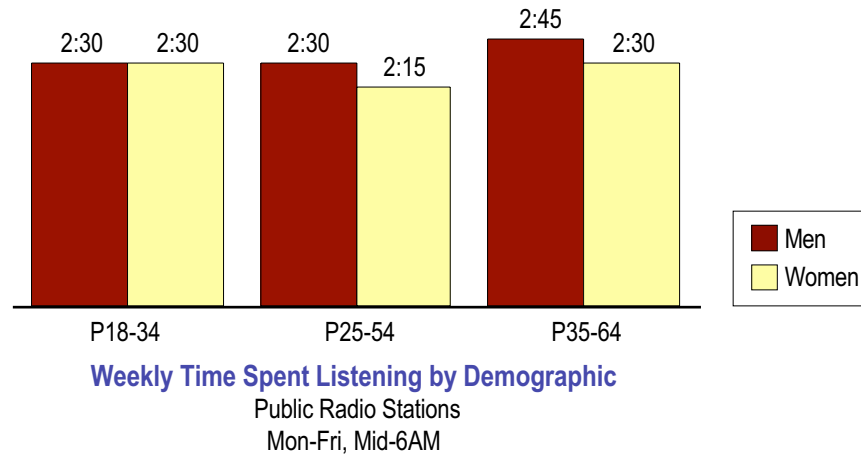
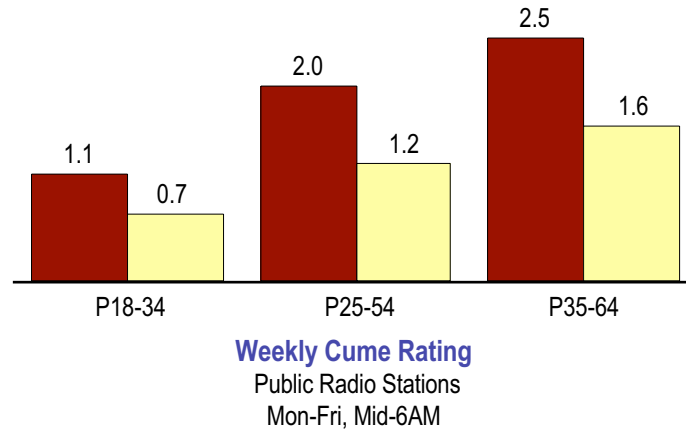
Hour-by-Hour Listening, AQH Rating
Public Radio Stations

Source: *MaxiSer® Plus National Regional Database, Spring 2004, Mon-Sun, 5AM-5AM.*

Overnight Listening

Tuning In at Twilight

Among all age groups, men listen to public radio overnight more than women, with Men 35-64 more likely to be late-night listeners (2.5 percent) than other groups. Meanwhile, Women 35-64 are more likely to tune in late at night (1.6 percent) than their younger counterparts. Men and women spend just about the same amount of time listening per week.

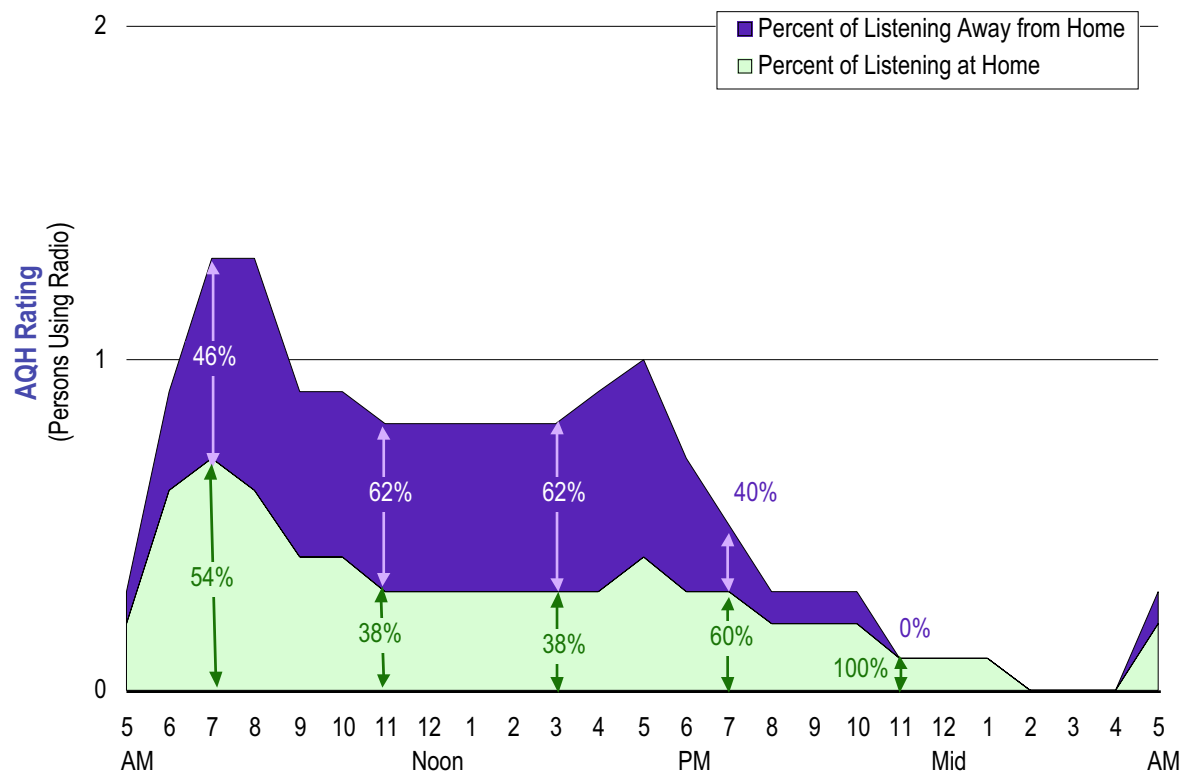


Source: *MaxiSer® Plus National Regional Database, Spring 2004, Mon-Fri, Mid-6AM.*

Where People Listen: Weekdays

Public Radio Is a Moving Medium

On weekdays before 8AM and after 7PM, the vast majority of public radio listeners are listening at home. Between those hours a giant shift occurs, with anywhere from 54 to 67 percent of listeners tuning in someplace away from their homes.



Weekday Listening, AQH Rating

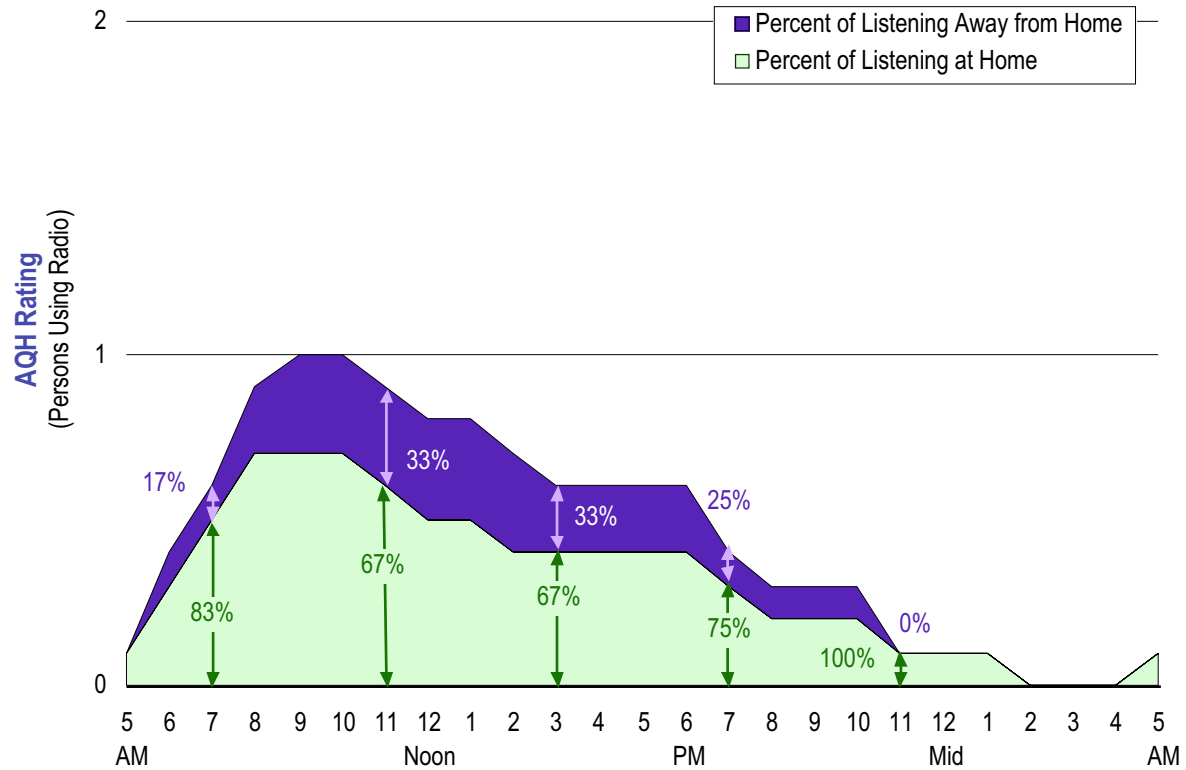
Public Radio Stations
Persons Using Radio
Mon-Fri, Total Day (5AM-5AM)

Source: Maximizer® Plus National Regional Database, Spring 2004, Mon-Fri, 5AM-5AM.

Where People Listen: Weekends

Strong Weekend Listening at Home

Not surprisingly, listening to public radio stations on weekends is more likely to take place in the home than outside of it. Around-the-clock, well over half of listeners tune in at home. Away-from-home weekend listening is highest from 12Noon through 3PM.



Weekend Listening, AQH Rating

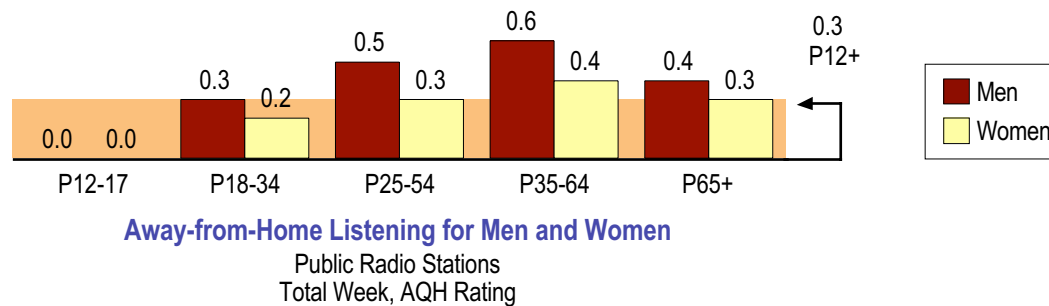
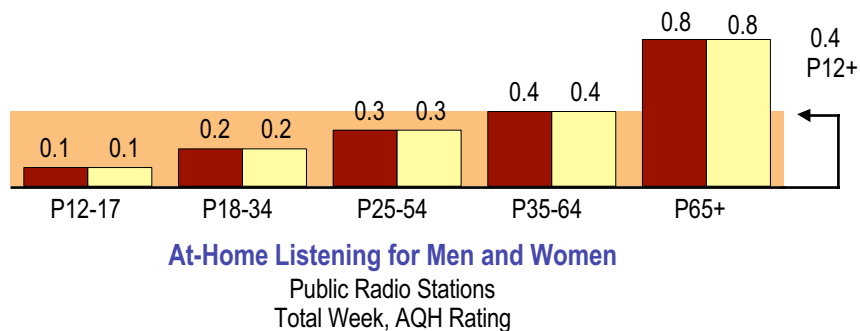
Public Radio Stations
Persons Using Radio
Sat-Sun, Total Day (5AM-5AM)

Source: *MaxiSer® Plus National Regional Database, Spring 2004, Sat-Sun, 5AM-5AM.*

Where Men and Women Listen

Home Is Where Women Are Listening

Men and women listen to public radio at home at about the same rate. Men 35-64 are most likely to listen at places outside the home. Women 65+ and Men 65+ are most likely to listen at home.



