This study was performed in response to the Notice of Proposed Rulemaking and Further Notice of Proposed Rulemaking in Rules and Policies Concerning Multiple Ownership of Radio Broadcast Stations in Local Markets, 16 FCC Rcd 19861 (2001) ("NPRM"). 1/ It is being submitted as an appendix to the Comments of the Minority Media and Telecommunications Council in response to the NPRM.

Background

The NPRM inquires whether "competing parties in a market have a commercial incentive to air 'greatest common denominator' programming, while a single party that owns all stations in a market has a commercial incentive to air more diverse programming to appeal to all substantial interests" (emphasis supplied). Ibid. at 19877 ¶37.

The importance of this question stems from the fact that a large platform of stations (co-owned or jointly operated stations in the same community) may have an economic incentive not to precisely duplicate one of its stations' formats on additional stations it adds to its platform. Thus, it may be that large platforms would contribute more format diversity ("variety") to a market than smaller ones. On the other hand, a larger platform may drive out smaller stations that specialize in niche formats, or a larger platform may force smaller stations to counterprogram with niche formats that the platform owner is unlikely to duplicate, either because of lack of interest, lack of know-how, or advertiser preferences.

A threshold question is whether platforms, duopolies, or standalones are more likely to carry niche formats or, in the alternative, to broadcast nonformat "special programming" -- niche material too narrow in audience or advertiser appeal to support a fulltime radio station.

Methodology and Study Limitations

To analyze format diversity, one must first distinguish among three "classifications" of formats: (1) mainstream formats (e.g., rock, country/western); (2) hybrids of mainstream formats (hard rock, modern country); and (3) niche formats, which serve substantial ethnic, regional, age-specific, or language groups (bluegrass, children's, jazz, Korean).

Formats may also be sorted into thirteen "types", which aggregate families of related formats, both mainstream and hybrid. For example, the "rock-based" format type includes rock (a mainstream format) and hard rock (a hybrid format); the "country-based" type includes country (a mainstream format) and

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1/ MMTC recognizes and appreciates the comments and suggestions of Kofi Ofori, Esq. and Fatima Fofana, Esq. We are profoundly grateful for the superb research and data presentation assistance provided by the Ivy Planning Group, Silver Spring, MD.

modern country (a hybrid). The "niche" or narrowcasted format type includes a variety of formats that each appeal to a substantial ethnic, regional, age-specific or language group.

Distinguishing among the three format classifications and the thirteen format types unavoidably introduces some degree of arbitrariness, just as defining music styles, races, language groups, dialects and even geographic regions depends to some extent on community consensus. For example, in some communities, every Spanish language format is mainstream; in others, it might be regarded as a niche. Furthermore, although we have followed industry custom in distinguishing between Black religious programming (gospel) and (for want of a better word) "White" religious programming, we realize that these designations are inexact in light of the racial integration of many churches over the past generation.

To minimize arbitrariness, we have attempted to use industry conventions in describing formats. In some cases, we employed format definitions in common usage, while recognizing that many stations self-identify their formats in a manner that does not follow standard conventions.

Where we were uncertain on the correct format type in which to place a format, we broke out data for those formats separately to enable those reading the study to re-analyze our data using their own format classification, typing and naming systems. Specifically, we did this for the classical, diverse, and smooth jazz formats, which some regard as mainstream and others regard as niches.

All references to radio stations in this study refer to commercial stations, on the air, and licensed in the United States.

A limitation of this study is that it is based on format competition under the current ownership paradigm, involving various sizes of radio platforms. We cannot predict, from our data, what formats platforms would adopt if they did not have to compete with standalones, or what formats standalones would adopt if they did not have to compete with platforms. Without the benefit of data on markets with radio platforms of a uniform size, no one can know precisely how much of the variation in formats over the years is attributable to cultural and demographic changes, and how much is attributable to the industry's ownership structure.

Comprehensive Tables With Format and Programming Data

Eight tables provide comprehensive data in a form from which subsidiary and conclusory data can be extracted. These tables appear at the conclusion of this report. Following is background describing each of these eight tables.

Table 1: Formats Contained in Platforms

We first examined the 6,522 stations and their formats in all Arbitron markets in 2001. This table breaks out all stations by

market, market size, owner, format type and platform size. Our source for the raw data was BIA Radio Market Report 2001. The formats are described therein at pp. 14-15. Market sizes are 2001 Arbitron metro ranks.

The thirteen format types, and the specific formats contained in each, that we used for Table 1 are as follows:

A. Rock-based popular music, including:

70's and 80's
70's Hits
70's Oldies
80's Hits
AAA (Triple A)
AC (Adult Contemporary)
Adult CHR
Adult Hits
Adult Rock
Alternative
AOR (Album Oriented Rock)
Beach
Bright AC (Bright Adult Contemporary)
CHR (Contemporary Hit Radio)
Classic Hits
Classic Rock
Dance
Dance Oldies
Hot AC (Hot Adult Contemporary)
Mix AC (Mix Adult Contemporary)
Modern AC (Modern Adult Contemporary)
Modern Rock
Oldies
Progressive
Rhythmic
Rock
Rock AC (Rock Adult Contemporary)
R&R (Rock and Roll)
Soft Rock
Top 40

B. Country-based music, including:

Americana
Country/Western
Classic Country
Modern Country

C. Easy Listening-based music, including:

Beautiful music
Easy (Easy Listening)
Lite AC (Lite Adult Contemporary)
Lite Rock
Soft Hits
Soft AC (Soft Adult Contemporary)

