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Effects of Local-Market Radio Ownership Concentration on Radio Localism,
the Public Interest, and Listener Opinions and Use of Local Radio

by

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EFFECTS OF LOCAL-MARKET RADIO OWNERSHIP CONCENTRATION
ON RADIO LOCALISM, THE PUBLIC INTEREST, AND
LISTENER OPINIONS AND USE OF LOCAL RADIO

Abstract

The Telecommunications Act of 1996 and ensuing radio ownership consolidation are blamed for harming *radio localism* and *the public interest*. Prior studies examined impacts attributed to consolidation on format diversity and other measures; however, none explored influences on listener perceptions. The present research sought to determine effects of local-market ownership concentration on listener opinions and use of radio—potentially indicative of stations' localism and public service—by surveying listeners in markets categorized by ownership concentration levels. Findings suggest concentration does not strongly influence perceptions; however, overall results indicate potentially negative consequences from local and national consolidation on amounts of local music, news, and public-service programming; live-local programming; and station responsiveness. Findings suggest policy change that could enhance radio localism.

Keywords: localism, media ownership consolidation, public interest, radio, Telecommunications Act of 1996

Dead air in broadcasting used to refer only to momentary program interruptions marked by silence. To some critics in today's age of media ownership consolidation, *dead air* describes the on-air fare of a *nonsilent* variety: radio conglomerates' programming that is depicted as duplicative, formulaic, homogenized, and unimaginative. In simpler terms: automated, sound-alike, *cookie-cutter* formats from *town to town, up and down the dial* across America.

Some critics argue that corporate-run local radio is increasingly devoid of the vibrancy of *localism* (a term encapsulating radio's unique and inherent qualities fostering its ability to serve the public interest in local communities, such as local announcers in local studios talking to local audiences). Portraying localism as all but dead and laying blame on ownership consolidation, these experts contend that local radio is losing relevance among listeners facing myriad choices in the digital age.

That is one side of the story. Critics on the other side typically posit that today's surfeit of new media—the same media challenging local radio for relevance—justifies a competitive free market (a euphemism, some would argue, for deregulation) in the best interests of consumers and the public good. Besides, they contend, any loss of *radio localism* or harm to *the public interest* from ownership consolidation is indeterminate because both are ambiguous concepts. While the decades-long bickering over media ownership plays on like a broken record—growing more coarse since enactment of the Telecommunications Act of 1996—few scholars have sought the opinions of the single group that might offer the most valuable insight into possible effects of radio ownership consolidation: listeners.

Background and Literature Review

While many ascribe the current state of local radio and *radio localism* principally to effects of ownership consolidation wrought by deregulation, conditions might be more accurately depicted as the product of a confluence of forces. Impacting local and national radio markets, *radio localism*, and, many argue, *the public interest* include, in combination:

1. Deregulation facilitated by a favorable (for *certain* stakeholders) legislative climate, together with unforeseen (by *some* lawmakers and regulators) consequences concerning the resultant amount of consolidation
2. Varying interpretations of *the public interest* and *radio localism*
3. The introduction of new technologies

Deregulation

Early U.S. broadcast regulators established local-radio licensing ostensibly to control and minimize signal interference among the rapidly growing number of radio stations utilizing the finite spectrum. While individual licensees were granted the privilege to use (but not own) assigned frequencies in designated local communities—giving radio its distinct local character (Sauls & Greer, 2007)—the government, through authority given to the Federal Radio Commission and its successor agency, the Federal Communications Commission (FCC), did not relinquish its oversight of the scarce, *public* resource. The Communications Act of 1934, which established the FCC, mandated station operation in *the public interest, convenience, or necessity*, and statutes imposed limits on local and national ownership to prevent *concentration of control*

contrary to the public interest. The justification for ownership caps became known as the *scarcity rationale* (Berresford, 2005; Horwitz, 2007; Tillinghast, 2000; Zarkin & Zarkin, 2006). With longstanding goals of promoting the values of competition, diversity, and localism, the FCC continues to regulate today's more than 14,800 radio stations (Federal Communications Commission, 2008b). As recently as 2008, the FCC acknowledged *the concept of localism* as "a cornerstone of broadcast regulation" (Federal Communications Commission, 2008a, p. 4); however, some critics question the applicability of the scarcity rationale in light of media proliferation in the digital age (Goodman, 2007).

Incremental deregulation through the years—accelerated during the 1980s (Bednarski, 2003; Cole & Murck, 2007; Fairchild, 1999; Mazzocco, 2005; Shelanski, 2006; Tillinghast, 2006)—culminated with the enactment of the Telecommunications Act of 1996, which relaxed local-market radio station ownership caps and lifted the national ownership limit *entirely*. Promoting competition was the overt justification for the greatly loosened restrictions, which permitted the rise of national radio conglomerates and oligopolies in many local markets and nationally (Drushel, 1998; Wirth, 2001, 2007). This *free-market* (or *marketplace*) model of broadcast ownership regulation (Cole & Murck, 2007; Prindle, 2003; Shelanski, 2006; Tillinghast, 2006) proffers that the marketplace is best suited to promote competition, diversity, and localism. Others, however, viewed the Telecommunications Act as "de facto re-regulation, raising barriers to entry" (McCourt, 1999, p. 6). Further clouding the issue were allegations of covert, favorable treatment afforded to duplicitous broadcast-industry stakeholders by

the crafters of the legislation. McChesney (1996), contending the bill was written not only for but also *by* media interests, criticized the Telecommunications Act as “perhaps one of the most corrupt pieces of legislation in U.S. history” (p. 3). Fairchild (1999) inferred that lobbyists provided lawmakers with “generous assistance” (p. 559), and he accused the FCC of being “more interested in serving industry than . . . the public good” (p. 550). Divergent opinions concerning media ownership seem to stem partly from the challenge in defining and measuring *the public interest*; indeed, the concept has been depicted as “arbitrary and undefined” (Howard, 2002, p. 49).

The Public Interest Standard and Radio Localism

As a broadcast-licensing principle, *the public interest standard* dates to early federal statutes (Communications Act of 1934). Despite its venerability, however, the concept occasionally clouds rather than clarifies debates over media ownership. As Bozeman (2002) wrote, “Actually determining the meaning of ‘public interest’ . . . remains as much of a challenge today as decades ago” (p. 10).

May (2001) explained that the public-interest standard, originally part of the Federal Transportation Act of 1920, likely pertained to notions of *reasonableness* and *nondiscrimination* in public-utility management. When Congress incorporated the principle into the Radio Act of 1927, May wrote, “Not only did the statute fail to define the standard’s intended meaning, but even the legislative history provides little guidance as to what degree of authority Congress meant to give the new agency” (p. 9). The concept, he continued, might be “so vague that it can mean whatever three FCC Commissioners say it means on any given day” (p. 11). Others warn that interpretations

could be partly determined by those in the very industry under regulation. Hall (2000) wrote, “Without an informed public, the very definition of ‘the public interest’ is left to government officials and the broadcasters to negotiate” (p. 75). In contrast, DiCola (2007a) highlighted a benefit of the public-interest standard—ambiguity and all—in media ownership regulation: *democratic responsiveness* that “allows the FCC more flexibility to retain or adopt policies that the public perceives as beneficial but that the agency cannot prove to be absolutely necessary” (p. 131). May, however, questioned the FCC’s regulatory authority based on the U.S. Constitution’s *nondelegation doctrine*, which could be interpreted as forbidding Congress from delegating legislative power with insufficient guidelines. Huber (1997), a staunch critic of the FCC, would seem to agree, arguing, “Antitrust law . . . is not a perfect instrument for promoting competition, but it is vastly better than a commission” (p. 100).

Conversely, Benton and Goodmon (2005) asserted that broadcasters should be “protectors and proponents of the public interest” (p. 2) by engaging citizens, checking governmental power, exposing waste and fraud, and protecting values of competition, diversity, localism, and democracy. Such goals might be consistent with unwritten aims of early broadcast legislation. Proffitt and Brown (2004) wrote that Congressman Ewin Davis—a public-interest advocate for whom the Davis Amendment to the Radio Act of 1927 was named—believed that radio should be regulated in the public good. The stance would seem to have precedence today, as the judiciary has consistently upheld media ownership restrictions on public-interest grounds. In *Associated Press et al. v. United States* (1945), Supreme Court Justice Black wrote, “The widest possible

dissemination of information from diverse and antagonistic sources is essential to the welfare of the public"; in *Mansfield Journal Co. (FM) v. FCC* (1950), a U.S. Court of Appeals held, "Monopoly in the mass communications . . . is contrary to the public interest"; and in *FCC v. RCA Communications Inc.* (1953), Supreme Court Justice Frankfurter determined, "There can be no doubt that competition is a relevant factor in weighing the public interest." In a landmark free-speech case, *Red Lion Broadcasting Co. v. FCC* (1969), Supreme Court Justice White decreed, "It is the right of the viewers and listeners, not the right of the broadcasters, which is paramount."

Complicating matters, however, the public-interest standard has been invoked by proponents of the *marketplace* model of media regulation. Sturm (2005), supporting repeal of the newspaper/broadcast cross-ownership ban (enacted in 1975), agreed with the FCC position that "a flat ban no longer served the public interest" (p. 202). He depicted media ownership diversity—typically regarded as a component of the public interest—as "elusive and not easily defined" (p. 206). Shelanski (2006), while not endorsing elimination of the cross-ownership ban, argued, "Such a sweeping prohibition makes little sense from a competition policy perspective" (p. 392), and it might harm consumers as well as competition.

