



**Radio Marketing Guide & Fact Book
For Advertisers**



2002-2003 Edition



Radio

Welcome to the 2002/2003 edition of the **Radio Marketing Guide & Fact Book for Advertisers**, a collection of the most recent and relevant data about Radio. We are confident that you will find this publication valuable in determining how Radio can help you attain your sales goals and to market your products and services more effectively and efficiently. It will help you better understand how Radio connects with its audience and where and how it reaches your customers.

As you view the many facts and figures associated with our dynamic medium, please don't forget the most important fact: **Radio Gets Results!**

During times of economic adversity, Radio always has been able to successfully deliver an advertiser's message to the right audience and with results! The past two years have been no exception, and Radio often is heralded for its ability to drive traffic to a location or Web site in any economic climate.

That's because Radio is **selective**, allowing you to target those consumers who are most likely to buy your products and services. Radio is **mobile**, so you can reach busy consumers wherever they are, 24 hours a day. Radio is **intrusive**, allowing you to break through the ever-increasing media clutter. Radio is **cost-efficient**, so you can afford to deliver the message with the frequency necessary to reach and influence customers. Radio is **intimate**, giving you a connection with your customers and prospects.

The fact is, Americans love Radio, and Radio travels with them wherever they go. Ninety-six percent of all consumers listen to Radio every week. They listen at home, at work, and in the car. It is no surprise that Radio advertisers get the **last word** as consumers run last-minute errands on their way home from work, during a busy weekend of shopping, or in the comfort of their own homes as they shop online.

The Radio Advertising Bureau's 5,600-plus member stations stand ready to help you harness the power of Radio. For more information on how to build your business with Radio, please call the RAB Headquarters and National Marketing Department in New York at 1-800-252-RADIO, or the RAB Services and Administrative Center in Dallas at 1-800-232-3131.



Mike Mahone
Executive VP/Services
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Radio Audiences

“We use Radio in our promotion to reach 18- to 24-year-old ‘echo boomers,’ a group that has been difficult to reach because they don’t watch a lot of television.” Kathy Alexander, Director of Media Services, Pizza Hut

Radio is a constant companion that joins us on our weekly rounds and sets our daily routines to a lively beat. And all that exposure is cumulative as the week progresses; it should be no surprise that Radio reaches 96 percent of all persons 12 and older — and an even larger share of selected age groups — in an average week!

Radio’s Weekly Reach

Read: Radio reaches 95.8% of persons 12 and older each week.

Persons

• 12+ 95.8%

Teens

• 12-17 99.2%

Men

• 18+ 96.6%

• 18-34 98.3%

• 25-54 98.0%

• 35-64 97.5%

• 65+ 89.3%

Women

• 18+ 94.3%

• 18-34 95.8%

• 25-54 96.5%

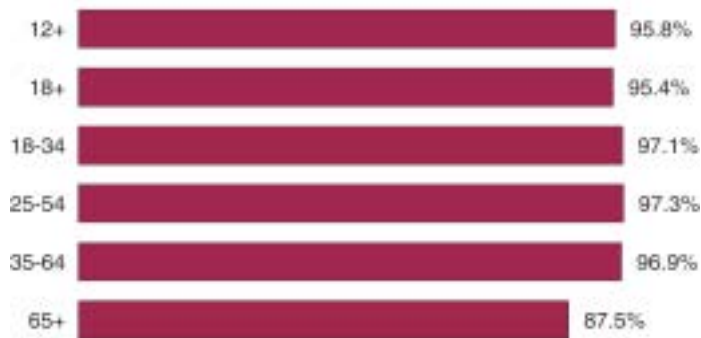
• 35-64 96.4%

• 65+ 86.2%

Source: RADAR[®] 71, Fall 2001, © Copyright Arbitron
(Monday-Sunday, 24 hours, based on weekly cume)

Radio Reaches 96% of All Consumers Every Week

Average weekly reach: Persons



Source: RADAR[®] 71, Fall 2001, © Copyright Arbitron
(Monday-Sunday, 24 hours, based on weekly cume)

Radio Audiences

The American lifestyle is undeniably a busy one. Trying to find time for everything from family activities and career responsibilities to leisure pursuits and hobbies can be a frustrating experience. Still, Americans always manage to find room for Radio on the daily list. In fact, an average of 77 percent of persons age 12+ turn in their favorite stations each and every day!

Radio's Daily Reach

Read: Radio reaches 76.9% of persons 12 and older each day.

Persons

• 12+ 76.9%

Teens

• 12-17 80.6%

Men

• 18+ 78.6%

• 18-34 79.0%

• 25-54 81.1%

• 35-64 81.2%

• 65+ 68.3%

Women

• 18+ 74.6%

• 18-34 77.0%

• 25-54 78.0%

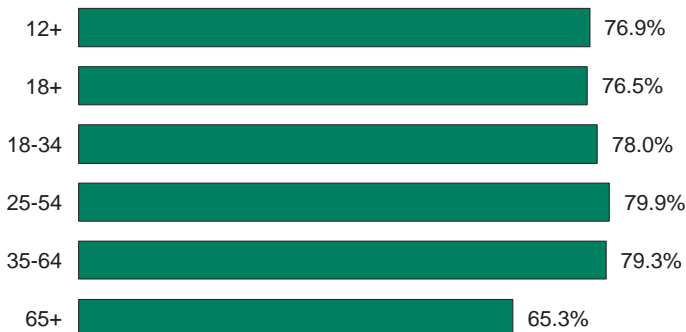
• 35-64 77.4%

• 65+ 63.3%

Source: RADAR[®] 71, Fall 2001, © Copyright Arbitron
(Monday-Sunday, 24 hours, based on daily cume)

Radio Reaches 77% of All Consumers Every Day

Average daily reach: Persons



Source: RADAR[®] 71, Fall 2001, © Copyright Arbitron
(Monday-Sunday, 24 Hours, based on daily cume)

“One of Radio’s greatest strengths is ... very targeted formats and personalities and content that speak to the local market and speak to the diversity within the marketplace.” Karen Treydte, Exec. Media Dir., Conill Advertising

Radio Audiences

“When an emerging brand has a modest budget and wants to challenge big guys in a category, Radio is the way to rapidly ramp up name awareness and establish a brand image.” *Bob Hoffman, President, Gearon-Hoffman*

Some of Radio’s media competitors are effective only at certain times of the day or days of the week. Not Radio — we get the job done anytime! All day long — including weekends — we deliver your message to the right people. As the data below shows, every week between the hours of 6 a.m. and 10 a.m., Radio reaches 85 percent of persons age 12+ — and that’s just the beginning!

Radio’s Weekly Reach by Daypart

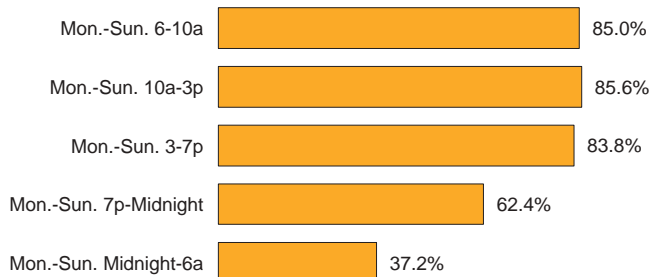
Read: Each week from 6-10 a.m., Radio reaches 85.0% of persons 12 and older.

	6-10A	10A-3P	3-7P	7P-Mid	Mid-6A
Persons					
• 12+	85.0%	85.6%	83.8%	62.4%	37.2%
Teens					
• 12-17	86.8%	84.7%	91.9%	80.7%	41.9%
Adults					
• 18+	84.8%	85.7%	82.9%	60.4%	36.7%
• 18-34	84.4%	87.5%	85.7%	70.1%	41.0%
• 25-54	88.6%	88.4%	88.1%	64.2%	39.2%
• 35-64	88.3%	87.4%	86.8%	61.1%	38.2%
• 65+	74.3%	77.3%	65.7%	40.5%	23.9%
Men					
• 18+	86.1%	86.3%	84.3%	61.3%	41.7%
• 18-34	84.7%	87.4%	85.9%	70.9%	46.4%
• 25-54	89.7%	88.2%	89.2%	64.8%	44.4%
• 35-64	89.5%	87.4%	87.8%	60.5%	43.4%
• 65+	76.2%	79.8%	67.7%	42.6%	24.7%
Women					
• 18+	83.5%	85.2%	81.6%	59.5%	32.0%
• 18-34	84.2%	87.6%	85.4%	69.3%	35.4%
• 25-54	87.4%	88.5%	87.1%	63.5%	34.0%
• 35-64	87.1%	87.4%	85.9%	61.7%	33.3%
• 65+	73.0%	75.6%	64.4%	39.1%	23.4%

Source: RADAR[®] 71, Fall 2001, © Copyright Arbitron
(Monday-Sunday, based on weekly cume for daypart)

Weekdays and Weekends, Radio Delivers

*Percentage reached weekdays and weekends
Persons 12 and older*



Source: RADAR[®] 71, Fall 2001, © Copyright Arbitron
(Monday-Sunday, based on weekly cume for daypart)

Radio Audiences

Listeners love their Radio programming. Starting with the first notes that emerge from the clock Radio in the morning and continuing all day, Americans devote more of the day to Radio listening than to any other medium. In fact, each day persons age 12+ spend 44 percent of their 6 a.m. to 6 p.m. media time with Radio — that's more than they spend with TV and cable combined!

Radio's Daily Reach by Daypart

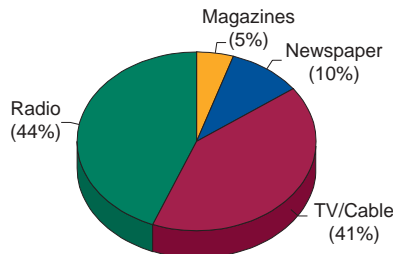
Read: Each morning from 6 to 10 a.m., Radio reaches 50.7% of persons 12 and older.