Source: MaximiSer® Plus National Regional Database, Spring 2004, Mon-Sun, 6AM-Mid.

Listening Location

At Home, at Work, or in the Car—Public Radio Goes Everywhere

Public radio has the flexibility to reach listeners at home, in their cars, at work, and at other away-from-home locations. Listening shifts along with people's movements during the day. At-home listening peaks from 7PM to 12Midnight (69.5 percent). In-car listening is highest during morning (35 percent) and afternoon (47 percent) commuting times. As one could expect, at-work listening is highest (30 percent) on weekdays from 10AM to 3PM. The majority of weekend listening (64 percent) takes place at home.

	Home	Car	Work	Other
Mon-Sun 6AM-Mid	51.3%	33.3%	14.0%	1.4%
Mon-Fri 6AM-10AM	52.4%	35.0%	11.7%	0.9%
Mon-Fri 10AM-3PM	38.0%	30.7%	30.0%	1.3%
Mon-Fri 3PM-7PM	37.1%	47.4%	14.4%	1.1%
Mon-Fri 7PM-Mid	69.5%	24.8%	4.2%	1.5%
Weekend 10AM-7PM	63.7%	29.7%	4.3%	2.3%

Distribution of AQH Radio Listeners by Listening Location

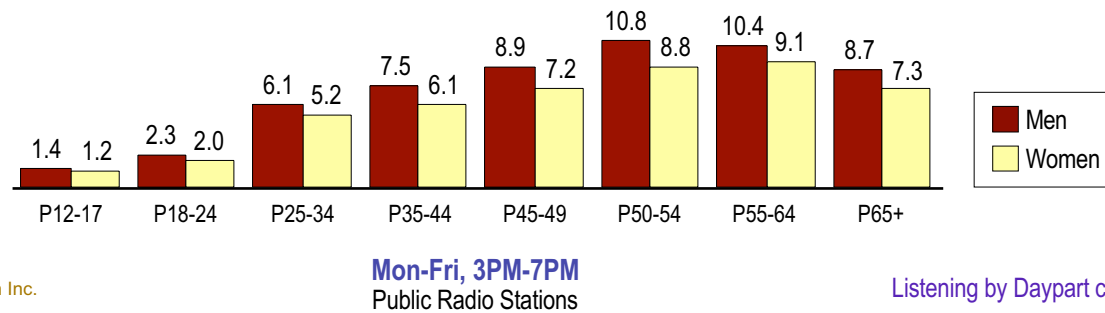
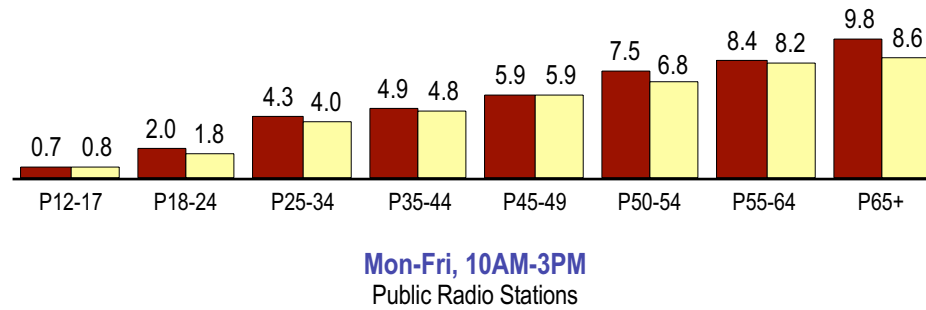
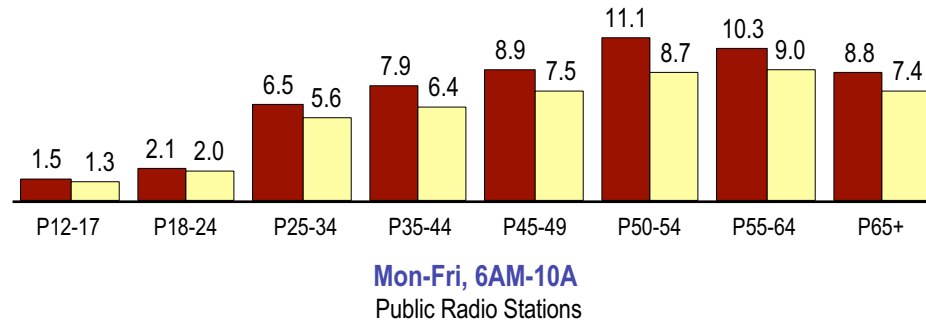
Public Radio Stations
Persons 12+

Source: *Maximiser® Plus National Regional Database, Spring 2004, Mon-Sun, 6AM-Mid.*

Listening by Daypart

Who's Listening When

People in different age groups listen to public radio at different times. Peak listening times for most men and women are weekday mornings from 6AM to 10AM and late afternoons from 3PM to 7PM. The Monday-Friday midday time slot (10AM-3PM) is popular with both older men and women ages 50+. Monday through Friday, the most dedicated nighttime listeners are men in the 50+ age group. Men 65+ are the most likely to tune in to public radio on weekends.

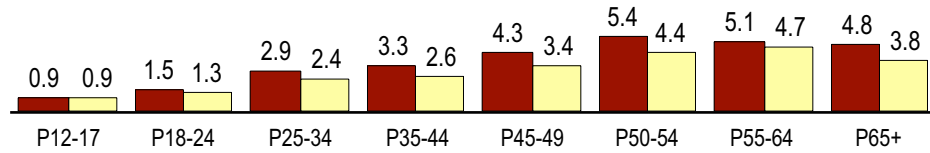


Note: Figures above are Cume Ratings

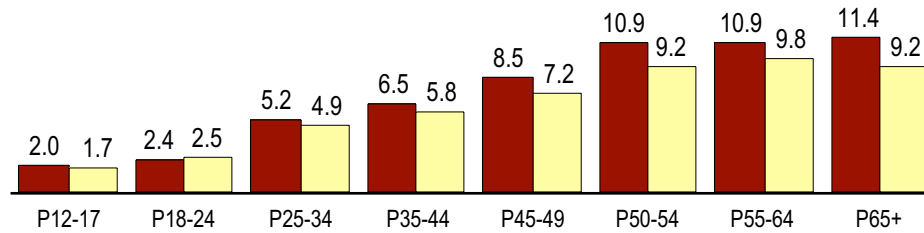
Source: MaximiSer® Plus National Regional Database, Spring 2004. Mon-Sun, 6AM-Mid.

Listening by Daypart

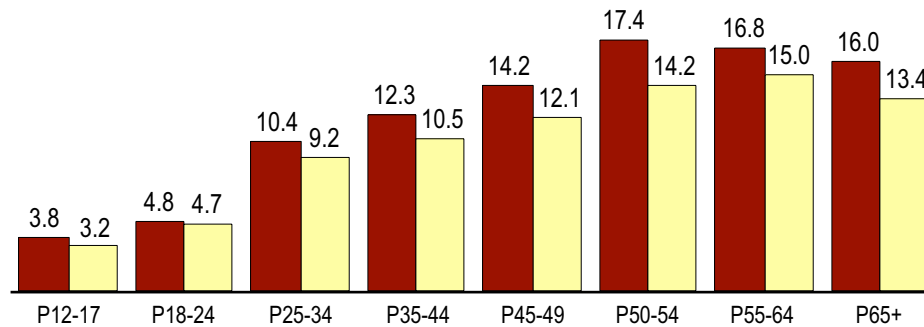
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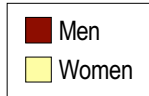
Mon-Fri, 7PM-Mid
Public Radio Stations



Sat-Sun, 6AM-Mid
Public Radio Stations



Mon-Sun, 6AM-Mid
Public Radio Stations



Note: Figures above are Cume Ratings

Source: MaximiSer® Plus National Regional Database, Spring 2004, Mon-Sun, 6AM-Mid.

People's Favorite Public Radio Formats

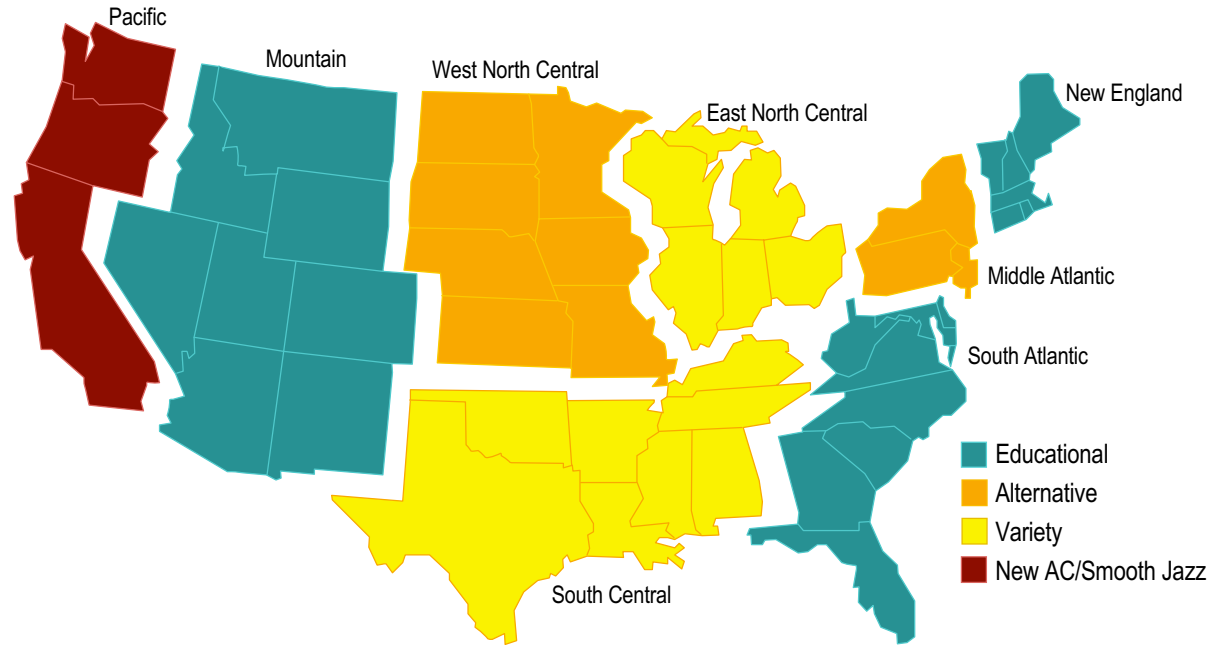
Public radio stations span a broad range of styles and genres. Programming often encompasses news, music, entertainment, sports and information—sometimes all on the same public station. Unlike commercial radio, public stations often serve niche audiences, such as ethnic or cultural groups. They are also capable of attracting much broader audiences, such as the millions of listeners who tune in to National Public Radio's news shows "Morning Edition" and "All Things Considered."

