

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.

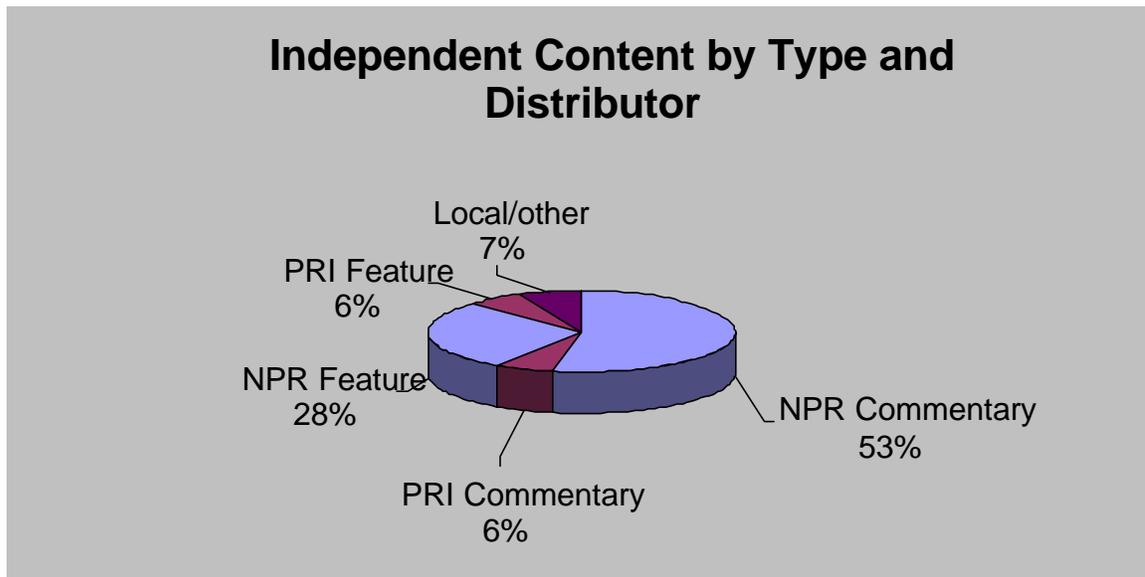
Has public radio lost its mission-driven integrity? Six in ten Producers say ‘yes,’ while half as many Acquirers feel this statement to be true. Producers also hold a comparatively negative view of how the industry has evolved over time, with seven in ten saying that programming was more creative years 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)*³



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

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³ Newscasts were not included in the content analysis

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-off's), 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.

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