	6-10A	10A-3P	3-7P	7P-Mid	Mid-6A
Persons					
• 12+	50.7%	44.0%	43.7%	24.6%	14.8%
Teens					
• 12-17	44.4%	34.0%	45.7%	35.5%	12.1%
Adults					
• 18+	51.4%	45.2%	43.5%	23.4%	15.1%
• 18-34	47.1%	44.2%	44.9%	27.2%	14.5%
• 25-54	55.6%	47.3%	48.9%	24.4%	16.3%
• 35-64	55.9%	47.1%	47.3%	23.4%	16.8%
• 65+	45.3%	40.7%	29.1%	16.6%	11.0%
Men					
• 18+	53.7%	45.5%	44.8%	23.9%	17.6%
• 18-34	49.0%	43.3%	44.0%	27.7%	17.1%
• 25-54	57.3%	47.3%	48.6%	24.2%	19.4%
• 35-64	58.2%	47.7%	48.9%	23.6%	19.7%
• 65+	47.2%	42.3%	31.1%	16.3%	10.9%
Women					
• 18+	49.4%	44.8%	42.2%	22.9%	12.8%
• 18-34	45.2%	45.1%	45.7%	26.7%	11.8%
• 25-54	53.2%	46.9%	47.4%	23.7%	13.3%
• 35-64	53.7%	46.6%	45.7%	23.1%	13.9%
• 65+	44.0%	39.6%	27.7%	16.8%	11.1%

Source: RADAR[®] 71, Fall 2001, © Copyright Arbitron
(Monday-Sunday, based on daily cume for daypart)

Radio is the Medium of Choice All Day

*Average daily share of time spent with each medium
Persons 12 and older, Monday-Friday 6 a.m. to 6 p.m.*



Source: Arbitron/RAB — Media Targeting 2000

“Radio can find the target in much more defined ways. Being able to reach our targets — our well-defined targets ... Radio is the best equipped to do that.”
Cathleen Campe, Sr. VP/Dir. of Spot Broadcast, Rubin Postner & Assoc.

Radio Audiences

"Radio is immediate, and with our product, every minute of every day is a good time to remind people how good Ben & Jerry's ice cream is." Bob Ellis, Director of Client Service, Black Rocket Euro RSCG

People don't get tired of listening to Radio. Each week, persons age 12+ spend an average of 20 hours tuned in to their favorite stations. Remember: Every minute consumers spend tuned in to Radio programming is another chance for your marketing message to reach its target audience!

Radio Listeners Listen... and Listen... and Listen

	Total Week Time Spent Listening Hrs:Min	Weekday Time Spent Listening Hrs:Min	Weekend Time Spent Listening Hrs:Min
Persons			
• 12+	20:00	3:00	5:00
Teens			
• 12-17	13:30	1:45	4:45
Adults			
• 18+	20:45	3:09	5:00
• 18-34	20:15	3:06	4:45
• 25-54	21:15	3:15	5:00
• 35-64	21:15	3:15	5:00
• 65+	20:30	2:33	5:45
Men			
• 18+	21:30	3:15	5:15
• 18-34	21:00	3:12	5:00
• 25-54	22:15	3:27	5:00
• 35-64	22:00	3:21	5:15
• 65+	20:00	2:30	5:30
Women			
• 18+	20:15	2:33	5:00
• 18-34	19:30	2:33	4:45
• 25-54	20:00	3:03	4:45
• 35-64	20:15	3:03	5:00
• 65+	20:45	3:00	5:45

Source: Fall 2001 Arbitron American Radio Trends Time Spent Listening Estimates, Monday-Sunday 6 a.m.-midnight; Average Weekday (Monday- Friday 6 a.m.-midnight); and Saturday/Sunday 6 a.m.-midnight. Based on Arbitron's 94 Continuous Measurement Markets.

Radio Audiences

When your marketing needs call for a tight focus on a particular demographic group, Radio has the targetability you need to zero in on your best customers! For example, Radio reaches 96 percent of African-Americans age 12+ in an average week. What's more, because African-Americans listen to their favorite stations an average of 24 hours each week, Radio excels at reaching — and persuading — them.

"Radio is an extremely important part of our media mix, much more so for urban customers than even for our general market plans, where Radio is also a critical element." *Charlee Taylor-Hines, Director Urban & Ethnic Marketing, Pepsi*

Radio's Reach with African-Americans

	Weekly Reach	Weekly Time Spent Listening Hrs:Min
Persons		
• 12+	95.7%	24:00
Teens		
• 12-17	95.9%	18:15
Persons		
• 18+	95.7%	24:45
• 18-34	96.7%	23:30
• 25-54	96.7%	25:15
• 35-64	96.0%	25:45
• 65+	91.0%	24:30
Men		
• 18+	96.2%	25:00
• 18-34	97.9%	24:00
• 25-54	97.5%	25:30
• 35-64	96.7%	25:45
• 65+	90.1%	24:30
Women		
• 18+	95.2%	24:30
• 18-34	95.6%	22:45
• 25-54	95.8%	24:45
• 35-64	95.3%	25:30
• 65+	92.8%	24:50

Source: Arbitron 2001 Black Radio Today
Based on African-American Cume and TSL estimates for Top 50 African-American Markets

Radio Reaches African-Americans

Monday-Sunday 6 a.m. - Midnight



Source: Arbitron 2001 Black Radio Today
African-American Cume estimates based on Top 50 African-American Markets

Radio Audiences

“If we want to be successful long-term, we have to be successful in the Hispanic market. The Radio-based programs and advertising that our agency brought to us resulted in a huge jump for our brand and the sales and distribution are following, particularly in the Hispanic sector.” Kevin Costa, Western Region Marketing Director, Heineken

The 2000 U.S. Census confirmed what many marketers already knew: Hispanics are America’s fastest-growing ethnic group, growing 58 percent from 1990 to 2000, surpassing general population growth. And research proves them to be fanatically loyal customers. With 95 percent of U.S. Hispanics age 12+ listening to Radio for an average of 23 hours a week, it’s fiesta time for savvy Radio advertisers!

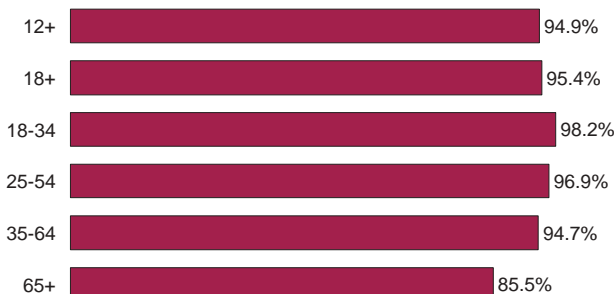
Radio’s Reach with Hispanics

	Weekly Reach	Weekly Time Spent Listening Hrs:Min
Persons		
• 12+	94.9%	23:00
Teens		
• 12-17	95.4%	17:45
Persons		
• 18+	95.4%	23:45
• 18-34	98.2%	23:30
• 25-54	96.9%	24:00
• 35-64	94.7%	23:45
• 65+	85.5%	23:45
Men		
• 18+	95.1%	23:30
• 18-34	98.8%	23:30
• 25-54	97.2%	23:45
• 35-64	95.2%	23:45
• 65+	85.3%	24:00
Women		
• 18+	95.6%	23:45
• 18-34	97.6%	23:45
• 25-54	96.6%	24:30
• 35-64	94.7%	24:00
• 65+	85.5%	23:15

Source: Arbitron 2001 Hispanic Radio Today
Based on Hispanic Cume and TSL estimates for Top 50 Hispanic Markets

Radio Reaches Hispanics

Monday-Sunday 6 a.m. - Midnight



Source: Arbitron 2001 Hispanic Radio Today
Hispanic Cume estimates based on Top 50 Hispanic Markets

Radio Audiences

Sometimes only a specific customer will do. If your company caters to affluent, well-educated, professional and managerial consumers, Radio can help bring you and your upscale target audience together. Each week, Radio reaches 99 percent of adults earning more than \$50,000 per year, 96 percent of adults with professional/managerial jobs, and 97 percent of college graduates.

Radio Reaches Upscale Consumers

Radio reaches adults with incomes of \$50,000+

	Weekly Reach	Avg. Daily Time Spent Listening Hrs:Min
Adults		
• 18+	99.3%	3:18
Men		
• 18+	99.6%	3:26
Women		
• 18+	98.9%	3:08

Radio reaches college graduates

	Weekly Reach	Avg. Daily Time Spent Listening Hrs:Min
Adults		
• 18+	97.0%	3:01
Men		
• 18+	96.8%	3:00
Women		
• 18+	97.3%	3:02

Radio reaches professionals/managers

	Weekly Reach	Avg. Daily Time Spent Listening Hrs:Min
Adults		
• 18+	96.3%	3:05
Men		
• 18+	96.2%	3:06
Women		
• 18+	96.3%	3:03

“Radio is efficient, it is local, and it builds frequency effectively. It was used exclusively for Bella Sera — a very successful campaign.” Sue McClelland, VP Media, E&J Gallo Wine Company

Radio Audiences

“Radio lets you do almost anything ... On Radio we can paint more personal, more precise images.” Keith Reinhard, Chairman, DDB Worldwide

At work, in the home, on the road, or online — wherever your customers may be, Radio is there alongside them. Among persons age 12+, 37 percent of Radio listening takes place at home; 44 percent takes place in the car; and 20 percent is done at work or in other places besides the home.

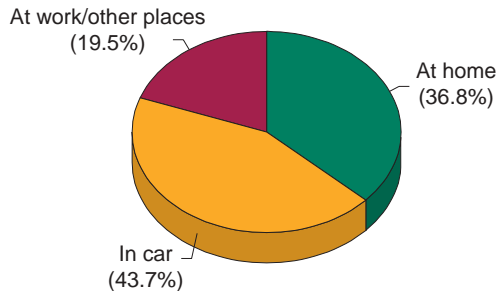
Radio Reaches Customers Everywhere

Demo	Location	Weekdays	Weekends
Persons 12+	At home	36.4%	38.9%
	In car	44.9%	50.3%
	At work or other places	18.7%	10.8%
Teens 12-17	At home	42.0%	43.6%
	In car	38.2%	42.4%
	At work or other places	19.8%	14.0%
Adults 18+	At home	35.7%	38.2%
	In car	45.8%	51.1%
	At work or other places	18.5%	10.3%
Men 18+	At home	33.0%	35.3%
	In car	47.1%	53.0%
	At work or other places	19.9%	11.7%
Women 18+	At home	38.3%	41.2%
	In car	44.5%	50.0%
	At work or other places	17.2%	8.8%

Source: Compiled by RAB from RADAR[®] 71, Fall 2001, © Copyright Arbitron
 Weekday numbers are weekly cume, Monday-Friday, 24 hours; Weekend numbers are weekly cume, Saturday/Sunday, 24 hours

Radio Reaches Customers Everywhere

Radio listening by location



Source: Compiled by RAB from RADAR[®] 71, Fall 2001, © Copyright Arbitron based on weekly cume, Monday-Sunday, 24 hours

Radio Audiences

With Radio, you don't have to worry about a "summer slump" sabotaging your advertising's effectiveness — you can make an impression anytime! There are no seasonal hills and valleys in Radio listening. Winter, summer, spring or fall, Radio's devotees show remarkably consistent listening patterns — and that stability is just what an advertiser needs to establish brand awareness and achieve long-term marketing goals.

