Radio Audience Attitudes Toward Programming and Localism in the Decade Following the 1996 Telecommunications Act

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Abstract

Numerous research studies have been conducted during the decade following the Telecommunications Act of 1996. However, little attention has been given to audience attitudes toward issues associated with that legislation. This study examined listener perceptions of radio, particularly in relation to programming and localism. Key findings were that localism matters to listeners, but programming does not influence total hours of listening. When it came to new media audio technology, the use of streaming audio was a significant predictor of radio use.

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More than a decade ago, the Telecommunications Act of 1996 produced sweeping changes in the landscape of broadcasting. The legislation was the most significant revision to communication regulation since the Communications Act of 1934 (Corn-Revere & Carveth, 1998). It was also the culmination of regulatory changes that started in the 1980s, including the elimination of ascertainment and non-renewal of the Fairness Doctrine (Tankel & Williams, 1998). A particularly important component of the 1996 Act involved changes in the national and local ownership of radio stations (Leeper, 2000). Compared with historical broadcast regulation in 1927 and 1934, Hilliard and Keith (2005) argued that deregulation changed "structures of and relationships among all the media" (p. 69). Additionally, the license renewal period was lengthened to eight years from seven. However, even though stations must meet certain qualifications for renewing their license, Sterling (2006) noted that none of the qualifications deal with the quality of programming.

Following implementation of the 1996 legislation, media scholars became concerned about the impact and potential implications of the Telecommunications Act. Since that time, research has included such topics as diversity of programming (Drushel, 1998; Huntemann, 1999), the issue of station transfers and the number of owners (Williams & Roberts, 2002), the relationship between consolidation and the price of advertising since 1996 (Brown & Williams, 2002), formats (Polinsky, 2007; Wirth, 2002), and whether the FCC's signal contour overlap definition of a market accurately depicts the number of stations that compete for advertising dollars in a given market (Williams, 1998).

Much has been written in the trade and scholarly press about the Telecommunications Act of 1996. Research has primarily focused on market effects, legal ramifications, programming, and station ownership issues. More than 10 years following passage of the Act, there remains of dearth of research that investigates audience effects from the legislation. Consolidation offered some stations the ability to be more efficient and innovative in programming (Leeper, 2000). However, the question is the product the audience receives (Leeper, 2000). Bates and Chambers (1999) argued that the effect of the Act on audiences is not well examined, particularly "how well audiences are served by radio and its programming" (p. 26). Additionally, Polinsky (2007) suggested that research should examine the relationship between increased concentration and audiences. Drawing on prior research regarding the Telecommunications Act of 1996, this study considers the effects of the Act on radio listeners by assessing attitudes toward their local radio stations.

Literature Review

One of the prominent effects of the 1996 Telecommunications Act for broadcasters involved large-scale changes in radio ownership. For several decades, a single entity could own relatively few AM and FM stations. By the mid-1990s, the number of stations an entity was allowed to own nationally was raised to "20 AM and 20 FM" facilities (see footnote 4 in National Telecommunications, 1997; see also FCC, 1996), plus three additional stations of each type if the stations were controlled by minorities or small businesses (FCC, 1996). In contrast, the 1996 legislation eliminated national ownership caps and relaxed maximum local ownership to a sliding scale, based on the total number of stations in a market, in which an entity could own no more than 50-percent of stations in a market (FCC, 1996). Consolidation following the Act occurred quickly, as evidenced by the number of radio station transactions. By 2001, the number of commercial station owners, nationally, had declined by 25-percent (FCC, 2001). Chang and

Ki (2004) examined radio station mergers and acquisition activities between 1981 and 2002, and found that the frequency of those activities corresponded with the years when ownership regulations were relaxed, with larger transactions occurring during later years. The results of their study supported previous research regarding consolidation after the 1996 Act.