D. English language spoken word, including:

Business News
Motivational
News
News/Talk
News/Talk/Sports
Public Service
Sports
Talk

E. Standards-based music, including:

Adult Standards
Big Band
Classic MOR (Classic Middle of the Road)
Full Service
MOR (Middle of the Road)
Nostalgia

F. Spanish language programming, including:

Mexican
Ranchera
Spanish
Spanish AC
Tejano

G. Black contemporary music, including:

Black
Rhythm & Blues (R&B)
R&B Oldies (Rhythm & Blues Oldies)
Urban
Urban AC (Urban Adult Contemporary)
Urban/CHR (Urban Contemporary Hit Radio)

H. White religious programming, including:

Christian
Christian Contemporary
Inspirational
Religion
Religious Music
Sacred

I. Black religious programming, including:

Black Gospel
Gospel

J. Classical

K. Smooth jazz

L. Variety, including:

Variety
Variety Hits

M. Niche programming, including:

Asian
Bluegrass
Children (and Kids)
Chinese
Comedy
Eclectic
Ethnic
Folk
Greek
Hawaiian
Information
International
Jazz
Korean
NAC (New Adult Contemporary)
New Age
New Wave
Polish
Polka
Portuguese
Rap

Table 1.1: Traditional Platform Size

This table is derived from Table 1. It is a crosstabulation of each format type above ("A" through "M") by the size of the platforms of the stations broadcasting the format. Note that some platform sizes were greater than eight; this is apparently because BIA includes pending transactions under station ownership or because BIA may recognize some stations as providing service to a market when these stations do not count toward the ownership limits in 47 U.S.C. §201(b)(1).

Table 2: Nontraditional Formats

This table is partly derived from Table 1. It breaks out the stations classified as "M" in Table 1 (niche formats) by metro rank, market, owner, platform size and call letters.

Table 2.1: Nontraditional Platform Size

This table is derived from Table 2. It is a crosstabulation by platform size of each specific niche format (e.g., Asian, bluegrass) included within the "M" (niche format) classification in Table 1.

Table 3: Formats Over Time

This table was derived from the master listings of stations' formats contained in eleven consecutive editions of the Broadcasting & Cable Yearbook (which was known as Broadcasting Yearbook before 1992). The period covered is 1991-2001; data in the 1999 edition was the same as the data in the 2000 edition. The starting year, 1991, was chosen because that was the last year in which the maximum permitted radio platform size was two -- an AM-FM duopoly. See Revision of Radio Rules and Policies, 7 FCC Rcd 2755, 2758-61, recon. denied, 7 FCC Rcd 6387 (1992). The format definitions used by Broadcasting and Cable are slightly different from BIA's definitions, but these differences did not prove to be decisionally significant. 2/ Each row of the table is one of the 90 formats included in Broadcasting and Cable Yearbook as of 2001. The formats are defined therein at pp. D-637- D-638 and in comparable pages in earlier editions of the Yearbook.

Table 3.1: Nontraditional Formats Over Time

This table is derived from and is a subset of Table 3. It breaks out, for the years 1991 through 2001, the number of stations carrying each of the niche formats.

Table 4: Special Programming Over Time

This table sets out the number of stations in the years 1991 through 2001 reported by Broadcasting and Cable as having carried some programming listed therein under "Special Programming on Radio Stations in the U.S." This data includes programming offered for at least one hour per week, but not for a sufficient number of hours to be regarded as a format. The program types are defined in the same way as the format types set out in Tables 3 and 3.1.

Table 4.1: Nontraditional Special Programming

This table is derived from and is a subset of Table 4. It breaks out, for the years 1991 through 2001, the number of stations providing each of the types of nonformat special programming which would be regarded as a niche.

2/ The Broadcasting and Cable database is organized somewhat differently from the BIA database. Among other things, it appears that Broadcasting and Cable permits some stations to designate two separate formats. Moreover, Broadcasting and Cable did not recognize some formats until (variously) 1993 or 1996, when it either split them off from other formats of the same type (e.g., Christian (1996) and Ethnic (1996)) or it took note of a new format that had been created by the industry (e.g., Sports (1993)). Broadcasting and Cable does not recognize some hybrid formats that BIA recognizes (including any hybrid of country-western), and BIA does not recognize a number of hybrid and niche formats that Broadcasting and Cable recognizes.

Results of Data Analysis

Chart 1, below, summarizes the thirteen format types according to the number and percentage of stations that air particular programming. Chart 1 is based on BIA data for the 283 Arbitron markets. The data contained in Tables 1, 1.1, 2 and 2.1 support the information presented in Chart 1.

Chart 1

Percentages Of Stations Of Each Format Type In The 283 Measured Markets

Format Type	Number of Stations in A Format Type	Percentage of All Stations Having That Format Type
A. Rock-based popular music	2291	35.1
B. Country-based music	832	12.8
C. Easy Listng-based music	176	2.7
D. English lang. spoken word	1022	15.7
E. Standards-based music	351	5.4
F. Spanish language programming	459	7.0
G. Black contemp. music	323	5.0
H. White religious programming	489	7.5
I. Black religious programming	280	4.3
J. Classical	37	0.6
K. Smooth jazz	41	0.6
L. Variety	48	0.7
M. Niche programming	173	0.7
All Stations	**6522**	**100.1 */**

*/ Due to rounding.

Chart 2, below, shows the format types that were carried by stations according to the size of the platforms to which they belong. All data is for 2001. Numbers in parentheses in the first column (below, and in Charts 2.1 and 2.2) represent the total number of stations that air a particular format type.