This study profiles six of the most common formats for public radio: Alternative, Classical, Educational (college/university stations), New AC/Smooth Jazz, News/Talk/Information and Variety. In many local markets, these public radio formats provide highly desirable programming that can't be found anywhere else.

Source: MaximiSer® Plus National Regional Database, Spring 2004

Public Radio Formats by Region

Of the six public radio formats profiled in this report, Educational is the most listened-to format in the New England, South Atlantic and Mountain regions. Meanwhile, Alternative is the favorite public radio format of listeners in the Middle Atlantic and West North Central regions. Variety is the most listened-to public radio format in the East North Central and South Central regions. Rounding out the survey, New AC/Smooth Jazz is the most popular public radio format in the Pacific region.



Source: *Maximiser® Plus National Regional Database, Spring 2004*

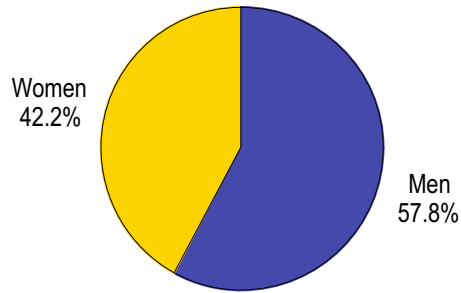
Alternative

Encompasses music that is usually cutting-edge and less mainstream, which may include local artists, as well as some punk, dance, industrial or heavy metal music.

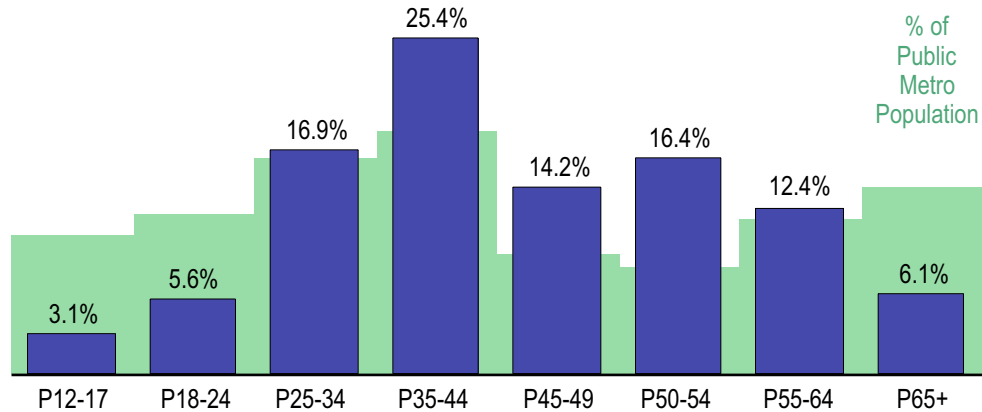
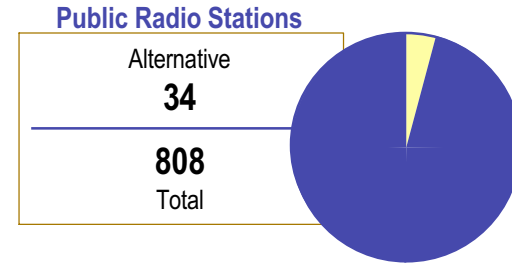
A Few Format Highlights

Men make up the majority of the adult audience for Alternative-formatted public stations (58 percent); adult Women 18+ compose the remaining 42 percent.

Forty-two percent of Alternative public radio fans are ages 25-44.



Listeners 18+
Public Radio Stations
Mon-Sun, 6AM-Mid



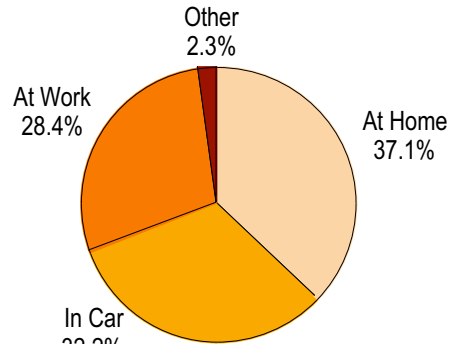
Audience Composition
Public Radio Stations
Percent of Format Audience by Demographic
Mon-Sun, 6AM-Mid

Note: Due to rounding, totals may differ.
Source: All data come from MaximiSer® Plus National Regional Database, Spring 2004.

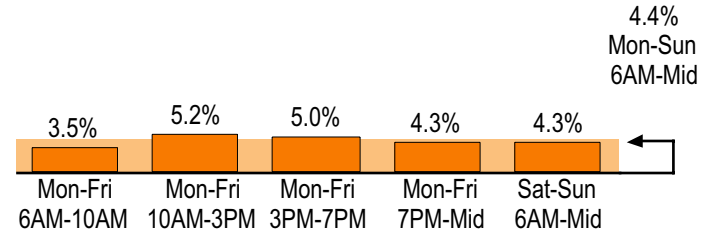
Alternative

Fans of Alternative public radio enjoy listening everywhere: at home, in the car and at work. The format's AQH share of listening peaks 10AM-3PM, Monday through Friday; followed closely by the 3PM-7PM time slot.

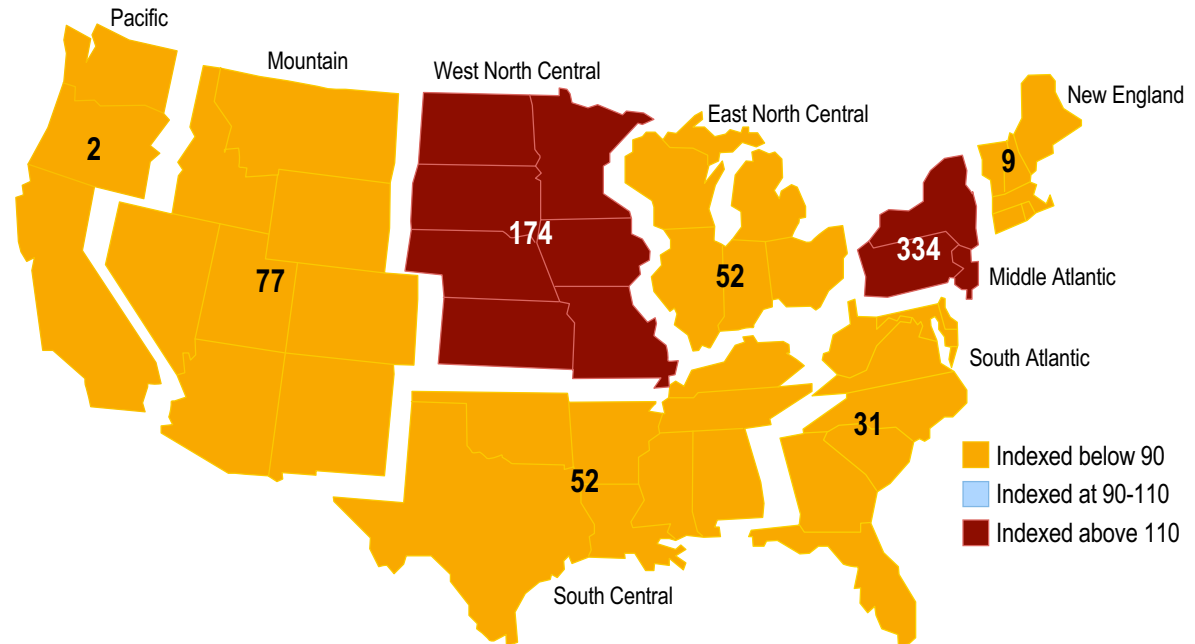
Alternative public radio is particularly popular in the Middle Atlantic and West North Central regions.



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



AQH Share of Listening by Daypart
Public Radio Stations
Persons 12+



Audience Share by Region
Public Radio Stations
100 = National Average
Mon-Sun, 6AM-Mid, Persons 12+, AQH Shares

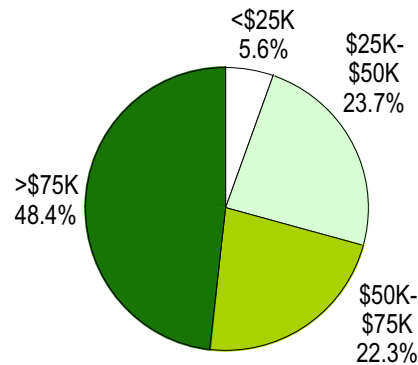
Note: Due to rounding, totals may differ.
Source: All data come from MaximiSer® Plus National Regional Database, Spring 2004.

Alternative

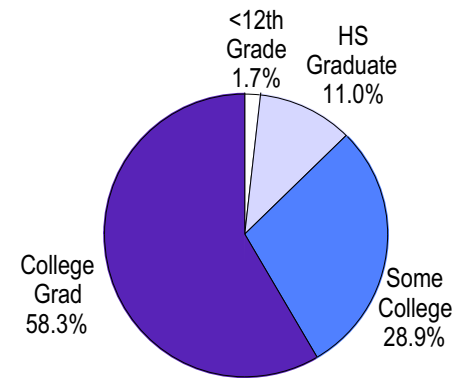
Forty-eight percent of the adults who listen to public Alternative have household incomes of more than \$75,000 per year, the highest proportion of any public format group. Accordingly, a majority, 58 percent, are college graduates.

Two percent of the public Alternative audience are black and 1.7 percent are Hispanic.

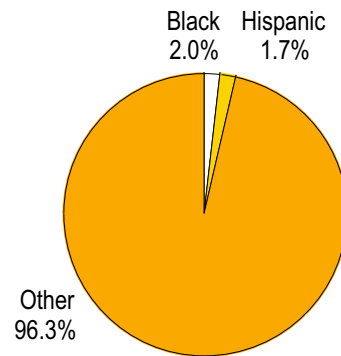
Older Alternative fans in the 35-64 age group listen the most, spending 7 hours and 45 minutes per week tuning in to their favorite stations.



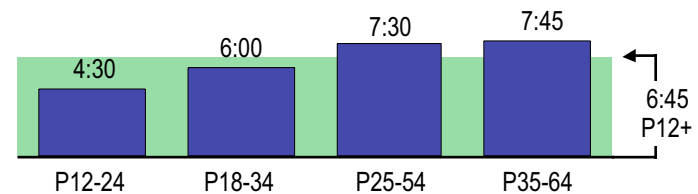
Household Income
Public Radio Stations
Persons 18+



Education
Public Radio Stations
Persons 18+



Ethnic Composition*
Public Radio Stations
AQH Persons
* Only in DST-Controlled Markets



Time Spent Listening by Demographic
Public Radio Stations
(Hours:Minutes)
Mon-Sun, 6AM-Mid

Note: Due to rounding, totals may differ.
Source: All data come from MaximiSer® Plus National Regional Database, Spring 2004.