Why not depend on antitrust law for broadcast-media ownership regulation? Because, Moss and Fein (2003) suggested, "radio was special" (p. 394):

Those who crafted the nation's radio legislation never fully explained why they believed existing antitrust law would be insufficient to achieve their objectives.

Presumably, the notion that antitrust law, an economic instrument, would not be

optimal for addressing concentrations of *political* power on the airwaves was so obvious that it was simply taken for granted. (p. 402)

In other words, some argue, economically efficient free markets might fail in certain other regards, such as promoting goals valued by society including fostering the *free marketplace of ideas* (the theory, ascribed to John Milton, that truth triumphs among a free exchange of ideas [Owen, 1975]). Bozeman (2002) termed the scenario *public value failure*, while Goodman (2007) specified *broad market failure*. Cooper (2003) argued that free-market economic efficiency should be of secondary importance when broader public-interest principles are at stake. Braman (2007) suggested that local broadcast-news content might reflect market failure possibly “deserving of government attention” (p. 263); Leeper (2000) contended, “Antitrust laws do not account for distortions in the marketplace” (p. 496). Shelanski (2006) proposed that antitrust laws likely fail in two ways by promoting neither the social goals of public-interest principles nor efficient-market objectives; Bednarski (2003) depicted the Telecommunications Act of 1996 as “an example of excessive adherence to the marketplace model . . . contrary to the public interest” (p. 275); and Tillinghast (2006) concluded, “Total reliance on free market operations [is] dangerous” (p. 143).

Waldfoegel (2007) summarized a reason for the conundrum concerning the public-interest standard: “Regulators have not articulated what outcomes they would control in the public interest” (p. 4); as a result, he wrote, for some “the ‘public interest’ standard means nothing; or nothing useful anyway” (p. 3). To the contrary, Moss and Fein (2003) asserted that the principle was meaningful to early regulators:

The fear of concentrated control over mass communication mattered a great deal in the making of American radio regulation. . . . A property-rights solution would *not* have been socially optimal. . . . The public-interest theory of policymaking, long dismissed as naive, actually requires further evaluation. (p. 409)

Critics have similarly debated the efficacy and meaning of *radio localism* as a quality and measure of local radio's potential to serve the public interest. Indeed, a variety of notions exist regarding the concept; in general, however, licensees' responsiveness to local community interests and needs is regarded as a vital component (Martens, 2004). DiCola (2006) concisely depicted *radio localism* as "where programming is produced, who produces it, and whether that programming meets local communities' and local residents' needs" (p. 75). Likewise, the Local Community Radio Act of 2007 defined *localism* plainly as "local operations, local research, local management, locally originated programming, local artists, and local news and events" (§ 3). Cole and Murck (2007) countered that not only is *radio localism* vague in concept, but it has never been mandated by law nor strictly enforced by the FCC, particularly concerning programming. Conceding that "the FCC believed that locally-oriented programming was an important aspect of a broadcaster's service to the public" (p. 6), they contended that regulation promulgating localism primarily targeted licensees' *nonprogramming* activities, but that even those guidelines were rarely compulsory. Braman (2007), however, conceptualized the prior notion of *localism*:

Localism is not unique to media policy but, rather, is a constitutionally based principle that has applications throughout U.S. law. The goal is the same as that of many others of constitutional status: to maximize the ability of citizens to effectively participate in decision-making about the conditions of their own lives. (p. 234)

Technology Developments

While debate over the meanings of *the public interest* and *radio localism* continue astride, technology has marched ahead. Technological advances, on both the producer and consumer sides, have converged with loosened radio-ownership limits resulting in repercussions for local radio. On the production side, *voicetracking*—cost-cutting, computer-automation technology that imitates live-local broadcasts—is highlighted by many critics for typically bland programming that not only reduces diversity and localism but also deceives listeners (Hilliard & Keith, 2005). Network and syndicated programming also rob stations of local flavor, detractors contend. While each of these technologies would exist despite deregulation, their use is likely more widespread due to ownership consolidation.

On the consumption side, today's proliferation of new media is frequently cited to bolster the case of free-market proponents. Huber (1997) wrote, "New technology has replaced scarcity with abundance" (p. 3). Opponents of media ownership deregulation counter that a small group of conglomerates controls many of the most popular television networks, cable TV channels, and Web sites, along with individual radio and television stations. Additionally, consumers' growing use of new-media

technologies, including portable digital-music players such as the iPod, likely influences their use of local radio and other traditional media, with potential policy implications. For example, rising use of new media as substitutes for local radio could force broadcasters to refocus on localism (out of necessity for survival), potentially lessening the need for ownership restrictions. In a bleak assessment of the current state of local (*terrestrial*) radio, Hilliard and Keith (2005) concluded, “Localism, it would appear, may turn out to be the only means of saving terrestrial radio” (p. 212). In the meantime, diminished radio localism attributed to the influence of deregulation and ownership consolidation might adversely impact the public interest—but how can the effects be measured?

Measurable Effects of Consolidation

In an expansive national study of radio ownership-consolidation effects, DiCola (2006) discovered *centralized programming* among group-owned stations, leading to format overlap and duplication, very little playlist diversity, and few niche formats. Nationally, he reported, only 15 formats accounted for 76% of commercial-radio programming. DiCola also found evidence of rising national advertising-revenue concentration, increasing local-market ownership concentration, and declining listenership. He concluded, “The majority of local radio markets have levels of concentration that ordinarily give rise to antitrust concerns about excessive market power” (p. 68). In a separate study, DiCola (2007b) reported that personnel downsizing has resulted in the loss of some local-radio on-air positions.

Williams and Roberts' study (as cited in Polinsky, 2007) revealed that while the number of commercial radio stations increased by about 5% in the six years following passage of the Telecommunications Act of 1996, there was a greater than one-third decline in the number of station owners. Polinsky found that increases in local-market ownership concentration resulted in decreased radio listenership. She concluded, "Ownership concentration may be driving audiences away from radio" (p. 138). Chambers (2001) reported a drop in the number of locally based radio station owners in the wake of post-Telecommunications Act mergers.

Wirth (2007), following up his prior examination of radio ownership and formats nationally, discovered an evolution toward format monopolies directly related to the Telecommunications Act. In his earlier study, Wirth (2001) found nationwide format oligopolies, along with examples of duopolies and monopolies, among 10 music formats. Drushel (1998) reported a trend toward market oligopolies, including rising ownership and advertising-revenue concentration, in the nation's top 50 markets. Although he did not directly link ownership concentration with effects on format diversity, he hinted at format homogenization among group owners nationally.

In a study of 50 markets, Chambers (2003) revealed reduced format and playlist diversity paralleling increased local-market ownership concentration. Suggesting possible format homogenization nationally, he identified *voicetracking* technology and diminished local programming autonomy as threats to localism. Steiner (1952) proposed that increased local-market ownership concentration would result in greater format diversity due to attempts by group owners to maximize total audience shares.

Consistent with Steiner's theory, Williams, Brown, and Alexander (2002), examining post-Telecommunications Act format and song diversity in 288 markets, found increased format diversity within markets, but a trend toward format homogenization nationally (they downplayed the influence of ownership consolidation on playlist diversity, however). In a study of 243 markets in 1993 and 1997, Berry and Waldfogel (2001) confirmed increased local-market ownership concentration and format diversity following passage of the Telecommunications Act. In accordance with Steiner, they reported that increased local-market ownership concentration coincided with marginal increases in format diversity within markets among group-owned stations with "an incentive not to compete with each other" (p. 1011). They reported that diversity might be small, however, and also discovered evidence of format similarity among group-owned stations in separate markets, revealing national format homogenization. Rogers and Woodbury (1996) suggested that within local markets, intra-format diversity (similar but not identical formats among competing stations) has certain value to listeners but is often diminished by ownership consolidation.

Literature Review Summary and Project Rationale

Each of the studies discussed above, by examining radio station and market characteristics such as ownership concentration, format and song diversity, advertising-revenue concentration, and employment, discovered effects of ownership consolidation locally and nationally. Spanning the decade following passage of the Telecommunications Act of 1996, they offer valuable findings of impacts attributable to the controversial legislation. Some experts, however, question the pertinence of certain

factors to the FCC's longstanding principles of competition, diversity, and localism. Prindle (2003) wrote, "Many argue . . . that formats are a poor measure of diversity" (p. 314). Capps (2002), seeming to acknowledge both the value and limitations of some measures, asserted, "For a robust marketplace of ideas to survive, *each community* must have a diversity of sources of information available to its members—not just a *variety* of formats, but *diversity* of formats and of ownership" (§ 8).

Despite such criticisms—which seem to be calling for better ways of gauging ownership-consolidation effects—investigations into *direct impacts* on citizens have been largely limited to the gathering of general remarks at a smattering of FCC-sponsored community forums. DiCola (2006), whose study of radio ownership-consolidation effects was extensive, acknowledged the need for additional information that could be valuable in research and policy recommendations. Because most prior research has not explored listener opinions and use of local radio and other media that might be attributable to ownership-consolidation effects, the present research aims to fill a void in the literature by examining listener perceptions about local stations' programming, community involvement, and responsiveness, and listeners' corresponding use of local radio. Moreover, the FCC focuses narrowly—and irresponsibly, some critics contend—on station counts (the number of stations firms may control within local markets), with little concern about licensees' levels of local programming and community engagement, even though both can be considered crucial components of radio localism and key measures of stations' fulfillment of a social contract to serve the public interest. Thus, by exploring possible influences of

local-market radio ownership concentration on listeners' attitudes toward and use of local radio and other media, the present study provides an indication about the current state of radio localism and stations' service in the public interest.

