Walrus Research

Acquirers and Independent Producers

How They Differ, How They Are Similar

Spring 2004

Reality has a way of eventually getting your attention

Acquirers and Independent Producers

Introduction

This research report is one component of a larger project directed by SchardtMEDIA that is titled Mapping Public Radio's Independent Landscape.

We surveyed acquirers who purchase programming from independent producers for public radio stations and networks. Our objectives were to describe the acquirers, measure their attitudes and determine their needs for independently produced programming, with comparisons to the producers.

For another component of the larger project, we had surveyed independent producers and divided them into segments based on their perceived role and opinion on public radio issues. Those results are printed in a separate report.

Credits

This research was funded by the Corporation for Public Broadcasting and project investors KCRW, Minnesota Public Radio, Public Radio International and WGBH, in partnership with National Public Radio.

We deeply appreciate the great work of Jay Youngclaus at the Corporation for Public Broadcasting. Jay understands research design and statistical analysis, as well as the implications for public radio policy on the national level.

We worked closely with a team of advisors who suggested research questions and edited several drafts of the questionnaire:

Dolores Brandon, Executive Director, Association of Independents in Radio
Dale Spear, Vice President of Programming and Acquisitions, PRI
Joanna Zorn, Executive Director, Third Coast Festival
Peggy Berryhill, Native American Public Radio
Craig Curtis, Director of Research and Station Relations, MPR
Will Lewis, Management Consultant, KCRW-FM
Davia Nelson, Kitchen Sisters
Jake Shapiro, Executive Director, The Radio Exchange
Peggy Girshman, Assistant Managing Editor, NPR
John Voci, Station Director/WCAI-WNAN, WGBH Radio
Bill Siemering, Developing Radio Partners

More Information

The president of Walrus Research is George Bailey. You may download electronic copies of this and other national research studies for public radio by going to www.WalrusResearch.com.

Also for this project, Craig Oliver has conducted a content analysis of public radio programming to measure the relative contribution of independent production.

Sue Schardt is the Project Director and Bill Siemering is the Contributing Editor for Mapping Public Radio's Independent Landscape. You can find the full report for this project, or learn more about other SchardtMEDIA projects, at www.SchardtMEDIA.org.

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Executive Summary

We surveyed acquirers who purchase programming from independent producers for public radio stations and networks. We compared their characteristics, attitudes and needs with those of independent producers.

- We found that acquirers and independent producers expressed significantly different opinions on issues relating to public radio.

- We found the greatest difference of opinion between acquirers and producers on the value of audience research. Acquirers are more likely to think that audience research provides useful information.

- Acquirers and producers also tend to disagree on whether the rates paid by acquirers for independently produced programming have been improving in recent years.

- Independent producers are more likely than acquirers to think that years ago public radio was more creative and that public radio has lost its mission-driven integrity.

- Acquirers tend to believe that public radio programming should appeal to givers as well as minorities. Producers are ambivalent on whether public radio programming should target listeners who contribute.

- Both acquirers and producers agree that independent programming delivers significant value to public radio listeners. Yet both agree that stations have become less willing to take risks in programming.

- The range of various opinions between acquirers and independent producers may be reduced to three fundamental modes of thinking that we called optimism, grievance and upside potential.

- We found that acquirers perceive themselves, in rank order, as broadcasters, writers, educators and journalists. Independent producers also strongly identify with those roles, although the order is writer and journalist, before broadcaster.

Acquirers and Independent Producers

- Most acquirers as well as most independent producers do not identify with the role of activist, but producers are less likely to distance themselves from that role.

- Demographically, acquirers are highly concentrated in one generational cohort—the Baby Boomers. Independent producers are more likely to include Gen Xers as well as older generations.

- Acquirers, like independent producers, have extremely high levels of formal education, even more elite than the NPR News audience.

- We found no statistically significant difference between acquirers and producers on race, ethnicity or sex. About 15 percent of acquirers would qualify as a "minority."

- While acquirers, on average, have a few more years of professional radio experience than independent producers, there is a wide dispersion of professional experience in both groups.

- There are large differences between acquirers and producers in how they measure the impact of their programming. Acquirers use Arbitron ratings and carriage data much more than producers. Yet both groups also rely on their personal sense of satisfaction.

