

# INTERIM REPORT

## **Mapping Public Radio's Independent Landscape**

### ***Key Findings, Critical Questions***

*We think in relations. This is truly the form of all thought; and if there are any other forms they must be derived from this*

Herbert Spencer, First Principles

November 29, 2004

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## CREDITS

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Bill Siemering serves as Contributing Editor, and the project's Research Partners are Walrus Research and Craig Oliver, with Steve Martin of SFM Consulting contributing as Research Associate. I'm grateful to each of them for their diligence and flexibility as we developed the methodologies, carried out the research, and navigated the occasional, unexpected turn in the road.

Sue Schardt, Project Director  
Boston, MA

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## INTRODUCTION

*Mapping Public Radio's Independent Landscape* set out to answer the question “what is the value of independently produced programming in public radio?” Our goal was to provide a thorough and objective analysis of a range of areas, including formats for commissioned work, funding, employment patterns, the programming economy, supply and demand, methods for evaluating programming, general business affairs, and the interrelationship between Acquirers and Independent Producers.

“Independent Producer” has a variety of definitions throughout the public radio system. For the purposes of this study, “Independent Producer” is considered to be an individual who is responsible for funding the cost of producing content, either through negotiated fees, corporation or foundation underwriting or grant, with their own funds, or some other means. We provide a glimpse into the role and contributions of financially independent production houses in the content analysis portion of the study, but the primary focus is freelancer reporters and Producers, commentators, and station-based Producers who shop out work independently of their station responsibilities. Our scope is domestic; foreign broadcasters or Producers who contribute to the content of US public radio are not included.

This is a benchmark study. It will set a bar for future studies, using the methodology we created for this project, to examine how certain measures evolve or whether perceptions shift over time. For example, while the findings detailed here give new insight into the volume of independent content that flows through the public radio system, it cannot tell us how this compares to five years ago. It will, however, provide a basis by which we may now make comparisons five years from now, if we choose to. Likewise, when we ask Acquirers and Producers whether they believe rates paid to Independent Producers is improving or not, we are not able to shed light on whether the opinion has shifted at all over time. In setting a baseline with this report, we will now be able to ask this question in the future and have perspective on whether opinions have shifted or not.

The research, which commenced in January 2004, was comprised of an analysis of nearly 2700 hours of content airing on a sample group of 21 public radio stations between 6am and midnight from September 1, 2002 to September 30, 2003 (addendum D) well as two extensive on-line surveys – one of Producers and a second survey of Acquirers. The 345 freelancers, reporters, and Acquirers who took time to complete the surveys are affiliated with dozens of public radio programs, including those produced or distributed by NPR, PRI, Pacifica, and AIROS, as well as those originating at local stations, independent production houses and minority consortia. Nearly half the Acquirers who participated in the study (47%) are Program Directors, 35% NPR employees, 12% work for PRI, and 7% work for other national program Producers or syndicates. The profile of the Producer-participants is detailed extensively beginning on page 6 of the report.

Research is most useful when it informs action. Now that we have this report in hand, the Findings detailed in this report will serve as a common “table” around which stakeholders will convene in the period ahead to consider, together, this question of the “value of independently produced programming” with new insight that’s offered in these pages.

## FOREWORD

By Bill Siemerling, Contributing Editor

We look at maps to see relationships: distances that separate and options for getting to our destination. One assumption of this study is that understanding the relationship between Independent Producers and Acquirers will enrich public radio. As in any exploration, we make discoveries. This takes us to a core question: how do we define public radio in 2004? How we answer that determines whether or not we have the same destination.

The Key Findings in Mapping Public Radio's Landscape are an important first step to answering this question. I'm reminded of a map I bought before traveling to Mongolia, where there are few paved roads and you often travel the countryside following tracks. The map had this disclaimer: "Road/track information is unreliable. Does Hasagt really exist without some sort of track to it? If so where? Do the roads/tracks shown on this map really end where our available research indicate? ... Please regard this map as a provisional map."

Likewise, while this study is an excellent way of understanding the landscape, it is only a first step and to some degree provisional.

Because of world events and the decline of commercial broadcast journalism<sup>1</sup>, public radio has evolved into "a competitive news source for influential listeners." The Acquirers who respond to this survey, who are mostly station program directors, but include a healthy contingent of network staffers, are most interested in acquiring commentaries and news pieces, and the Realists producers are successful in supplying this need.

At the same time, both the Independent Producers and Acquirers agree that the producers make a valuable contribution to public radio. However, according to the content analysis, only two-percent of the programming is from individual Independent Producers. And much of this is in the form of commentaries and essays, not evocative, sound-rich pieces.

The PRPD Core Values characteristics include "curiosity, idealism, and a uniquely human voice; conversational, authentic and intimate; attention to detail, music, sound elements, language." They are the result of extensive audience research and describe the ideals that listeners value most in public radio programming, whether from Independent Producers, local stations or the networks.

Research is what has also driven the evolution of public radio into a primary news source. When considering PRPD's descriptions of the craft in the context of what we've learned in this study about the effect public radio's news success has had on limiting demand and air space for more adventuresome uses of the medium, I wonder if we've arrived at different destinations.

The differences between Acquirers and Producers uncovered in this study regarding the use of Arbitron and focus groups are understandable. While producers can benefit from some research, some of it is irrelevant to how they work or their objectives and assumptions. *New Yorker* editor David Remnick said, "I have never been to a focus group. I'm not interested. It's not because I don't care about readers but because I do. The *New Yorker* reader does not want to be anticipated or

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<sup>1</sup>Based upon "The State of the New Media 2004 Annual Report on American Journalism" by the Project for Excellence in Journalism (journalism.org). Some key findings: 61% of national television and radio journalists say that the state of journalism is moving in the wrong direction. 51% are concerned about the quality of journalism. 78% say too little attention is given to complex issues. In the last seven year, newsroom staffing dropped by 57% -44% full-time and 71% part-time. Decline of journalism is also documented in "The News about the News" American Journalism in Peril" by Leonard Downie and Robert Kaiser, both editors at the Washington Post.

pandered to. Our reader wants to be surprised or thrilled. Thrilled never comes out of a focus group." In other words, research can be valuable, but it is very difficult to calculate to what degree research does, or should, influence the creative process.