Research Questions

The present research, a pilot study, surveyed respondents in markets identified by levels of local AM and FM radio station ownership concentration (low, medium, or high). It examined (a) respondents' self-reported opinions about the amount of local programming aired on local stations, (b) respondents' self-reported opinions about and firsthand experience with local stations' amount of community involvement and responsiveness, and (c) respondents' self-reported levels of satisfaction with and use of local radio and other media. Results were analyzed for statistically significant differences between three groups categorized according to local-market ownership concentration levels to help answer the following research questions:

RQ₁: What do respondents report as their opinions about the amounts of local news, local public-service programming, music created by local artists, and live programming originating from within their local communities aired on local radio stations? What differences are there between three groups categorized according to local-market ownership concentration levels?

RQ₂: What do respondents report as their opinions about the amount of local community involvement among local radio stations? What differences are there between three groups categorized according to local-market ownership concentration levels?

RQ₃: What do respondents report as their satisfaction levels with the amount of community involvement among local radio stations and with the programming aired on local stations? What differences are there between three groups categorized according to local-market ownership concentration levels?

RQ₄: How much time spent listening to local AM and FM broadcast stations during the previous week do respondents report? What differences are there between three groups categorized according to local-market ownership concentration levels?

RQ₅: Which media do respondents report using most often for daily news and during times of crisis? What differences are there between three groups categorized according to local-market ownership concentration levels?

Method

The present research used a written, 24-item Web-based survey, which was the preferred survey format for this pilot study for the following reasons: (a) the ease at which invitations to take the survey, including a Web link, could be sent to potential participants; (b) the complexity of some survey questions and response options, making a written survey preferable to a telephone survey; (c) the convenience afforded to participants, who could complete the survey at their desired time, location, and pace; and (d) the anticipated timely receipt of completed surveys.

By exploring survey respondents' perceptions about and use of local radio and other media, the present research touches on the uses-and-gratifications theory posited by Blumler and Katz (1974), which depicts media audiences as engaged, rather than passive, media consumers. Mendelsohn's (1964) investigation of New York City radio

listeners offers a model. He found that radio served important and specific functions for listeners, such as providing news and information, entertainment, companionship, background noise, and mood-setting or mood-enhancing effects.

Sample Design and Administration

An invitation and Web link to the survey were sent via e-mail to a convenience sample of 13,530 alumni of Rochester Institute of Technology in three U.S. markets. Each locality was categorized according to its level of local radio station ownership concentration (low, medium, or high), as determined by the Herfindahl-Hirschman Index (HHI), a standard method for calculating market concentration (Bednarski, 2003; DiCola, 2006; Drushel, 1998; Leeper, 2000; Wildman, 2007). In an attempt to maximize the number of survey completions, markets in which large numbers of RIT alumni resided were selected. The markets surveyed were Middlesex-Somerset-Union, NJ (low concentration), Rochester, NY (medium concentration), and Ithaca, NY (high concentration). The Rochester market, in particular, was a propitious selection for this study due to its large population of RIT alumni and on account of a precedent-setting ruling, in *United States of America and State of New York v. American Radio Systems Corporation, The Lincoln Group, L.P., and Great Lakes Wireless Talking Machine LLC* (1997), concerning radio ownership concentration in Rochester (Saffran, 2006; Williams, 1998) that warranted follow-up investigation of current market conditions. In addition, five supplemental populations were surveyed through market-specific discussion boards on the Web site of Radio-Info.com. Also categorized according to local radio ownership concentration levels, these markets were Dallas, TX (low concentration); Buffalo, NY,

and Rochester, NY (medium concentration); and Binghamton, NY, and Ithaca, NY (high concentration).

Invitations to take the survey and reminders sent or posted four days after original messages yielded 830 completions from June 18 to July 1, 2007. Responses from each sample were tallied separately to allow for analysis between low, medium, and high ownership-concentration markets. For this pilot study, however, aggregated descriptive findings are frequently reported in the Results, Discussion, and Conclusion sections. See Table 1 for HHI and sample sizes, number of survey completions, and response rates by market for the RIT alumni sample; see Table B1, in Appendix B, for number of survey completions by local-market radio station ownership concentration levels. Survey participants' demographic characteristics (among those who provided the information) are: male, 66.9% ($N = 825$, $n = 552$); female, 33.1% ($n = 273$); 45–54 years old, 27.2% ($N = 827$, $n = 225$); 35–44 years old, 24.5% ($n = 203$); 25–34 years old, 18.6% ($n = 154$); 55–64 years old, 16.9% ($n = 140$); 65 years and older, 8% ($n = 66$); 18–24 years old, 4.4% ($n = 36$); under 18, 0.4% ($n = 3$).

Table 1

HHI^a, Sample Size, Survey Completions, and Response Rate (%) by Market

	<i>HHI^a</i>	<i>Sample Size^b</i>	<i>Survey Compl.^b</i>	<i>Response Rate^b</i>
Middlesex-Somerset-Union, NJ (low concentration)	1240	575	14	2.43
Rochester, NY (medium concentration)	2348	12,854	635	4.94
Ithaca, NY (high concentration)	3725	101	11	10.89
Total		13,530	660 ^c	4.88

Note. ^aHerfindahl-Hirschman Index (HHI) is calculated by adding the squares of the market shares of each competing firm in a market (United States Department of Justice, n.d.). ^bRIT alumni sample only.

^cTotal excludes selected survey completions based on survey participants' response to a contingency question pertaining to market residency.

Survey Instrument Design

The survey included (a) a clearly worded introduction and section-by-section instructions; (b) matrix-style questions utilizing four-point or six-point Likert scales for response options pertaining to local radio stations' programming, community involvement, localism, and responsiveness (even-numbered Likert scales were used to force survey participants to provide decisive responses); (c) closed-ended and inventory-style questions seeking respondents' patterns of use of local radio and other electronic and mass media; (d) two demographic-related questions; and (e) an assurance of confidentiality, space to provide comments, and an opportunity to request research findings (each included to encourage participation). A pretest, administered to a convenience sample of 15 individuals, identified instructions,

questions, and terminology needing further clarification, and survey revisions were completed prior to distribution to the larger samples.

No ethical concerns were identified related to this survey or to the pilot study, which received prior approval from the Institutional Review Board, Office of Human Subjects Research, Rochester Institute of Technology. Participants in each of the eight groups received identical surveys, aside from customization with specific market names in instructions and some questions and statements. Survey instructions, questions, and statements for Rochester, NY, are shown in Appendix A.

Question 1, a contingency question, asked survey participants to confirm that they resided in the specified market. It was included to help ensure that respondents' opinions about local radio were based on experience in the given market. Those who answered "No" were instructed to continue with survey item 24. Their responses and those of participants who did not answer the contingency question were assigned to a category designated as *Unknown Market*.

To measure perceptions related to specific types and qualities of programming aired on local radio stations, survey participants were asked, in questions 2–5, to report their opinions about the amounts of local news, local public-service programming, music created by local artists, and live-local programming (broadcasts featuring announcers or disc jockeys broadcasting live from respondents' localities). Responses will help answer RQ₁. When analyzed by local-market ownership concentration levels, results could be indicative of ownership-consolidation effects on respondents' perceptions about local radio programming.

To measure perceptions related to specific characteristics of local radio stations, survey participants were asked, in questions 6–9, to report their level of agreement with statements about local radio stations, including on-air and off-air qualities that could be indicative of stations' levels of community involvement and responsiveness to community needs. Responses will help answer RQ₁ and RQ₂. When analyzed by local-market ownership concentration levels, results could be indicative of ownership-consolidation effects on respondents' perceptions about local radio stations.

To measure opinions about local radio stations' programming and amounts of community involvement, survey participants were asked, in questions 10–11, to report their level of satisfaction. Responses will help answer RQ₃. When analyzed by local-market ownership concentration levels, results could be indicative of ownership-consolidation effects on respondents' satisfaction with local stations' programming and community involvement.

As an additional measure of local radio stations' levels of community involvement and responsiveness to community needs, survey participants were asked, in question 12, to report their level of success in attempting to contact announcers or disc jockeys at local radio stations via studio telephones. Results could be valuable in future research concerning local stations' responsiveness.

To measure respondents' levels of use of local radio, survey participants were asked, in question 13, to report their amount of time spent listening to local radio stations during the previous week. Responses, which will help answer RQ₄, will reveal whether participants are heavy ("More than 10 hours"), moderate ("5 to 10 hours"),

or light (“Fewer than 5 hours”) users of local radio. Prior research has specified alternative ranges to categorize users according to reported amount of time spent listening. For example, a study by Bridge Ratings (as cited in Philipp, 2006) identified *light users* as those listening to local radio for less than 34 hours per week. In the present research pretest (which also specified alternative ranges), more than 8 in 10 participants selected “Less than 10 hours.” As a result, ranges deemed potentially more informative were used in the broader study. Additionally, U.S. Census Bureau (2004) data (for the year 2000) revealed an average one-way commute time of 25.5 minutes nationally. Respondents with similar commute times to the average and who listen to local radio primarily while commuting to and from work would be appropriately identified as *light users* in this pilot study. When analyzed by local-market ownership concentration levels, results could be indicative of ownership-consolidation effects on respondents’ local-radio usage levels.

To measure respondents’ most common listening locations, survey participants were asked, in question 14, to report where they most often listen to local radio stations. Results could be valuable in areas of future research.