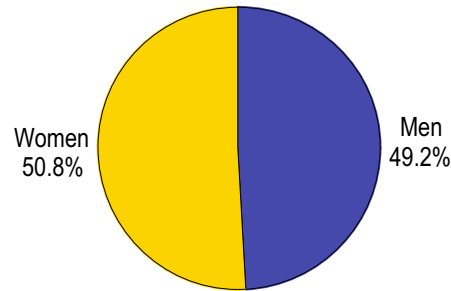
Classical

Classical emphasizes music written by a composer for performance by any suitable group of musicians, with every instrument and its part carefully specified. Much of the music is performed in the European tradition, including such forms as orchestras, choirs, chamber music, opera and symphonies.

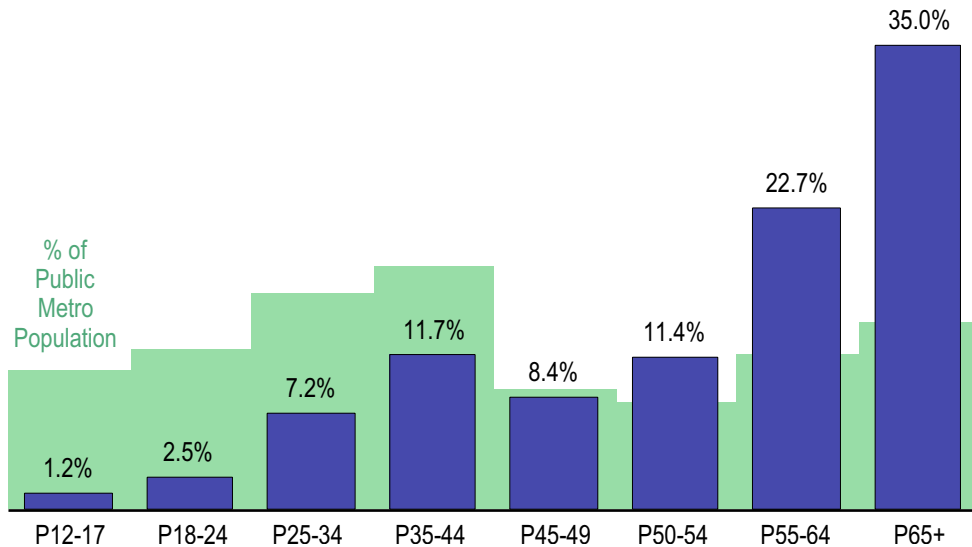
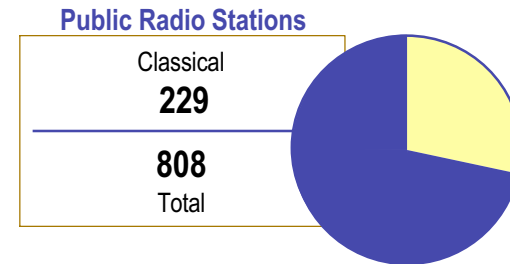
A Few Format Highlights

The Classical format attracts about an equal number of adult male and female public radio listeners.

Classical appeals greatly to the 55+ crowd, who make up 58 percent of the audience.



Listeners 18+
Public Radio Stations
Mon-Sun, 6AM-Mid



Audience Composition

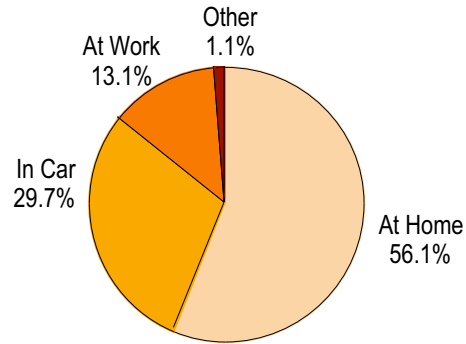
Public Radio Stations
Percent of Format Audience by Demographic
Mon-Sun, 6AM-Mid

Note: Due to rounding, totals may differ.
Source: All data come from MaximiSer® Plus National Regional Database, Spring 2004.

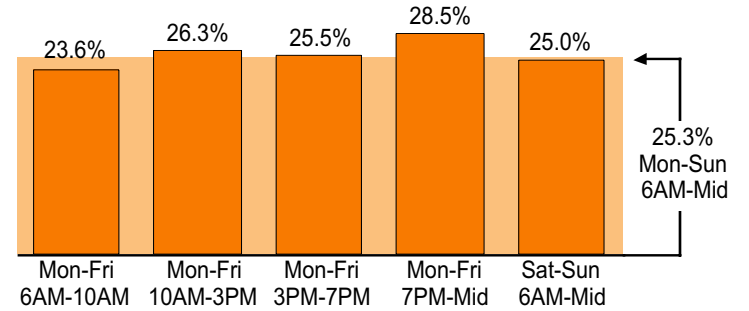
Classical

Classical public radio posts solid shares of listening across all dayparts, Monday through Friday, as well as on weekends. Much of this listening occurs at home.

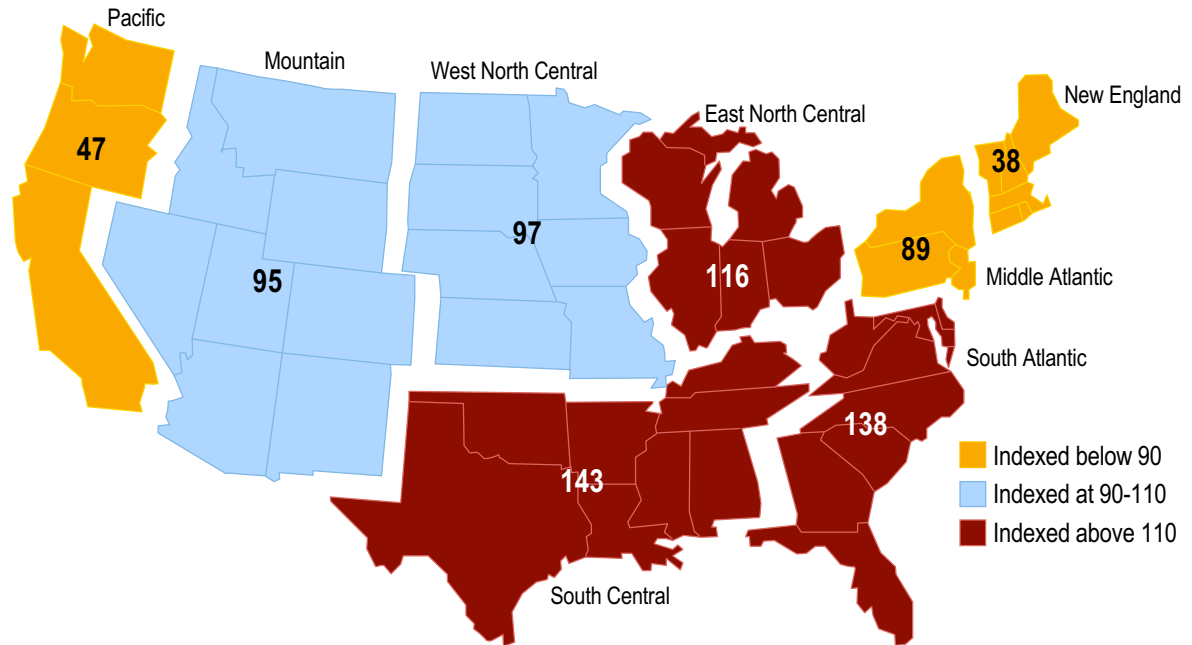
This format captures above-average shares of the audience in the South Central, South Atlantic, and East North Central regions.



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



AQH Share of Listening by Daypart
Public Radio Stations
Persons 12+



Audience Share by Region

Public Radio Stations
100 = National Average
Mon-Sun, 6AM-Mid, Persons 12+, AQH Shares

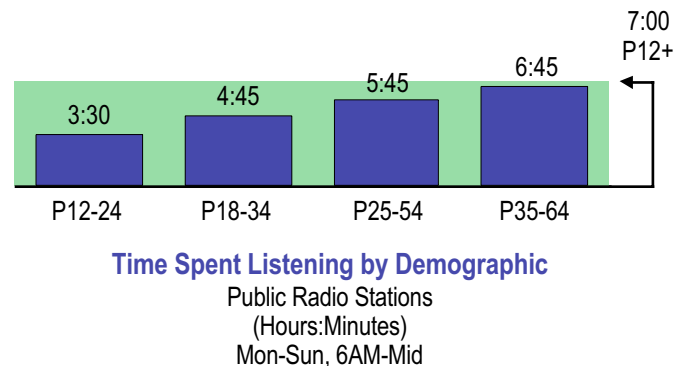
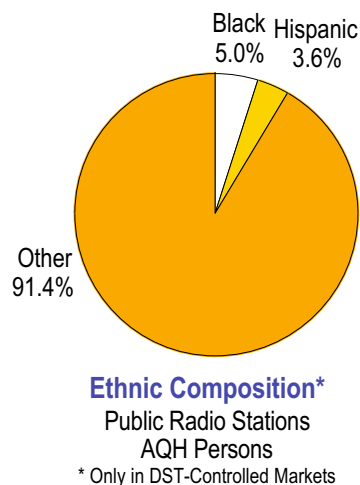
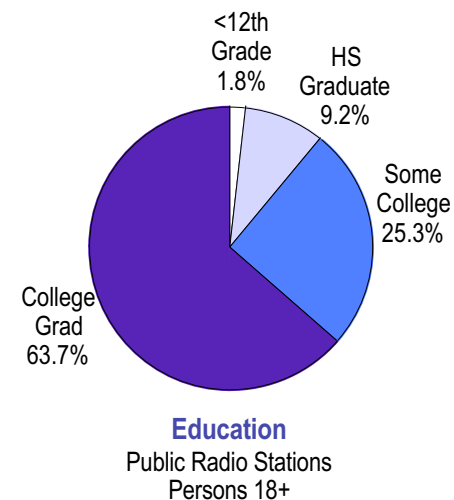
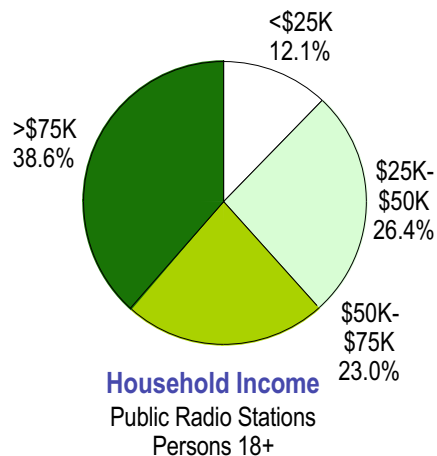
Note: Due to rounding, totals may differ.
Source: All data come from MaximiSer® Plus National Regional Database, Spring 2004.