Over the years, both when I was Executive Producer at *Soundprint* and as a listener, I've regarded the pieces from independent producers as:

- Reflecting the diversity of place, viewpoint and ethnicity that is America
- Taking listeners to neighborhoods they may only glimpse from the expressway, or to a town they recognize only as a name on an exit sign on the Interstate
- As a source of innovative audio techniques
- A way of bringing new talent to the system.
- Enhancing the news magazines with features that breathe, and that engage the listeners' imagination

In this research, the Acquirers seem to see the value of Producers' in a more limited light.

With the ascendancy of satellite radio and the increasing use of the Internet for information and music, it's important for us to define the unique role for public radio now while continuing to serve our core audience. So we ask, what is important? Is it still important to reflect diversity? To celebrate the human experience? To capitalize on the strengths of radio as a sound medium? To be a creator and curator of culture? To inspire young people to the medium through innovative examples? As the research in this study shows, there are at least three different mindsets (Addendum B) at work here whose visions vary.

To me, the most disturbing finding is the little use of the work of Independent Producers, given the value they have added to public radio in the past. In addition to projects such as "Hearing Voices" and "Worlds of Difference" that are working to use independently produced programming in new ways, the Public Radio Exchange (PRX) is working to connect with station program directors who are interested in creating a distinctive sound by drawing upon Independent Producers. PRX facilitates the relationship between producers and acquirers by finding available productions reviewed and rated. In turn, the process encourages a higher level of craft. And transom.org on the Web is another place for producers to present their work and encourage each other.

I don't like to see anyone impose limits on what radio can do. This is my bias after working in other places where the medium of radio is often the most important. In developing countries, for example, I've seen radio create a Commons by giving voice to people and helping them to solve their problems. I've seen how soap operas create a model for Tutsis and Hutus to live together in peace in Burundi and at the same time be the most popular program. In South Africa I've seen violent disputes settled on-air, and life saving information offered by health workers, where public officials are held accountable.

Radio can literally save lives by providing accurate information and by teaching conflict resolution and peace making. At the same time it still inspires listeners to sing and dance to the music. So I see radio with a new sense of purpose.

Most importantly, public radio needs to define itself in relation to the challenges to our older democracy, which has one of the widest gaps between what the people want and what the government does. People are hungry for community connections that transcend those things that divide us.

Retuning to this “mapping”, and the differences within our small community of public radio, informed about our differences, let’s focus on our common goals. This paper, this study, is but a first step. Using this information, the stakeholders need to come together to define ourselves and see how each contributes to the whole.

Let’s continue drawing the map so we can travel together once we agree on our destination.

## EXECUTIVE SUMMARY

*Mapping Public Radio’s Independent Landscape* is a landmark study examining the opinions, habits, and characteristics of public radio’s Independent Producer community and the relative value of their contributions to the public radio system and to the Acquirers who are critical gatekeepers for their work.

The Key Findings which are outlined in the pages of this second Interim Report to CPB are drawn from the research reports submitted by the project’s Partners, Walrus Research and Craig Oliver, with additional data provided by CPB, NPR, and sourced to the US Census Bureau.

One of the primary goals of the project’s research was to first, identify stereotypes or commonly held perceptions, and secondly, subject them to rigorous testing to see if they held true or if, in fact, another picture came forward. Through this process of careful analysis, some clear realities have emerged. The information detailed in these pages can help build consensus by providing a common basis of understanding for constituencies concerned with programming and, specifically, the role of Independent Producers in public radio. While some of these findings may provoke, stimulate, or simply confirm what the reader already believed, this research will be most valuable if it is put to work to inform strategic decisions and inspire new ideas.

Following is a brief summary of the key points to emerge from the study:

1. **The community of Independent Producers is not one, homogenous group, but is quite diverse** in demographic composition, in their perceptions of the industry, in areas of expertise and interest, and in their relationship to the medium, both economically and as craftspeople. Walrus Research’s segmentation analysis identifies three segments of the Independent Producer community:

**Idealists** are journalist/reporters who are the most prolific producers in the variety of formats they work in. They consider themselves entrepreneurs, and are the likeliest group to be trying to be making a living with their independent production work. Idealists believe that programming was more innovative in the past than it is now, and generally have a negative view of the impact audience research has had on public radio.

**Outsiders** identify most strongly as ‘independent’ and also consider themselves to be artists or writers. They have a negative view of the evolution of public radio in terms of programming and the effects of research. They are more often employed outside of public radio than members of the other Producer groups; six in ten of them have full or part time work outside of public radio, in addition to their independent production work.

**Realists** identify as journalist/reporters who have a more positive view of the usefulness of audience research and its effect on programming than their colleagues. They are the most prolific

producers of the short-form news features and reports. The majority of the -- six in ten -- have full or part time employment within public radio.

2. **The Independent Producer community has a strong contingent of up-and-comers.** Four in ten Independent Producers are Gen Xer's, coming of age in the '80s, and a similar portion of the community reports five years or less experience working in the industry.
3. **Independent Producers are intellectual achievers, outranking even the highly educated public radio news listener in holding college degrees** (96% v 63%). Acquirers are rank high, too, with 91% of them graduating college and more than one in three holding an advanced degree.
4. While the study reflects a range of differences, **Independent Producers agree** that a) stations have become less willing to take programming from Independent Producers, b) rates paid by Acquirers for independent programming are not improving, and c) independently produced programming delivers significant value to public radio listeners.
5. **Acquirers and Independent Producers converge in number of areas**, as well, including: a) Independent Producers have an important role to play in the industry, b) the "ear" – personal aesthetic or sense of satisfaction – is ranked as the number one method for evaluating the impact of programming, and c) public radio should invest more in programming for minority, disadvantaged, and underserved listeners.
6. **The greatest divide between Producers and Acquirers is in their opinions about Audience research.** While there are differences between the segments of Producers, as detailed above, fewer than half Producers have a positive view of the effect audience research has on public radio, while the vast majority of Acquirers believe these tools have led to an improvement in the system. It is not surprising to learn, too, that the vast majority of Acquirers (80%) say they 'often' rely on audience data, versus just one in ten Producers.
7. **There is significant disparity between Producers and Acquirers their perceptions of compensation for Independent Producers.** The vast majority of Acquirers believe rates are improving, and a commensurate number of producers hold the opposite view.
8. **Stations are an important base for Independent Producers.** More than four in ten Independent Producers responding to the survey indicated that the program inserts they'd produced – reports, features, or essays -- were for local distribution. We also find one in five Independent Producers based at a radio station, filing freelance on the side.
9. **Independently produced programming makes up a relatively small portion of public radio's content stream**, with just 2% of the stream coming from individual Independent Producers, and another 3% originating at independent production houses such as *Living on Earth*, *Democracy Now*, or *Humankind*.
10. **In terms of supply and demand, the drive-time news magazines are driving Independent radio content.** NPR commissions the greatest volume of content from Independents, with commentaries and short form pieces – between 3 and 5 minutes in length – dropped into *All Things Considered* and *Morning Edition* comprising the vast majority (82%) of the independent content stream. Independently produced material longer than 10 minutes is a negligible, with long form documentaries or special series not registering at all during the period of this study.