To measure the popularity of local radio as a principal source for daily news and information compared with other media, survey participants were asked, in questions 15–16, to identify their primary sources for daily news and during times of crisis, such as weather emergencies. Responses will help answer RQ₅. When analyzed by local-market ownership concentration levels, results could be indicative of ownership-consolidation effects on respondents’ use of local radio and other media.

To measure the popularity of local radio as a source for entertainment compared with other electronic media, survey participants were asked, in question 17 (an inventory question), to report their top three selections of electronic media for entertainment. Responses might reveal patterns related to participants' use of local radio compared with other electronic media that could be valuable in areas of future research.

To measure respondents' primary reasons for listening to local radio, survey participants were asked, in question 18 (an inventory question with an exhaustive list of choices), to identify their three most important reasons for listening to local radio stations. Results could be valuable in areas of future research.

To measure the most common time periods—often referred to as *dayparts*—in which they heard local radio stations, survey participants were asked, in questions 19–20, to report when they heard local radio during the previous 24 hours and, if possible, to identify the station(s) according to call letters, dial position, or station nickname, or to list program or host names. Both questions were included for their potential value in future research.

Questions 21–22 asked respondents for their age and gender. They were included to describe the sample and to allow for demographic-related analysis of findings and patterns discovered in future research.

Survey items 23–24 provided space for participants to share comments about local radio stations and the survey. Respondents were also afforded an opportunity to request study findings.

Results

Results showing statistically significant differences in comparisons between three groups categorized according to local-market radio station ownership concentration levels (low, medium, and high) were obtained using the Kruskal-Wallis H Test or, for interval data, the one-way Analysis of Variance (ANOVA) test for significant differences between more than two groups. Significant differences between paired groups were revealed using the Mann-Whitney U Test or, for interval data, the Scheffe and Tukey HSD post-hoc tests. An alpha level of .05 was used for all statistical analyses. (See Tables 2–6 for significance test results; see Tables B1–B7, in Appendix B, for comprehensive descriptive results.)

Response to Research Questions

RQ₁: What do respondents report as their opinions about the amounts of local news, local public-service programming, music created by local artists, and live programming originating from within their local communities aired on local radio stations? What differences are there between three groups categorized according to local-market ownership concentration levels?

Among all survey participants who responded, 54% ($N = 824$, $n = 445$) reported opinions of “Some” local news aired on local radio stations; 22.7% ($n = 187$) reported perceptions of “A Lot”; 22.6% ($n = 186$) reported opinions of “Very Little”; 0.7% ($n = 6$) reported perceptions of “None.” Differences between three groups categorized according to local-market ownership concentration were not significant (see Table 2).

Among all respondents, 47.9% ($N = 823$, $n = 394$) reported opinions of “Some” local public-service programming aired on radio stations in their localities; 40.2% ($n = 331$) reported perceptions of “Very Little”; 8.7% ($n = 72$) reported opinions of “A Lot”; 3.2% ($n = 26$) reported perceptions of “None.” Differences between the three groups were significant between low-concentration and medium-concentration markets and low-concentration and high-concentration markets only, with respondents in low-concentration markets reporting perceptions of lower amounts of local public-service programming (see Table 2).

Among all survey participants who responded regarding their opinions about the amount of music created by local artists and bands aired on local radio stations, 64.3% ($N = 816$, $n = 525$) reported perceptions of “Very Little”; 19.7% ($n = 161$) reported opinions of “Some”; 13.8% ($n = 113$) reported perceptions of “None”; 2.1% ($n = 17$) reported opinions of “A Lot.” Differences between the three groups were significant between low-concentration and medium-concentration markets only, with respondents in low-concentration markets reporting perceptions of lower amounts of locally created music (see Table 2).

Among all respondents, 43.3% ($N = 818$, $n = 354$) reported opinions of “Some” radio programming by live announcers located within survey participants’ markets; 37.8% ($n = 309$) reported perceptions of “A Lot” of live-local programming; 17.4% ($n = 142$) reported opinions of “Very Little”; 1.6% ($n = 13$) reported perceptions of “None.” Differences between the three groups were not significant (see Table 2).

Table 2

Kruskal-Wallis H Test for Respondents' Opinions About Local Radio Programming

	<i>M</i>	<i>df</i>	<i>X</i> ²	<i>p</i>
Between groups				
Amount of local news ^a	2.99	2	4.78	.09
Amount of local public-service programming	2.62	2	30.90	< .01
Low-concentration markets	2.29 _a			
Medium-concentration markets	2.66 _b			
High-concentration markets	2.96 _b			
Amount of music created by local artists	2.10	2	11.95	< .01
Low-concentration markets	1.89 _a			
Medium-concentration markets	2.13 _b			
High-concentration markets	2.13 _{ab}			
Amount of live-local programming ^a	3.18	2	.10	.95

Note. Survey participants responded using a four-point scale: 1 = none, 2 = very little, 3 = some, 4 = a lot. Means with different subscripts differ significantly at $p < .05$ by the Mann-Whitney U Test comparing mean ranks between paired groups.

^aNonsignificant three-way mean-rank comparisons were omitted.

In response to a separate question seeking opinions about the amount of radio programming originated by live announcers in local markets, 82.6% ($N = 814$, $n = 672$) agreed with the statement, “The announcers and DJs on [Market] radio stations broadcast live from the [Market] community”; 17.4% ($n = 142$) disagreed. Differences between the three groups were not significant (see Table 3).

RQ₂: What do respondents report as their opinions about the amount of local community involvement among local radio stations? What differences are there between three groups categorized according to local-market ownership concentration levels?

Among all respondents, 61.4% ($N = 817$, $n = 501$) agreed with the statement, “[Market] radio stations provide a forum for debate on topics of interest to local residents.” Majorities also affirmed the statements, “[Market] radio stations are actively involved in the local community through local benefits (for example, food drives and fundraising for good causes)” (82.9%, $N = 818$, $n = 678$) and “The announcers and DJs on [Market] radio stations are active in the local community through promotional appearances (for example, on-location broadcasts at local festivals)” (87.2%, $N = 812$, $n = 708$). For each statement, differences between three groups categorized according to local-market ownership concentration were significant between low- and medium-concentration markets, with respondents in low-concentration markets expressing less agreement; concerning the statement about stations’ community involvement, differences were significant also between low- and high-concentration markets, with respondents in low-concentration markets expressing less agreement (see Table 3).

Table 3

Kruskal-Wallis H Test for Respondents' Levels of Agreement With Statements About Local Radio Stations

	<i>M</i>	<i>df</i>	<i>X</i> ²	<i>p</i>
Between groups				
Announcers broadcast live from the local community ^a	4.55	2	4.69	.10
Provide a forum for debate on topics of local interest	3.64	2	10.01	< .01
Low-concentration markets	3.17 _a			
Medium-concentration markets	3.71 _b			
High-concentration markets	3.50 _{ab}			
Stations are actively involved in the local community	4.49	2	15.28	< .01
Low-concentration markets	4.01 _a			
Medium-concentration markets	4.55 _b			
High-concentration markets	4.67 _b			
Announcers are active in the local community	4.67	2	22.32	< .01
Low-concentration markets	4.05 _a			
Medium-concentration markets	4.76 _b			
High-concentration markets	4.57 _{ab}			

Note. Survey participants indicated level of agreement or disagreement with statements using a six-point scale: 1 = disagree strongly, 2 = disagree moderately, 3 = disagree slightly, 4 = agree slightly, 5 = agree moderately, 6 = agree strongly. Means with different subscripts differ significantly at *p* < .05 by the Mann-Whitney U Test comparing mean ranks between paired groups.

^aNonsignificant three-way mean-rank comparisons were omitted.

RQ₃: What do respondents report as their satisfaction levels with the amount of community involvement among local radio stations and with the programming aired on local stations? What differences are there between three groups categorized according to local-market ownership concentration levels?

Among all survey participants who responded, 55.1% ($N = 818$, $n = 451$) reported being “Somewhat” satisfied with the amount of community involvement among local radio stations; 22% ($n = 180$) reported satisfaction “To A Great Extent”; 17.7% ($n = 145$) reported “Very Little” satisfaction; 5.1% ($n = 42$) reported satisfaction as “Not At All.” Differences between three groups categorized according to local-market ownership concentration were significant between low-concentration and medium-concentration markets only, with respondents in low-concentration markets reporting less satisfaction (see Table 4).

Among all respondents, 45.6% ($N = 815$, $n = 372$) reported being “Somewhat” satisfied with the programming aired on radio stations in their localities; 28.3% ($n = 231$) reported satisfaction as “Very Little”; 14.8% ($n = 121$) reported being satisfied “To A Great Extent”; 11.2% ($n = 91$) reported satisfaction as “Not At All.” Differences between the three groups were significant between low-concentration and medium-concentration markets only, with respondents in low-concentration markets reporting less satisfaction (see Table 4).

Table 4

Kruskal-Wallis H Test for Respondents' Levels of Satisfaction With Local Radio Stations

	<i>M</i>	<i>df</i>	<i>X</i> ²	<i>p</i>
Between groups				
Satisfaction with amount of community involvement	2.95	2	23.52	< .01
Low-concentration markets	2.57 _a			
Medium-concentration markets	3.00 _b			
High-concentration markets	2.96 _{ab}			
Satisfaction with programming	2.65	2	15.92	< .01
Low-concentration markets	2.30 _a			
Medium-concentration markets	2.69 _b			
High-concentration markets	2.65 _{ab}			

Note. Survey participants responded using a four-point scale: 1 = not at all, 2 = very little, 3 = somewhat, 4 = to a great extent. Means with different subscripts differ significantly at $p < .05$ by the Mann-Whitney U Test comparing mean ranks between paired groups.

