

SELECTED KEY FINDINGS

Mapping Public Radio's Independent Landscape

Not all Independent Producers are Alike

Presented at the Annual Membership Meeting for the Association of Independents in Radio
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Overview of Selected Findings

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, specifically, to the Acquirers who are critical gatekeepers for their work.

The findings outlined in this paper will be presented and discussed at the October 12, 2004 Annual Membership meeting of the Association of Independents in Radio (AIR). They are drawn from research reports submitted by the project's Research Partners, Walrus Research and Craig Oliver. Additional finding reports will be released over the course of the October and November 2004.

The research, which commenced in January 2004, was comprised of a content analyses of nearly 2700 hours of public radio programming airing between 6am and midnight on public radio from September 1, 2002 through September 30, 2003, as well as two extensive on-line surveys – one of Producers and a second survey of Acquirers -- that began with a pool of more than 1500 potential respondents. The freelancers, reporters, and Acquirers who took time to complete the on-line surveys are affiliated with dozens of public radio programs, including those produced or distributed by NPR, PRI, Pacifica, AIROS, as well as those originating at local stations and independent production houses and minority consortia.

For the purposes of this study, "Independent Producer" is defined as an individual who is responsible for funding the cost of producing content, either through negotiated fees, corporation or foundation underwriting or grants, with their own funds, or some other means. We will provide a glimpse into the role and contributions of financially independent production houses in later reports, but the primary focus of this project is freelancer reporters and Producers, commentators, and station-based Producers who shop out work independently of their station responsibilities. This is a domestic study; foreign broadcasters or Producers who contribute to the content of US public radio are not included.

One of the fundamental questions we set out to answer was "what is the value of independently produced programming in public radio?" To answer this, we focus on the key areas of formats for commissioned work, funding and funders, employment patterns, experience and expertise, methods for evaluating programming, and general business affairs. By surveying Acquirers as well as Producers, we're able to learn where these two interrelated constituencies converge and diverge in their perceptions and habits.

Another key area for this *Mapping Public Radio's Independent Landscape* set out to answer the question, "who is the Independent Producer" and brings new understanding in how they work, where they live, and identifies fundamental demographics of this constituency. This presentation at AIR's Annual Membership on October 12, 2004 will offer a first-time view of the dominant 'clusters' or groupings of Producers based on their perceptions and experience.

The October 12 presentation marks the first in a series of discussions that will be convened over the coming weeks and months to gather response to the findings, and to work towards developing strategic recommendations. A final report is expected in December 2004.

Mapping Public Radio's Independent Landscape is a project of SchardtMEDIA with the support of CPB, KCRW in Santa Monica, Minnesota Public Radio, Public Radio International, National Public Radio, and WGBH in Boston. Bill Siemerling serves as Contributing Editor. The project's Research Partners are Walrus Research and Craig Oliver with Steve Martin of SFM Consulting contributing as Research Associate.

The project advisors, who helped a great deal in shaping the research questions and reports, and opened doors for us as we gathered the data needed for the study are Peggy Berryhill, Native American Public Radio; Dolores Brandon, Executive Director of AIR; Craig Curtis, Director of Research and Station Relations at MPR; Peggy Girshman, Assistant Managing Editor at NPR; Will Lewis, Management Consultant for KCRW/Los Angeles; Davia Nelson, the Kitchen Sisters; Jake Shapiro, Executive Director of PRX; Dale Spear, VP of Programming and Acquisitions at PRI; John Voci, Station Director/WCAI-WNAN and WGBH; and Johanna Zorn, Executive Director of the Third Coast International Audio Festival,

More information about the project is available at SchardtMEDIA.org, or by e-mailing info@SchardtMEDIA.org

SELECTED KEY FINDINGS : *Not All Independent Producers are Alike*

The goal of any research is to first, identify stereotypes or commonly held perceptions and, secondly, to subject them to rigorous testing to see if they hold true or if, in fact, another picture emerges. One fundamental reality that emerged from the *Mapping Public Radio's Independent Landscape* 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 amounts of time on their independent radio work, and who are concentrated in different sectors both inside and outside of the industry, flowing back and forth between the public radio system and other areas of employment and interest.

- The segmentation analysis conducted by Walrus Research finds that “not all independent producers are alike;” that, in fact, the community of producers breaks out into three dominant “clusters” or cohorts based on the way Producers responded to a series of survey questions about their work habits and lifestyles, as well as 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 producer 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 are 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 as journalists or reporters – a key factor differentiating them from the other categories of Independent Producers – and identify strongly 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 brethren 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 when asked whether public radio was more creative years ago. Of the three groups, they are the most prolific Producers of news reports. Six in ten of the – 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. More than the other groups, they report that most of their income comes from sources other than their Independent production work.
- **Public Radio's Independent Producers are highly intellectual**, 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 have an advanced degree. When not working in radio, we find many of them engaged in, as Walrus Research characterizes it, “mind work.” Most identify as writers. For those working outside public radio, when they take off their Independent Producers’ hat, we find them working for print publications (1 in 4) or teaching in a college (1 in 5).
- **Key demographics of Acquirers and Producers**, show Producers split equally – 50/50 – down gender lines, while Acquirers tend to be more male (58%) than female. One in five Independent Producers identify as a racial minority which is commensurate to the US minority population (19.5%)*, while only 15% of Acquirers in our study identify as non-white.
- **Four in ten Producers do not earn a net income from their independent production work**, and eight in ten have full or part time employment – either within or outside the public radio system -- in addition to their independent production work. Producers who work within the public radio station are most often found working at a radio station (78%).
- **Independent Producers are concentrated in the coastal media centers of the US**, with California serving as home to the largest group (20%) and the next runner-up New York with 13% of Producers based there. Next in rank is Massachusetts (8%) and Washington DC (5%).