Chart 2

Percentages Of Stations Of Each Format Type That Are Carried By Station Platforms Of Various Sizes

Format Type	% of Stns. in Format Type on Stand-alones	% of Stns in Format Type on 2-stn. Platforms	% of Stns in Format Type on 3-stn. Platforms	% of Stns in Format Type on 4-stn. Platforms	% of Stns in Format Type on 5-12 stn. Platforms
A. Rock-based popular music (2291)	14.2	13.7	13.2	14.3	44.6
B. Country-based music (832)	19.1	18.6	13.2	13.3	35.8
C. Easy Listng-based music (176)	21.1	14.8	11.9	14.8	37.5
D. English lang. spoken word (1022)	20.7	16.9	9.4	11.7	41.3
E. Standards-based music (351)	20.8	21.7	12.0	12.3	33.2
F. Spanish language programming (459)	38.6	20.0	13.5	9.4	18.5
G. Black contemp. music (323)	24.8	16.7	12.1	14.9	31.5
H. White religious programming (489)	56.2	24.7	5.9	8.2	5.0
I. Black religious programming (280)	44.6	24.6	9.6	7.9	13.3
J. Classical (37)	40.5	29.7	13.5	5.4	10.9
K. Smooth jazz (41)	19.5	22.0	4.9	17.1	36.5
L. Variety (48)	45.8	8.3	14.6	10.4	20.9
M. Niche programming (173)	50.3	16.8	8.1	9.8	15.0
All Stations (6522)	**24.7**	**17.4**	**11.6**	**12.5**	**33.8**

Here is the same data with format types ranked according to the percentage of stations in the format types that are broadcast by standalone stations.

Chart 2.1

Percentages Of Stations Of Each Format Type That Are Carried By Station Platforms Of Various Sizes (ranked by percentage carried on standalones)

Format Type	% of Stns. in Format Type on Stand-alones	% of Stns in Format Type on 2-stn. Platforms	% of Stns in Format Type on 3-stn. Platforms	% of Stns in Format Type on 4-stn. Platforms	% of Stns in Format Type on 5-12 stn. Platforms
H. White religious programming (489)	**56.2**	24.7	5.9	8.2	5.0
M. Niche programming (173)	**50.3**	16.8	8.1	9.8	15.0
L. Variety (48)	**45.8**	8.3	14.6	10.4	20.9
I. Black religious programming (280)	**44.6**	24.6	9.6	7.9	13.3
J. Classical (37)	**40.5**	29.7	13.5	5.4	10.9
F. Spanish language programming (459)	**38.6**	20.0	13.5	9.4	18.5
G. Black contemp. music (323)	**24.8**	16.7	12.1	14.9	31.5
All Stations (6522)	**24.7**	**17.4**	**11.6**	**12.5**	**33.8**
C. Easy Listng-based music (176)	**21.1**	14.8	11.9	14.8	37.5
E. Standards-based music (351)	**20.8**	21.7	12.0	12.3	33.2
D. English lang. spoken word (1022)	**20.7**	16.9	9.4	11.7	41.3
K. Smooth jazz (41)	**19.5**	22.0	4.9	17.1	36.5
B. Country-based music (832)	**19.1**	18.6	13.2	13.3	35.8
A. Rock-based popular music (2291)	**14.2**	13.7	13.2	14.3	44.6

Here is the same data with format types ranked according to the percentage of stations in the format type that are broadcast by platforms of four or more stations.

Chart 2.2

Percentages Of Stations Of Each Format Type That Are Carried By Station Platforms Of Various Sizes (ranked by percentage carried on 5-12 station platforms)

Format Type	% of Stns. in Format Type on Stand-alones	% of Stns in Format Type on 2-stn. Platforms	% of Stns in Format Type on 3-stn. Platforms	% of Stns in Format Type on 4-stn. Platforms	% of Stns in Format Type on 5-12 stn. Platforms
A. Rock-based popular music (2291)	14.2	13.7	13.2	14.3	**44.6**
D. English lang. spoken word (1022)	20.7	16.9	9.4	11.7	**41.3**
C. Easy Listng-based music (176)	21.1	14.8	11.9	14.8	**37.5**
K. Smooth jazz (41)	19.5	22.0	4.9	17.1	**36.5**
B. Country-based music (832)	19.1	18.6	13.2	13.3	**35.8**
All Stations (6522)	**24.7**	**17.4**	**11.6**	**12.5**	**33.8**
E. Standards-based music (N=351)	20.8	21.7	12.0	12.3	**33.2**
G. Black contemp. music (323)	24.8	16.7	12.1	14.9	**31.5**
L. Variety (48)	45.8	8.3	14.6	10.4	**20.9**
F. Spanish language programming (459)	38.6	20.0	13.5	9.4	**18.5**
M. Niche programming (173)	50.3	16.8	8.1	9.8	**15.0**
I. Black religious programming (280)	44.6	24.6	9.6	7.9	**13.3**
J. Classical (37)	40.5	29.7	13.5	5.4	**10.9**
H. White religious programming (489)	56.2	24.7	5.9	8.2	**5.0**

Chart 3, below, displays the Table 1.1 data to show the percentage of stations in each size group that are devoted to each format type. The letters A-M refer to the format types in Chart 2.