Several pertinent concerns were voiced by media scholars following implementation of the 1996 Act; one of which was the Federal Communication Commission's (FCC) move from the government entrusting stations to operate in the public interest to a “marketplace model” (Bednarski, 2003, para. 15). Bednarski (2003) argued that the new model for station ownership had a negative effect on ownership diversity. Under the former legislation, the FCC limited ownership and decreed that stations were to operate in the public interest (Bednarski, 2003). Although operating in the public interest is still the focus of the Act, that concept was not followed in the principle of competition (Aufderheide, 2006). Bates and Chambers (1999) posited that changes in the regulation, which included removing the duopoly rule and thus providing for consolidation and station clustering, enabled “market power and control of the most influential radio stations” (p. 26). Similarly, Ness (2006) argued that radio moved from a competitive local industry to one run by a few national players. However, Ness also stated that such massive consolidation was probably not foreseen by Congress.

Despite the long-standing dictum that broadcasters are to operate in the public interest (Creech, 1996), the foundation for regulation and deregulation of broadcasting has typically been economic in nature (Bates & Chambers, 1999; Corn-Revere & Carveth, 1998). One concern noted by media scholars was that consolidation under the 1996 Act “provided incentives for the development of market power within local radio markets” (Bates & Chambers, 1999, p.25). Furthermore, although the law restricts the “numbers of stations” an entity can own within a market, it does not stipulate “audience popularity or economic power of those stations” (Sterling, 2006, para. 10).

Another pertinent issue relates to programming diversity, particularly the number of format choices within a market (Hilliard & Keith, 2005). It has been posited that, as radio under the 1996 Act became more consolidated, there were fewer formats within markets (Gomery, 2000) and that some areas had "more overlapping standard formats" (Aufderheide, 2006, para. 4). According to Sterling (2006), few owners in a market resulted in “homogenized programming...of similar-sounding stations across the nation” (para. 16). In addition, the 1996 Act negatively affected the amount of “locally-produced programming”, the number of people that stations employed, and the amount of “local news and public affairs programming” (Sterling, 2006, para. 16). A related concern was the origination of programming, since technology now enabled stations to distribute content from a distance and to operate facilities at less cost (Hilliard & Keith, 2005).

A number of empirical studies have focused on the effects of the 1996 Act on formats. For example, one year after its implementation, Drushel (1998) examined various effects of the legislation on the largest 50 radio markets. Regarding horizontal integration, Drushel found that concentration of stations in spring 1997 was about twice that of spring 1992 in all but three of the markets. He also noted that there was a slight increase in program diversity, but that there was little association between market concentration and “program format diversity” (p. 14). On the other hand, there was an increase in advertising revenue index so that an increase in ad revenue was associated with concentration.

Comparing stations in 243 markets between 1993 and 1997, Berry and Waldfogel (2001) found that, although concentration “decreased station entry” into a market, it did not decrease format variety (p. 1021). Concentration actually increased “the amount of programming variety relative to the number of stations” (p. 1024).

Wirth (2002) examined format competition within 152 markets the year before and the four years after passage of the 1996 Act. He found that just over 11% of markets experienced “a net increase in direct format competition” (p. 39). When markets were combined, there was an overall net increase of 8.7%. For individual markets, the largest increase in direct format competition was in medium markets (28%), compared with a 12% increase in large markets and just under 2% in small markets. Overall, there was a 10.71% decrease in competition in large markets, while medium-sized markets increased in direct competition by 22.95%. Meanwhile, small markets experienced no change in format competition. In addition to the issue of format competition, Wirth also examined effects on potential listening population and found that there was more than a 46% decrease in “direct format competition” (p. 43), while just under 30% experienced an increase. Nearly 24% “experienced no change” (p. 43). In summary, Wirth noted that the Telecommunications Act of 1996 improved direct competition in a market, but nearly half of listeners experienced loss of “direct format competition” (p. 44).

Two other studies by Wirth (2001, 2007) dealt with the effects of consolidation on format control and audience reach. In the first study, Wirth (2001) examined whether there was an oligopoly of programming, in which “more than 50% of all radio listeners...tune to a specific music format...serviced by four radio groups” (p. 254). Ten formats fit the definition of an oligopoly. Four station groups were found to reach more than half of the listening audience in each of 10 formats. Following up his earlier study, Wirth (2007) examined whether the Telecommunications Act resulted in “format monopolies, duopolies, and new oligopolies” (p. 145). Specifically, Wirth (2007) was interested in the top 20 formats, plus six formats from prior research. He found that five formats fit the format monopoly criteria, seven formats fit the duopoly criteria, and 13 formats for the oligopoly criteria. One format was non-oligopoly. Wirth concluded that formats were moving from oligopolies to monopolies, and that the changes were related to the results of the Telecommunications Act.