11. **For every programming dollar flowing through the public radio system, one half cent goes into the pocket of the Independent freelance producer.** The system expends approximately \$25,000 per week on programming from freelance producers. (see page 11)
12. **PRI distributed programs expend the most revenue on Independently produced content,** with 53% of the fees for Producers coming from PRI programs, and 45% from NPR. (see page 11)
13. **Three quarters of Independent Producers earn most of their income outside of the freelance radio work, and nearly four out of ten do not generate net income from their Independent radio work.** At the same time, more than half of Independent Producers say they are trying to make a living through independent production.
14. **Public radio's traditional funding sources do not provide strong economic support to Independent Producers.** Four in ten producers report self-funding as the "major or minor" source of revenues outside of the fees they negotiate with Acquirers. Foundation grants rank second to self-funding, and CPB is listed as a source for 7% of Independent Producers through direct contract, and another 14% through subcontracts with other projects. The vast majority of producers have little to no success expanding income streams beyond public radio via internet, secondary sales, or sales or merchandising. (see table on page 13)

## KEY FINDINGS

### Profile

#### Not all independent Producers are alike

One fundamental reality that emerged from the project research is that the Independent Producer community is not one homogenous group of like-minded individuals, but is made up of a range of people who hold different beliefs, who spend varying amount of time on their independent radio work, and who are concentrated in different areas both inside and outside of the industry, flowing back and forth between the public radio system and other areas of employment and interest (addendum C).

Walrus Research's analysis concludes that "not all independent producers are alike," and sketches an Independent Producer community broken out into three dominant "clusters" or cohorts based on their perceptions and opinions of public radio and their place in it.

- ⇒ **Idealists** are self-described journalist-reporters who are, on average, 44 years old. They hold strong beliefs that programming from Independent Producers is more innovative than that of networks and stations. They also believe more strongly than other Producers that public radio programming was more creative in years past than it is today. Idealists tend to feel that audience research – Arbitron data and focus groups – has not been very useful in improving public radio programming.

Idealists see themselves more entrepreneurial than the other groups, and are the most likely to be trying to make a living as an Independent Producer. The most frequent type of production for this group is modules, with three out of four of Idealist reporting this as their most common short-form format. Idealists are also the most versatile group; their work appears in many forms ranging from news reports and essay/reviews to weekly programs.

They are also the most prolific producers of weekly programs, and one-time specials or documentaries.

- ⇒ **Outsiders** are 46 years old on average and, when asked about their role in public radio, they responded strongly to “independent” as the best way to describe themselves. They do not identify strongly as journalists or reporters – a key factor differentiating them from the other categories of Independents – but do identify as artists and writers. Like the Idealists, they tend to see the evolution of public radio in a negative light relative to the current quality of programming and the reliance on audience research, and feel it is hard to gain entry to the industry. They are more often found working in places other than public radio; six in ten Outsiders report that – apart from their independent producing work – their full or part-time employment is outside public radio.
- ⇒ **Realists** are the youngest segment of producers, averaging 39 years old. Like the Idealist, they self-describe as journalist-reporters. They differ from their Idealist colleagues in having a slightly more positive outlook on the way public radio has evolved in recent years, especially with respect to the effect research methodologies have had on programming. They are neutral on the questions about whether public radio was more creative years ago. Of the three groups, they are the most prolific news/feature producers. Six in ten – more than either of the other two segments – are likely to have full or part-time employment within public radio in addition to their independent work. They are least likely to report that their independent income exceeds their other sources of income.

And while there are factors that differentiate Independent Producers, the three groups are in agreement about three things:

1. Stations have become less willing to take programming from independent producers
2. Rates paid by Acquirers for Independent programming are not improving
3. Independent programming delivers significant value to the public radio listener

**Public Radio’s Independent Producers are intellectuals**, with significantly higher levels of education than even the NPR news listener. Nearly all Producers (96%) hold a college degree and nearly four in ten having an advanced degree. When not working in radio, we find many of them engaged in, as Walrus Research characterizes it, “mind work.” Most identify strongly as writers. For those working outside public radio, when they take off their Independent Producers’ hat, we find them working for print publications (25%) or teaching in a college (19%).

*Acquirers are high intellectual achievers, too, with 91% of them graduating college and more than one in three holding an advanced degree.*

**The Independent Producer community is well diversified** with a 50/50 gender split and one in five identifying as a racial minority, mirroring the overall US minority population composition (31%)<sup>2</sup>

*Acquirers are more often male than female (58%/42%) and minorities tend to be under-represented (15%) in the gate-keeper community, when compared to both the Independent Producer community and the US population.*

**We find most Independent Producers in the “coastal media power centers,”** with one in five Producers setting up shop in California, and another 13% in New York. Massachusetts and Washington DC are next in line with 8% and 5% of the Independent population, respectively.

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<sup>2</sup> Source: U.S. Census Bureau, Census 2000 Brief, March 2001, and National Population Estimates.  
*Mapping Public Radio’s Independent Landscape: Key Findings, Critical Questions*  
November 29, 2004

**Public Radio stations are an important base for the Independent Producer community.** The results of our Producer survey indicate that nearly one in five independent producers working at a public radio station and producing independently on the side.

**There are a notable number of up-and comers in the Independent Producer community,** who are not yet careerists, and seem to be exploring radio as a profession. Looking at the generational break-out, we find about four in ten Producers are Gen X'ers who came of age during the '80s. A similar number who appear to be "test drivers," reporting 5 years or less experience working in radio.