Chart 3

Percentages of Stations Of Each Platform Size Group That Carry Particular Format Types

Platform Size	% of Stations In Platforms That Have These Format Types:												
	A	B	C	D	E	F	G	H	I	J	K	L	M
1	20.1	9.9	2.3	14.0	4.5	11.0	5.0	17.1	7.8	0.9	0.5	1.4	5.4
2	27.8	13.7	2.3	15.3	6.7	8.1	4.8	10.7	6.1	1.0	0.8	0.4	2.6
3	39.9	14.6	2.8	12.7	5.6	8.2	5.2	3.8	3.4	0.7	0.3	0.9	1.9
4	40.4	13.7	3.2	14.8	5.3	5.3	5.9	4.9	2.7	0.2	0.8	0.6	2.1
5-12	46.1	13.2	3.0	18.5	5.3	3.8	4.6	1.1	1.7	0.2	0.7	0.5	1.2
All	35.1	12.8	2.7	15.7	5.4	7.0	5.0	7.5	4.3	0.6	0.6	0.7	2.7

As shown in Charts 2, 2.1, 2.2 and 3, there appear to be four format types that are proportionally the least likely to be carried in large platforms: White religious (H), Black religious (I), Classical (J) and Niche (M). Fifteen percent or fewer of the stations that carry these format types are part of platforms consisting of five or more stations. To ascertain whether market size correlates with and perhaps helps illuminate the dynamics of station carriage of these format types, we broke them out for the Arbitron (2001) market-size break points: 1-10, 11-50, 51-100, 101-200 and 201-283. This data is presented in Chart 4 below. The raw data used to generate Chart 4 is found in Table 1.

Chart 4

Percentages Of Stations Of Selected Format Types That Are Carried By Stations In Five Market Sizes

Market Size	% of Stations In Market Size Groups That Have These Format Types:			
	White Religious (H)	Black Religious (I)	Classical (J)	Niche (M
1-10	8.3	2.4	1.5	7.6
11-50	8.6	4.9	0.9	3.4
51-100	8.3	4.7	0.4	2.3
101-200	7.3	4.2	0.4	1.8
201-283	5.3	4.2	0.3	1.0
Average, 1-283	7.5	4.3	0.6	2.7

As shown in Chart 4, the religious formats tended to skew toward the middle sized markets, and classical and niche formats skewed toward the largest markets.

The data in Tables 3, 3.1, 4 and 4.1, drawn from the Broadcasting and Cable database, shows the evolution of formats over time. Key regulatory events were the introduction of three and four station platforms between 1992 and 1996, and the introduction of platforms of five to eight (or more, as a practical matter in some cases) since 1996. Thus, it is possible to examine, over time, the evolution of certain formats, including formats within format types. Furthermore, since each format in the Broadcasting and Cable database corresponds with a "special programming" designation (i.e., programming offered regularly, but not for a sufficient time per week to serve as a format), it is possible to ascertain whether the delivery method for each program type (format, or nonformat special programming) is changing over time.

This time-series data is summarized in Chart 5. We used the years 1991, 1996 and 2001 as break points, inasmuch as they reflect the last year in which the respective maximum platform sizes (2, 4 and 8+) were permitted.

Chart 5

Number of Stations Offering Selected Formats And Their Corresponding Special Program Types, 1991, 1996 and 2001

Number Of Stations In Each Year Offering Selected Programming

F = Number Offering Format
S = Stations Offering Special Programming

Format Type, And Formats With That Format Type	1991 F	1991 S	1996 F	1996 S	2001 F	2001 S
A. Rock-based poplr. music						
Adult Contemporary	2316	10	1971	5	1812	5
Alternative	0	0	30	5	103	11
AOR	0	0	127	1	71	0
CHR/Top 40	820	10	480	12	519	13
Classic Rock	220	7	387	12	557	15
Golden Oldies	0	0	28	3	30	3
Light Rock	0	0	8	0	35	0
New Wave	0	0	0	0	1	0
Oldies	931	89	980	94	1170	86
Progressive	33	22	52	10	30	6
Rock/AOR	369	9	386	14	464	15
Top 40	0	0	38	2	61	4
Triple A (AAA)	0	0	22	1	39	2
Total, Rock-based	4689	131	4709	159	4892	160

(continued)

Chart 5 (continued)

Format Type, And Formats With That Format Type	1991 F	1991 S	1996 F	1996 S	2001 F	2001 S
B. Country-based music						
Country-Western	2559	89	2789	46	2351	35
C. Easy Listng.-based music						
Beautiful music	277	4	137	3	76	7
Easy listening	0	0	64	2	61	2
Total, Easy List.-based	277	4	201	5	137	9
D. English lang. spoken word						
Comedy	2	7	1	6	2	5
Discussion	0	0	0	1	0	2
Drama/Literature	0	6	0	4	0	1
Educational	19	6	10	8	19	7
News	267	13	345	53	356	72
News/Talk	356	1	885	26	1056	25
Public Affairs	9	43	18	74	19	79
Sports	0	0	420	354	742	425
Talk	284	60	493	146	658	125
Total, English spoken	937	136	2172	672	2852	741
E. Standards-based music						
Big Band	167	77	151	86	133	76
MOR	533	1	381	2	239	4
Nostalgia	98	12	118	20	135	16
Total, Standards-based	798	90	650	108	507	96
F. Spanish language pgmg.						
Spanish	279	235	413	252	509	249
Tejano	0	0	21	2	32	2
Total, Spanish-based	279	235	434	254	541	251
G. Black contemp. music						
Black	147	299	141	267	111	328
Disco	0	1	0	1	5	1
Soul	0	0	0	0	9	1
Urban Contemporary	215	2	274	2	291	4
Total, Black contemp.	362	302	415	270	416	334