Average Weekly Time Spent Listening

	FA'00	WI'01	SP'01	SU'01	FA'01
	Hrs:Min	Hrs:Min	Hrs:Min	Hrs:Min	Hrs:Min
Persons					
• 12+	20:30	20:15	20:30	20:15	20:00
Teens					
• 12-17	13:45	13:45	14:15	14:45	13:30
Adults					
• 18+	21:15	21:00	21:15	20:45	20:45
• 18-34	20:45	20:30	20:45	20:30	20:15
• 25-54	21:30	21:15	21:30	21:00	21:15
• 35-64	21:30	21:15	21:30	21:00	21:15
• 65+	21:00	21:15	21:00	20:30	20:30

Source: Arbitron American Radio Listening Trends (Fall 2000-Fall 2001). Based on Arbitron's 94 Continuous Measurement Markets. Weekly Time Spent Listening estimates (Mon-Sun 6 a.m.-midnight).

Radio Reaches Customers Year-Round

	FA'00	WI'01	SP'01	SU'01	FA'01
	Hrs:Min	Hrs:Min	Hrs:Min	Hrs:Min	Hrs:Min
Persons					
• 12+	94.9%	94.8%	94.9%	94.5%	95.0%
Teens					
• 12-17	95.3%	94.5%	94.4%	93.9%	94.6%
Adults					
• 18+	94.8%	94.8%	95.0%	94.6%	95.1%
• 18-34	96.2%	96.0%	96.2%	95.8%	96.1%
• 25-54	96.3%	96.4%	96.4%	96.1%	96.5%
• 35-64	95.8%	95.9%	95.9%	95.6%	96.1%
• 65+	88.9%	88.6%	89.2%	88.4%	89.5%
Men					
• 18+	94.9%	94.9%	95.2%	94.6%	95.2%
• 18-34	95.5%	95.3%	95.7%	95.0%	95.7%
• 25-54	96.1%	96.1%	96.3%	95.8%	96.4%
• 35-64	95.8%	95.9%	95.9%	95.6%	96.0%
• 65+	90.0%	89.8%	90.6%	89.4%	90.7%
Women					
• 18+	94.8%	94.7%	94.8%	94.5%	95.0%
• 18-34	96.9%	96.6%	96.8%	96.6%	96.6%
• 25-54	96.6%	96.6%	96.8%	96.6%	96.7%
• 35-64	95.8%	96.0%	95.9%	95.6%	96.2%
• 65+	88.1%	87.8%	88.3%	87.8%	88.7%

Source: Arbitron American Radio Listening Trends (Fall 2000-Fall 2001). Based on Arbitron's 94 Continuous Measurement Markets. Cumulative Persons Using Radio estimates (Mon-Sun 6 a.m.-midnight).

"Radio is such a personal medium, and it's the best means of reaching a broad population base with high frequency. We used it as our long-term base for Cedars-Sinai Medical Center, supplementing with various print media, and the Internet." Renee Fraser, Ph.D., President/CEO, Fraser Communications

Radio Audiences

"We primarily relied on print media. That all changed in 1985 when we were sold a modest overnight Radio schedule. The results were phenomenal. The first month on the Radio was the most business we had ever done. We now use Radio 52 weeks a year. If it wasn't for Radio, I wouldn't be in business today. There's nothing more to say." *Larry Miller, President, Sit 'n' Sleep*

Radio fits with the American car culture like a wheel on an axle. For most Americans, the mental picture of zooming down the road would be missing something without Radio there to provide the soundtrack. As a matter of fact, Radio reaches 84 percent of adults age 18+ each week while they're driving.

Upscale Consumers Listen to Radio in the Car

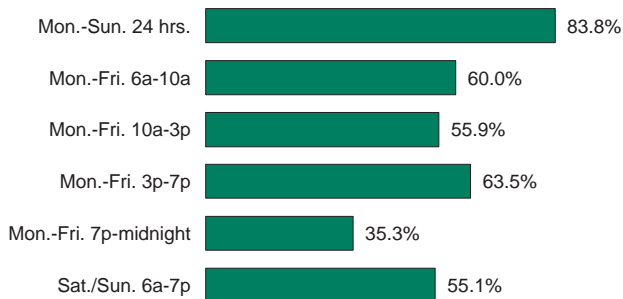
Percentage reached weekly by car Radio Monday-Sunday, 24 hours

	Adults 18+	Men 18+	Women 18+
• Professional/Manager	90.0%	94.5%	92.5%
• College Graduates	90.3%	89.8%	90.7%
• Household Income \$50K+	94.7%	96.2%	93.0%

Source: RADAR[®] 71, Fall 2001, [©] Arbitron

Adults Listen to Radio in the Car

Percentage reached in cars by daypart (Adults 18+)



	Adults 18+	Men 18+	Women 18+
Monday-Sunday 24 hours	83.8%	87.6%	81.2%
Monday-Friday 6 a.m.-10 a.m.	60.0%	65.1%	55.2%
10 a.m.-3 p.m.	55.9%	57.9%	54.1%
3 p.m.-7 p.m.	63.5%	67.2%	60.0%
7 p.m.-midnight	35.3%	36.9%	33.9%
Saturday/Sunday 6 a.m.-7 p.m.	55.1%	58.6%	51.9%

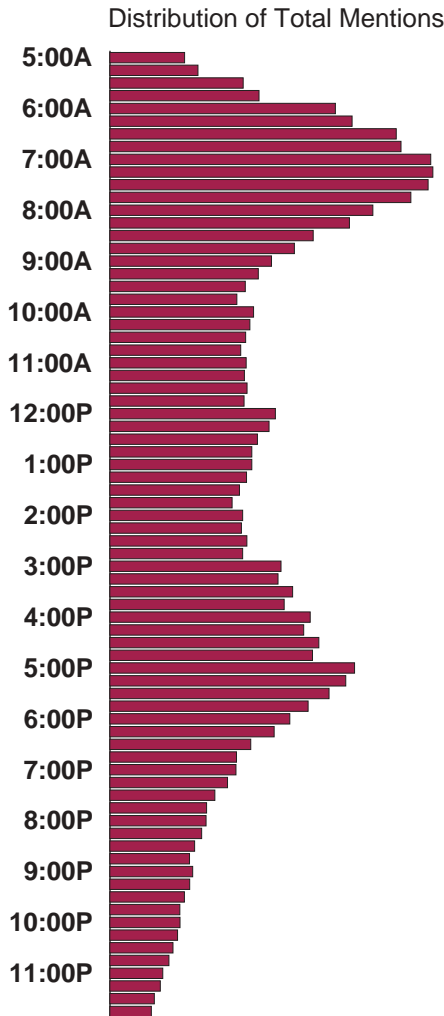
Source: RADAR[®] 71, Fall 2001, [©] Copyright Arbitron
Based on weekly cume for dayparts

Radio Audiences

To be sure, the in-car Radio audience rocks along all day. However, it makes sense that the percentage of Americans listening behind the wheel peaks dramatically during heavy commuting times. In addition to the surges of in-car listening during the morning and afternoon drive times, there also is a noticeable increase at midday as people go out to lunch. It's clear: if Americans are driving, they're tuned in to their favorite stations.

Daily In-Car Radio Audience

The audience flow chart below shows the percentage of Arbitron diary mentions by quarter-hour, Monday-Friday, 5 a.m. to midnight.



"Radio is a gigantic part of Dunkin' Donut's business. It demonstrates over and over that it can get tremendous results for an advertiser who uses fresh, out-of-the-box thinking in their creative." Marty Donahue, Creative Director, Hill/Holiday Radio: Hill, Holiday, Connors, Cosmopolis

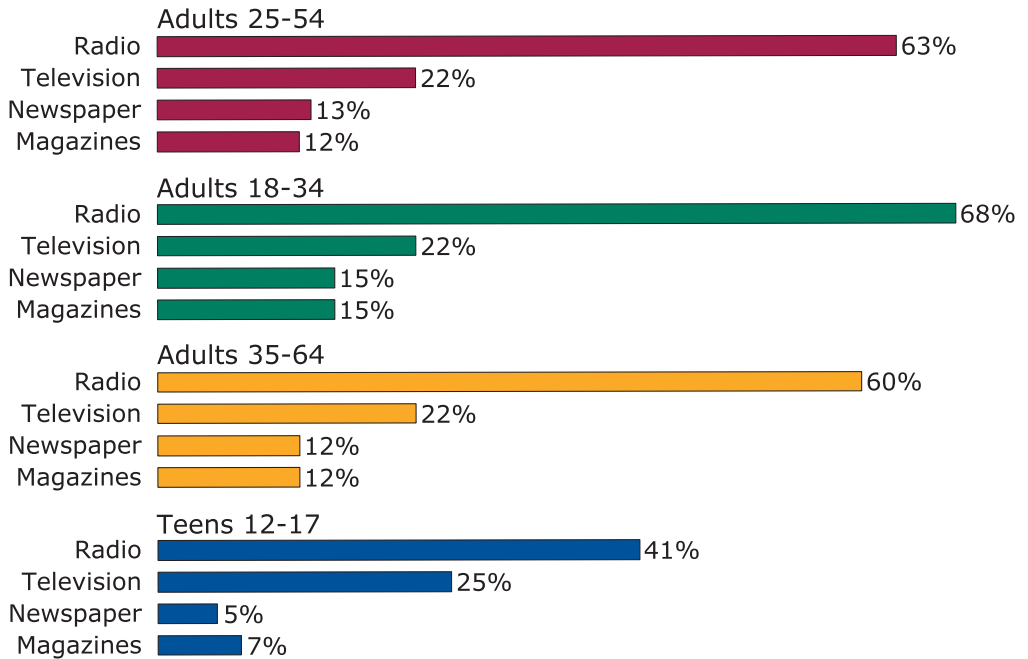
Consumer Categories

“Forty percent of first-time buyers visit Robbins Brothers as a result of hearing Radio spots.” Steve Robbins, Chairman & CEO, Robbins Bros.

The one thing no consumer has enough of is time. With so much crammed into their hectic schedules, people simply don't have the luxury of devoting time to things such as comparison shopping. Time-starved Americans need access to on-the-fly information as they head to the store. What medium can deliver it? Only Radio. Radio reaches 63 percent of adults age 25-54 within one hour of making their largest purchase of the day.