*Acquirers are overwhelmingly (80%) Baby-Boomers, born between 1946 and 1964 and coming of age during the '60s. Further, at 45 years old, the average Acquirer has worked in the radio profession for about 15 years. The Independent Producer has been working in radio for average of 12 years, and is 42 years old, on average.*

## **Acquirers / Producers**

### **Converge...**

**Acquirers and Producers alike believe that Independent Producers have an important role to play.** Both groups responded strongly and favorably to the idea that a) Independently produced programming brings significant value to listeners, and b) it would make a difference to the audience if there were no independent programming

**Acquirers and Producers are wordsmiths, strongly identifying as writers.** As a group, Independent Producers see themselves as writers first and foremost. Acquirers also strongly share this view of themselves, but identify primarily as broadcasters. Both groups also share the opinion that, in addition to being broadcaster and writers, they are journalists, and are responsible for educating their listeners.

**The system should invest more in programming for minority, disadvantaged, and underserved listeners,** and Producers and Acquirers agree that stations have become less willing to take risks in programming.

**Producers with journalism training will produce better programming.** While the response was not overwhelmingly positive, both Producers and Acquirers were in close alignment (2.7 and 2.9 respectively, on a scale of 4), indicating a slight bias in favor of Producers with journalism chops.

**The power of the ear reigns supreme.** When asked what methods they use to evaluate the impact of programming, both groups ranked their "own aesthetics" first, with "listener letters" ranking second. From there, the two groups split in their methodologies (see "the great divide," below).

**Public radio is an exclusive club.** Both Acquirers and Producers lean towards a view of public radio as an exclusive club, though not in overwhelmingly so. 65% of Producers and 53% of Acquirers believe that it is difficult for a newcomer to gain entry to the industry.

**"Independent Producers are difficult to work with"** was one of the stereotypes we tested in this study. In the end, the majority of both Acquirers and Producers did not agree with this statement.

## Diverge...

**The great divide: Arbitron research.** Acquirer and Producer views of audience research to evaluate programming reveals the study's biggest divide between the two groups, both in the disposition to use research, as well perceptions of the benefits these methods bring to programming. When asked whether Arbitron data and focus groups were important tools that led to improvement in public radio, nine out of ten Acquirers answered affirmatively. Slightly less than half of Producers responded positively. As for audience data, eight in ten Acquirers say they "often" rely on Arbitron versus just one in ten Producers. The use of carriage reports also shows disparity with about half of the Acquirers and only a quarter of Producers citing this as useful tools.

*One in ten Independent Producers say they "rarely or never" receive Arbitron data. This is, perhaps, a factor in why Producers don't value research in evaluating their work.*

**There is great disparity in the perception of how Independent Producers are compensated for their work.** Our study indicates that the majority of Acquirers – nearly seven in ten – believe rates paid to Independent Producers are improving, while seven in ten Producers hold exactly the opposite view... believing rates have not improved in recent years.

**Has public radio lost its mission-driven integrity?** Six in ten Producers say 'yes,' while half as many Acquirers feel this statement to be true. Producers also hold a comparatively negative view of how the industry has evolved over time, with seven in ten saying that programming was more creative years ago compared to only slightly fewer than four in ten of the Acquirers with this view.

## Opportunity and demand

### Short news features in the drive-time magazines are the name of the game

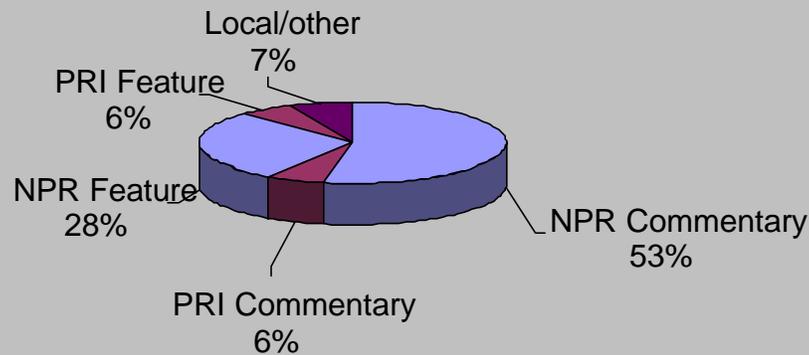
**NPR leads the way in commissioning work from Independent Producers.** We find in our content analysis that the vast majority (82%) of public radio's independent content stream is comprised primarily of segments aired during *Morning Edition* and *All Things Considered*. Breaking this down further, more than half of the independently produced programming NPR buys from Independents is in the form of commentaries, with short feature reports comprising just over a quarter (28%) of Independent output commissioned and distributed via NPR.

*Over the course of one year, our respondents collectively produced 6323 news reports, which we've learned is the most in-demand format and holds the most potential to generate revenue for Independent Producers. More than half of the news reports were produced by Realists, 44 percent by Idealists and only 1 percent by Outsiders. In the same time period, our respondents also produced 991 audio art or story telling pieces, 874 essays or reviews and 2206 modules (56% for national distribution, 44% local distribution)<sup>3</sup>*

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<sup>3</sup> Newscasts were not included in the content analysis

## Independent Content by Type and Distributor



*Mapping Public Radio's Independent Landscape: Content Analysis*  
 Craig Oliver, September 2004

**Independently produced programming makes up a relatively small portion of the overall public radio program stream.** Our content analysis indicates that just 5% of the programming flowing through the public radio system comes from Independents, that is, from either financially Independent production houses (such as *Living on Earth*, *Human Kind*, or *Democracy Now*) or from individual producer-reporters who identify as Independent. When we break this down further, we see 3% of this programming comes from Independent production houses, and only 2% comes from individual Independent Producers, mostly in the form of NPR commentaries and short feature reports inserted in the news magazines. These percentages are reflective of pieces or programs that were 'rolled over,' which suggests the amount of Independent programming actually commissioned is even lower than what these percentages represent.