In another recent study, Polinsky (2007) examined whether there was a relationship between format diversity and "ownership concentration." The results of the study showed that the more stations in a market equaled more formats. In addition, the higher percentage of radio listeners was also associated with the number of formats in a market. Polinsky (2007) stated, "diversity of stations may be more important to listeners than just having diversity of formats" (p. 140). The number of stations in a market might influence the number of people listening to radio, so that the number of stations "within the formats" is important rather than just the choice of formats. Polinsky concluded that the concentration of ownership might be related to the "percentage of radio listeners in a market" (p. 141) – more concentration equaled fewer listeners.

Another focus of attention for media scholars is the issue of localism, which has been a part of regulation since the early days of radio in the U.S. However, its definition and application have been points of contention over the past century. Kirkpatrick (2006) argued that, during the time of the Federal Radio Commission, the concept of localism served as a regulatory means of modernizing local radio and connecting local communities to national standards. According to Kirkpatrick (2006), the FRC's view of localism was seen as a negative and a disadvantage to small broadcasters, compared with "affirmative localism", which started to be encouraged by the FCC following the Communications Act of 1934 (p. 105).

Presently, the FCC approaches localism from the perspective that radio and television stations are "local media" and, therefore, should "serve the needs and interests of the communities to which they are licensed" (FCC Consumer Facts, n.d. para. 1). In 2003, concerns about the impact of ownership on localism prompted the Commission to launch a "'Localism in broadcasting' initiative" (FCC, 2003). Included in the initiative was the institution of a "Localism Task Force" whose duties would include conducting research regarding the issue, as well as recommending how the FCC could promote localism (FCC, 2003). In January 2008, the Commission released a report based on comments received from the public and industry regarding localism (FCC, 2008). According to findings in the report, while some TV and radio stations provide programs about local issues, broadcasters are generally not connecting with the needs of their communities. In addition, the report also noted that the public is "not fully aware of the local issue-responsive programming that their local stations have aired" (p. 3). At the same time, the report stated that the Commission needed to better inform the public about its processes and "broadcaster obligations" via resources that include the FCC's Web site and publications such as "The Public and Broadcasting" (p. 11).

Hilliard and Keith (2005) argued that the 1996 Telecommunications Act had reduced the number of "locally controlled and programmed independent stations" (p. 7). Similarly, in their review of localism in relation to radio and the 1996 Telecommunications Act, Sauls and Greer (2007) argued that consolidation was resulting in programming that lacked local content due to the mass distribution of content. Concerns also exist regarding connections between stations and their communities and the effects on political perspectives (Hilliard & Keith, 2005). Another effect on localism is small-market FM radio stations requesting FCC permission to relocate their transmitters (called "move in"), which tends to put stations near larger metropolitan areas (Stavitsky & Odell, 2006, p. 692). Considering ownership, news, and "program origination", Stavitsky and Odell (2006) lamented that "Not much is local about small-market local radio anymore" (p. 698). Concerns have also arisen regarding the extent of localism in public broadcasting, including preferences for NPR program quality and content over local content, syndicated programming, regional connections among broadcasters, and adopting "seamless formats" rather than offering a variety of community produced programs (Stavitsky, 1994, p. 23).

As discussed in the review of literature, there are two key areas from prior research regarding the Telecommunications Act of 1996 -- programming and localism. In this study, programming is defined as elements associated with in-market station competition (Aufderheide, 2006; Wirth, 2002), format diversity (Drushel, 1998; Gomery, 2000; Polinsky, 2007), and general programming issues. Localism is defined as the production and distribution of local content (Sauls & Greer, 2007) and items of general community interest (FCC Consumer Facts, n.d.). Taking these topics into consideration, the following three hypotheses are proposed:

H1: Audience perceptions of radio programming and localism will predict radio listening habits.

H2: Market size (based on population) will be a predictor of audience perceptions of radio programming and localism.

H3: Perceived importance of radio will be associated with audience attitudes about radio programming and localism.