Radio is the #1 Medium Close to the Point of Purchase

Read: In any 24-hour period, 63% of adults ages 25 to 54 are exposed to Radio within one hour of making their largest purchase of the day.



Source: Arbitron/RAB — Media Targeting 2000

Consumer Categories

“Recently, our rugs and mattress business converted their entire budgets to traffic reports and spot Radio. They are absolutely thrilled with the results!” Evelyn Romdine, VP Media, Macy’s West

Radio Reaches Retail Consumers

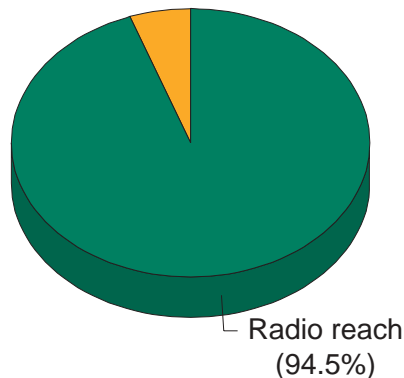
Read: Every week, Radio reaches 94.5% of those who shopped at hardware/building supply stores 4+ times in the last 4 weeks.

Radio’s weekly reach among adults 18 and older who ...

• Shopped hardware/building-supply stores 4+ times — past 4 weeks	94.5%
• Shopped drug stores 4+ times — past 4 weeks	92.0%
• Shopped discount stores 6+ times — past 4 weeks	94.2%
• Shopped jewelry stores — past 4 weeks	93.9%
• Shopped sporting-goods stores — past 4 weeks	95.1%
• Shopped auto-parts stores 1+ times — past 4 weeks	93.1%
• Purchased men’s/boys’ clothing — past 4 weeks	92.9%
• Purchased women’s/girls’ clothing — past 4 weeks	92.1%
• Purchased 5+ books from a bookstore — past year	92.9%
• Plan to purchase new furniture — next 12 months	93.2%
• Plan to purchase bed/mattress/etc. — next 12 months	92.6%

Source: The Media Audit, March 2001 — February 2002 National Report — Radio

Radio’s weekly reach among adults 18+ who shopped hardware/building-supply stores 4+ times in the past 4 weeks:



Consumer Categories

“The company started in 1968 and was the only one advertising auto insurance on the Radio at the time. From the beginning we have sourced all of our calls so we know how many are coming in from the various Radio stations. Without Radio we would not be here today. There’s no doubt about that.” *Jerry Baker, Executive Vice President, Auto Insurance Specialists*

Radio Reaches Car Buyers/Leasers

Read: Every week, Radio reaches 92.2% of those who plan to buy or lease a new car in the next 12 months.

Radio’s weekly reach among adults 18 and older who ...

- Plan to buy or lease a new car 92.2%
- Plan to buy or lease a new pickup truck 93.0%
- Plan to buy or lease a new sport-utility vehicle 94.3%
- Plan to buy or lease a new van/minivan 92.4%

- Plan to pay \$10,000-\$14,999 for a new or leased vehicle 91.2%
- Plan to pay \$15,000-\$19,999 for a new or leased vehicle 92.4%
- Plan to pay \$20,000-\$24,999 for a new or leased vehicle 92.7%
- Plan to pay \$25,000-\$29,999 for a new or leased vehicle 93.3%
- Plan to pay \$30,000-\$34,999 for a new or leased vehicle 92.4%
- Plan to pay \$35,000+ for a new or leased vehicle 93.2%

- Plan to buy a used car 92.5%
- Plan to buy a used pickup truck 93.1%
- Plan to buy a used sport-utility vehicle 93.9%
- Plan to buy a used van/minivan 92.4%

Source: 2001 Scarborough Multimarket Release 2

Radio Reaches the Auto Aftermarket

Read: Every week, Radio reaches 91.9% of those who had repairs/service for new tires.

Radio’s weekly reach among adults 18 and older who ...

- Had auto repair/service (paid or unpaid) for new tires 91.9%
- Had auto repair/service (paid or unpaid) for a car battery 91.1%
- Had auto repair/service (paid or unpaid) for shocks/struts 92.1%
- Had auto repair/service (paid or unpaid) for a muffler 91.3%
- Had auto repair/service (paid or unpaid) for a transmission 92.2%
- Had auto repair/service (paid or unpaid) for brakes 92.4%
- Had auto repair/service (paid or unpaid) for paint/body work 92.6%
- Had auto repair/service (paid or unpaid) for a tune-up 91.8%
- Had auto repair/service (paid or unpaid) for car radio/stereo equipment 93.4%

Source: 2001 Scarborough Multimarket Release 2

Consumer Categories

Radio Reaches Consumers of Financial Services

Read: Every week, Radio reaches 95.2% of those who have a car loan.

Radio's weekly reach among adults 18 and older who ...

• Have a car loan	95.2%
• Have a home-improvement loan	93.3%
• Have a secured line of credit/home equity account	93.5%
• Have an IRA/KEOGH account	93.3%
• Have CDs/Savings Certificates	91.5%
• Have liquid assets (cash/stocks/CDs/etc.) valued at \$250K+	92.6%
• Influence business banking decisions	94.9%
• Traded stocks/bonds/securities — past year	93.8%
• Used any American Express Card — past 6 months	92.8%
• Used any Visa Card — past 6 months	91.9%
• Used any MasterCard — past 6 months	91.9%
• Used Discover Card — past 6 months	91.2%
• Have medical insurance coverage	91.5%
• Have health care covered by HMO	92.5%

Source: The Media Audit, March 2001 — February 2002 National Report — Radio

Radio Reaches Homeowners, Prospective Homeowners, and Renters

Read: Every week, Radio reaches 91.0% of those who own their own dwelling.

Radio's weekly reach among adults 18 and older who ...

• Own home/dwelling unit	91.0%
• Rent home/dwelling unit	86.9%
• Plan to buy a home in next 2 years — now own	94.2%
• Plan to buy a home in next 2 years — now rent	91.9%
• Plan to buy a home in next 2 years — \$50K+ income	94.7%
• Moved in past year — to a house	92.1%
• Moved in past year — to an apartment	88.1%
• Plan to remodel home — next 12 months	93.2%
• Have a home-improvement loan	93.3%
• Have a secured line of credit/home-equity account	93.5%
• Shopped hardware/building-supply stores 4+ times in past 4 weeks	94.5%

Source: The Media Audit, March 2001 — February 2002 National Report — Radio

Consumer Categories

“Radio stations are typically very willing to support our marketing initiatives, whether it’s for a new product launch or to promote any number of our community-related efforts. We look at these stations as media partners.” *Marilyn Dennis, Manager Local Media, Wendy’s*

Radio Reaches Restaurant/Fast-Food Consumers

Read: Every week, Radio reaches 93.3% of those who made 3+ purchases at fast-food restaurants in the past week.

Radio’s weekly reach among adults 18 and older who ...

- Made 3+ purchases at fast-food restaurants — past week 93.3%
- Made 5+ purchases at fast-food restaurants — past week 93.5%
- Consumed 4+ evening meals at sit-down restaurants — past 2 weeks 92.5%

Source: The Media Audit, March 2001 — February 2002 National Report — Radio

- Ate out at any “upscale” restaurant — past month 91.4%
- Ate out at any Chinese/Asian restaurant — past month 91.3%
- Ate out at any French restaurant — past month 92.6%
- Ate out at any Italian restaurant — past month 91.5%
- Ate out at any Mexican restaurant — past month 91.9%
- Ate out at any seafood restaurant — past month 90.5%
- Ate out at any steakhouse — past month 91.0%
- Ate out at any coffee house/coffee bar — past month 92.0%
- Ate out at any bagel shop — past month 92.9%

Source: 2001 Scarborough Multimarket Release 2

Radio Reaches Grocery Shoppers

Radio’s weekly reach among adults 18 and older who ...

- Spend \$100+ on groceries in average week 91.8%
- Spend \$150+ on groceries in average week 92.5%

Source: 2001 Scarborough Multimarket Release 2

Consumer Categories

Radio Reaches Beer and Wine Drinkers

Read: Every week, Radio reaches 92.6% of those who drank any domestic (non-light) beer in the past week.

Radio's weekly reach among adults 18 and older who ...

• Drank any domestic (non-light) beer — past week	92.6%
• Drank any domestic light beer — past week	92.8%
• Drank any imported beer — past week	93.4%
• Bought red wine — past 3 months	91.3%
• Bought white wine — past 3 months	91.2%
• Bought blush or rosé wine — past 3 months	91.2%
• Bought Champagne or sparkling wine — past 3 months	91.9%

Source: 2001 Scarborough Multimarket Release 2

Radio Reaches Soft-Drink and Water Consumers

Radio's weekly reach among adults 18 and older who ...

• Consumed soft drinks 5+ times — past week	92.3%
• Consumed soft drinks 10+ times — past week	93.3%
• Usually drink regular (not diet) soft drinks	90.9%
• Usually drink diet soft drinks	91.5%
• Bought bottled water — past month	92.1%

Source: The Media Audit, March 2001 — February 2002 National Report — Radio

“Radio is a key element in taking Anheuser-Busch’s messages to the individual markets across the country. It is a critical tool in our branding strategy for all of our products.”
David Drew, VP/Director Field Media, Anheuser-Busch

Consumer Categories

"In Radio you can create the theater of the mind. It's difficult, but when you do it well, you entertain the audience and get results. That's the best." Bob Gardner, President, Gardner Geary Coll (GGC)

Radio Reaches Entertainment/Recreation Consumers

Read: Every week, Radio reaches 93.8% of those who rented VCR tapes/movies in the past month.

Radio's weekly reach among adults 18 and older who ...

• Rented VCR tapes/movies — past month	93.8%
• Bought stereo tapes/CDs — past month	93.8%
• Attended movie theater — past month	93.7%
• Attended 3+ college/professional sports events — past year	95.6%
• Attended country-music concert — past year	94.1%
• Attended rock/pop-music concert — past year	95.3%
• Attended opera/symphony/theatre — past year	93.7%
• Exercised 12+ times at health club — past year	93.5%
• Own power or motor boat	93.4%
• Own motorcycle	94.0%
• Own RV/motor home	90.8%
• Participated in golf 3+ times — past year	95.1%
• Participated in hunting/fishing — past year	94.0%
• Participated in lawn and garden activities — past year	92.6%
• Have a dog	92.8%
• Have a cat	92.1%

Source: The Media Audit, March 2001 — February 2002 National Report — Radio

• Went to movies once — past 3 months	92.0%
• Went to movies twice — past 3 months	92.3%
• Went to movies 3+ times — past 3 months	92.6%
• Usually see a movie within first two weeks of its opening	92.8%
• Usually see a movie after the second week of its opening	92.3%
• Bought a lottery ticket 1-7 days ago	90.2%
• Bought a lottery ticket 8-30 days ago	90.1%

Source: 2001 Scarborough Multimarket Release 2

Consumer Categories

Radio Reaches Consumer Electronics/ Computer Consumers

Read: Every week, Radio reaches 93.4% of those who plan to buy a stereo/tape or CD player in the next 12 months.