**Non-NPR distributed independently produced content makes up a very small portion of the overall public radio stream,** with PRI distributed commentaries/features (mainly *Marketplace*) a distant second to NPR (12%). Other non-NPR program sources such as local stations, Pacifica, or minority consortia comprise about 7% of the content stream

**Short features are in, long features and documentaries are out.** In study of formats and lengths of pieces, we found half of all independent pieces fall between 2 and 5 minutes in length. Another 40% of independent programming falls into the 5 to 10 minute range. Pieces longer than 10 minutes comprise a relatively negligible portion of public radio's program stream, and there were no programming in the content analysis longer than 18 minutes. In light of the demand, it is not surprising to find that a minority of Producers report they are producing any work outside the short-form report, essay, or module format.

*This study focused on the period between September 2002-September 2003, While we know that long-form documentaries distributed as one-off's or in limited series are, especially in more recent times, a part of the landscape of public radio programming (American Radio Works, Leonard Bernstein: An American Life, Comedy-O-Rama), this format did not register at all in this analysis. This suggests that, when judged quantitatively, the long-form independently produced format was a negligible component of the public radio programming stream during the period of*

our study. In such a programming environment, Producers generating anything other than news-feature reports will have a difficult time selling material and, therefore, a harder time making a living through independent production. Opportunities are few and prospects bleak for Producers interested in long-form radio (documentary series or one-offs), or those wishing to use public radio as a medium for self-expression or as an art-form.

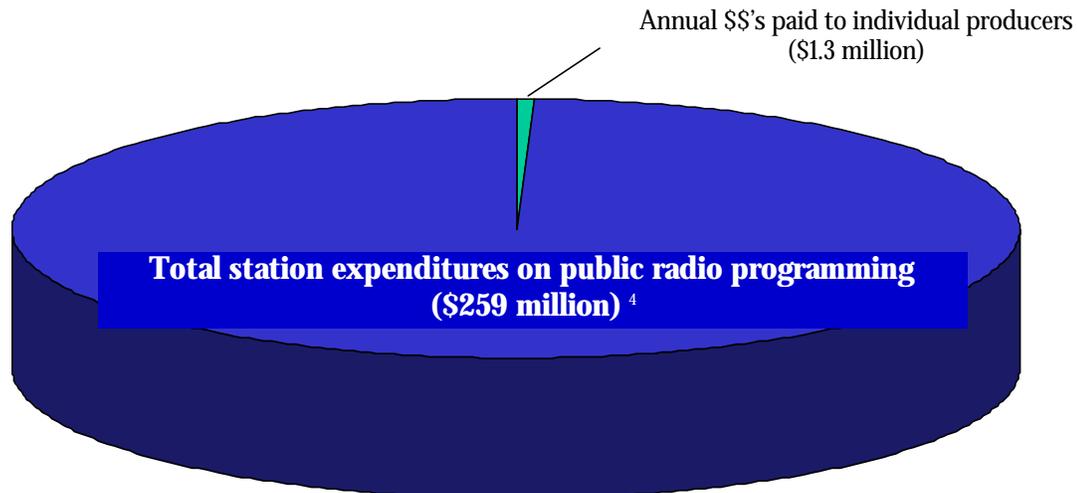
**The majority of Acquirers say they want more Independent programming**, so long as they conform to the short-format and can be easily dropped into another program or between programs in the schedule. Next to news reports, essays/reviews are what Acquirers say they want more of (64%), followed by art stories (62%). Given that the nearly half of the Acquirers participating in this study are Program Directors at local stations, and the dominant outlet for Art Stories (51%) are local stations, this may be indicative of an acquisitions market that holds potential for growth.

*A slight majority of Acquirers (57%) did say they'd like to have more one-time special programs, documentaries, or special series.*

## The Economy

### Independent radio production is not a thriving business

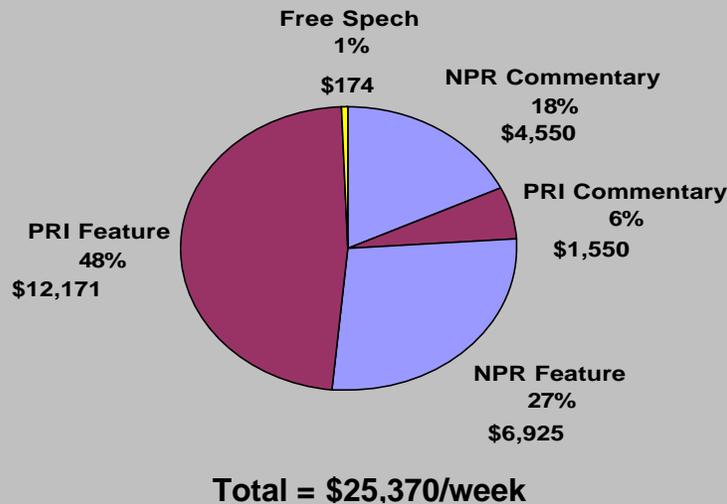
**For every programming dollar flowing through the public radio system, about one half cent goes into the pocket of the Independent Producer.** Our content analysis reveals that public radio as a whole – both nationally and locally – spends a weekly average of \$25,000 on independently produced programming from individual producers, or \$1.3 million each year.



In order to give some perspective on the economy of independent production, we measure this weekly expenditure against the total public radio station programming economy for 2002 (\$259,000,000)<sup>4</sup> and find that, in this context, the percentage of revenues expended on independent produced programming is .5%. This is not inclusive of network fees for independent work, which would yield an even lower total percentage of the total economy.

<sup>4</sup> CPB, FY 2002 (Line E1, Schedule E of the Annual Financial Report that Grantees file with CPB) represents the total public radio station costs of production and/or acquisition of programming. This does not include fees paid by networks for independent work.

## Weekly Revenues to Individual Independent Producers



**PRI distributed programs leads the way total revenues paid to Independent Producers (54%),** with NPR expenditures making up 45% of the total revenues reported during the period of the project sample week. FSRN registers with 1% of the revenues spent. Other Acquirers such as Pacifica, National Native News, or station-based productions did not register in the analysis. PRI revenues skewed higher in this sample because of longer form pieces commissioned by individual programs. Newscast spots were not included in the analysis and, though this margin between PRI and NPR expenditures is relatively narrow, it is significant because NPR dominants in the absolute number of pieces they commission.

**The average fee paid for Independent work ranges from \$235 for a commentary to \$796 for a news or feature story,** as measured across the 17 programs (15 national and 2 local) that paid for Independent programming in our sample. More news and features aired on NPR programs.