Given the changes in communication technology since the 1996 Act and the results of programming content, it is logical to consider the influence of newer audio sources on radio listeners. According to Ness (2006) and Sterling (2006), technologies such as satellite radio and iPods are providing alternatives to local radio for some people. Previous research has shown that technologies such as MP3 players (Ferguson, Greer, & Reardon, 2007) and satellite radio (Book

& Grady, 2005) have the capability to draw some audience members away from terrestrial radio. At the same time, however, traditional radio is still a popular medium, particularly during drive-time (Book & Grady, 2005). Additionally, according to a report by Arbitron/Edison Research (Rose & Lensky, 2007), there is only a slight difference in the amount of time listening per day to traditional AM/FM radio between people who use digital technologies and those who do not. Based on the increased use of digital audio media, the following hypothesis is proposed:

H4: Use of new audio media technologies will be related to audience perceptions of radio programming and localism.

Method

Data for this study were obtained via a convenience/snowball sampling method. Students enrolled in communication courses at two US universities -- one on the east coast and another on the west coast -- were invited to complete a radio perception survey that was posted on the Web site of one of the universities. In addition to their participation, students who had Facebook accounts were asked to send an email to 10 of their friends, inviting those individuals to also complete the questionnaire. Some classes offered students minor extra credit points in the course if they completed the survey. Ninety-eight students were in courses that offered extra credit and 32 were in courses that did not receive extra credit for participation. Students from all the courses indicated that they had invited approximately 459 of their Facebook friends to complete the questionnaire. This resulted in a total of approximately 589 possible participants. Of that number, 185 individuals responded to the questionnaire for a 31.40% response rate.

Items in the questionnaire revolved around five areas: demographics, radio use, programming, localism, and general attitudes toward radio. For demographics, participants were asked to indicate such things as their ZIP Code, the population of their city (as an indication of market size), gender, and the year of their birth. Most of the 183 people who responded to the gender question were female (n=133; 72.7%). City population estimates of the 158 respondents who answered that question ranged from 300 to 8,000,000 (M=538,145.71; SD=1,142,470). Ages of the 178 who responded to the birth year question ranged from 17 to 81 (M=20.52; SD=5.53).

To assess the relationship between traditional radio listening and the use of new media audio technologies, respondents indicated their level of use (1= not at all; 5 = great deal) of iPods/MP3 players (n=185; M=3.91; SD=1.23), satellite radio (n=184; M=1.69;SD=1.00), HD Radio (n=185; M=1.39; SD=.83), and streaming radio via the Internet (n=184; M=2.30; SD=1.27). Respondents also indicated the number of hours a day they listened to radio stations at home (n=183; M=.63; SD=1.13), in the car (n=183; M=1.23; SD=1.05), and at work or school (n=182; M=.58; SD=1.32). Total daily radio listening was calculated by adding the three listening locations, resulting in an average of 2.44 hours per day (n=182; SD=2.26).

Respondents also were asked to indicate which format they listened to the most (rock, easy listening, jazz, religious, country, classical, news/talk, urban, other). Of the 185 respondents, the top three formats selected were rock (n=69; 37.3%), country (n=36; 19.5%), and urban (n=17; 9.2%).

To examine attitudes toward station programming, respondents were presented with a list of eight items and asked to indicate their level of agreement on a scale of 1 (disagree) to 5 (agree). Items were adapted, in part, from prior research (e.g., Drushel, 1998; Polinsky, 2007; Sterling, 2006; Wirth, 2002). A total of 178 individuals completed the eight items associated with programming: There is a variety of radio formats in my community (M=3.63; SD=1.14), I am satisfied with programs on the station I listen to the most (M=3.60; SD=1.09), the radio station I listen to the most offers higher quality programming now than five years ago (M=3.63; SD=1.02), my favorite station offers music I like (M=4.12; SD=.94), I am satisfied with the amount of commercials my favorite station plays (M=2.64; SD=1.16), several stations in my area broadcast similar formats (M=3.83; SD=.842), stations in my area are competitive with each other (M=3.47; SD=.98), and having a variety of radio station formats in my area is important to me (M=3.81; SD=1.19). The program scale was reduced from eight to seven items (removing the item dealing with importance of having a variety of formats) to increase Cronbach's alpha from .67 to a more acceptable .73, although reliability of this measure was not particularly strong. The final programming scale was constructed by adding the remaining seven items (M=24.93).