RQ₄: How much time spent listening to local AM and FM broadcast stations during the previous week do respondents report? What differences are there between three groups categorized according to local-market ownership concentration levels?

Among all respondents, 40.3% ($N = 823$, $n = 332$) reported listening to local radio “5 to 10 hours” during the prior week; 34.3% ($n = 282$) reported tuning in “Fewer than 5 hours”; 25.4% ($n = 209$) reported listening “More than 10 hours.” Differences between three groups categorized according to local-market ownership concentration levels were significant between low-concentration and medium-concentration markets only, with respondents in low-concentration markets reporting greater use of local radio (see Table 5).

RQ₅: Which media do respondents report using most often for daily news and during times of crisis? What differences are there between three groups categorized according to local-market ownership concentration levels?

Among all respondents, the Internet was cited as a primary source for daily news by 34.6% ($N = 823$, $n = 285$), followed by television (26.7%, $n = 220$), newspapers (19.6%, $n = 161$), and radio (18.1%, $n = 149$). Among all respondents, television was identified as a primary media selection during times of crisis, such as weather emergencies, by 51.3% ($N = 819$, $n = 420$), followed by radio (28%, $n = 229$) and the Internet (20.1%, $n = 165$). Differences in participants’ responses concerning their primary choices of media for daily news and during times of crisis were not significant between three groups categorized according to local-market ownership concentration levels (see Table 6).

Table 5

Analysis of Variance for Respondents' Time Spent Listening to Local Radio

	<i>M</i>	<i>df</i>	<i>F</i>	<i>p</i>
Between groups				
Reported amount of time spent listening	1.91	2	16.56	< .01
Low-concentration markets	2.30 _a			
Medium-concentration markets	1.84 _b			
High-concentration markets	2.17 _{ab}			

Note. Survey participants selected one of three response options: 1 = fewer than 5 hours, 2 = 5 to 10 hours, 3 = more than 10 hours. Means with different subscripts differ significantly at $p < .05$ by the Scheffe and Tukey HSD post-hoc tests.

Table 6

Kruskal-Wallis H Test for Respondents' Primary Source for Daily News and Crisis Information

	<i>df</i>	<i>X</i> ²	<i>p</i>
Between groups			
Primary source for daily news ^a	2	3.43	.18
Primary source during times of crisis ^a	2	1.59	.45

Note. Survey participants selected one of six response options: Internet, newspaper, radio, television, e-mail or cell phone text message alerts, other.

^aNonsignificant three-way mean-rank comparisons were omitted.

$p < .05$

Discussion

Although some findings reported above pertaining to comparisons of responses between markets grouped according to radio ownership concentration levels were not statistically significant, it is reasonable to ascribe the lack of significance in part to high concentration across markets. DiCola (2006) showed that many U.S. radio markets—including those identified as low-concentration and medium-concentration markets in this pilot study—are highly concentrated by alternative measures, such as Local Commercial Share and variations of the Herfindahl-Hirschman Index. Cooper (2003) reported that more than 95% of U.S. radio and television markets are highly concentrated by U.S. Department of Justice and Federal Trade Commission merger guidelines.

Shelanski (2006) highlighted another challenge: “Market share is only as strong as the underlying market definition” (p. 409). In other words, market definitions can be manipulated by, for example, broadly including or narrowly excluding differentiated products (noncommercial outlets and other media, for instance). In addition, market boundaries can be altered, as the FCC has done by changing its method of market definition (DiCola, 2006). Further, determining firms’ market shares can be problematic when the product—programming, in the case of radio—is free to consumers (aside from their “cost” of listening to commercial-radio advertisements), and when shares change rapidly (Shelanski, 2006). For these reasons, overall results concerning respondents’ perceptions about and use of local radio and other media are often the focus of findings explored in this section and in the Conclusion section.

Perceptions Of and Satisfaction With Local Radio Community Engagement

Local citizens' opinions about local radio stations—including their perceptions about various on-air and off-air qualities—can be considered crucial measures of *radio localism* by some of the conceptual definitions discussed earlier. In the present research, majorities of survey respondents expressed agreement with statements pertaining to local radio stations providing a forum for debate on topics of interest to local residents, about local stations being actively involved in the local community through benefits, and concerning announcers and DJs on local stations being active in the local community through promotional appearances. These findings tend to indicate that local stations overall are performing adequately by these measures of radio localism (with local-market ownership concentration not a strong factor influencing listener perceptions).

Many stations seem to be faltering, however, by a separate measure of community engagement: responsiveness through accessibility via studio telephone. Excluding survey participants who reported not phoning local radio stations or who could not recall their success rate, more than three-quarters of the remaining 311 respondents answering the question reported unsuccessfully reaching a live announcer on at least some occasions (with about half reporting “Never” or “Rarely” making contact). Respondents who reported being periodically unsuccessful callers constituted majorities in each ownership concentration group—possibly indicative of some stations' reliance on computer-automated, network, or syndicated programming, and potentially reflective of ownership-consolidation across markets.

Overall, survey participants cannot be depicted as overly dissatisfied with the amount of community involvement among local radio stations. A majority—approximately 55%—described themselves as “Somewhat” satisfied. Nor, however, can respondents be described as highly satisfied, as almost identical numbers—just under 25%—reported satisfaction as either “Not At All” / “Very Little” or “A Lot” (with local-market ownership concentration not a strong factor influencing results). More striking than respondents’ attitudes toward local stations’ community involvement are their opinions about the programming on local radio stations (discussed below).

Perceptions Of and Satisfaction With Local Radio Programming

Concerning their opinions about the airing of local news, approximately 1 in 4 respondents reported perceptions of “None” / “Very Little” local news, while an equal number reported opinions of “A Lot” of local news. Regarding their opinions about the amount of local public-service programming aired on local radio stations, approximately 43% reported perceptions of “None” or “Very Little,” while only 9% reported “A Lot.” Although local-market ownership concentration was not a strong factor influencing respondents’ opinions about these two crucial measures of radio localism, overall results might be indicative of failure on the part of many local stations in meeting their obligations to local communities.

Through their opinions about the amount of locally created music aired on radio stations, respondents overall sang a sad song to local musicians. More than three-quarters of survey participants reported perceptions of “None” or “Very Little” music

by local artists and bands aired on local radio stations, while a scant 2% reported “A Lot.” These stark results will surely trouble—but probably not surprise—local musicians vying for airplay on their hometown radio stations.

Live and local programming—that is, broadcasts originating from within local markets (excluding network and nationally syndicated programming, for example) and by live announcers (excluding *voicetracking*, the prerecorded, computer-automated programming that mimics live-local programming)—can be considered another vital component of radio localism. Therefore, because of its importance, live-local programming was the subject of two survey questions. Overall results indicate that many stations might not be underperforming by this measure (with local-market ownership concentration not influencing respondents’ perceptions). It is possible, however, that some respondents were unable to delineate live-local programming from the ruse of *voicetracking*.

Additionally, it should be noted that despite the strong majority—about 8 in 10—expressing agreement with the statement, “The announcers and DJs on [Market] radio stations broadcast live from the [Market] community,” the result should *not* be interpreted as respondents’ perceptions of “A Lot” of live-local programming. Rather, the result is roughly equal to the combined percentage that, in response to the separate question concerning opinions about live-local programming, reported perceptions of “Some” (43%) and “A Lot” (38%). Moreover, it could be argued that as a measure of radio localism, the percentage of respondents answering “A Lot” is quite low.

Overall, approximately 40% of survey participants described their satisfaction with the programming aired on local radio stations as “Not At All” / “Very Little,” while only about 15% reported it as “To A Great Extent.” Again, local-market ownership concentration was not a strong factor influencing respondents’ opinions. As stated, this could be attributable to high ownership concentration across markets. Thus, the most revealing finding concerning respondents’ attitudes about local radio programming is the overall high percentage reporting *dissatisfaction*.

Use of Local Radio and Other Media

Potential trends emerge concerning respondents’ reported amount of time spent listening to local radio. Markets with low ownership concentration had the greatest percentage of reported heavy users (“More than 10 hours”); markets with medium ownership concentration had the greatest percentage reporting light use (“Fewer than 5 hours”) and the smallest percentage of reported heavy users. Youngest respondents reported using local radio the least, with those under 25 comprising the greatest percentage of light users; 45-to-54-year-olds comprised the greatest percentage of heavy users. While local-market ownership concentration was not a strong factor influencing listening habits, an interesting area for future research might be a broader demographic-related analysis of local-radio use.

Concerning respondents’ reported use of local radio and other media for daily news and crisis information, once again local-market ownership concentration did not influence results. Nearly twice as many respondents overall cited the Internet over radio as a primary source for daily news, and more reported reliance on television and

newspapers than on radio. Survey participants under 25 comprised the smallest percentage identifying radio as a main source for daily news, while 45-to-54-year-olds represented the greatest percentage citing radio. Radio fared better as a primary source for crisis information, trailing only television overall; across all ownership concentration groups, television and radio ranked in the top two.

Limitations of the Study

Limitations associated with this pilot study include (a) survey participants' self-reported data and self-selection bias, (b) nonrepresentative convenience samples, (c) market size disparities, (d) an unfavorable market selection, and (e) uncontrolled populations taking the survey from links provided on the Radio-Info.com Web site.