*While we found that some Acquirers pay a flat rate for commentaries or features, others pay what is negotiated with an individual. In our sample, a few producers with negotiated rates skewed the average cost upward. In some cases we determined Acquirers pay more for a higher level of expertise from a commentator.*

**Three quarters of Independent Producers earn most of their income outside of their radio work** and more than four in ten producers (43%) report that their gross income does not exceed their expenses; that they did not generate net income from their Independent work.

*A quarter of Independent Producers consider their radio work to be a hobby.*

**There is some disparity between what Producers are aspiring to economically and what they are actually achieving.** When we look at Producers as an entire group, more than half said they are trying to make a living with their Independent radio work. Of this total group, the majority – 77% – report that most of their income comes from sources other than their independent production. When we focus a bit deeper on that half of the group who are trying to make a living, we find that 64% earned some net income through their Independent Production work, though we cannot tell from our analysis how much net income. Another third of Independent Producers who are trying to make a living report a net loss or zero earnings.

**Independent Producers are not succeeding in expanding beyond public radio.** When we queried entrepreneurial initiative and opportunities Independent Producers are pursuing to expand into new markets or sources of revenue outside of public radio, we find little success. The vast majority (95%) of Independent Producers say they receive “minimal or no” funding from streaming or downloading, and little to no revenue coming from sales or merchandising. Even with respect to more conventional forms of fund-raising, the great majority (88%) answered “minimal or no” to securing underwriting as a source of revenue to support their work. The same number indicated that they have developed few if any secondary markets for their work.

**The leading source of funding for independently produced programming, outside of negotiated fees, comes from Producers themselves.** When we asked about sources for supplementing the income earned from Acquirers fees, more than four in ten Producers (43%) report “self-funding” as “Major or Minor” source. Foundation grants rank as the next leading source for Producers (39%). Partner stations are reported by one out of five of Independents to be a source of supplemental income. CPB is listed as source of financial support for only 7% of Independent Producers through direct contract, and another 14% through subcontracting with other projects.

*One in five Independent Producers cite “station partnership” as a source of funding.*

Funding	Major/Minor	Minimal/Not
Self-Funding	43	57
Grant Foundation	39	61
Partner Station	20	80
Partner Network	15	86
Subcontract CPB	14	87
Secondary Mkts	13	87
Corp Underwriting	12	88
Sale Merchandise	8	92
Grant CPB	7	93
Partner Company	6	94
Stream Download	5	95

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Walrus Research, Spring 2004

## CRITICAL QUESTIONS

Bill Siemering, in his Foreword to this report, describes our “mapping” as a first step and, in this section of the report, we provide a framework for what the next step for the project will be.

The following Critical Questions were posed by project Advisors as they proof-read a draft of this report. This is not an exhaustive list, by any means. The correlations of various findings and related questions are meant to stimulate new thinking and ideas, and help to inform the agenda for convening stakeholders throughout the system as we begin to discuss the project’s Findings.

1. **Looking at the total sector of Independent Producers, it appears that public radio’s traditional funding sources don’t provide a strong economic base.**

- Q: Does the industry have a responsibility to ensure the economic viability of Independent Producers? If so, what is the reasoning?
- Q: Is it wiser to take a survival of the fittest approach to the Independent economy, and assume that the best negotiators or the ‘cream of the crop’ producers will rise to the top, and have the best chance of thriving, and of serving listeners with their work?
- Q: If the public radio system values independently produced programming, is it logical or necessary that the barometer of economic support should register more highly?
- Q: Are there any opportunities to build on the foundation of support for freelance producers that exists at the local radio stations?

2. **The community of Independent Producers is smart, diverse, and includes a contingent of young producers who are not yet committed to radio as a profession.**

- Q: At a time when we see growing challenges to the industry, is there an opportunity to better harness the resources of the Independent Producer community in a way that could enhance public radio’s competitive stance? Or is it best to play to the proven strength of the industry’s programming and not risk trying to upset a successful formula?
- Q: How important is it to try to foster environment where younger producers would have a chance to thrive?

3. **Acquirers say they are interested in a range of formats from Independent Producers.**

- Q: Is there an onus on individual producers to learn to market their programming better to Acquirers?
- Q: Are we in a situation where there are too many suppliers but not enough shelf space?

4. **Conventional thinking right now is that satellite radio and streaming audio threatens to erode public radio’s listener base. As a result, many stations are thinking about how to be more strategic locally to strength their position.**

- Q: Is there a way for stations work more closely with the Independent Producer community to build their local program identity and bolster their position strategically?

**Q:** Along these same lines, is there an opportunity with HD Radio or streaming for stations to form stronger ties to Independent Producers?

5. **We are currently in period where public radio is considered, by all measures, a tremendous success story. The growth of the industry in terms of revenues and the size of listenership can be attributed, in large part, to its overwhelming success in serving its audience with high quality in-depth journalism. This study seems to indicate that one of the consequences of this success is that public radio has evolved into a limited platform for programming produced by Independent Producers, both in terms of the volume of the programming stream comprised of independent work, and also in the dearth of opportunity for formats other than short-form reporting or commentary.**

**Q:** Are alternative formats, such as storytelling, evocative soundscapes, or extensively researched programs a necessary sacrifice of public radio's enormous success as a provider of in-depth journalism?

**Q:** Are there incentives for increasing airtime for independently produced, alternative formats?

**Q:** Given the incredibly crowded and competitive programming field, and the lack of demonstrated ability to generate listener sensitive income, where would such programs find a home?

**Q:** Should public radio simply stick to its successful "brand" as a high quality provider of in-depth news as it considers strategies for the future?

**Q** Given that 90% of independently produced programming that turned up in this study is less than 10 minutes in length, has the description "in-depth" changed in meaning over time? Does 10 minutes allow for 'in-depth?' Does 5 minutes allow for in-depth?

Following are additional "critical questions" that have emerged during debriefings after the December 7, 2004 release of "Key Findings, Critical Questions":

6. **Some consider it a luxury to take the time to produce long-form programming that focuses on a single-topic, is in-depth, sound-rich, and generally requires some sort of special funding.**

**Q:** If the Acquirer has an in-house Independent Producer – someone working full or part time on the payroll, producing independently on the side – is the incentive to keep such an assignment in-house greater than looking outside?