(continued)

Chart 5 (continued)

Format Type, And Formats With That Format Type	1991 F	1991 S	1996 F	1996 S	2001 F	2001 S
H. White religious pgmg.						
Christian	0	0	200	10	390	29
Inspirational	0	0	22	1	39	1
Religious	755	451	627	786	543	754
Total, White religious	755	451	849	797	972	784
I. Black religious pgmg.						
Gospel	242	312	387	506	590	496
j. Classical	79	140	53	82	65	66
k. Smooth jazz	0	0	0	0	1	0
l. Variety						
Variety/Diverse	178	0	74	3	92	4
Diversified	0	0	48	4	43	2
Full Service	0	0	73	0	76	1
Total, Variety	178	0	195	7	211	7
m. Niche pgmg.						
Language Niches:						
Albanian	0	1	0	0	0	0
Am. Ind./Native Am.	2	38	4	32	3	29
Arabic	0	6	1	5	1	3
Armenian	0	4	1	2	1	2
Chinese	0	4	2	6	2	9
Croatian	0	10	0	8	0	8
Czech	0	12	0	13	0	13
Ethnic	0	0	15	6	37	15
Farsi	0	0	0	1	1	1
Filipino	0	10	0	10	1	9
Finnish	0	3	0	3	0	1
Foreign/Ethnic	39	43	49	71	67	55
French	1	55	5	40	3	32
German	0	79	0	68	0	56
Greek	3	30	5	38	4	24
Hebrew	0	0	0	2	0	1
Hindi	0	7	0	8	0	9
Hungarian	0	9	0	5	0	3
Italian	0	65	1	67	2	60
Irish	0	33	1	33	0	32

(continued)

Chart 5 (continued)

Format Type, And Formats With That Format Type	1991 F	1991 S	1996 F	1996 S	2001 F	2001 S
Language Niches (continued)						
Japanese	0	10	2	7	2	6
Korean	0	2	5	2	6	2
Lithuanian	0	4	0	5	0	5
Polish	2	151	3	145	3	142
Portuguese	7	22	6	15	4	18
Russian	0	6	1	11	1	11
Scottish	0	1	0	0	0	0
Serbian	0	4	1	5	0	5
Slovak	0	2	0	2	0	4
Slovenian	0	5	0	0	0	4
Ukrainian	0	11	0	10	0	9
Vietnamese	0	1	1	3	1	2
Non-Language Niches						
Agriculture	104	1276	100	1198	80	1054
Bluegrass	16	43	19	58	20	68
Blues	25	22	36	50	74	59
Children	3	8	22	14	21	42
Folk	1	23	3	20	2	22
Jazz	84	277	71	209	97	175
Jewish	0	12	1	13	0	10
New Age	27	22	20	11	12	2
Polka	7	41	7	60	7	61
Reggae	0	15	2	18	5	18
Women	0	4	0	5	0	6
Total Language Niches	54	628	103	623	139	570
Total Non-Lang. Niches	267	1743	281	1656	318	1517
Total, All Niches	321	2371	384	2279	457	2087
Other (unclassified)	150	170	39	144	136	168
Total, All Stations	11627	4447	13147	5326	14141	5134

Data Trends and Observations

Programming and Platform Size

Charts 2, 2.1, 2.2 and 3 disclose that two format types generally tend to be included in large (5+ station) platforms. 44.6% of stations carrying rock-based formats are in platforms of this size, as are 41.3% of stations carrying English-language spoken word formats (e.g. news, talk, news/talk and sports). By comparison, 33.8% of all stations are in platforms of this size.

Furthermore, 46.1% of the stations in large (5+ station) platforms carry rock-based formats, and 18.5% of the stations in these platforms carry English-language spoken word formats.

Rock-based programming tends not to be provided on standalone stations. Only 14.2% of stations carrying rock-based formats are standalones (compared to 24.7% of all stations being standalones) and only 20.1% of standalones carry rock formats.

On the other hand, four format types tend not to be included in large (5+ station) platforms. The percentages of stations on large platforms are, respectively: White religious (5.0%); Classical (10.9%); Black religious (13.3%); and Niche (15.0%). By comparison, 33.8% of all stations are in platforms of this size. Furthermore, the percentages of large platforms' stations which carry these formats are, respectively: White religious (1.1%); Classical (0.2%); Black religious (1.7%); and Niche (1.2%). A fifth format type, Spanish language programming, was also underrepresented on large (5+ station platforms; 18.5% of stations carrying Spanish language formats were on large platforms while 33.8% of all stations are in platforms of this size. However, review of Table 1 discloses that over 45 of the 85 stations carrying Spanish language formats in large platforms (53%) are in just four markets: Puerto Rico (22 stations), Los Angeles (8 stations), Monterey (8 stations) and Houston (7 stations). Thus, in most of the country, large platforms tend not to include stations with Spanish language formats.

White religious, Classical, Black religious and Niche (as well as the "Variety" program type and Spanish language programming) are heavily carried on standalone stations. The proportions of stations carrying each of these format types that are standalones are, respectively: White religious (56.2%), Niche (50.3%), Variety (45.8%); Black religious (44.6%); Classical (40.5%) and Spanish language (38.6%); by comparison, 24.7% of all stations are standalones. The proportion of standalone stations that carry these format types are, respectively: White religious (17.1%); Niche (5.4%), Variety (1.4%), Black religious (7.8%); Classical (0.9%) and Spanish language (11.0%).