Recognizing that self-selection bias exists among all survey participants, soliciting respondents' self-reported data was justified because of a lack of prior research exploring possible effects of radio ownership consolidation on listener opinions and use of local radio and other media. Rubin, Rubin, and Piele (2000) indicated that a survey and the uses-and-gratifications approach are appropriate for the study of self-reported related attitudes and behaviors. Concerning radio audiences, in particular, Abelman (2005) agreed: "Research grounded in uses and gratifications theory would benefit from actual audience response" (p. 28). Further, as stated, prior research has investigated other measurable effects from radio ownership consolidation, such as influence on format diversity, and many scholars have widely condemned media consolidation on broad philosophical grounds related to possible societal impacts. The present research, therefore, aimed to bridge the chasm by exploring

direct and measurable effects of ownership consolidation on listeners' attitudes toward and use of local radio and other media, with results potentially reflective of stations' levels of radio localism and fulfillment of public-interest obligations.

A longitudinal study comparing listeners' current opinions about aspects related to radio localism with their attitudes of more than a decade ago (prior to passage of the Telecommunications Act of 1996) would be ideal. Unfortunately, however, such research is unlikely because focus on localism as an area of study has gained prominence only since consequences of the Telecommunications Act have come to light. Simple analysis of Arbitron ratings is also impracticable as a method of gauging listener perceptions of and satisfaction with local radio because ratings (based on diary entries of self-reported use or, in select markets, measurement by *portable people meters*) estimate only the most-listened-to stations in local markets. Because they do not explicitly measure listener satisfaction with local radio, Arbitron ratings might merely suggest the *lesser among evils*. Moreover, ratings alone offer *no indication* of radio localism. As Abelman (2005) wrote, "Ratings information obscures important elements of the social and psychological contexts in which exposure to and repeated listenership of radio programming occur" (p. 28).

Regarding nonrepresentative convenience samples and market size disparities, future research would be enhanced by using randomly drawn samples from larger, controlled populations in similarly sized markets. In the present research, some findings related to comparisons of responses between markets could be reasonably attributed to the influence of market size rather than ownership concentration level.

For example, respondents' reported amount of time spent listening to local radio could be directly related to the duration of their daily commute (which is likely shorter in smaller markets). In addition, the identification of low-concentration markets for comparison purposes posed a challenge (and could continue to present an obstacle in future research due to high ownership concentration across many markets). Also, the Middlesex-Somerset-Union, NJ, market was, in hindsight, inappropriate for this study due to the likelihood that many residents frequently use media based in adjacent New York City in place of or in addition to local media (a factor that would influence their opinions and use of local radio). Likewise, concerning the uncontrolled populations taking the survey from links provided on the Radio-Info.com Web site, it is reasonable to conclude that some respondents' attitudes toward and use of local radio might not be representative of the populations in the markets surveyed. Thus, results cannot be generalized. As previously noted, results were tallied separately to allow for future comparisons.

Implications for Future Research

Findings in the present research suggest a number of areas for future research related to measurement of the concepts of *radio localism* and *the public interest*. These areas could include in-depth examinations of correlations between:

1. Listener satisfaction with local radio programming and their opinions about amounts of local news, local public-service programming, music created by local artists, and live-local programming

2. Listener perceptions about and satisfaction with local radio programming and stations' *actual* amounts of local programming

3. Listener satisfaction with local radio programming and primary reasons for listening to local radio (results could be reflective of whether or not specific preferences are being fulfilled; also, concerning preferences for services traditionally provided by local radio, such as local news, traffic, and weather reports, results could be indicative of amounts of local programming in a given market)

4. Listener satisfaction with the amount of community involvement among local radio stations compared with on-air and off-air qualities that might be indicative of stations' levels of community engagement

Other areas for potential future research include studies examining correlations between (a) listener satisfaction with local radio stations, their usage levels (functioning as a covariate), and their most important reasons for listening to local radio; (b) listeners' use of local radio (including amount of time spent listening functioning as a covariate) and their use of other media for entertainment (particularly electronic media typically used separately from radio); and (c) listeners' demographic characteristics and local-radio listening habits.

Trends discovered in follow-up studies could be revealing to broadcasters and policymakers alike (with local-market ownership concentration levels occasionally notwithstanding). For example, the present research found that moderate and heavy users of local radio are, not surprisingly, generally more satisfied with local stations' community involvement and programming than are light users. Also, light users of

local radio perceive lower amounts of live-local programming than do moderate and heavy users. Among heavy users, perceptions of live-local programming decrease with increases in local-market ownership concentration. The most important reasons cited by survey participants for listening to local radio included some of local radio's traditional strengths, such as music (in general) and local news, traffic, and weather.

Consumers' evolving use of new digital media is another area ripe for further study. Albarran et al. (2007) highlighted the need: "There is a lack of academic research on how new audio technologies impact terrestrial radio from a U&G [uses and gratifications] perspective" (p. 94). In two prior uses-and-gratifications studies, Parker and Plank (2000) found that radio ranked high among survey respondents as a source of news and weather information, but new digital media might be used as substitutes for traditional media. Similarly, Ferguson, Greer, and Reardon (2007) confirmed that college students use iPods as a substitute for local radio (principally for listening to music).

The present research discovered greater reported use of Internet radio (online audio streaming of Web-only radio stations) and online audio streaming of local AM and FM stations, together with reduced use of local radio among certain samples in high-concentration markets. This finding might be indicative of the use of digital media as substitutes for local radio. Future research might explore the possible influence of consumers' familiarity with and acceptance of Internet radio in making listeners amenable to sampling local-radio online audio streams; or, alternatively, if the availability of local-radio online streaming encourages listeners to use Web radio,

generally. In other words, does consumer use of Web-only radio influence the availability of and use of local-radio online streaming, or vice versa? Future studies might also examine the effects, if any, of local-market radio ownership concentration on the availability of and listeners' use of Web-only and local-radio online streaming. For example, do possible adverse effects of high ownership concentration drive listeners to use Web-only alternatives? Or, are some conglomerates more likely to utilize local-radio online streaming, which, in turn, promotes consumer use?

Among younger listeners, local radio's apparent weakness compared with new digital media presents another compelling area for future study. Despite radio's ranking among the top three forms of electronic media for entertainment across markets and demographics in the present research, its standing among respondents under 25 dropped to third place behind digital-music players (such as iPods) and cable TV. Although it appears inexpensive song downloads are taking a bigger *byte* from compact discs than from radio, it is noteworthy that local radio is losing out to digital-music players among younger respondents. These findings support those discovered by Albarran et al. (2007) showing that 50% of 18-to-24-year-olds *never* use local radio.

Patterns related to consumers' most frequently cited local-radio listening locations and dayparts could be discovered in future research. As might be anticipated, the present study revealed much greater in-car use—by 7 in 10 respondents overall—than at-home and at-work listening. This finding parallels the results of a larger study by Bridge Radio (as cited in Boyle, 2006) showing that 76% of 2,880 respondents listen

to local radio in their cars. Both studies' findings might be indicative of a trend toward local radio's shrinking relevance outside of *captive audience* situations, such as in the car, where fewer media options are available compared with other locations (although in-car alternatives are rapidly expanding to include satellite radio, wireless Internet connections, and *iPod integration* systems as optional equipment [Wong, 2006]). Future research might explore this digital-media invasion into the automobile, building on studies by Paragon Media Strategies, which discovered that half of those in the so-called *millennial* generation (those born after 1984) have reduced their in-car use of local radio (Stevens, 2007); and Edison Media Research, *Internet and Multimedia 2007* (as cited in Visakowitz, 2007), which revealed that radio has slipped as a medium deemed *most essential*, from 26% in 2002 to 17% in 2007, among all consumers.

Based on the percentage of survey respondents in the present research who reported in-car radio listening, it is not surprising that a majority also reported tuning in most often during morning and afternoon drivetimes—dayparts when they are likely to be commuting to and from work. Falloff in reported listening during afternoon drivetime, evenings, and overnights, along with corresponding increases in local-market ownership concentration levels (see Table B6) could be indicative of increased reliance on computer-automated *voicetracking* technology, particularly during non-drivetime hours (when its use is believed to be the most prevalent) among some radio stations in medium- and high-concentration markets. Future research might explore listeners' use of local radio related to stations' utilization of *voicetracking*.

Conclusion

The present research found that local-market radio ownership concentration generally did not influence respondents' opinions and use of local radio. As stated, however, this reasonably can be attributed to high ownership concentration across markets. Thus, the most revealing discoveries from this study are select overall results concerning survey respondents' perceptions about local radio, including:

1. The overall high level of listener *dissatisfaction* with local radio programming
2. The small amount of locally created music aired on local radio stations in the overwhelming opinion of respondents across markets (confirming a widespread suspicion among many radio localism proponents)
3. Overall *satisfaction* with the community involvement of local radio stations and announcers

The latter discovery belies, however, the general findings of inadequacy among many local radio stations in meeting their obligations to serve local communities through other important measures of radio localism, including local news and public-service programming, live and local programming, and responsiveness. Copps (2004), speaking at an FCC-sponsored public hearing on radio localism, reasoned that activities such as station-sponsored fundraisers comprise but a small portion of local broadcasters' public-service obligations:

Some of our panelists and commenters seemed to confuse such things as conducting blood drives and fundraising for charities with the sum total of their public interest responsibilities. Now these fundraising activities are

commendable activities, to be sure. But they are only a part of a broadcaster's responsibilities to the community. . . . [T]he question on the plate tonight goes to how well this very different and very special industry is serving its very special obligations to use the airwaves for the larger benefit of us all. So I hope our panelists and commenters tonight will resist the temptation to catalogue all of their non-broadcast efforts and will focus instead on the greater picture of what they are doing as trustees of the public's airwaves. (¶ 11)

As detailed in the previous section, overall findings from the present study portend a growing irrelevance of local radio, most notably among younger respondents. As discussed, this is an area needing further examination—particularly because local radio's strength as a primary source for crisis information (as more than 1 in 4 respondents overall cited radio and it ranked in the top two across all ownership-concentration groups) suggests a continuing need for the immediacy uniquely provided by local radio as a pervasive, portable, low-cost, easy-to-use (by producers and consumers alike), and *inherently local* broadcast medium. Overall findings suggest, however, that so-called *local* radio stations are often local in name only (that is, the name of their transmitter-site location referred to in hourly station identifications), but not through programming or other important measures of radio localism. Arnold (2008) concluded, "To a large degree, localism has been one of the greatest casualties of the post-consolidation era."