**Q:** From an Acquirers P.O.V., what is the incentive for giving this sort of an assignment over to an Independent Producer who works outside their usual infra-structure? Is there something an outside Independent brings that is of unique value?

## Appendix A : Research Questions

We convened *Mapping Public Radio's Independent Landscape's* research partners, advisors and investors over the course of several months beginning in September 2003 to develop a set of research questions that would be used to develop the surveys and focus the goals of the project. Following is a distilled list of the questions, grouped according to the findings outlined in this report.

### Profile:

- What other things are independents doing to supplement their income (i.e.: teaching)?
- Do independents involved in station partnerships fare better than those who seek to go it alone?
- Get at a breakout of how much of the Independent pool are veterans. Ask the question “how long have you been producing content for US public radio?” to get at a break-out of old-timers vs. mid-career vs. newcomers.
- Where do producers live and work?
- How many minorities are there in the Independent Producer community?

### Acquirers and Producers converge, diverge

- How many Producers have journalism training? Do acquirers favor those with journalism background?
- Where do producers and acquirers' definition of “public service” converge or diverge?
- How to best assess what their respective perceptions are of the relationship between radio programming and the listener... the relative importance of it, what their methodology is for assessing it, how often they assess it, etc ....
- Do public radio stations and network gatekeepers and independent producers have the same or differing programming values? How do the various constituencies “rate” their values relative to other groups...more important, less important, equally as important?
- What perceived relative value do public radio gatekeepers have for independent producers? Likewise, what perceived relative value do independents have for public radio gatekeepers?

### Opportunity and demand

- What kind of appetite do stations have for long-form work?
- Are opportunities for independents in public radio are growing? Shrinking? Staying the same?
- What is the preferred format for producers?
- Who are the acquirers and what are the pools of money?
- What format do they actually produce the most of?
- What are buyers looking for in terms of content, length, format?
- Is NPR the big controlling entity that everyone imagines it is?
- Of the 40+ hours of NPR News programming each week how much is Independent work?
- What contributions do independents make to the system in terms of hours of content, program length that independents prefer or gravitate towards?

### Economy

- Which sector is making the biggest investment in the independent economy?
- Are independent producers adequately compensated for their work? How are they valued as measured by the economics of the system -at-large?
- Do independents who are involved in station partnerships fare better than those who go it alone?
- What is the norm in terms of payment? What is the range? What are the differentiating factors?
- Do you do your radio work @ a deficit? What is the gain?
- How are Independent producers paid compared to station based producers?

## Appendix B : Mindsets

Walrus Research applied a common research methodology called Factor Analysis to distill the many opinions gathered from the Acquirers and Producers respondents into central “modes of thinking<sup>1</sup>.” The goal is to help us understand how opinions sometimes converge into a central belief systems. The 16 opinion questions presented in the survey were reduced down to three basic Mindsets, as follows:

### Conventional.

- Comfortable with way public radio has evolved and the role of audience research; it has had a positive impact on public radio.
- It is important that public radio programming appeal to potential “givers.”
- Rates for Independent Producers have been improving.
- It’s best if producers have journalism training.
- Growing the audience has not led to a loss of mission-driven integrity
- Not nostalgic for the ‘old days.’ Public radio programming was not more innovative or creative years ago than it is today

### Grievance

- Public radio is an exclusive club that sets a high bar for newcomers to enter.
- Stations have become more risk averse in their programming
- Independent Producers are more innovative than the stations or the networks.
- Acquirers are not very receptive to new ideas from Independent Producers
- Opportunities for Producers to place their work are diminishing

### Potential

- The system needs more programming that appeals to minority, disadvantaged, and underserved listeners.
- There is a lot of high quality work from Independent Producers out there – “enough to fill an entire channel” – that is rarely if ever broadcast.
- There is little merit to the idea that Acquirers believe Independent Producers are difficult to work with
- It would make a difference to the audience if Independent work disappeared from public radio.

These Mindsets are not distinguished by a respondent’s role as an Acquirer and/or a Producer. Both categories of individuals can ascribe to a particular set of beliefs and, in this analysis, one who holds one of the beliefs is likelier to hold the other opinions in that category. Further, while this exercise can be useful in revealing underlying views that are at the heart of some of the thinking throughout the industry, it’s important not to assume that all people necessarily fall neatly into one of these categories. This is just one, reliable way to look through the multi-faceted and ever-changing prism of the public radio industry in order to understand some core belief-systems that drive opinions and, ultimately, decisions about programming and strategy.

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<sup>1</sup> The Walrus Report describes the Mindsets in a section entitled “Modes of Thinking” (*Acquirers and Independent Producers* pg 17). The labels given each mode by Walrus Research are “Optimism, Grievance, Upside Potential” respectively.

## **Appendix C : Producers, in their own words**

### ***Not all Independent Producers are alike***

At the conclusion of the Walrus Research survey, we gave Independent Producers an opportunity to describe themselves in their own words. Following is a selected sampling of those responses, which reveals the breadth of expertise, interests, and personalities:

*I am a schoolteacher.*

*I am a general assignment news and feature reporter*

*My interests range over the entire panoply of American life.*

*All things animal, domestic and wild, are my main interests, and areas of expertise.*

*I'm especially interested in how such unavoidable immediacy in communications will/is radically changing people, society, and business relations.*

*[My interests lie in] culture, broadly defined.*

*It does take a lot of perseverance to get through and to have an idea that clicks with them (the Acquirer). They are the only arts show that allow you to be artistic so I find it worthwhile to keep on trying. I really don't think it's an issue of disrespect but one of the stresses of working on a weekly national show. [You have to] keep on trying and follow up with phone calls.*

*An interfaith, nonsectarian approach to religion, spirituality and/or ethics, especially where these topics intersect with public policy or culture.*

*Work that helps create community through story work at the intersection of public radio and the Internet new distribution models for public radio*

*I received a BA in Communications, minoring in Journalism and Music. I have taught Journalism FT at the college level -- and after graduate school worked for three years as a telecommunications policy analyst.*

*The skill I have here is to get people to tell me their stories and then relate those stories to their larger culture*

*I find that I produce a lot of spot news to keep the money flowing into my account. Granted, it's a trickle of money but consistent.*

*The reselling of pieces is how I (sort of) survive.*

*My interest is to expand the landscape of possibilities, and consequently, the multitude of choices available to the listener.*