Radio's weekly reach among adults 18 and older who ...

• Plan to buy stereo/tape or CD player — next 12 months	93.4%
• Plan to buy video equipment/VCR/camera — next 12 months	93.6%
• Plan to buy new TV set — next 12 months	92.2%
• Plan to buy major household appliance — next 12 months	92.6%
• Have cable TV service	91.4%
• Receive cable by satellite reception only	92.8%
• Receive cable by satellite and local cable	93.5%
• Receive pay-per-view cable — past 3 months	93.9%
• Plan to buy a cellular phone	93.1%
• Currently have one or more computers at home	92.6%
• Plan to buy personal computer/equipment — next 12 months	93.7%
• Accessed Internet/went online at home — past month	94.5%
• Spend 430 minutes or more per week on Internet/online (heavy user)	94.1%
• Visited Radio Web site via the Internet — past month	98.0%

Source: The Media Audit, March 2001 — February 2002 National Report — Radio

“It's all about education. Younger writers and producers think TV is the only medium in which you can 'wow' people. When they 'look behind the curtain' and hear that great Radio is possible, it opens up a bunch of new possibilities.” Mark Nardi, Writer, Hill Holliday Connors Cosmopolis

Consumer Categories

Radio Reaches Travelers

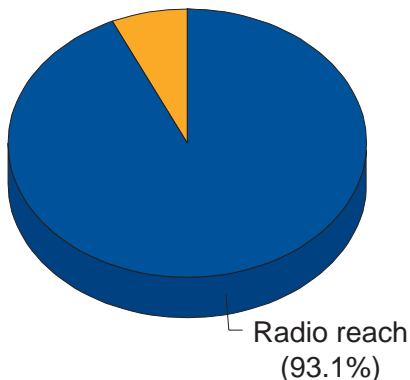
Read: Every week, Radio reaches 93.1% of those who used a travel agent three or more times in the past year.

Radio's weekly reach among adults 18 and older who ...

• Used travel agent 3+ times — past year	93.1%
• Rented car 5+ times — past year	93.3%
• Flew 3+ domestic air trips — past year	94.3%
• Flew 6+ domestic air trips — past year	94.5%
• Flew 1+ foreign air trips — past 2 years	91.5%
• Flew 2+ foreign air trips — past 2 years	91.6%
• Are heavy business air travelers	94.7%
• Stayed in a hotel or motel 10+ nights — past year	93.4%
• Visited gambling casino 1+ times — past year	92.7%
• Participated in snow skiing — past year	96.2%
• Plan to take ocean cruise — next 2-3 years	93.5%
• Attended major theme park — past year	94.0%
• Own RV/motor home	90.8%

Source: The Media Audit, March 2001 — February 2002 National Report — Radio

Radio's weekly reach among adults 18+ who used a travel agent 3+ times in the past year:



"I've always had a special place in my heart for great Radio writers. Great Radio builds great brands. We've done it for Motel 6 and a ton of other clients. I've also become convinced that if someone can write great Radio, he/she can write great anything. Radio, more than any other factor, can sift out the wheat from the chaff." Stan Richards, Principal, The Richards Group

Advertising Expenditures

Radio Revenue is Bouncing Back

Radio continued to deliver results to advertisers throughout the challenging economic climate of 2001. In spite of the fall-off in advertising dollars, Radio fared better than most media because of its ability to react quickly and deliver a message effectively and efficiently. Positive growth in Radio for 2002 is already underway in all sectors.

Revenue Trends

Figures shown in billions of dollars.

	Local Spot	National Spot	Network Revenue
2001	\$14.55	\$2.90	\$91
2000	15.22	3.60	1.00
1999	13.59	3.21	0.88
1998	11.92	2.77	0.74
1997	10.74	2.41	0.65
1996	9.85	2.09	0.47
1995	9.12	1.92	0.43
1994	8.37	1.87	0.41
1993	7.53	1.63	0.41
1992	6.90	1.48	0.38

Total Radio Revenue



Source: Local and national revenues are based on a pool of more than 100 markets, as reported by the accounting firm of Miller Kaplan Arase & Co and other certified public accounting firms.

"Most clients in my experience know the power of good Radio, want it, and are frustrated when they don't get it. Smart clients know that Radio has an equally strong power to connect with listeners and want to exploit that fact." *Arthur Bijur, President and Executive Creative Director, Cliff Freeman and Partners*

Advertising Expenditures

“Radio is the most powerful interactive medium. That’s because good Radio takes place in your mind. The pictures you see, the characters and situations you identify with, the sights, sounds, sensations, and smells all come to life through an interaction with your imagination.” *Bill Ludwig, Chairman and Chief Creative Officer, Campbell-Ewald*

Radio’s Top 40 National Network & Spot Advertisers Corporate

The Competitive Media Report ad spending data includes network and spot Radio spending only. Many national advertisers — such as Budweiser and McDonald’s — place the majority of their Radio advertising directly with stations and not through a network or spot representative company. Therefore, CMR is unable to capture these advertisers’ true Radio expenditures. Direct spending by many national advertisers substantially exceeds the amounts spent by the advertisers listed in the CMR Top 100.

Figures shown in millions of dollars.

National Corporate Advertiser	Total	Network	Spot
1 SBC Communications Inc.	\$73.2	—	\$73.2
2 Verizon Communications	69.1	\$5.2	63.9
3 National Amusements Inc.	47.9	12.9	35.0
4 AT&T Wireless	44.3	0.2	44.1
5 Walt Disney Co.	43.8	21.0	22.9
6 AOL Time Warner Inc.	41.7	9.4	32.3
7 DaimlerChrysler AG Dealer Assn.	40.5	—	40.5
8 Home Depot Inc.	39.9	—	39.9
9 News Corp. Ltd. (Fox TV, 20th Century Fox)	36.5	4.4	32.1
10 General Motors Corp.	35.8	6.8	29.0
11 Sears Roebuck & Co.	33.1	16.8	16.3
12 JC Penney Co. Inc.	32.8	19.3	13.5
13 Signet Group PLC (Jared, Kay Jewelers, etc.)	31.3	—	31.3
14 Procter & Gamble Co.	30.7	22.5	8.2
15 Berkshire Hathaway Inc.	29.3	11.2	18.1
16 Pfizer Inc.	27.8	26.3	1.5
17 Target Group (Target, Dayton Hudson, Marshall Field's)	27.2	2.3	25.9
18 State Farm Mutual Auto Insurance Co.	23.9	10.9	13.0
19 Philip Morris Cos. Inc. (Kraft, Miller Brewing, etc.)	23.6	13.5	10.1
20 Diageo PLC (Burger King, various alcoholic beverages)	23.3	0.2	23.1
21 Volkswagen AG Dealer Assn.	22.5	—	22.5
22 Autozone Inc.	21.6	18.8	2.8
23 Ford Motor Co. Dealer Assn.	20.9	—	20.9
24 Ford Motor Co.	20.9	12.8	8.1
25 California, State of	20.3	—	20.3
26 General Motors Corp. Dealer Assn.	19.1	—	19.1
27 AllTel	18.9	—	18.9
28 AT&T Corp.	18.8	4.5	14.3
29 Vivendi Universal SA	18.7	0.6	18.1
30 DaimlerChrysler AG	18.2	4.9	13.3
31 Wells Fargo & Co.	17.8	—	17.8
32 U.S. Government	17.5	10.1	7.4
33 Tandy Corp. (Radio Shack)	17.4	11.5	5.9
34 Sprint Corp.	17.0	—	17.0
35 EchoStar Communications Corp.	16.8	8.0	8.8
36 McDonald's Corp.	16.8	9.3	7.5
37 Kohl's Corp.	16.0	—	16.0
38 Hyundai Corp. Dealer Assn.	15.7	—	15.7
39 Advantica Restaurant Group (Denny's)	15.6	—	15.6
40 General Electric Co.	15.1	6.1	9.0

Source: Competitive Media Reporting — LNA/MediaWatch Service — © 2002
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Advertising Expenditures

Radio's Top 40 National Network & Spot Advertisers Brand

The Competitive Media Report ad spending data includes network and spot Radio spending only. Many national advertisers — such as Budweiser and McDonald's — place the majority of their Radio advertising directly with stations and not through a network or spot representative company. Therefore, CMR is unable to capture these advertisers' true Radio expenditures. Direct spending by many national advertisers substantially exceeds the amounts spent by the advertisers listed in the CMR Top 100.

Figures shown in millions of dollars.

National Brand Advertiser	Total	Network	Nat'l. Spot
1 Verizon Wireless Wireless Service	\$52.1	\$ 4.8	\$47.3
2 Cingular Wireless Service	41.7	—	41.7
3 Home Depot Home Center	39.5	—	39.5
4 AT&T Wireless Store	22.4	—	22.4
5 Autozone Parts Store	21.6	18.8	2.8
6 SBC Communications Internet Services	19.8	—	19.8
7 Burger King Restaurant	19.7	0.2	19.5
8 Radio Shack Electronics Stores	17.4	11.5	5.9
9 Wells Fargo Bank Consumer Services	16.8	—	16.8
10 Dish Network Satellite System	16.7	8.0	8.7
11 Dodge Dealer Assn. Various Autos and Trucks	16.7	—	16.7
12 Kohl's Dept. Stores — Multiple Products	16.0	—	16.0
13 Hyundai Dealer Assn. Various Autos and Trucks	15.7	—	15.7
14 Fox TV Network Entertainment Div.	15.7	—	15.7
15 Audi Dealer Assn. Various Autos	15.7	—	15.7
16 Denny's Restaurants	15.5	—	15.5
17 Jared's Jewelers	14.9	—	14.9
18 Epson Printers	14.3	9.2	5.1
19 State Farm Insurance — Various	14.2	10.9	3.3
20 Nextel Cellular Service	13.9	—	13.9
21 AT&T Wireless Phone Centers	13.8	—	13.8
22 Toys 'R' Us Stores	13.8	1.1	12.7
23 Alltel Communications — Residential	13.6	—	13.6
24 Lifetime Cable TV Paid Promos	13.3	13.3	—
25 Priceline.com Pricing Service Online	12.6	12.2	0.4
26 1-800-CALL-ATT	11.9	4.3	7.6
27 Office of National Drug Control	11.9	7.7	4.2
28 Red Lobster Restaurants	11.7	11.0	0.7
29 JC Penney Department Stores — Sales Announcements	11.5	11.2	0.3
30 Sprint PCS Digital Service	11.5	—	11.5
31 GEICO Auto Insurance	11.5	11.2	0.3
32 Chrysler Plymouth Dealer Assn. Various Autos, Trucks	11.4	—	11.4
33 Safeway Food Stores	11.3	—	11.3
34 XO Web Hosting Internet Services	11.3	—	11.3
35 Showtime Cable TV	11.2	6.3	4.9
36 McDonald's Restaurants	11.0	5.9	5.1
37 Travelocity Travel Services Online	10.7	9.2	1.5
38 7-Eleven Food Stores	10.7	—	10.7
39 Joint-Ritis Arthritis Rub	10.7	8.6	2.1
40 Albertson's Food Stores	10.6	—	10.6