Classical

Most of the adults 18+ who listen to Classical public radio (62 percent) have household incomes of \$50,000 or more per year. Sixty-four percent are college graduates.

Five percent of those who listen to public Classical stations are black, while 3.6 percent are Hispanic.

Listeners to Classical-formatted public radio stations tune in for an average of seven hours each week.



Note: Due to rounding, totals may differ.
Source: All data come from MaximiSer® Plus National Regional Database, Spring 2004.

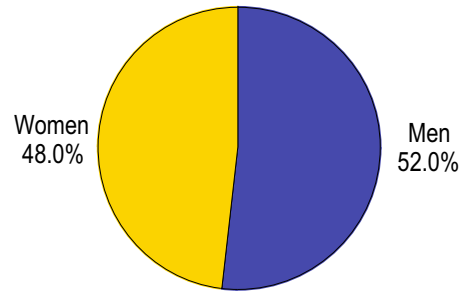
Educational

This format classification typically describes the licensee type of the station. These stations are owned by a university, college or community college. The content of Educational stations may include news, public affairs, music or a mix of formats.

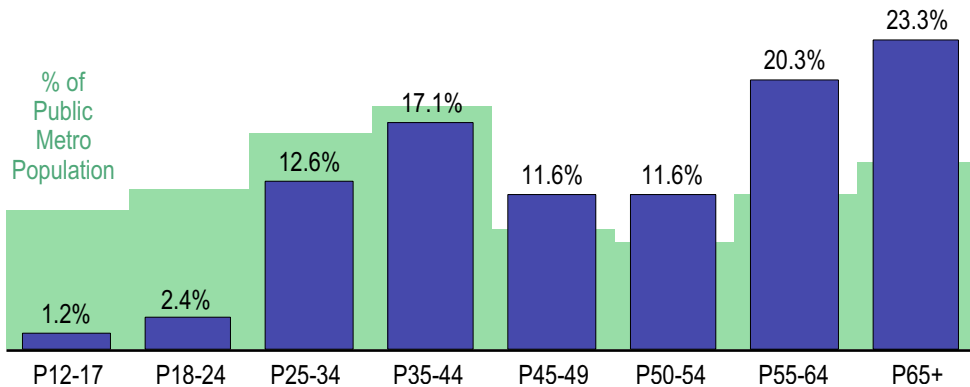
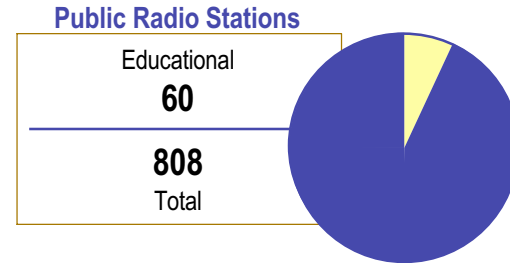
A Few Format Highlights

University/college stations attract slightly more adult men than women.

Forty-three percent of those who listen to Educational stations are over the age of 55. Seventeen percent are ages 35-44.



Listeners 18+
Public Radio Stations
Mon-Sun, 6AM-Mid



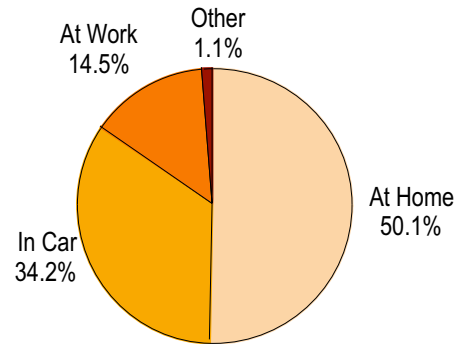
Audience Composition
Public Radio Stations
Percent of Format Audience by Demographic
Mon-Sun, 6AM-Mid

Note: Due to rounding, totals may differ.
Source: All data come from MaximiSer® Plus National Regional Database, Spring 2004.

Educational

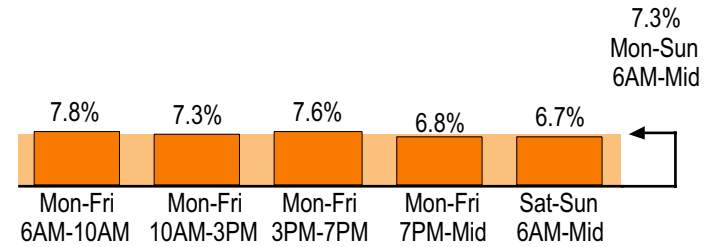
Most of the listening to university/college radio occurs at home and in the car. Educational stations perform well across all dayparts, Monday through Friday, as well as on weekends.

Listeners to university/college stations are most likely to be found in the New England and South Atlantic regions.



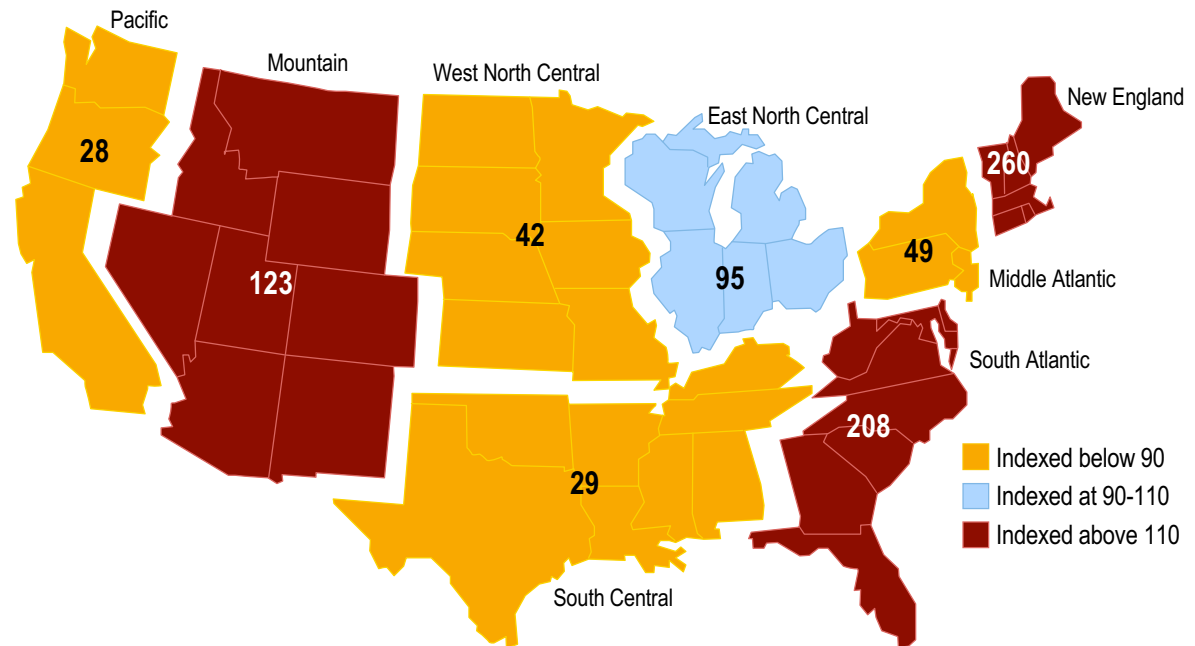
AQH Share of Listening by Location

Public Radio Stations
Mon-Sun, 6AM-Mid, Persons 12+



AQH Share of Listening by Daypart

Public Radio Stations
Persons 12+



Audience Share by Region

Public Radio Stations
100 = National Average
Mon-Sun, 6AM-Mid, Persons 12+, AQH Shares

■ Indexed below 90
■ Indexed at 90-110
■ Indexed above 110

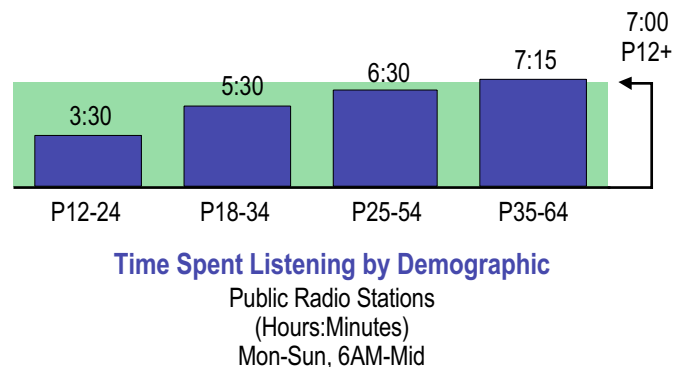
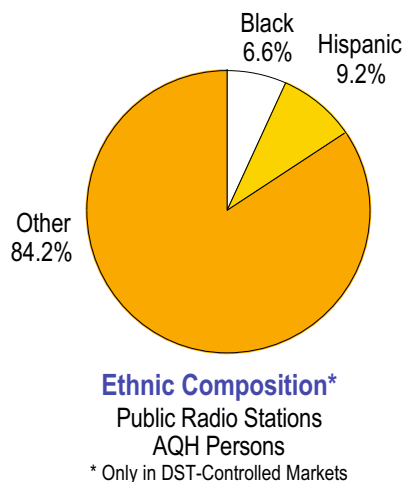
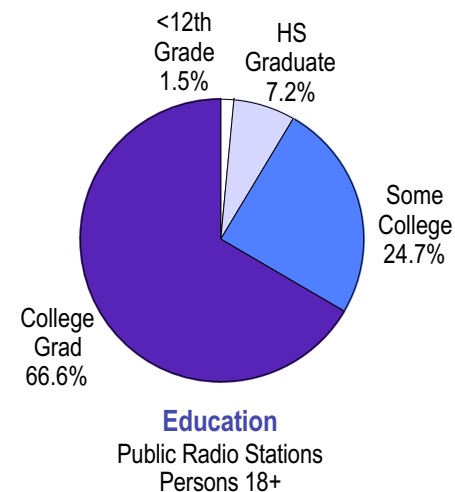
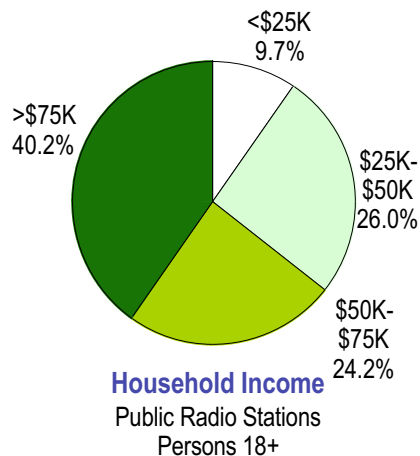
Note: Due to rounding, totals may differ.
Source: All data come from MaximiSer® Plus National Regional Database, Spring 2004.

Educational

Of the adults 18+ who listen to university/college stations, nearly two-thirds have household incomes of \$50,000 or more per year. A similar proportion are college graduates.

About seven percent of those who listen to college/university stations are black, and nine percent are Hispanic.

Those who listen to university/college stations tune in for an average of seven hours per week.



Note: Due to rounding, totals may differ.
Source: All data come from MaximiSer® Plus National Regional Database, Spring 2004.