*As a full-time reporter and radio (and soon to be television) producer, I have to be a Jill of all trades. I do four or five full-length (five-minute) pieces a week for our daily news program...I try for a rich sound piece about once a week.*

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*Being a physician who works in social justice issues in medicine I'm interested in producing stories that focus both on health in society and the effects of large policies on individual people.*

*I am a Fellow at a think tank in Washington, DC. My experience is in legal issues, especially those relating to crime, law enforcement, and (more recently) civil liberties and the war on terrorism.*

*I'm a generalist, and believe in being a generalist. I believe everyone should have an interest in many different things, and my job as a reporter and producer is to spark listener's curiosity in the world around them. If I have made someone think outside the corporate mind set, I have done my job.*

*I'm interested in so many stories; I find new ones all the time, all around me. I'm fascinated by family dynamics, the intimate intricacies that form a family's interaction with one another -- especially Southern families, since that's where I live right now. Funny stories, small stories -- things people believed as children that they now know to be false.*

*I was trained as an anthropologist and my co producer was trained as a sociologist. So I guess you would say we're deeply-rooted in the humanities. Our main interest is non-traditional documentaries that incorporate oral histories. We usually take an issue and humanize it.*

*I mostly handle pieces about sports.*

*My area of interest is radio drama. Radio drama that has a social activist message. That deals with the struggle of mankind to be better and do right.*

*I come from an ocean conservation background and think that there is not enough science and long-term environmental content.*

*Radio Oddio*

*Any issue related to the use of American military forces and the Administration's commitments requiring the use of those forces, particularly in combat. The impact of U.S. foreign policy on the daily lives of professional military families.*

*I am a roving regional reporter with expertise in covering politics, policy, business, environment and breaking news in my home territory*

*My work as a freelance producer has focused on early American Christmas music, most of which is unfamiliar to the American public, or when it is familiar, is not generally understood to be music created in North America.*

*I have a master's degree in opera/music, so I specialize in arts and culture reporting. I am also a professional musician in my off hours. I did not have any training in journalism before I started working in radio, but I work at a station in a top ten market and produce for NPR regularly.*

*I have a degree in broadcast journalism and cover environmental topics. My family has a number of scientists/writers who spurred my interest in environmental journalism.*

*I have been an international economics correspondent for over 40 years.*

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*My expertise is in puzzles -- which I create weekly*

*In addition to my work as a public radio reporter, I am a professional violinist.*

*No expertise*

*I've got an American Dream and the push to make life better and more enjoyable for listeners.*

*I am a parent with children in the public school system. I also taught music in 12 private preschools in NYC.*

*I am a conceptual artist driven to make art that helps people to think and feel about their community, society and self.*

*My expertise is also in artful programming, humor, wit and maximizing the use of music to evoke feelings. My interest is in bringing more engaging and thought-provoking material to listeners.*

*I survive by doing temp work in between assignments.*

*I have some training from college in journalism, however, most of what I know I learned from working for NPR.*

## Appendix D: Station sample

...excerpted from Craig Oliver's "Content Analysis" report, 9/24/04

To properly capture the contribution of independents to public radio programming, we established a representative sample of 21 public radio stations.

The stations included in the sample were chosen so that a variety of market sizes and station format types were represented. The following criteria were used:

- 287 Arbitron Metro Survey Areas divided by 21 stations yields an interval of every 14 markets (source: Arbitron Market Survey Schedule and Population Rankings, Spring 03)
- CPB qualified station (Source: Arbitron Nationwide CPB line-up, Spring 03)
- Station must be home to the market (Source CPB and Arbitron)
- If not home to the market, then nearest CPB Qualified signal and best coverage area (Source: MIT Radio Locator database)
- If more than one station, then alternate between first alpha-call letters/last alpha-call letters.

These criteria yielded the following station sample list, which yields desirable geographical variety as well as variety of station format-types, including network-affiliated public radio, community licensees, minority consoritia, and Pacifia members stations.

MSA	Market	Station	Format*
1	New York NY	WBAI	News/Talk
15	Phoenix AZ	KJZZ	News/Talk
29	Kansas City MO-KS	KCUR	News/Talk
43	Greensboro-Winston Salem-Highpoint NC	WSNC	Jazz
57	Birmingham AL	WBHM	News/Classical
71	Albuquerque NM	KUNM	Eclectic
85	Little Rock AR	KUAR	News/Talk
99	Melbourne-Titusville-Cocoa FL	WFIT	News/Jazz
113	Morristown NJ	WNYC-FM (New York)	NewsTalk
127	Fayetteville NC	WFSS	News/Jazz
141	Quad Cities (Davenport-Rock Island- Moline) IA/IL	WVIK	News/Classical
155	Killeen-Temple TX	KNCT	Variety Music
169	Hagerstown-Chambersburg-Waynesboro MD/PA	WETH (WETA, Washington DC)	News/Classical
183	Cape Cod MA	WBUR-AM (West Yarmouth/Boston)	News/Talk
197	Danbury CT	WSHU (Fairfield CT)	News/Classical
211	Tri Cities (Richland-Knnewick-Pasco) WA	KFAE	News/Classical
225	Muskegon MI	WBLV	Classical
239	Wheeling WV	WVNP (West Virginia Public Radio)	News/Classical
253	Columbia MO	KBIA	News/Classical
267	Decatur IL	WUIS (Springfield IL)	News/Classical
281	Cheyenne WY	KUNC (Greeley CO)	News/Classical

\* Source: NPR

## Appendix E : Sample week

NPR provided us with detailed carriage data for one year of programming for each of the sample stations. This, in combination with DACS rundowns and other materials supplied by producers forms the pool of data for the content analysis. Beginning the week of January 12<sup>th</sup>, we commenced analysis of this carriage data dating from September 1, 2002 through September 30, 2003 identifying and categorizing programming that fits our definition of independently produced based on a random sampling of weeks as follows:

1-Sep	2002	Sunday	Wk 1
11-Nov	2002	Monday	Wk 2
21-Jan	2003	Tuesday	Wk 3
25-Mar	2003	Wednesday	Wk 4
8-May	2003	Thursday	Wk 1
18-Jul	2003	Friday	Wk2
27-Sep	2003	Saturday	Wk 3