As discussed, some critics believe that notions of *radio localism* and *the public interest* are outdated or, at best, ill-defined. Arguably, the FCC should offer greater

clarity. Nevertheless, some qualities of both should be obvious to even the most casual of observers. Staffing of local studios offers a basic example. Overall findings concerning respondents' ability to reach live announcers via studio telephone would not surprise citizens in Minot, ND, who need not be reminded that in times of emergency, the absence of living, breathing human beings in local radio studios is not a trivial matter. In a much-publicized incident, in 2002, local emergency-management officials were initially unable to contact anyone at the market's designated emergency-alert station (part of a cluster of group-owned stations), causing the delay of an announcement about a toxic-chemical release in a train derailment (Lee, 2003).

Based on this example and other findings from the present research, radio localism in the public interest is defined here as *broadcast licensees' public-service obligations to local communities, as stewards of a public trust, through the provision of live and local news and public-affairs programming, and via community engagement, accessibility, and responsiveness*. Although survey results indicate that local-market radio ownership concentration is not a strong factor influencing opinions and use of local radio, overall findings showing respondents' perceptions across all markets surveyed suggest that many local radio stations *fail* in meeting their obligations to local communities by critical measures of radio localism. These findings suggest that policy recommendations of DiCola (2006) and Martens (2004) could potentially foster enhanced radio localism and public-interest benefits to U.S. citizens. Included among these recommendations are:

1. Local and national radio station ownership cap reductions
2. Digital-spectrum reallocation to independent, local broadcasters
3. Passage of the Local Community Radio Act of 2007, which calls for expanded licensing of low-power FM (LPFM) stations (House and Senate versions of the bill are pending at the time of the present writing)
4. Sharpened and strictly enforced studio staffing requirements

Additionally, present study findings suggest support for *elimination of the newspaper/broadcast cross-ownership ban* (departing from a position championed by some opponents of media ownership consolidation), coupled with the inclusion of conditions that could benefit radio localism and local radio generally. According to an FCC study, newspaper/television station cross-ownership enhances the quantity and quality of news and public-affairs programming (Knee, 2003). Similar benefits could result from partnerships between radio stations and publishers due to the fact that most newspapers (with a few notable exceptions) are, much like radio, *inherently local*. Sturm (2005), depicting the cross-ownership ban as outdated, wrote, “Permitting newspaper publishers to combine their extensive newsgathering resources with those of broadcasters . . . would have enabled TV and radio stations to provide audiences nationwide with improved news and informational services” (p. 202).

Thus, the addition of print reporters to the small news staffs (if they exist at all) of cross-owned radio stations could enhance local-radio news—an area in which local radio is currently underperforming, according to findings in the present research. Further, if lifting the restriction serves to benefit struggling local radio stations

(particularly AM stations) or newspapers (if there exists an industry currently more distressed than radio, it likely is newspapers), or if ending the ban offers even the slimmest hope of fostering local newspaper startups, such outcomes *should be nurtured*.

Moreover, despite affirmation of the cross-ownership ban by the courts, some critics have strong reservations concerning ownership restrictions pertaining to publishing (for, unlike radio, publishing is not subject to the *scarcity rationale* necessitating spectrum allocation, as discussed earlier). As the U.S. Court of Appeals, in *Stahlman v. FCC* (1942), determined, “Whatever fetters a free press fetters ourselves.” Further, existing proposals to tighten radio ownership restrictions might realistically stand a greater chance for enactment with tradeoffs agreeable to stakeholders on both sides. Thus, to benefit radio localism, policy tying *loosened* cross-ownership restrictions with *tightened* radio ownership caps might be more effective than total opposition to newspaper/broadcast cross-ownership or, conversely, the near unilateral loosening of the ban (as proposed by the FCC, but killed by Congress in May 2008). Such a compromise could include:

1. Local broadcast ownership cap of four stations per market, including no more than two in the same service (AM, FM, or TV) per market
2. National broadcast ownership cap of 120 stations, including any combination of AM, FM, or TV stations
3. Elimination of newspaper/broadcast cross-ownership ban

This policy would serve to revert the local-radio ownership cap to the extant level prior to passage of the Telecommunications Act of 1996, while permitting national

radio ownership of up to three times *more* stations than was allowed before 1996 (but about 10 times *less* than the station count attained, post-Telecommunications Act, by Clear Channel Communications). Thus, the policy would reverse that which Prindle (2003) depicted as the *reckless* elimination of the national radio ownership cap that resulted in a “radio marketplace, where excessive ownership consolidation has created an anti-competitive environment” (p. 322); and, it could help correct the *public value failure* model described by Bozeman (2002). This policy might ultimately promote the aims of competition, diversity, and localism through the marketplace theory, which, as Prindle wrote, “only works . . . within a genuine competitive marketplace” (p. 300). Lastly, the compromise might also enhance the vibrancy of struggling AM stations by making them potentially more attractive to group owners seeking to maximize station counts within local markets.

The principal motivation behind such policy is promoting the *relevance* and *preservation* of local radio by (a) encouraging licensees to capitalize on localism and service in the public interest (local radio’s inherent strengths), and (b) fostering responsible federal policy on media control. Therefore, present study findings also suggest support for transparent federal policymaking, consistent with the public-comment requirement provision of the Media Ownership Act of 2007 and in contrast to prior attempts by the FCC to expedite relaxed media ownership restrictions, depicted by Sterling (2003) as “stealth policy-making” (p. 4).

In formulating policy, regulators and lawmakers should consider Carpenter’s (1999) challenge (directed at print media, but updated here): “What can [local radio]

do better than any other medium and is that worth doing?" (p. 267). Most critics on all sides of the media ownership regulation debate likely would agree that an *unfathomable* response to the challenge would be for local radio to largely ignore local communities and, instead, emphasize homogenized national formats.

Additional research is needed to discern the *direct and measurable impacts* on radio localism and the public interest attributable to ownership consolidation as a result of current federal policy on media control. Copps (as cited in Hilliard & Keith, 2005) called for "independent research studies on media concentration in a variety of markets" (p. 102). Prior research investigating format diversity and other measures of ownership-consolidation effects is valuable; however, follow-up studies should examine the opinions of *local citizens* as the *penultimate arbiters*—building on the findings of Polinsky (2007) and the present research. Copps (2004) aptly asked, "How can we possibly know if licensees are serving their communities without hearing from the community?" (§ 7).

In highlighting the current lack of such insight, DiCola (2006) stated, "We can only speculate . . . that listenership has declined because of the damage to diversity and localism from [ownership consolidation]" (p. 14). Likewise, Napoli (2007) described a much-needed but "disappointing paucity" (p. xvi) of prior research pertaining to principles of media diversity and localism. Regrettably, the information vacuum might be as old as vacuum tubes. Mendelsohn (1964) observed that compared with TV, research on radio is sparse. The dearth of attention is puzzling considering that more than 93% of Americans use radio daily (Arbitron, 2007). Nonetheless, as

Hilmes and Loviglio (2002) lamented, radio is “perennially the stepchild of media attention” (p. 14). Polinsky’s (2007) call for future research would appear specifically directed at the present study: “Future research should explore the relationship between increases in ownership concentration and radio audiences and policymakers should also consider that ownership concentration may have a detrimental . . . [effect] on audience satisfaction with radio programming” (p. 141).

The present research discovered that local-market radio ownership concentration does not strongly influence listener opinions and use of local radio; as stated, however, the finding is attributable to high ownership concentration across markets. Overall results suggest negative effects from local and national radio ownership consolidation on listener perceptions about various on-air and off-air qualities of local radio and, thus, reveal poor performance among many local stations by certain measures of radio localism and service in the public interest. May the sounds of these citizens’ voices *not* be akin to radio *dead air*: short-lived, unfortunate, and soon forgotten.

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Appendix A

Listeners' Opinions and Use of Rochester Radio Stations

Instructions:

Please respond with your opinions about local Rochester radio stations, no matter how much or how little you choose to listen (including overhearing someone else's radio).

Local Rochester radio stations are AM or FM broadcast stations transmitting from the Greater Rochester area and whose signals reach where you live (including outlying counties).

There are no right or wrong answers.

1. Do you currently live in the Greater Rochester area (including outlying counties)?

Yes (continue with next question)

No (go to question #24)

For questions 2 through 5, indicate your opinions about programming on Rochester radio stations. There are no right or wrong answers.

Click one circle for each question.

2. In your opinion, how much local news is aired on Rochester radio stations?

None

Very Little

Some

A Lot

3. In your opinion, how much local public service programming (for example, public service announcements and public affairs talk shows) is aired on Rochester radio stations?