Perceptions of localism were assessed by asking respondents to indicate their level of agreement to seven items on a scale of 1 (disagree) to 5 (agree). Items were adapted, in part, from prior studies (e.g., American Media Services, 2008; FCC, .n.d; Hilliard & Keith, 2005; Sterling, 2006). A total of 180 individuals completed all seven items associated with localism: I feel a connection to the personalities on the radio station I listen to the most (M=2.68; SD=1.28), my favorite radio station keeps me well informed of local news (M=2.87; SD=1.12), the station I listen to the most is responsive to the needs of its listeners (M=3.37; SD=.89), the station I listen to the most works hard to keep my loyalty through give-aways and contests (M=3.42; SD=1.07), the station I listen to the most addresses the needs of the community (M=2.86; SD=1.05), the station I listen to the most provides programming that is in the best interest of the public (M=3.18; SD=1.06), and I consider myself loyal to my favorite station (M=2.98; SD=1.25). A localism scale was created by adding the seven items (M=21.34). Compared to the programming scale, the seven-item localism scale fared much better, with an .82 alpha level of reliability.

A final list of items sought listener perceptions on a scale of 1 (disagree) to 5 (agree) regarding four general radio topics, which were adapted, in part, from prior literature (e.g., American Media Services, 2008; Bates & Chambers, 1999): Radio stations are an essential part of society ($n=181$; $M=3.44$; $SD=1.14$), listening to radio is an important part of my day ($n=181$; $M=2.48$; $SD=1.25$), I am aware of who owns radio stations in my area ($n=180$; $M=1.67$; $SD=1.04$), and I listen to radio now more than five years ago ($n=181$; $M=2.69$; $SD=1.53$). Those four items were regressed individually with several independent variables as reported in the results.

Results

The first hypothesis proposed that audience perceptions of radio programming and localism would predict radio listening habits. A stepwise regression of the localism and programming scales on total listening per day showed that the latter scale was excluded from the model ($F(1,174) = 9.29$, $p<.01$). The standardized beta coefficient for the local scale was .23 ($t=3.05$, $p<.01$). Thus, Hypothesis 1 was partially supported: Localism matters to listeners, but programming does not influence total hours of listening.

Hypothesis two examined whether there was a connection between market size, as measured by population, and perceptions of programming and localism. The relationship between population and the programming and localism scales was tiny and not statistically significant. Therefore, Hypothesis 2 was not supported. The correlation between localism and population was .08 (n.s.) and only slightly higher between programming and population ($r=.11$, n.s.).

The third hypothesis dealt with the perceived importance of radio and its possible relationships with audience attitudes about radio programming and localism. A stepwise regression of the localism and programming scales on radio being an essential part of society again showed that the latter scale was excluded from the model ($F(1, 175) = 53.10$, $p < .001$). The standardized beta coefficient for the local scale was .48 ($t = 7.29$, $p < .001$). Thus, Hypothesis 3 was partially supported. Again, localism is associated with the essential nature of radio, but programming is not.

Hypothesis four sought to determine whether the use of new audio media technologies would be related to audience perceptions of radio programming and localism. The relationships between the four kinds of new media audio technology use (MP3, satellite, HD Radio, and streaming audio) and the two scales were all very small and not statistically significant. Hypothesis 4 was not supported: Attitudes toward localism and programming did not predict the use of new media audio technologies.

Although not directly tested as hypotheses, some of the technology use variables were associated with individual items in the program and localism scales. For example, variety was associated with satellite use ($r = .21$, $p < .01$) and interest in local news was linked to streaming audio use ($r = .17$, $p < .01$). Also, when the four types of audio technology uses were regressed on total listening per day, only the use of streaming audio was a significant predictor ($ß = .32$, $t = 4.55$, $p < .001$).