Chart 4 illustrates a nuance associated with the carriage of some format types, which tend to vary in magnitude with market size. In particular, the religious formats tended to skew toward the middle sized markets, and classical and niche formats skewed toward the largest markets. Consolidation may play some part in this, but there could be a simpler explanation: the specialized audiences desiring classical and niche formats reside in more cosmopolitan communities, while audiences preferring religious programming skew rural.

The rise and fall of formats over time is shown in Chart 5. The following trends are evident over the 1991-2001 study period.

Rock-Based Popular Music

The number of stations carrying rock format hybrids, and the number carrying rock-based formats overall, have increased steadily. This kind of programming is almost always offered as a format rather than as nonformat special programming. As seen in Charts 2 and 3, rock-based programming has been heavily adopted by large platforms. Thus, it seems likely that the adoption of rock-based hybrid formats by platform owners has had some impact on the growth and variety of rock music on the radio.

Country-Based Music

This kind of programming has been carried on substantially fewer stations since 1996. Like rock programming, it is almost always offered as a fulltime format rather than as nonformat special programming. Country music does not appear to receive proportionally more coverage on platforms than standalones.

Easy Listening-Based Music

This kind of programming has been declining rapidly in carriage. Easy listening does not receive proportionally more coverage on platforms than standalones.

English Language Spoken Word

Stations carrying English language spoken word formats report their formats to Broadcasting and Cable using somewhat porous and overlapping definitions: news, news/talk and sports. Irrespective of the formats' precise boundaries, this programming has been adopted in dramatic numbers both as a fulltime format and as nonformat special programming, more than tripling its coverage in eleven years. This program type has proportionally more carriage on large platforms, perhaps because of the higher-income audiences it attracts. The growth of this program type has taken place at a much faster pace than that of consolidation, suggesting that cultural trends rather than industry structure has largely driven the growth of this format type.

Standards-Based Music

Formats dating from the birth of radio -- big band and MOR -- are generally and slowly dying out. These formats skew toward older listeners. This format type does not appear to receive proportionally more coverage on platforms than standalones.

Spanish Language Programming

Spanish radio is growing very rapidly, almost doubling in format adoption between 1991 and 2001. Spanish radio skews very strongly toward carriage on standalones, and except in a few markets (notably, Puerto Rico, Los Angeles, Monterey and Houston) it has seldom been included in large platforms.

Two factors have probably contributed to the growth of Spanish radio. First, the Spanish population itself almost doubled during the 1990s, and large Spanish speaking populations in medium and small markets have reached the critical mass required to support a standalone station. Second, consolidation could be inducing some standalone station owners to switch to a Spanish format. Standalone station operators know that many advertisers have to buy Spanish radio, while consolidators are unlikely to duplicate or try to sell around the format.

Black Contemporary Music

Since 1991, Black music has held steady in station adoption as a format, and in carriage as nonformat special programming. Furthermore, the distribution of stations in this format type almost exactly tracks the national norm for carriage on all platform sizes -- that is, this programming is well represented on standalones, medium sized platforms and large platforms.

The deployment of Black music on stations in all ownership configurations reflects broadcasters' and advertisers' growing respect for the format. Throughout most of the world and on American music television, Black music has come to be regarded as America's primary mainstream music and cultural form.

Moreover, unlike some format types such as standard-based or easy listening that are also carried on all types of platform configurations, Black music can be programmed in several distinctive and largely nonoverlapping format hybrids. Thus, when a platform adopts a Black contemporary format on one of its stations, a standalone already carrying this programming frequently can remain in the format type by counterprogramming a Black contemporary hybrid (e.g., urban adult contemporary or hip-hop). The variety of Black contemporary hybrids also provides an opportunity for minority owned companies to build platforms that contain several stations carrying Black contemporary hybrid formats. These multi-format platforms can dominate coverage of the Black community and of other demographic groups preferring this programming, much as other platform operators dominate coverage of certain demographic groups by programming several stations with hybrids of rock-based formats. Black music's wide appeal and versatility helps account for the economic soundness of the leading companies specializing in this programming.

Religious Programming

Religious formats have grown rapidly, with Black religious programming (gospel) leading the way by almost doubling in format adoptions between 1991 and 2001. Religious formats skew very strongly toward coverage on standalones and tend not to be carried on platforms. Religious formats may be growing because some standalone station owners may be switching to religious formats, knowing that many advertisers have to buy it and a consolidator is unlikely to duplicate it or try to sell around it. As noted above, this scenario probably also characterizes Spanish radio.

Variety

This eclectic but not widely broadcast format type has increased steadily in influence. It is more likely to be adopted by standalones and not adopted by platforms; thus, its growth may be attributable to the desire of standalone owners to choose a reliable format that advertisers understand and that a platform owner is unlikely to duplicate.

Language Niches

Language niche program format adoptions almost tripled from 1991-2001, although nonformat special programming of language niches did not increase during that period. Language niche formats are seldom offered in large platforms, and they are heavily carried by standalones. Their growth may be attributed to the same factors that have driven the growth of Spanish language programming, as discussed above: in particular, they may provide a safe harbor for standalone owners wishing to protect themselves from the market power of consolidators.