Source: Competitive Media Reporting — LNA/Media Watch Service — ©2002
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"Bud Light uses Radio to reach not only the general market of contemporary adults 21-27, but also Latinos and African-Americans. It's important to be sensitive to the different language strata within the Latin market, taking into account that Spanish is both a primary and secondary language within that culture." Peter McLoughlin, VP Corporate Media, Anheuser-Busch

Advertising Expenditures

“Radio is a great medium for our younger target. It gives AT&T the flexibility to blanket the country with their message while simultaneously pinpointing those local markets with the strongest history of collect-calling usage. Network Radio maximizes our efficiency, and spot Radio allows us to emphasize our best potential markets.”
Karen Milke, Media Director, AT&T

Top 30 National Network & Spot Radio Categories

The Competitive Media Report ad spending data includes network and national spot Radio only. Many national advertisers — such as Budweiser and McDonald’s — place the majority of their Radio advertising directly with stations and not through a network or spot representative company. Therefore, CMR is unable to capture these advertisers’ true Radio expenditures. Direct spending by many national advertisers substantially exceeds the amounts spent by the advertisers listed in the CMR Top 100.

The “Retail” listing refers to Radio advertising purchased by national retailers, such as department stores. All subsequent listings refer to Radio advertising purchased by manufacturers and/or distributors for that category.

Figures shown in millions of dollars.

2001 Rank		2001 Revenue	2000 Revenue	2000 Rank	% Change
1	Retail	\$466.6	\$482.3	1	- 3.3%
2	Media & Advertising	273.6	390.3	2	- 29.9%
3	Automotive, Automotive Access. & Equip.	268.6	288.7	3	- 7.0%
4	Telecommunications	241.0	282.4	4	- 14.7%
5	Financial	157.6	222.9	5	- 29.3%
6	Restaurants	143.4	150.0	8	- 4.4%
7	Medicines & Proprietary Remedies	124.3	129.0	11	- 3.6%
8	Government, Politics & Organizations	115.5	173.4	7	- 33.4%
9	Miscellaneous Services & Amusements	104.5	133.7	10	- 21.8%
10	Insurance & Real Estate	104.4	147.7	9	- 29.3%
11	Department Stores	103.0	111.0	13	- 7.2%
12	Public Transportation, Hotels & Resorts	102.1	127.4	12	- 19.9%
13	Computers, Software, Internet Nec	87.8	189.4	6	- 53.6%
14	Dairy, Produce, Meat & Bakery Goods	60.3	65.3	15	- 7.7%
15	Beverages	48.3	53.2	17	- 9.2%
16	Confectionery & Snacks	48.2	58.5	16	- 17.6%
17	Audio & Video Equipment & Supplies	43.1	48.7	18	- 11.5%
18	Direct-Response Companies	42.8	34.1	24	+ 25.5%
19	Automotive Dealers & Services	41.3	47.4	19	- 12.9%
20	Horticulture & Farming	33.2	35.3	23	- 5.9%
21	Beer & Wine	32.4	40.6	20	- 20.2%
22	Prepared Foods	31.5	35.4	21	- 11.0%
23	Gasoline, Lubricants (Trans) & Fuels	28.5	35.3	22	- 19.3%
24	Discount Department & Variety Stores	28.2	32.2	25	- 12.4%
25	Liquor	24.3	21.0	27	+ 15.7%
26	Business & Technology	20.5	70.0	14	- 70.7%
27	Personal Hygiene & Health	20.1	19.7	28	+ 2.0%
28	Schools, Camps, Seminars	19.3	19.4	29	- 0.5%
29	Manufacturing: Materials & Equipment/ Freight/Industrial Development	14.9	6.6	42	+ 125.8%
30	Ingredients, Mixes & Seasonings	14.3	29.1	26	- 50.9%

Source: Competitive Media Reporting — LNA/MediaWatch Multi-Media Service — © 2002
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Media Mix

Heavy Internet users love to listen to Radio while they're online. And why shouldn't they? Radio is the ideal companion for online activity — everything from Web surfing and information-gathering to e-shopping and communicating by e-mail and instant-messaging networks. It's no wonder that every day, Radio reaches 94 percent of heavy Internet users!

Radio and the Internet

(13.0 or more online hours per week)

Read: Radio reaches 94.1% of heavy Internet users.

24 Hours  94.1%

Heavy Internet users listen to Radio during these time periods:

5-10 a  60.8%

10 a-3 p  43.3%

3-7 p  59.8%

7 p-Midnight  23.5%

Source: The Media Audit, March 2001-February 2002 National Report — Radio

- There are more than 10,300 U.S. Radio stations (commercial and non-commercial) with Web sites, of which 4,500 were streaming their content as of April 2002. (1)
- As of January 2002, one in four Americans had listened to Radio online. (2)
- 45% of those who listen to Radio stations online listen to stations from their local area, down from 52% a year ago. Forty-one percent listen to stations from other parts of the U.S., up from 37% last year; and 9% listen to stations from other countries, up from 7% last year. (2)
- Internet users are 51.44% female and 48.46% male. However, men spend more time online during the average month than women (12:24 versus 10:34, respectively), with men logging 22 sessions per month to 20 for women. (3)
- Monday is the busiest day of the week on the Web, with 15.04% of visits taking place that day. Traffic flow by other days of the week: Friday, 14.67%; Thursday, 14.50%; Wednesday, 14.37%; Tuesday, 14.27%; Sunday, 13.68%; Saturday, 13.47%. (4)
- 72% of Americans access the Internet from any location — at home, at work, at a public library or at school. (2)
- 52% of African-Americans, 51% of Hispanics and 65% of whites own computers at home; 46% of African-American households, 44% of Hispanic households and 57% of white households currently are online. (5)

Sources: (1) BRS Media Inc., 4/02; (2) Arbitron/Edison Media Research Internet 8, *Advertising us. Subscription — Which Streaming Model Will Win?*, 1/02; (3) Nielsen NetRatings, 1/02, as reported in the *Wall Street Journal*, 4/15/02; (4) websidestory.com, 5/29/02; (5) Knowledge Networks/SRI, as reported in *Adweek*, 7/1/02

“Radio is, believe it or not, one of the top ways to reach teens that we’ve found in our research. Teenagers are really looking for a sense of community, and that’s one thing that local Radio stations can really provide.” *Michael Wood, Vice President, Teenage Research Unlimited*

Media Mix

"We had a large crowd on Sunday, and just about everyone said they had come to visit because of the ads they had heard on the Radio." *Jerry Jennings, Co-owner, Jennings Construction, Statesboro, GA*

Newspaper readership among young Americans is at an all-time low. A significant percentage of persons age 12+ don't read the paper at all; among those who do, most look at only some sections and discard the rest unread. That's a significant gap in newspaper-ad coverage — especially since many such ads run only once. Let Radio fill that gap: Strengthen your newspaper ad's impact among consumers who saw it, and reach those who didn't.

Radio Reaches Newspaper Readers and Non-Readers

- Radio reaches 91.3% of the 51.9% of readers who usually read the Front Page section, and reaches 87.7% of the 48.1% who don't usually read the Front Page section.
- Radio reaches 89.0% of the 29.1% of readers who usually read the TV Schedule/Book section, and reaches 89.5% of the 70.9% who don't usually read the TV Schedule/Book section.
- Radio reaches 92.6% of the 28.1% of readers who usually read the Sports section, and reaches 88.4% of the 71.9% who don't usually read the Sports section.
- Radio reaches 89.5% of the 23.8% of readers who usually read the Food section, and reaches 89.6% of the 76.2% who don't usually read the Food section.
- Radio reaches 91.9% of the 27.5% of readers who usually read the Business section, and reaches 88.7% of the 72.5% who don't usually read the Business section.
- Radio reaches 92.0% of the 22.5% of readers who usually read the Lifestyle/Fashion section, and reaches 88.9% of the 77.5% who don't usually read the Lifestyle/Fashion section.
- Radio reaches 92.6% of the 9.8% of readers who usually read the Auto Classified section, and reaches 89.2% of the 90.2% who don't usually read the Auto Classified section.
- Radio reaches 92.4% of the 9.7% of readers who usually read the Employment Classified Ads, and reaches 89.5% of the 90.3% who don't usually read the Employment Classified Ads.
- Radio reaches 91.7% of the 17.2% of readers who usually read the Real Estate/Home section, and reaches 89.1% of the 82.8% who don't usually read the Real Estate/Home section.

Source: The Media Audit, March 2001 — February 2002 National Report
(Based on Daily Newspaper Readership estimates)

Media Mix

Most cable-TV subscribers get more than 54 channels. Satellite subscribers may have hundreds. With such a huge list to choose from, the TV viewing audience is so splintered it's hard to reach enough of your target consumers. Radio, on the other hand, has several peak dayparts to TV's one — and strong overall listenership. This makes Radio a logical partner for TV advertising.

Radio Reaches TV Viewers and Light TV Viewers

- Radio reaches 89.3% of the 29.1% of adults who watch TV 7-9 a.m., and reaches 89.7% of the 70.9% of adults who don't watch 7-9 a.m.
- Radio reaches 86.6% of the 26.2% of adults who watch TV 9 a.m.-4 p.m., and reaches 90.6% of the 73.8% of adults who don't watch 9 a.m.-4 p.m.
- Radio reaches 87.4% of the 33.8% of adults who watch TV 4-5 p.m., and reaches 90.3% of the 66.2% of adults who don't watch 4-5 p.m.
- Radio reaches 89.3% of the 44.2% of adults who watch TV 5 p.m.-prime, and reaches 89.8% of the 55.8% of adults who don't watch 5 p.m.-prime.
- Radio reaches 90.9% of the 59.8% of adults who watch primetime TV, and reaches 87.6% of the 40.2% of adults who don't watch primetime TV.
- Radio reaches 90.4% of the 29.8% of adults who watch late evening local news, and reaches 89.2% of the 70.2% of adults who don't watch late evening local news.