- From the perspective of acquirers, the greatest need for programming from independents is for more news reports, more personal narratives and more essays or reviews. All of those would air within a larger program, rather than stand alone.

- While the rhetoric about acquirers vs. independent producers may assume that they are two different groups of individuals, they can be the same people acting in different roles at different times.

Acquirers and Independent Producers

Opinions about Public Radio

Acquirers who purchase programming from independent producers may work at NPR, PRI, other national syndicators or local stations. We asked a national sample of acquirers to express their opinion on a range of issues relating to public radio programming.

With help from our panel of advisors, we had collected the kind of assertions about independent producers and acquirers that may be heard at public radio conferences, in position papers or on internet chats. We were able to compare the opinions of acquirers with those expressed by independent producers.

Here is how we asked the question:

> *Everyone in public radio has opinions about our mission, funding, audience and programming. We are interested in your opinion.*
>
> *For each of the statements below, please indicate whether you strongly agree, somewhat agree, somewhat disagree or strongly disagree:*
>
> > *Years ago, public radio programming was generally more creative and imaginative than it is now*
> >
> > *Programming from independent producers is generally more innovative and ground-breaking than programming produced by stations and networks*
> >
> > *Stations have become less willing to take risks in programming*
> >
> > *Public radio ought to invest in more programming that appeals to minorities, disadvantaged and underserved listeners*
> >
> > *Independents who have solid training in professional journalism are more likely to produce valuable programming*
> >
> > *Audience research, including Arbitron ratings and focus groups, has yielded useful information leading to the improvement of public radio*

Acquirers and Independent Producers

Acquirers often find that independent producers are difficult to work with

If all of the independent programming disappeared from public radio, it really would not make much difference to the audience

Acquirers are generally receptive to new ideas pitched by independent producers

It is important that public radio programming appeals to those listeners who are likely to contribute as givers

Recognition by peers, such as winning an award, is the most important measure of success for a public radio producer

As public radio has added listeners, it has joined the mainstream media and lost its mission-driven integrity

In recent years there have been more and more opportunities for independent producers to get their programming material on public radio

Public radio is an exclusive club. It is difficult for new producers to gain entry

The rates paid by acquirers for independently produced programming material have been improving in recent years

There's a lot of high quality independent work out there that is rarely or never broadcast. Just in terms of quantity, there's enough to fill up an entire channel

Acquirers and Independent Producers

Significant Differences

We found that acquirers and independent producers expressed significantly different opinions on all but one of the 16 opinion variables.

By significantly different we mean that the opinions expressed by the two groups were statistically significant (not due to sampling error) based on both T-tests and Chi-square tests. Keep in mind that a statistically significant difference may not be large in absolute value, even though it is a real difference.

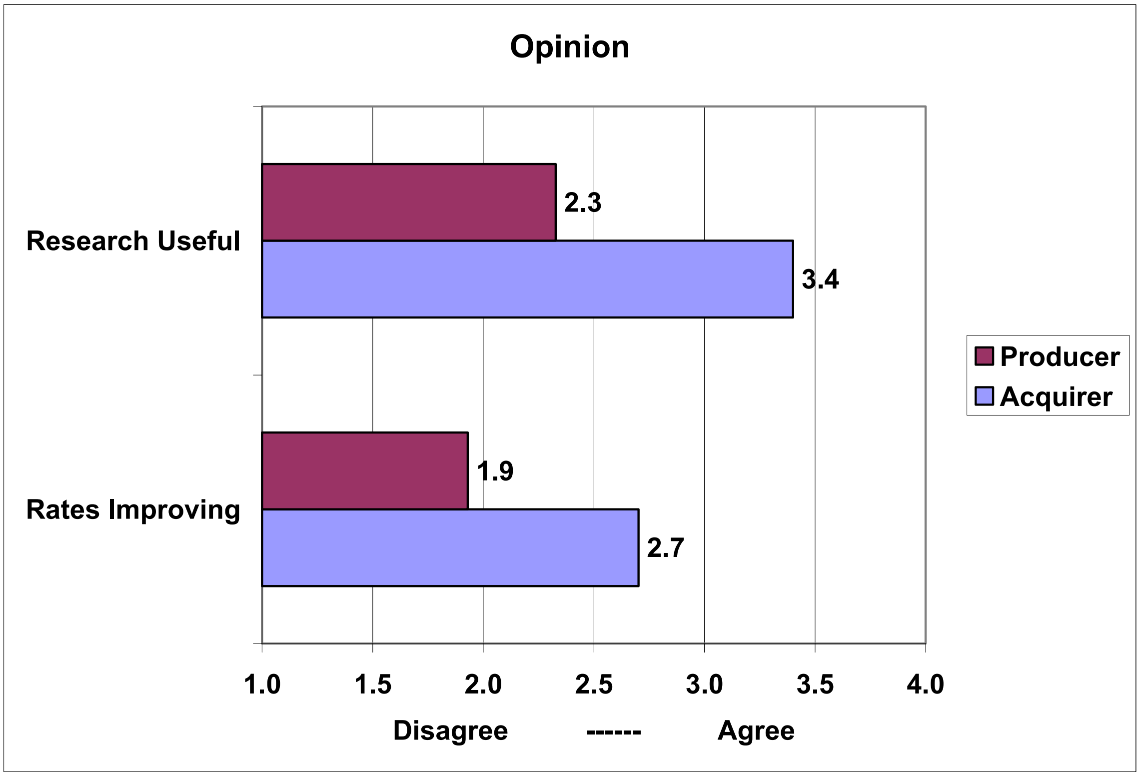
The following charts show how acquirers and independent producers scored on the 16 opinion variables. The average scores or means in each chart were calculated on a 4-point scale:

4 = Strongly Agree
3 = Somewhat Agree
2 = Somewhat Disagree
1 = Strongly Disagree

Detailed Tables

For readers who are interested in the complete distribution of each variable, we have provided detailed tables at the end of this report.

Acquirers and Independent Producers



We found the greatest difference of opinion between acquirers and independent producers on this particular variable:

> *Audience research, including Arbitron ratings and focus groups, has yielded useful information leading to the improvement of public radio*

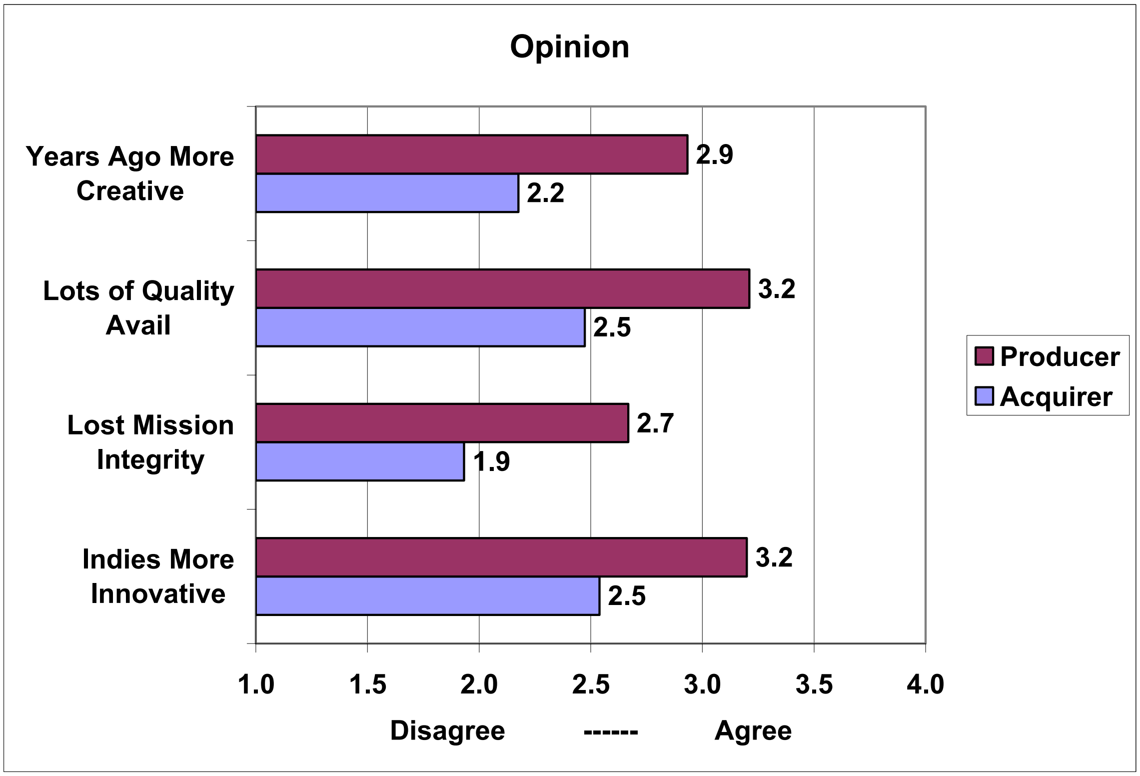
Acquirers generally agree (3.4) that audience research has been useful for public radio, while producers fall on the negative side (2.3) of ambivalence. This one variable, along with its correlates, may explain much of the divide between acquirers and producers.