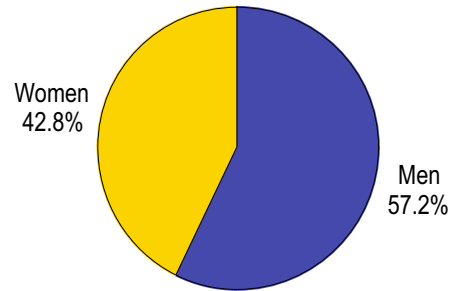
New AC/ Smooth Jazz

Includes recent and current Adult Contemporary hits as well as new and recent upbeat Jazz recordings.

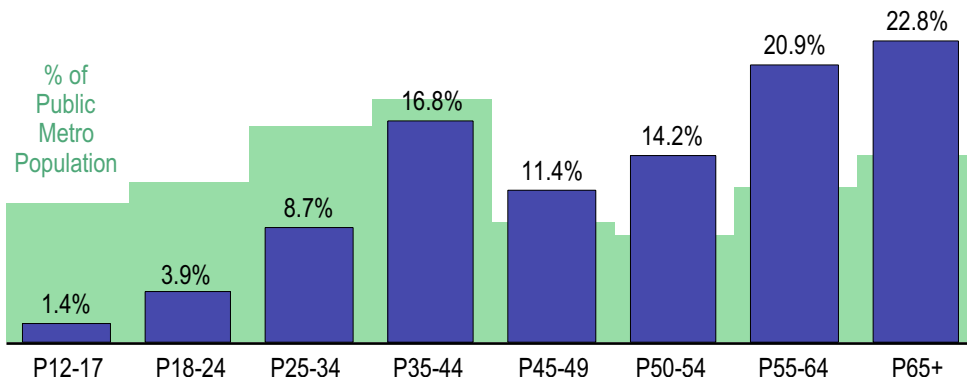
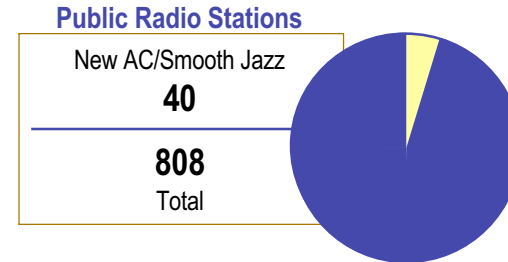
A Few Format Highlights

Public radio stations that play New AC/Smooth Jazz attract more Men 18+ (57 percent) than Women 18+ (43 percent).

Twenty-six percent of public radio's New AC/Smooth Jazz fans are ages 45-54; another 21 percent are ages 55-64.



Listeners 18+
Public Radio Stations
Mon-Sun, 6AM-Mid



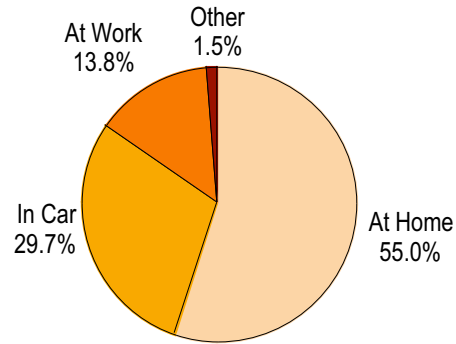
Audience Composition
Public Radio Stations
Percent of Format Audience by Demographic
Mon-Sun, 6AM-Mid

Note: Due to rounding, totals may differ.
Source: All data come from MaximiSer® Plus National Regional Database, Spring 2004.

New AC/ Smooth Jazz

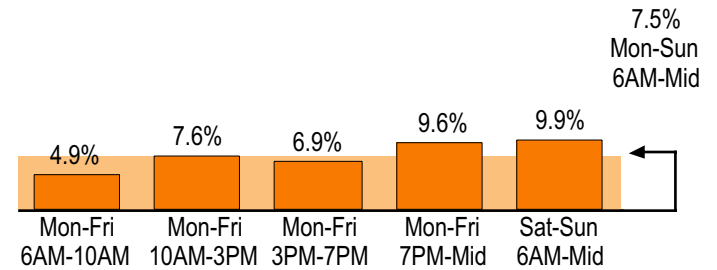
Public New AC/Smooth Jazz stations capture their highest share of listening on weekday evenings and on weekends. Accordingly, New AC/Smooth Jazz is a popular format choice while listening at home.

The format is especially popular in the Pacific region.



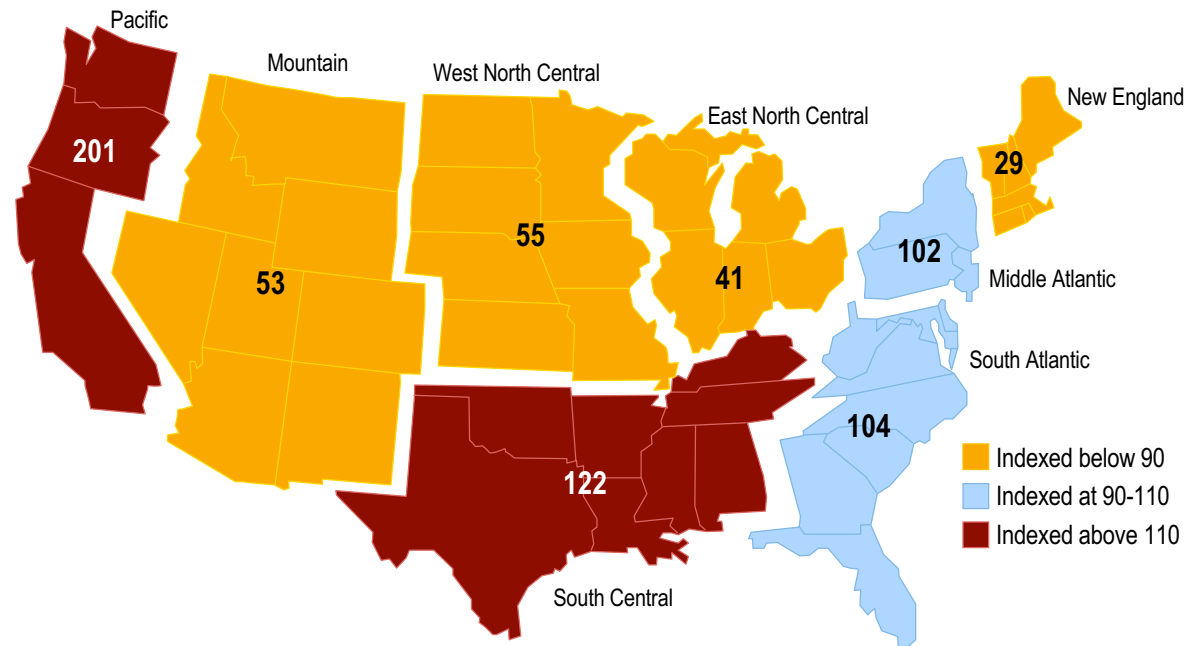
AQH Share of Listening by Location

Public Radio Stations
Mon-Sun, 6AM-Mid, Persons 12+



AQH Share of Listening by Daypart

Public Radio Stations
Persons 12+



Audience Share by Region

Public Radio Stations
100 = National Average
Mon-Sun, 6AM-Mid, Persons 12+, AQH Shares

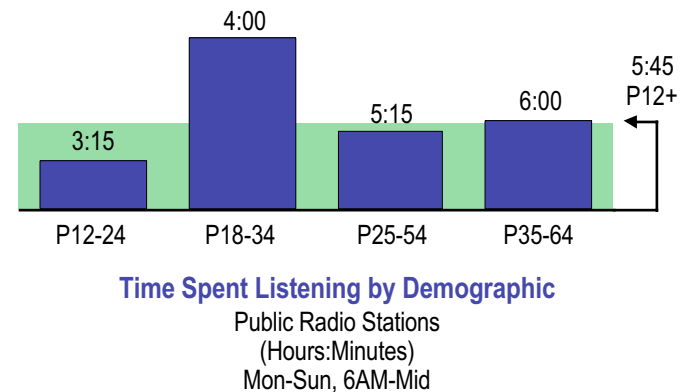
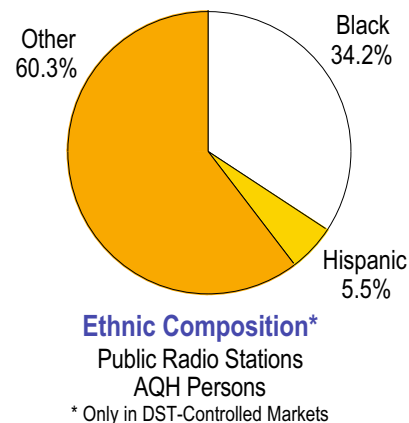
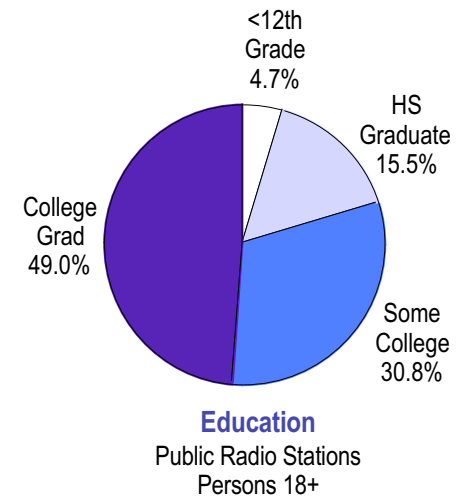
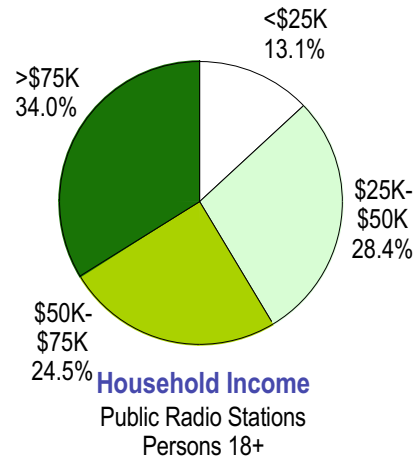
Note: Due to rounding, totals may differ.
Source: All data come from MaximiSer® Plus National Regional Database, Spring 2004.

New AC/ Smooth Jazz

Approximately one-third of the adults who listen to public New AC/Smooth Jazz stations have household incomes of more than \$75,000 per year. Nearly half are college graduates.

Public New AC/Smooth Jazz stations are popular among black listeners, who compose 34 percent of the audience. Hispanics account for another 5.5 percent.

New AC/Smooth Jazz listeners spend an average of 5 hours and 45 minutes each week with their favorite public stations.



Note: Due to rounding, totals may differ.
Source: All data come from MaximiSer® Plus National Regional Database, Spring 2004.

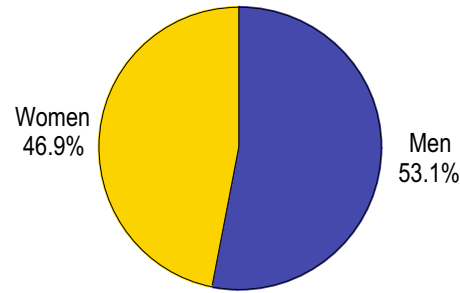
News/Talk/ Information

Features a heavy concentration of news (local, regional and global) as well as talk programming, including the presentation of views and listener-participation call-in segments and shows.