Source: The Media Audit, March 2001 — February 2002 National Report
(Based on Daily Television Viewing estimates)

“Within two days, we completely sold out our tickets due to the Radio spots we ran on KCHT!”
Dotie Hiatt, Owner, Bakersfield City Hostess Bridal & Expo Show,
Bakersfield, CA

Media Mix

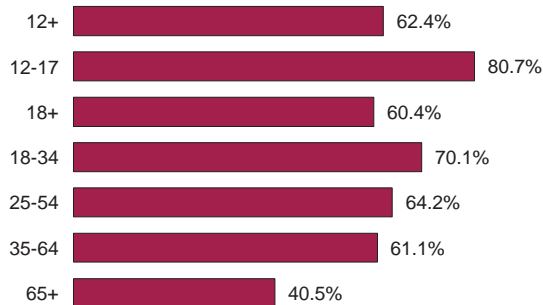
“Radio advertising has been a driving force behind our success. It is a very powerful medium. Radio commercials are creative. People talk about my commercials and ask about my products. I advertise on the Radio because Radio gets results!” Marc Gelfand, Owner, E & G Auto Parts, Brockport, PA

A TV spot, even in primetime, doesn't necessarily hit all consumers with the same impact. Radio's reach against TV viewers of all types — light, medium, and heavy — not only boosts the effectiveness of TV ads that reached the target but also may rope in consumers who missed the TV ads entirely.

Radio is Strong During TV's Primetime

Read: Each week during TV's primetime viewing hours, Radio reaches 62.4% of persons 12 and older.

	Persons	Men	Women
• 12+	62.4%	62.9%	62.0%
• 12-17	80.7%	76.5%	85.0%
• 18+	60.4%	61.3%	59.5%
• 18-34	70.1%	70.9%	69.3%
• 25-54	64.2%	64.8%	63.5%
• 35-64	61.1%	66.5%	61.7%
• 65+	40.5%	42.6%	39.1%



Source: RADAR[®] 71, Fall 2001, © Copyright Arbitron
Monday-Sunday 7 p.m.-midnight Cume Audience

Read: Radio reaches 64.8% of persons 12+ who are light primetime TV viewers.

	Light - 1 Hour or Less	Medium - 1-2.5 Hours	Heavy - 2.5+ Hours
Persons			
• 12+	64.8%	63.2%	59.3%
• 12-17	80.5%	80.5%	81.3%
• 18+	62.2%	61.6%	57.6%
• 18-34	72.2%	72.7%	64.2%
• 25-54	63.9%	63.9%	64.7%
• 35-64	60.8%	60.2%	62.4%
• 65+	39.5%	43.3%	39.2%

Source: RADAR[®] 71, Fall 2001, © Copyright Arbitron
Monday-Sunday 7 p.m.-midnight Cume Audience

Media Mix

Radio's powerful branding capabilities are verified in competitive media test scores from The PreTesting Company across a wide range of key product categories. Radio demonstrates a distinctive edge in key message communication to consumers. Tests also demonstrate that Radio, when combined with television, offers superior message recall to dual television exposures.

Radio Outscores TV in Key-Message Communication in a Competitive Environment

Read: In the PreTesting survey, automotive ads on Radio were recalled 39% of the time, versus 24% of the time for automotive ads on TV.

	Radio (:60s)	TV (:30s)
• Auto	39%	24%
• Beer	35%	22%
• Direct-to-Consumer Drug	62%	45%
• Fast-Food	46%	38%
• Financial Services	45%	35%
• Health/Beauty Aids	47%	31%
• Internet Services	36%	19%
• Long-Distance Services	41%	27%

Radio/TV Synergy

Radio helps your TV message work harder ... and better! In studies comparing recall of the main message of two television spots against the message in one television spot with one Radio spot, the Radio/TV mix delivered superlative results every time.

	Main Message 2 TV Spots	Message 1 TV/1 Radio Spot
• Auto	23%	36%
• Beer	04%	17%
• Direct-to-Consumer Drug	31%	49%
• E-Businesses	09%	24%
• Travel	17%	32%

The PreTesting Company uses pairs of Radio and TV commercials in real-life settings and has determined that Radio executions often outperform those on television. Unaware of the purpose of the tests, target audience participants are asked to recall specific main message after their selection of either, choosing from three different television programs or four different Radio stations (they could change channels/stations at will throughout the presentations, which are approximately 45 minutes in length).

Source: PreTesting Company, 2000-2001

"Radio is a medium that allows an advertiser to reach a targeted audience, and that's valuable... Radio is an exceptional medium in that it can evoke emotion and reach a consumer in ways that print advertising cannot." Gary Shapiro, President, Consumer Electronics Association

Radio Formats

“Radio has the unique ability to talk very personally to individuals and bring them into the restaurant, whether it’s with on-air mentions that draw people to a specific chain or a remote that pulls people to a specific location. That can be really important to the smaller chains that may have only a few locations.” *Jeff Davis, Executive VP, Sandelman & Associates*

Radio Delivers Reach and Frequency

GRPs do not explain how many people are reached, or what their average exposure is. Reach and frequency show both parameters. Therefore, the combination of reach and frequency can tell the user if his/her Radio campaign was reaching enough of the target audience effectively and whether the average listener was exposed to the message an adequate number of times.

Reach and frequency (R&F) — An industry-accepted method of judging the potential effectiveness of a Radio advertising schedule. R&F reflects “how many” people have heard a commercial and “how often” the average listener heard it. Both of the components (reach and frequency) are crucial for a successful Radio campaign.

Reach — The number of different people who hear a commercial campaign. Each person reached is counted only once regardless of how many times he or she is exposed to a given schedule. Reach is expressed as the percent of the target audience reached with a given Radio schedule.

Frequency — The average number of times a person in the target audience is exposed to a given schedule.

A user who wishes to hold GRPs constant can affect his/her reach and frequency. Since GRPs are equal to reach multiplied by frequency, if reach is increased, frequency will decline. Conversely, if GRPs are constant and frequency is increased, reach will decline.

The ratio of reach to frequency can be manipulated in different ways:

To increase reach and decrease frequency:

- Increase the number of stations used and decrease the number of messages per station.
- Utilize new dayparts on existing stations.

To increase frequency and decrease reach:

- Decrease the number of stations used and add spots on the remaining stations.
- Decrease the number of dayparts used.

Radio Formats

There's a Radio Format For Everyone

The following pages illustrate the audience composition for many of the more popular Radio formats across the country. These are, of course, national averages. Individual market percentages may vary.

Read: The News/Talk/Information format captures a 17.6% share of Radio listening among persons 12 and older.

Format	12+ Share
• News/Talk/Information	17.6%
• Adult Contemporary (AC)	14.6%
• Contemporary Hits Radio (CHR)	11.7%
• Urban	9.1%
• Country	8.4%
• Oldies	7.8%
• Hispanic	7.2%
• Alternative	5.0%
• Classic Rock	4.5%
• NAC/Smooth Jazz	3.0%
• Album Rock (AOR)	2.8%
• Adult Standards	3.0%
• Religious	2.6%
• Classical	1.5%
• Remaining Formats	1.9%

Source: Arbitron American Radio Trends — Fall 2001; 94 Continuous Measurement Markets; Monday-Sunday 6 a.m.-midnight average quarter-hour share.

Total U.S. 12+ Listening Audience:

225,568,000

Source: RADAR[®] 71 Fall 2001, [©] Copyright Arbitron
(Monday-Sunday, 24 Hours, based on weekly cume)

“Radio’s fire power is unlimited. It demonstrates over and over that it can get tremendous results for an advertiser who uses fresh, out-of-the-box thinking in the creative.”
Marty Donahue, Creative Director, Hill, Holiday, Connors, & Cosmopolos

Radio Formats

This page illustrates the audience composition for many of the more popular Radio formats across the country among the younger demographic groups. These are national averages; individual market percentages may vary.

There's a Radio Format For Everyone

Read: The Contemporary Hits Radio (CHR) format captures a 43.7% share of Radio listening among persons 12-17.

Format	12-17 Share	Format	18-24 Share
Contemporary Hits Radio (CHR)	43.7%	Contemporary Hits Radio (CHR)	26.2%
Urban	16.3%	Urban	13.5%
Alternative	10.5%	Adult Contemporary (AC)	12.1%
Adult Contemporary (AC)	6.9%	Alternative	10.2%
Hispanic	4.7%	Hispanic	9.2%
Country	4.3%	Country	6.3%
Oldies	2.6%	News/Talk	4.1%
Album Rock (AOR)	2.1%	Classic Rock	4.0%
News/Talk/Information	1.8%	Album Rock (AOR)	3.9%
Classic Rock	1.6%	Oldies	3.9%
Religious	1.6%	Religious	1.3%
Remaining Formats	3.5%	NAC/Smooth Jazz	0.8%
		Remaining Formats	4.5%

Format	24-35 Share	Format	35-44 Share
Adult Contemporary (AC)	15.8%	Adult Contemporary (AC)	17.6%
Contemporary Hits Radio (CHR)	14.3%	News/Talk/Information	14.7%
Urban	11.0%	Urban	9.5%
News/Talk/Information	10.4%	Contemporary Hits Radio (CHR)	8.3%
Hispanic	9.8%	Country	8.3%
Alternative	8.5%	Classic Rock	8.0%
Country	7.2%	Oldies	7.9%
Oldies	5.4%	Hispanic	7.8%
Classic Rock	5.0%	Alternative	4.5%
Album Rock (AOR)	4.8%	Album Rock (AOR)	4.1%
Religious	2.1%	NAC/Smooth Jazz	3.3%
NAC/Smooth Jazz	1.6%	Religious	2.9%
Classical	0.5%	Classical	0.8%
Remaining Formats	3.6%	Remaining Formats	2.3%

Source: Arbitron American Radio Trends — Fall 2001; 94 Continuous Measurement Markets; Monday-Sunday 6 a.m.-midnight average quarter-hour share.

"All print can do is convey a price and a picture. Radio is a much more exciting way to communicate. With Radio, an audience can hear what a dealer is trying to do, and it gets them motivated to come in and see all the possibilities." Brad Parker, Franchisee, La-Z-Boy Furniture

Radio Formats

This page illustrates the audience composition for many of the more popular Radio formats across the country among the older demographic groups. These are national averages; individual market percentages may vary.