We found another relatively large difference of opinion between acquirers and independent producers on this variable:

> *The rates paid by acquirers for independently produced programming material have been improving in recent years*

Acquirers fall on the positive side (2.7) of ambivalence, while the independent producers (1.9) generally disagree with the statement.

Acquirers and Independent Producers



This chart shows the results on four opinion statements that were written to be critical of how public radio has evolved. You can see that the producers were more critical of public radio than the acquirers on all four of these variables.

The producers somewhat agree (2.9) that years ago public radio programming was more creative than it is now, while the acquirers (2.2) tend to disagree.

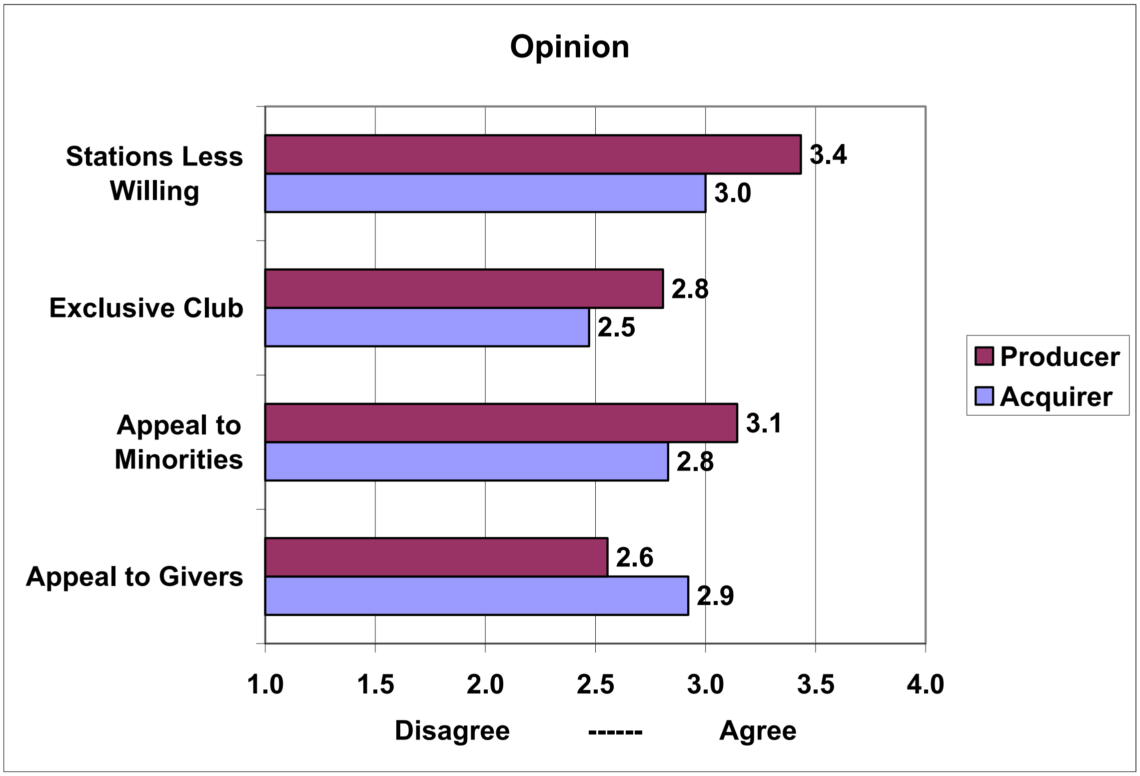
The producers generally agree (3.2) that there is plenty of quality material available from independents, while the acquirers (2.5) are ambivalent.