None

Very Little

Some

A Lot

4. In your opinion, how much music created by local artists (bands or individual musicians) is aired on Rochester radio stations?

- None
- Very Little
- Some
- A Lot

5. In your opinion, how much programming featuring announcers or disc jockeys (“DJs”) broadcasting live from Rochester is aired on Rochester radio stations?

- None
- Very Little
- Some
- A Lot

For items 6 through 9, indicate your level of agreement or disagreement with each statement based on your opinions about Rochester radio stations. There are no right or wrong answers.

Click one circle for each statement.

6. Rochester radio stations provide a forum for debate on topics of interest to local residents.

- Disagree Strongly
- Disagree Moderately
- Disagree Slightly
- Agree Slightly
- Agree Moderately
- Agree Strongly

7. Rochester radio stations are actively involved in the local community through local benefits (for example, food drives and fundraising for good causes).

- Disagree Strongly
- Disagree Moderately
- Disagree Slightly
- Agree Slightly
- Agree Moderately
- Agree Strongly

8. The announcers and DJs on Rochester radio stations broadcast live from the Rochester community.

Disagree Strongly

Disagree Moderately

Disagree Slightly

Agree Slightly

Agree Moderately

Agree Strongly

9. The announcers and DJs on Rochester radio stations are active in the local community through promotional appearances (for example, on-location broadcasts at local festivals).

Disagree Strongly

Disagree Moderately

Disagree Slightly

Agree Slightly

Agree Moderately

Agree Strongly

For questions 10 and 11, indicate your level of satisfaction with Rochester radio stations.

Click one circle for each question.

10. How satisfied are you with the amount of community involvement among Rochester radio stations?

Not At All

Very Little

Somewhat

To A Great Extent

11. How satisfied are you with the programming on Rochester radio stations?

Not At All

Very Little

Somewhat

To A Great Extent

For question 12, answer based on your experience phoning Rochester radio stations' studio lines (or "request lines").

Click one circle for this question.

12. When you phone Rochester radio stations' studio lines (or "request lines"), how often do you reach a live announcer or DJ?

Never

Rarely

Sometimes

Often

I do not recall or I do not phone radio stations

13. Last week, how much time did you spend listening to Rochester radio stations?

Fewer than 5 hours

5 to 10 hours

More than 10 hours

14. Where do you listen most often to Rochester radio stations? (Select only one.)

Car

Home

Work

Other...

15. Which one of the media below do you turn to most often for daily news?

(Select only one.)

Internet

Newspaper

Radio

Television

E-mail or cell phone text message alerts

Other...

16. Which one of the media below do you turn to most often in times of crisis, such as weather emergencies? (Select only one.)

Internet

Newspaper

Radio

Television

E-mail or cell phone text message alerts

Other...

17. Which of the following types of electronic media do you use most often for entertainment? (Choose up to three.)

Compact discs (CDs) played on a CD player

Digital music files downloaded to a portable music player such as an iPod or to a personal computer

Podcasts (audio or video shows received via online subscriptions or downloaded from Web sites)

Internet radio (online audio streaming of Web-only radio stations)

Satellite radio

Local AM or FM radio (via a radio receiver)

Local AM or FM radio (via online audio streaming)

Local TV

Cable TV

18. What are your most important reasons for listening to Rochester radio stations? (Select all that apply.)

Current time

Local news

National news

Local talk shows

National talk shows

Traffic reports

School closings

Weather forecasts and current temperature

Local or regional sports play-by-play broadcasts

National sports play-by-play broadcasts

Wakes me up in the morning
Companionship and/or background noise
Favorite announcers and/or DJs
Effects on my mood
Music I enjoy
Overheard at work, school or a public place (I did not choose to listen)
Other...

19. In the past 24 hours, during what time period(s) did you hear Rochester radio stations? (Select all that apply.)

Early morning (6-9 a.m.)

Midday (9 a.m.-3 p.m.)

Late afternoon (3-6 p.m.)

Evening (6 p.m.-midnight)

Overnight (Midnight-6 a.m.)

20. In the past 24 hours, which Rochester radio station(s) did you hear? (Please list call letters, dial positions, station nicknames, and/or program or host names.)

21. What is your age?

Under 18

18-24

25-34

35-44

45-54

55-64

65 or older

22. What is your sex?

Female

Male

23. Your comments about Rochester radio stations and/or this survey are welcome.

24. If you want to receive survey results, please provide an e-mail address or U.S. mail address.

Thank you for completing this survey!

Appendix B

Table B1

Survey Completions by Local-Market Radio Station Ownership Concentration Levels

	<i>Survey Completions</i>
Low ownership-concentration markets	94
Medium ownership-concentration markets	689
High ownership-concentration markets	24
Unknown market	23
Total	830

Table B2

Respondents' Opinions About Local Radio Programming (%)

	<i>None</i>	<i>Very Little</i>	<i>Some</i>	<i>A Lot</i>
Amount of local news ^a	0.7	22.6	54.0	22.7
Low-concentration markets	1.1	28.0	57.0	14.0
Medium-concentration markets	0.7	22.1	53.1	24.1
High-concentration markets	0.0	25.0	54.2	20.8
Amount of local public-service programming ^a	3.2	40.2	47.9	8.7
Low-concentration markets	6.5	63.4	24.7	5.4
Medium-concentration markets	2.8	36.9	52.3	8.1
High-concentration markets	4.2	29.2	33.3	33.3
Amount of music created by local artists ^a	13.8	64.3	19.7	2.1
Low-concentration markets	24.7	62.4	11.8	1.1
Medium-concentration markets	11.8	65.3	21.1	1.8
High-concentration markets	17.4	56.5	21.7	4.3
Amount of live-local programming ^a	1.6	17.4	43.3	37.8
Low-concentration markets	5.4	15.1	37.6	41.9
Medium-concentration markets	1.2	17.1	44.5	37.3
High-concentration markets	0.0	17.4	47.8	34.8

Note. ^aAll samples combined.

Table B3

Respondents' Levels of Agreement With Statements About Local Radio Stations (%)

	<i>Agree</i>	<i>Disagree</i>
Stations provide a forum for debate on topics of local interest ^a	61.3	38.7
Low-concentration markets	45.1	54.9
Medium-concentration markets	64.5	35.5
High-concentration markets	54.1	45.9
Stations are actively involved in the local community ^a	82.9	17.1
Low-concentration markets	71.0	29.0
Medium-concentration markets	84.8	15.2
High-concentration markets	79.2	20.8
Announcers broadcast live from the local community ^a	82.6	17.4
Low-concentration markets	76.3	23.7
Medium-concentration markets	84.7	15.3
High-concentration markets	66.7	33.3
Announcers are active in the local community ^a	87.2	12.8
Low-concentration markets	72.1	27.9
Medium-concentration markets	90.3	9.7
High-concentration markets	73.9	26.1

Note. Survey participants indicated level of agreement or disagreement with statements by selecting a response option using a six-point scale ranging from “Disagree Strongly” to “Agree Strongly.”

^aAll samples combined.

Table B4

Respondents' Levels of Satisfaction With Local Radio Stations (%)

	<i>Not At All</i>	<i>Very Little</i>	<i>Some- what</i>	<i>Great Extent</i>
Satisfaction with community involvement ^a	5.1	17.7	55.1	22.0
Low-concentration markets	12.0	33.7	40.2	14.1
Medium-concentration markets	4.0	14.9	58.7	22.5
High-concentration markets	8.7	17.4	43.5	30.4
Satisfaction with programming ^a	11.2	28.3	45.6	14.8
Low-concentration markets	21.7	37.0	30.4	10.9
Medium-concentration markets	9.7	26.4	48.7	15.1
High-concentration markets	8.7	34.8	39.1	17.4

Note. ^aAll samples combined.

Table B5

Respondents' Time Spent Listening to Local Radio (%)

	<i>Under 5 Hours</i>	<i>5–10 Hours</i>	<i>Over 10 Hours</i>
Time spent listening to local radio stations ^a	34.3	40.3	25.4
Low-concentration markets	21.5	26.9	51.6
Medium-concentration markets	36.6	42.5	20.9
High-concentration markets	29.2	25.0	45.8

Note. ^aAll samples combined.

Table B6

Respondents' Primary Source for Daily News and Crisis Information (%)

	<i>Internet</i>	<i>Paper</i>	<i>Radio</i>	<i>TV</i>
Primary source for daily news ^a	34.6	19.6	18.1	26.7
Low-concentration markets	42.6	9.6	26.6	21.3
Medium-concentration markets	33.9	21.1	16.7	27.3
High-concentration markets	20.8	29.2	8.3	37.5
Primary source during times of crisis ^a	20.1	0.2	28.0	51.3
Low-concentration markets	11.7	1.1	38.3	47.9
Medium-concentration markets	21.2	0.1	25.7	52.8
High-concentration markets	20.8	0.0	45.8	29.2

Note. ^aAll samples combined.

Table B7

Respondents' Local-Radio Listening by Daypart (%)

	<i>AM Drive</i>	<i>Midday</i>	<i>PM Drive</i>	<i>Evening</i>	<i>Overnite</i>
All respondents ^a	74.5	41.3	55.9	27.6	6.4
Low-concentration markets	70.2	45.7	59.6	37.2	19.1
Medium-concentration markets	75.5	40.1	55.4	26.0	4.5
High-concentration markets	66.7	54.2	50.0	16.7	0.0

Note. Percentages total more than 100% because survey participants could select multiple response options.

^aAll samples combined.