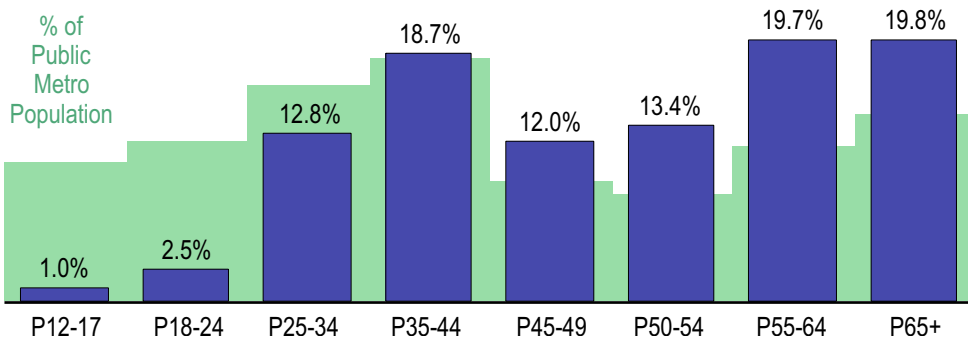
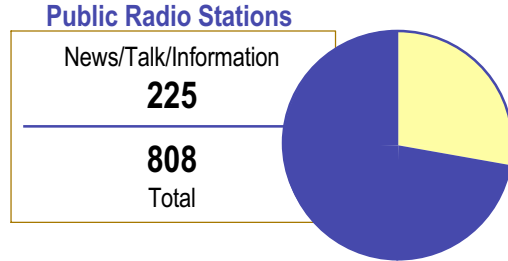
A Few Format Highlights

There are significantly more adult men (53 percent) than adult women (47 percent) in the listening audience for public stations that program News/Talk/Information.

The format appeals to older people ages 55+, who compose about 40 percent of the format's audience. It is also popular with adults 35-44, who represent 19 percent of listeners.



Listeners 18+
Public Radio Stations
Mon-Sun, 6AM-Mid



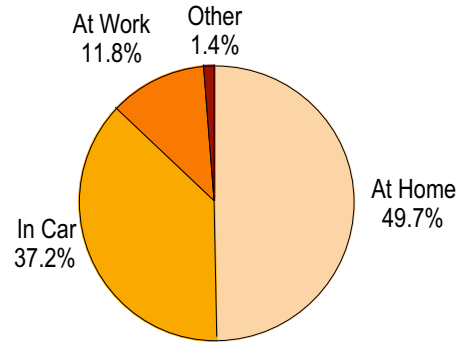
Audience Composition
Public Radio Stations
Percent of Format Audience by Demographic
Mon-Sun, 6AM-Mid

Note: Due to rounding, totals may differ.
Source: All data come from MaximiSer® Plus National Regional Database, Spring 2004.

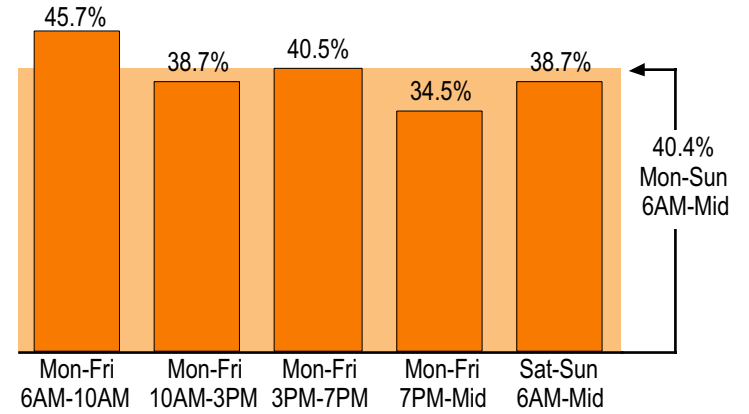
News/Talk/Information

Fifty percent of the listening to public News/Talk/Information (NTI) occurs at home, while 37 percent occurs in the car. Although the format has solid listenership across all dayparts, AQH share of listening peaks weekday mornings from 6AM to 10AM.

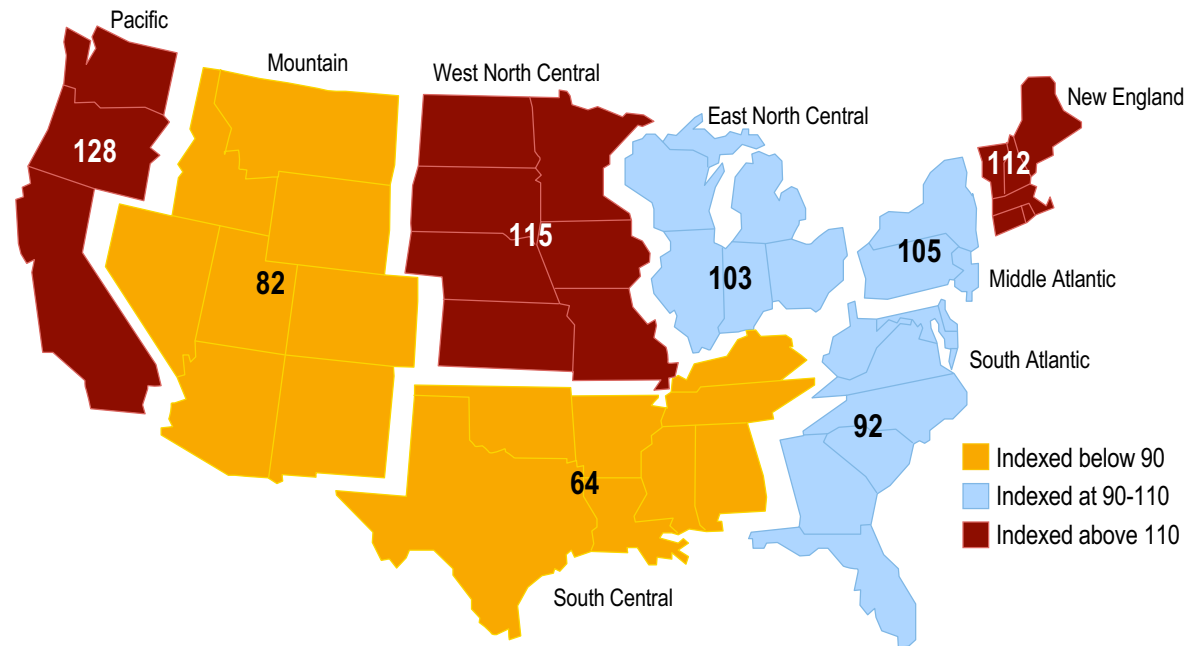
NTI-formatted public stations are particularly popular in the Pacific region.



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



AQH Share of Listening by Daypart
Public Radio Stations
Persons 12+



Audience Share by Region

Public Radio Stations
100 = National Average
Mon-Sun, 6AM-Mid, Persons 12+, AQH Shares

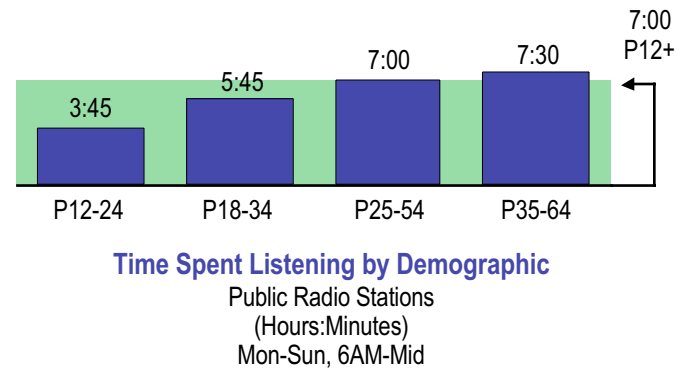
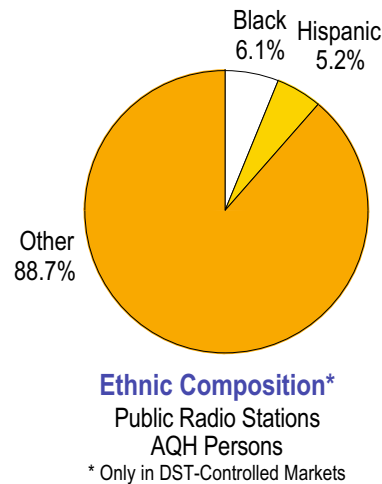
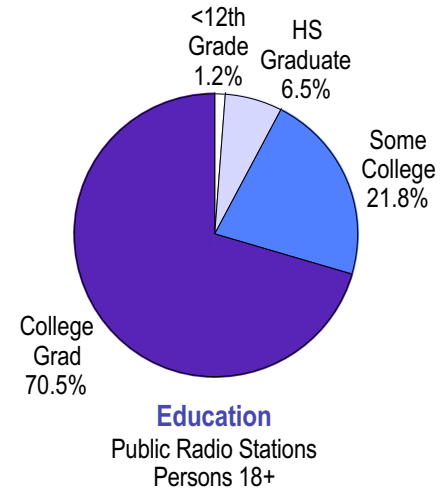
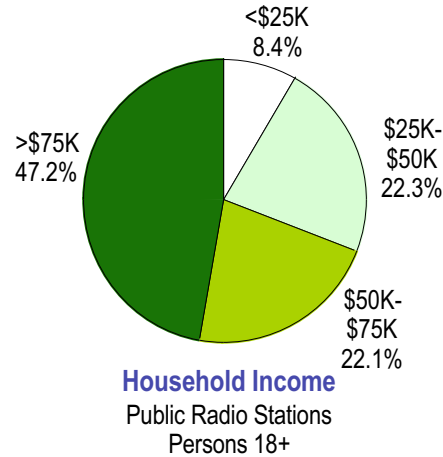
Note: Due to rounding, totals may differ.
Source: All data come from MaximiSer® Plus National Regional Database, Spring 2004.

News/Talk/Information

Forty-seven percent of adults who listen to News/Talk/Information (NTI) public stations have household incomes of more than \$75,000 per year, while 22 percent report household incomes between \$50,000 and \$75,000. Almost three-quarters (70.5 percent) have college degrees.

Six percent of the public NTI audience are black, and five percent are Hispanic.

Those who listen to NTI-formatted public radio spend an average of seven hours each week tuning in to their favorite stations.



Note: Due to rounding, totals may differ.
Source: All data come from MaximiSer® Plus National Regional Database, Spring 2004.

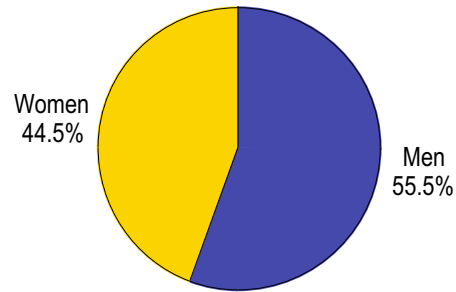
Variety

Features programming segments that do not adhere to one specific format or style but rather a true mix of programming styles or genres.