Discussion

In 1996, the Telecommunications Act dramatically changed the dynamics of radio in the U.S., particularly in the realm of ownership (Leeper, 2000). Compared to long standing federal regulations, a single entity could now enjoy large-scale ownership of radio stations on a national level (Sterling, 2006). Within the first few years following the Act, the industry experienced numerous mergers and acquisitions (Chang & Ki, 2004) resulting in a move from local to distant owners with ramifications that included potential loss of local control (Hilliard & Keith, 2005) and a reduction in the diversity of formats and programming (Sterling, 2006). Despite the number of studies that have dealt with the 1996 Telecommunications Act, little research has considered listener attitudes toward radio. Based on prior literature, this study focused on the two issues of station programming and localism.

A key finding of this study was that localism was important to respondents, but programming did not influence total hours listened to radio. Prior research noted that the Telecommunications Act facilitated consolidation and less competition (Aufderheide, 2006), as well as fewer formats (Gomery, 2000). However, those factors did not seem to affect attitudes of listeners in the present study, particularly in relation to their listening habits.

This study also found that attitudes toward programming and localism were not dependent upon the size of the market. Given the average size of the markets represented by respondents in this study, the results here might support the findings of Polinsky's (2007) study in that larger markets have more variety of formats. There might actually be more programming diversity due simply to the larger markets that appear to be represented in this study. Another explanation for this finding is that, more than 10 years after the 1996 legislation, listeners have become accustomed to current radio structure. Also, the respondents might not have a context and point of comparison for radio prior to 1996, since the average age of respondents was about 20 years old.

It was also hypothesized that localism would be associated with the nature of radio as expressed in attitudes about the importance of the medium to the individual. This study found that respondents believe that radio is an important part of society. In this study, the support for this assertion is the local nature of the medium. On the other hand, programming was not associated with importance.

Due to the changes in communication technology over the past decade, it was also important to consider the influence of newer, digital audio sources on radio listeners, including satellite radio (Book & Grady, 2005; Ness, 2006), MP3 players (Ferguson, Greer, & Reardon, 2007), and "online radio" (Rose & Lenski, 2007, p. 3). The hypothesis that new media technology use would be associated with localism and programming was not supported. However, the use of streaming audio via the Internet was found to be associated with total daily radio listening. The finding that variety in programming was related to satellite use makes sense, particularly due to the number of channels and format choices that are available through satellite radio services.

So, how well is radio serving its audiences (Bates & Chambers, 1999) a decade after passage of the Telecommunications Act of 1996? First, despite the emergence of new media audio technologies in recent years, radio still seems to be attracting listeners. In this study, respondents averaged around 2.43 hours of daily radio listening. This finding is similar to an Arbitron/Edison Media Research report (Rose & Lenski, 2007), which showed that people listen an average of just over two and a half hours a day to AM/FM radio. Second, it appears that localism and connectivity is important to the radio listeners polled in this study, more so than programming issues. Although programming diversity, ownership, and consolidation have been concerns for media scholars and industry practitioners, it is possible that listeners might not recognize these as concerns or even understand such issues. Instead, the public simply might know whether or not it likes a station well enough to listen. Perhaps this also explains why elements associated with localism reached statistical significance in relation to time listening to the radio. Connections with announcers, news content, and station loyalty are much more tangible than the abstract concepts associated with formats and market competition.

There are a number of limitations to this study that should be noted. One is that respondents were obtained via a convenience/snowball sample in two regions of the U.S. rather than a random, national study. Therefore, results cannot be generalized to the population. Second, since most of the respondents likely were college students, radio listening habits were probably untypical of the larger radio listening population. For example, there might be fewer hours listened in a vehicle if the students did not commute to school. A third limitation is that this study does not necessarily represent a wide variety of market sizes, since the students and their Facebook friends might have resided on the same campus. Also, given the average market size, we might not be seeing the same effects on programming that might be observed with more diverse market representation. Despite these limitations, however, this study serves as an important pilot test of items associated with localism and programming. In particular, the alpha for the items in the programming scale was lower than desired, which warrants adjustments to the questionnaire.

Future research regarding audience perceptions of radio should offer more variety and representation of market sizes and age groups. Also, future studies on this topic should be based on a random selection of participants. Finally, research should continue to examine radio industry status, local stations, and attitudes of listeners toward this medium, particularly given recent activity by the FCC in relation to the issue of localism (e.g., FCC, 2003, 2008).

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