There's a Radio Format for Everyone

Read: The News/Talk format captures a 20.5% share of Radio listening among persons 45-54.

Format	45-54 Share	Format	55-64 Share
News/Talk/Information	20.5%	News/Talk/Information	28.1%
Adult Contemporary (AC)	17.5%	Adult Contemporary (AC)	15.2%
Oldies	13.7%	Country	12.6%
Country	9.2%	Oldies	12.3%
Alternative	7.2%	Hispanic	5.9%
Urban	6.0%	Urban	5.7%
Hispanic	5.6%	NAC/Smooth Jazz	4.5%
Classic Rock	5.6%	Adult Standards	3.9%
NAC/Smooth Jazz	5.1%	Classical	3.2%
Contemporary Hits Radio (CHR)	4.4%	Religious	3.1%
Religious	2.9%	Contemporary Hits Radio (CHR)	1.9%
Album Rock (AOR)	1.9%	Classic Rock	1.7%
Classical	1.6%	Alternative	0.8%
Adult Standards	1.0%	Album Rock (AOR)	0.6%
Remaining Formats	3.4%	Remaining Formats	0.5%

Format	65+ Share
News/Talk/Information	41.5%
Adult Standards	12.4%
Country	9.7%
Adult Contemporary (AC)	9.3%
Oldies	5.1%
Classical	4.7%
Hispanic	4.7%
Religious	3.8%
NAC/Smooth Jazz	3.4%
Urban	2.8%
Contemporary Hits Radio (CHR)	1.1%
Classic Rock	0.5%
Album Rock	0.2%
Alternative	0.2%
Remaining Formats	0.6%

Source: Arbitron American Radio Trends — Fall 2001; 94 Continuous Measurement Markets; Monday-Sunday 6 a.m.-midnight average quarter-hour share.

"It's tangible, measurable success — even our direct mail offers increase significantly when we run radio, versus when we don't." *Phyllis Wasserman, Vice President of Advertising, Staples*

Radio Formats

With dozens of formats and thousands of Radio stations nationwide, there's a station that's just right for you. In 2002, there are 10,571 commercial Radio stations on the air in the U.S. Below is a list of the most popular Radio formats and their station counts.

Radio's Most Popular Formats

Rank	Format	#Stations
1	Country	2133
2	News/Talk	1177
3	Oldies	814
4	Adult Contemporary	716
5	Hispanic	596
6	Adult Standards	559
7	Top 40	472
8	Hot AC	395
9	Sports	380
10	Classic Rock	378
11	Soft Adult Contemporary	346
12	Religion (Teaching, Variety)	335
13	Rock	279
14	Black Gospel	257
15	Classic Hits	255
16	Southern Gospel	239
17	R&B	194
18	Contemporary Christian	164
19	Modern Rock	146
20	Urban AC	118
21	Ethnic	99
22	Alternative Rock	97
23	Jazz	82
24	R&B Adult/Oldies	78
25	Modern AC	59
26	Gospel	52
27	Pre-Teen	50
28	Variety	42
29	Classical	32
30	Easy Listening	21
31	Other/Not Available	6

Source: M Street Corp., © 2002

“Small-business owners work long, hard hours, and they have a lot less time for TV viewing. Many of them listen to Radio at work or spend a significant amount of time on the road where they are a captive audience. At IBM, we are committed to continuing to use radio and to experiment with different uses of it.” *James Garrity, Dir. of Advertising, IBM*

Statistics

Vital U.S. Statistics

Demographic Characteristics

Read: 48% of the total U.S. population lives in the top 50 metropolitan areas.

			(000s)
	Total U.S. Population	% of Population	283,876.4
	Top 50 Metro Areas	48%	136,331.3
New England	Top 100 Metro Areas	62%	176,296.1
CT, ME, MA,	Top 200 Metro Areas	74%	211,000.5
NH, RI, VT			
	Population by Age Groups		
East South Central	0-17	26%	72,901.6
AL, KY, MS, TN	18-24	9%	25,919.1
	25-34	14%	38,980.4
Middle Atlantic	35-49	23%	66,262.5
NJ, NY, PA	50+	28%	79,812.8
	Population by Region		
West South Central	New England	5%	13,976.3
AR, LA, OK, TX	East South Central	6%	17,161.4
	Middle Atlantic	14%	39,827.4
East North Central	West South Central	11%	31,800.5
IL, IN, MI, OH, WI	East North Central	16%	45,389.3
	Mountain	7%	18,511.1
Mountain	West North Central	7%	19,357.0
AZ, CO, ID, MT,	Pacific	16%	45,468.4
NM, NV, UT, WY	South Atlantic	18%	52,385.0
	Total Number of U.S. Households		106,206.0
West North Central	Top 50 Metro Areas	48%	50,713.2
IA, KS, MN, MO,	Top 100 Metro Areas	62%	65,742.8
ND, NE, SD	Top 200 Metro Areas	74%	78,768.3
	U.S. Households by Region		
Pacific	New England	5%	5,341.3
AK, CA, HI, OR, WA	East South Central	6%	6,576.0
	Middle Atlantic	14%	14,860.2
South Atlantic	West South Central	11%	11,647.4
DE, DC, FL, GA,	East North Central	16%	17,138.6
MD, NC, SC, VA, WV	Mountain	7%	6,969.0
	West North Central	7%	7,478.4
	Pacific	15%	16,021.2
	South Atlantic	19%	20,173.9

“Before using Radio, we attracted 300 to 400 people to our open houses. After Radio, we started seeing 600 or 700! Our enrollment has gone up almost 11 percent since we’ve begun using Radio.” Stephen Dougherty, Director of Recruiting, Dowling College

Statistics

Vital U.S. Statistics

General Characteristics

Read: 63% of the total U.S. African American population lives in the top 50 metropolitan areas.

		(000s)	
U.S. African American Population		36,832.8	New England
Top 50 Metro Areas	63%	23,042.5	CT, ME, MA,
Top 100 Metro Areas	76%	27,973.0	NH, RI, VT
Top 200 Metro Areas	85%	31,223.4	
U.S. Hispanic Population		36,354.7	East South Central
Top 50 Metro Areas	74%	27,034.1	AL, KY, MS, TN
Top 100 Metro Areas	84%	30,551.7	
Top 200 Metro Areas	90%	32,681.2	Middle Atlantic
			NJ, NY, PA
U.S. Asian & Pacific Islander Population		12,298.5	West South Central
Top 50 Metro Areas	79%	9,672.3	AR, LA, OK, TX
Top 100 Metro Areas	87%	10,758.9	
Top 200 Metro Areas	93%	11,465.2	
Total U.S. Effective Buying Income (EBI)		\$5.23 Trillion	East North Central
Per Capita EBI		\$18,426.0	IL, IN, MI, OH, WI
Average Household EBI		\$49,252.0	
Median Household EBI		\$39,129.0	Mountain
			AZ, CO, ID, MT,
Percent of Total U.S. EBI, by Region			NM, NV, UT, WY
New England		5.9%	West North Central
East South Central		5.2%	IA, KS, MN, MO,
Middle Atlantic		15.3%	ND, NE, SD
West South Central		10.1%	
East North Central		16.2%	Pacific
Mountain		6.0%	AK, CA, HI, OR, WA
West North Central		6.7%	
Pacific		16.7%	South Atlantic
South Atlantic		17.9%	DE, DC, FL, GA,
			MD, NC, SC, VA, WV
Average Household EBI, by Region			
New England		\$57,531.00	
East South Central		\$41,457.00	
Middle Atlantic		\$53,925.00	
West South Central		\$45,646.00	
East North Central		\$49,338.00	
Mountain		\$44,766.00	
West North Central		\$46,662.00	
Pacific		\$54,618.00	
South Atlantic		\$46,415.00	

Source: Sales & Marketing Management Survey of Buying Power, September 2001

"We have processed as many loans during our first four months of Radio advertising than we did during the entire [last] year! Now that's an impressive result." Mark McGwire, Vice President, Cook Financial Services

2003 Broadcast Calendar

Radio Advertising Bureau

1320 Greenway Drive,

Suite 500

Irving, TX 75038

<http://www.rab.com>

Member Service HotLine:

1-800-232-3131

January

	M	T	W	TH	F	SA	SU
1	30	31	1	2	3	4	5
2	6	7	8	9	10	11	12
3	13	14	15	16	17	18	19
4	20	21	22	23	24	25	26

February

5	27	28	29	30	31	1	2
6	3	4	5	6	7	8	9
7	10	11	12	13	14	15	16
8	17	18	19	20	21	22	23

March

9	24	25	26	27	28	1	2
10	3	4	5	6	7	8	9
11	10	11	12	13	14	15	16
12	17	18	19	20	21	22	23
13	24	25	26	27	28	29	30

April

14	31	1	2	3	4	5	6
15	7	8	9	10	11	12	13
16	14	15	16	17	18	19	20
17	21	22	23	24	25	26	27

May

18	28	29	30	1	2	3	4
19	5	6	7	8	9	10	11
20	12	13	14	15	16	17	18
21	19	20	21	22	23	24	25

June

22	26	27	28	29	30	31	1
23	2	3	4	5	6	7	8
24	9	10	11	12	13	14	15
25	16	17	18	19	20	21	22
26	23	24	25	26	27	28	29

July

	M	T	W	TH	F	SA	SU
27	30	1	2	3	4	5	6
28	7	8	9	10	11	12	13
29	14	15	16	17	18	19	20
30	21	22	23	24	25	26	27

August

31	28	29	30	31	1	2	3
32	4	5	6	7	8	9	10
33	11	12	13	14	15	16	17
34	18	19	20	21	22	23	24
35	25	26	27	28	29	30	31

September

36	1	2	3	4	5	6	7
37	8	9	10	11	12	13	14
38	15	16	17	18	19	20	21
39	22	23	24	25	26	27	28

October

40	29	30	1	2	3	4	5
41	6	7	8	9	10	11	12
42	13	14	15	16	17	18	19
43	20	21	22	23	24	25	26

November

44	27	28	29	30	31	1	2
45	3	4	5	6	7	8	9
46	10	11	12	13	14	15	16
47	17	18	19	20	21	22	23
48	24	25	26	27	28	29	30

December

49	1	2	3	4	5	6	7
50	8	9	10	11	12	13	14
51	15	16	17	18	19	20	21
52	22	23	24	25	26	27	28



Radio Marketing Guide & Fact Book for Advertisers

2002 - 2003 Edition

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