A unique attribute of language programming is the multiplicity of languages whose primary speakers lack the critical mass to support a fulltime station, while possessing sufficient numerosity and intensity of demand to support a considerable number of special programs on stations with other formats. A good example is German: Tables 3 and 4 disclose that during the study period, only in 1993 and 1994 did a single station broadcast a German format; yet in every year, dozens of stations offered special nonformat programming in German. In 2001, no station carried a German format but 56 stations broadcast some programming in the language. Dozens of stations also offer special nonformat programming in Italian and Polish. Other program types adopted by few or no stations, but offered on many stations as special programs are American Indian, Croatian, Czech, Filipino, French, Greek, Irish and Ukrainian.

Chart 5 also discloses the virtual absence of format adoption or even nonformat programming in Asian languages -- particularly Chinese and Vietnamese -- notwithstanding the huge populations for which these are the primary languages. 3/ The low representation of this programming on the airwaves contrasts starkly with the representation of programming serving other language groups with the same or smaller numbers of primary speakers. Set out below in Chart 6 is the number of stations offering formats and special

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3/ In 2001 there were 104 stations with "ethnic" or "foreign/ethnic" formats, and another 70 stations carrying nonformat special programming in this category. See Chart 5. We do not know how much of this programming was offered in each language.

programming in the ten language groups having (as of the 1990 Census, which has the latest data on this subject) the largest numbers of speakers who speak English "less than 'very well.'" 4/

Chart 6

Number of Stations Offering Programs In The Ten Languages With The Most Primary Speakers, 1991, 1996 and 2001

Number Of Stations In Each Year Offering Selected Programming

F = Number Offering Format
S = Stations Offering Special Programming

Format Associated With Language Group	Speakers of Language Who Speak English Less Than "Very Well" (1990 Census)	1991 F	1991 S	1996 F	1996 S	2001 F	2001 S
Spanish */	8,305,765	279	235	434	254	541	251
Chinese	752,936	0	4	2	6	2	9
French	476,133	1	55	5	40	3	32
Italian	434,616	0	65	1	67	2	60
German	385,972	0	79	0	68	0	56
Korean	383,539	0	2	5	2	6	2
Vietnamese	320,862	0	1	1	3	1	2
Tagalog	286,999	0	0	0	0	0	0
Polish	267,932	2	151	3	145	3	142
Japanese	224,460	0	10	2	7	2	6

*/ Includes all subformats reported to Broadcasting and Cable.

One reason for the unavailability of this programming may be that Asian Americans often reside in or near large cities for which the price of a radio station, and even the price of brokered radio airtime, may be out of reach due to the limitations that spectrum scarcity imposes on the number of signals that can fit into these markets. However, most primary speakers of European languages also largely reside in and near large cities. Thus, large-city

4/ U.S. Census Bureau, "Detailed Language Spoken at Home and Ability to Speak English for Persons 5 Years and Over -- 50 Languages with Greatest Number of Speakers" (1990). The numbers of primary speakers of Chinese, Vietnamese, Korean, Tagalog, Hindi, Thai, and Miao (Hmong), as well as Haitian Creole, have increased substantially since 1990.

residence cannot fully explain why, for example, over 750,000 primary Chinese speakers were offered format or nonformat special programming by no more than eleven stations from 1991-2001, while about 1/3 as many primary Polish speakers were offered format or nonformat special programming by at least 145 stations -- thirteen times as much service, a disparity that is probably even greater today. See fn. 4.

Members of European language groups have largely overcome the severe ethnic discrimination which characterized broadcasting before about 1960, and thus members of these groups enjoy longstanding relationships with stations that will carry programming in Italian, German and Polish. Consequently, the likely explanation for the near absence of programming in Asian languages is that Asian Americans have not yet been as successful in overcoming the entry barriers to broadcasting that have been imposed by discrimination.

Non-Language Niches

By far the largest non-language niche (in the Broadcasting and Cable database; BIA does not report it) is Agriculture. Agricultural programming, both as a format and in its far more common incarnation as nonformat special programming, is steadily declining. In rural areas, radio ownership consolidation has not yet taken hold; thus, the slow death of the family farm probably explains the decline in this type of programming.

Other non-language niches, being seldom carried by large platforms and often carried by standalones, may be growing on much the same model as Spanish language broadcasting, discussed above. Cultural trends surely play a role in the steady growth of bluegrass and the dramatic growth of blues and children's programming.

Conclusions

1. Rock-based formats and English language spoken word formats (news, talk, news/talk and sports) tend to be adopted by large platforms. Rock-based formats are less likely to be adopted by standalone stations.

2. Religious, classical, and niche programming tend not to be included in large platforms. Spanish language programming tends not to be included in large platforms except in four markets. These format types, as well as the variety format type, are more likely to be adopted by standalone stations.

3. The adoption of rock hybrid formats by large platforms probably has contributed to the proliferation and variety of rock music programming on the radio. In this particular respect, large platforms contribute more format diversity ("variety") to a market than smaller platforms.

4. Cultural and market trends, rather than consolidation, probably have largely accounted for the very rapid growth of English language spoken word programming.

5. Black music is carried across all platform sizes, and the format type has displayed long-term steadiness in station adoption and in carriage as nonformat special programming. Moreover, this format type is available in several largely nonoverlapping hybrids, thereby often providing standalones with the flexibility to counterprogram platforms that adopt a Black format while also providing minority owned platform developers with an opportunity to dominate demographic groups attracted to this programming. These trends underscore the growing respect for the programming by broadcasters and advertisers, while helping to account for the economic soundness of many companies specializing in this programming.