A Few Format Highlights

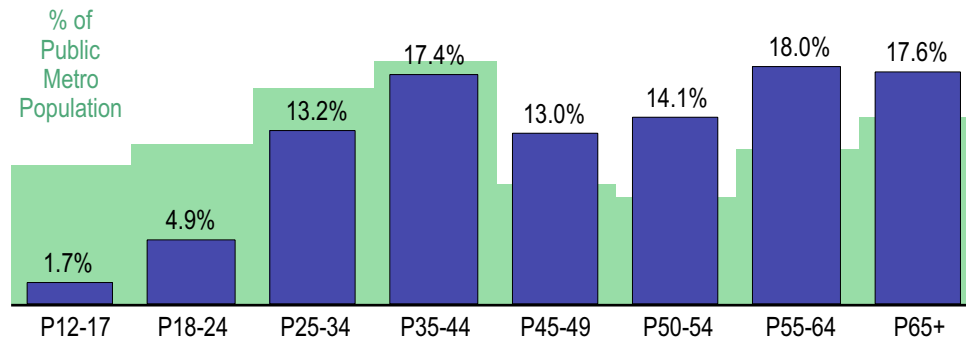
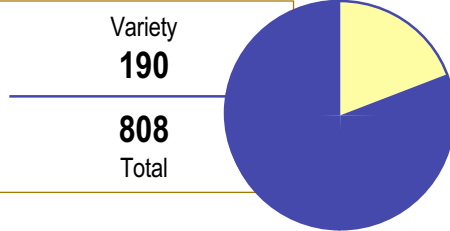
Variety appeals slightly more to Men 18+ (55.5 percent) than Women 18+ (44.5 percent).

The format is most popular with listeners ages 35-44 (17 percent) and those who are over the age of 55 (36 percent).



Listeners 18+
Public Radio Stations
Mon-Sun, 6AM-Mid

Public Radio Stations



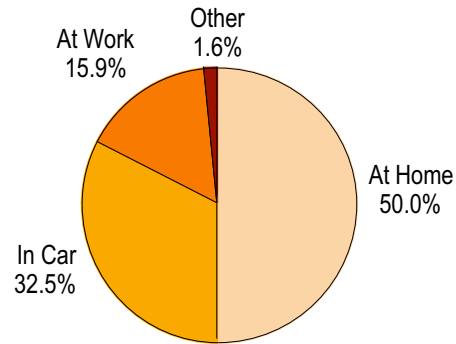
Audience Composition
Public Radio Stations
Percent of Format Audience by Demographic
Mon-Sun, 6AM-Mid

Note: Due to rounding, totals may differ.
Source: All data come from MaximiSer® Plus National Regional Database, Spring 2004.

Variety

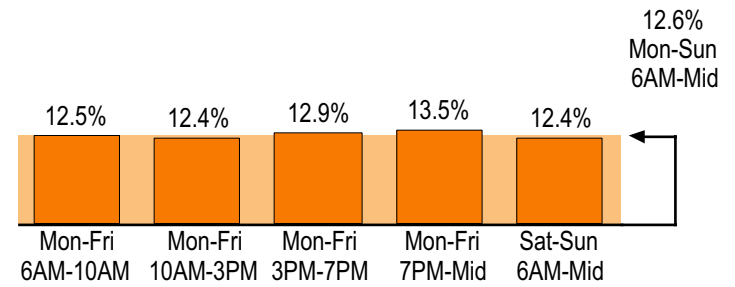
Variety performs almost equally well across dayparts, with listenership peaking slightly on weeknights 7PM-Mid. Half of the listening to Variety-formatted public stations occurs at home.

Public Variety stations perform extraordinarily well in the New England region. They also capture above-average audience shares in the South Central, East North Central and Pacific regions.



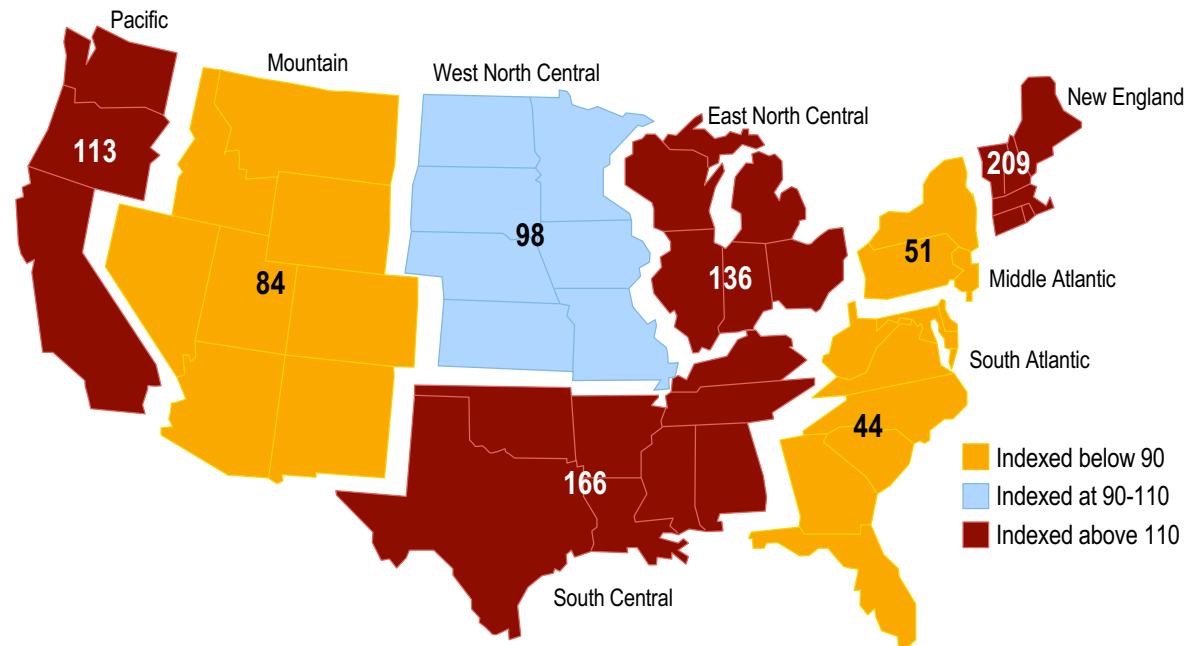
AQH Share of Listening by Location

Public Radio Stations
Mon-Sun, 6AM-Mid, Persons 12+



AQH Share of Listening by Daypart

Public Radio Stations
Persons 12+



Audience Share by Region

Public Radio Stations
100 = National Average
Mon-Sun, 6AM-Mid, Persons 12+, AQH Shares

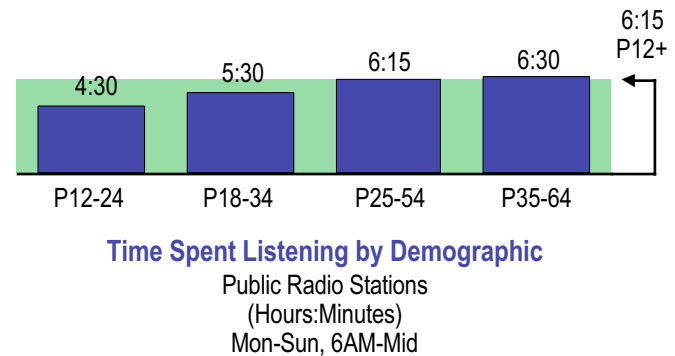
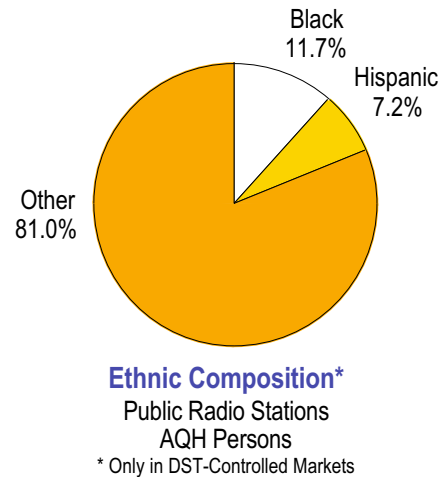
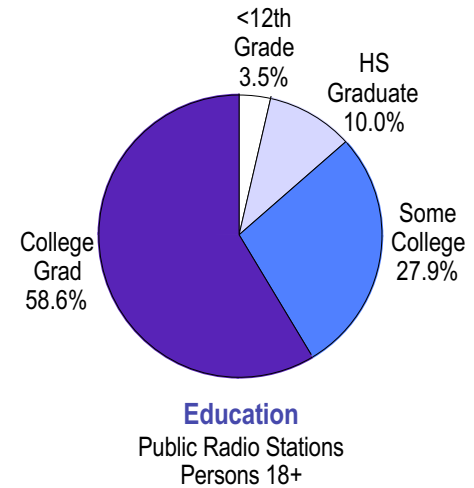
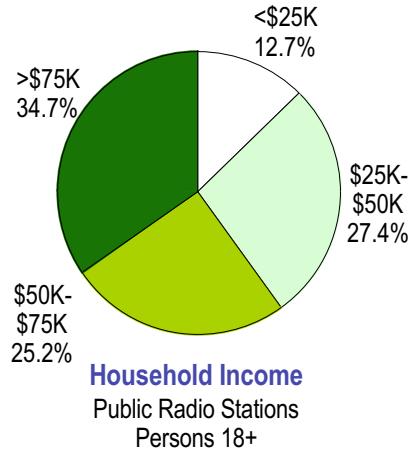
Note: Due to rounding, totals may differ.
Source: All data come from MaximiSer® Plus National Regional Database, Spring 2004.

Variety

A little more than one-third of public Variety's adult listeners have household incomes above \$75,000 per year. Fifty-nine percent have graduated from college.

Twelve percent of public Variety listeners are black, and seven percent are Hispanic.

Those who listen to Variety-formatted public radio stations listen for an average of 6 hours and 15 minutes each week.



Note: Due to rounding, totals may differ.
Source: All data come from MaximiSer® Plus National Regional Database, Spring 2004.

P1 Listening by Format

Public radio listeners are extremely loyal. Across formats, nearly 90 percent of public radio listening comes from “P1” listeners. (Those who listen to one radio station more than any other are P1 listeners for that station.)

The public radio audience is also highly desirable from a marketing perspective, with P1 listeners skewing toward the older, more-established end of the coveted 25-54 demographic.

P1 Listening by Format	Proportion of Listening from P1s	Average Age of P1 Listeners
Alternative	91%	42
Classical	89%	53
Educational	91%	51
New AC/Smooth Jazz	88%	49
News/Talk/Information	90%	50
Variety	88%	49

Sources

Public Radio Today contains general statistics on public radio and listening trends. Format definitions come from various public radio organizations. Data for charts and graphs come from Arbitron's MaximiSer® Plus National Regional Database, Spring 2004. The MaximiSer Plus National Regional Database includes radio audience information from every market surveyed by Arbitron in the United States.

Glossary

Average Quarter-Hour Persons (AQH Persons)

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

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

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

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

Cume Persons

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

Cume Rating or Cume PUR

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

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

Format Share

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

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

Index

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

P1 – First Preference Listening

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

Time Spent Listening (TSL)

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

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

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