6. Almost no radio stations carry formats or even nonformat special programming in Asian languages, particular Vietnamese and Chinese, notwithstanding the huge populations for which these are the primary languages. On the other hand, programming in European languages with (today) fewer primary speakers (e.g., Polish, German and Italian) is widely available. For example, there are 1/3 as many primary speakers of Polish as Chinese (as of 1990) but from 1991-2001 there was at least 13 times as much programming in Polish. Primary speakers of Asian and European languages each tend to reside in or near large cities; thus, spectrum scarcity alone cannot explain the near absence of Asian language radio programming. Italian, German and Polish Americans faced severe discrimination in and out of broadcasting, but fortunately they largely overcame these barriers by about 1960. What most likely explains the near absence of programming in Asian languages today is that Asian Americans have not yet been as successful in overcoming the entry barriers to broadcasting that have been imposed by discrimination.

7. It is likely that several format types are being embraced by standalone stations as a means of protecting themselves from the advance of consolidation. Standalone operators seek formats that advertisers have to buy, and that consolidators can neither easily duplicate nor sell around. Among the format types whose steady and in some cases dramatic growth has probably been fueled by standalone operators seeking protection from consolidators are Spanish language, religious, variety, language niche formats and some non-language niche formats. This last trend might not continue indefinitely, though. Consolidation could advance to the point where there is too little radio advertising money not controlled by platforms to support the surviving standalone stations in any format. Alternatively, platform owners could buy (and convert to mainstream hybrids) so many stations that too few standalones are left to serve the needs of substantial niche audiences.

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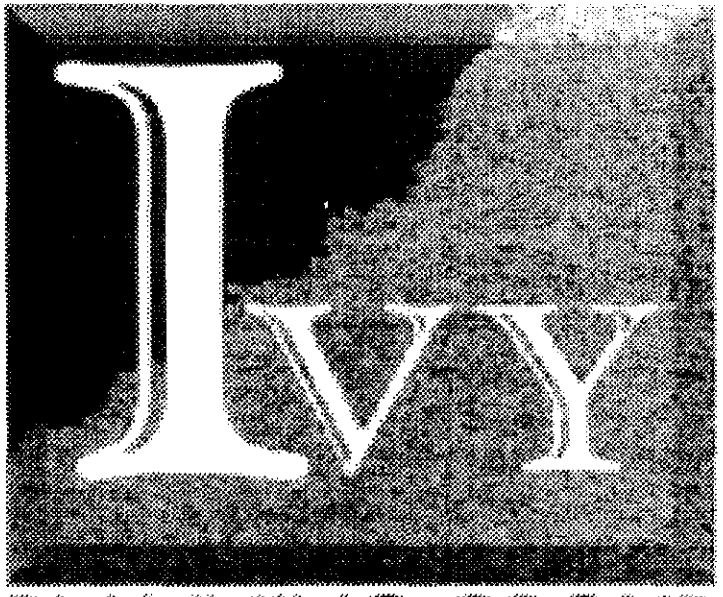

Radio Ownership Format Analysis

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LEGEND

A=Traditional Rock-based popular music formats

B=Country-based formats

C=Easy Listening-based formats

D=English-language spoken word formats

E=Traditional standards-based formats

F=Spanish language formats

G=Black Contemporary music formats

H=White church based formats

I=Black church-based formats

J=Classical

K=Smooth Jazz

L=Variety

M=Other

TABLE 1: FORMATS CONTAINED IN PLATFORMS

Metro Rank	Market	Company Owner	Format Codes													M-Types & Call Letters	Number of Stations
			a	b	c	d	e	f	g	h	I	j	k	l	m		
1	New York	ABC Radio Inc				1									1	Children-WQEW	2
1	New York	Access 1Comm							1								1
1	New York	Alexander Bcstg			1												1
1	New York	Aurora Comm	1			1									1	Jazz-WFAF	3
1	New York	Barnstable Bcstg	4	1			1										6
1	New York	Big City Radio			3												3
1	New York	Bloomberg Comm				1											1
1	New York	Buckley Bcstg				1											1
1	New York	Clear Channel	4		2				1								7
1	New York	Cox Radio Inc	4														4
1	New York	Emmis	1						2								3
1	New York	Family Stations Inc								1							1
1	New York	Forward Bcstg				1											1
1	New York	Greater Media	1			1											2
1	New York	Hispanic Bcstg						2									2
1	New York	Hudson					1	1									2
1	New York	Infinity Bcstg	2			4											6
1	New York	Inner City Bcstg				1			1								2
1	New York	Jarad Bcstg Co.Inc.	2														2
1	New York	Long Is.Multi-Medi					1										1
1	New York	Mariana Bcstg Inc.	1														1
1	New York	Mega Comm. Inc						1									1
1	New York	Multicultural Bcstg						1							2	Ethnic-WPAT,WNSW	3
1	New York	Nassau Bcstg	1														1
1	New York	New Jersey Bcstg	1				2										3
1	New York	Pamal	1				1										2
1	New York	Pillar of Fire								1							1
1	New York	Polnet Comm.Ltd													1	Polish-WRKL	1
1	New York	Radio Vision						1									1
1	New York	Salem Comm. Corp								2							2
1	New York	Spanish Bcstg						2									2
1	New York	Universal Bcstg					1										1

A=Trad.Rock, B=Country, C=Easy List., D=Eng.Lang.E=Trad.Stand, F=Span., G=Black Cont., H=White Church, I = Black Church, J=Classical, K=Sm. Jazz, L=Variety, M=Other
Note: Dark stations not listed
Prepared by Ivy Planning Group LLC
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