The producers tend to agree (2.7) that public radio has lost its mission-driven integrity, while the acquirers (1.9) disagree.

The producers think (3.2) that their programming is more innovative than stations or networks, while the acquirers (2.5) express ambivalence on that.

All of these differences are statistically significant and fairly large in value, indicating a perceptual gap between acquirers and producers. The producers are less satisfied than acquirers with the evolution of public radio.

Acquirers and Independent Producers



At the top of this chart are two statements that could be interpreted as either negative criticisms of public radio or just observations of the current reality:

Stations have become less willing to take risks in programming

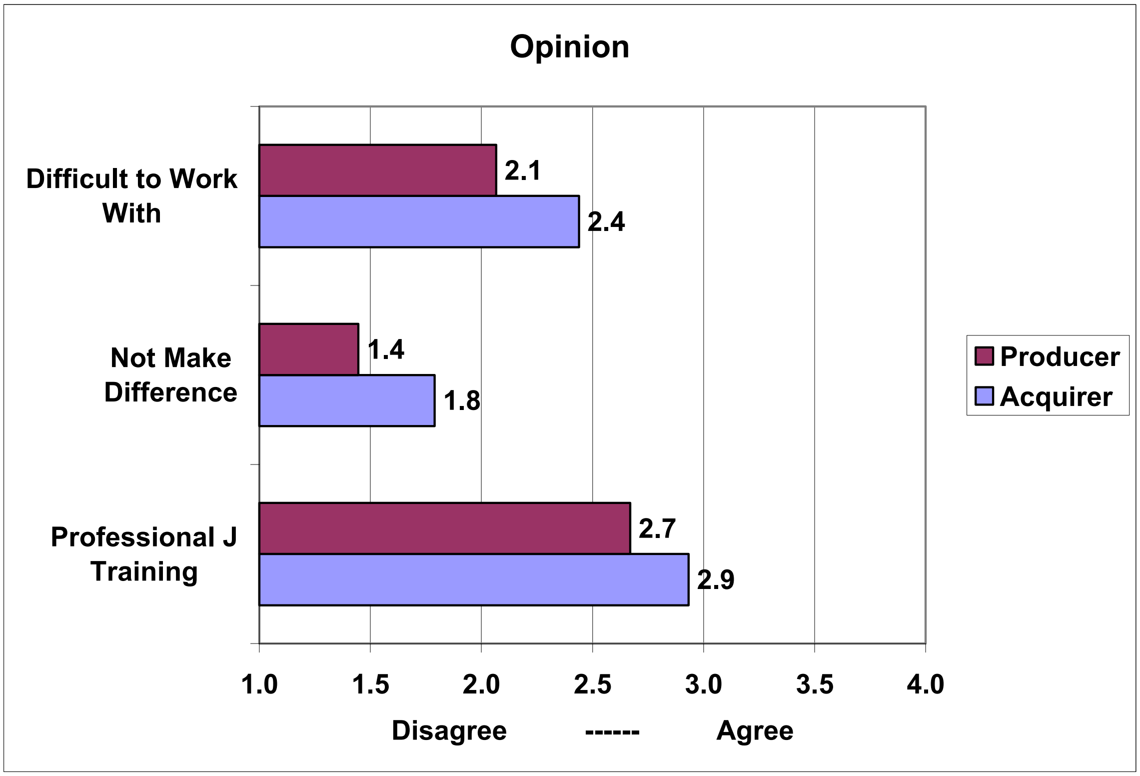
Public radio is an exclusive club. It is difficult for new producers to gain entry

For both statements, producers are more likely to agree than acquirers, yet the differences between the two groups are not large. Both producers (3.4) and acquirers (3.0) agree that stations are less willing to take risks, although producers are more convinced of that. The producers (2.8) are more certain than acquirers (2.5) that public radio has become an exclusive club.

At the bottom of this chart are two statements that express programming goals that could be debated, depending on your vision for public radio.

Independent producers somewhat agree that programming should appeal to minorities (3.1), as do acquirers (2.8). But acquirers also think that public radio should appeal to givers (2.9). On that opinion statement, producers are rather ambivalent (2.6).

Acquirers and Independent Producers



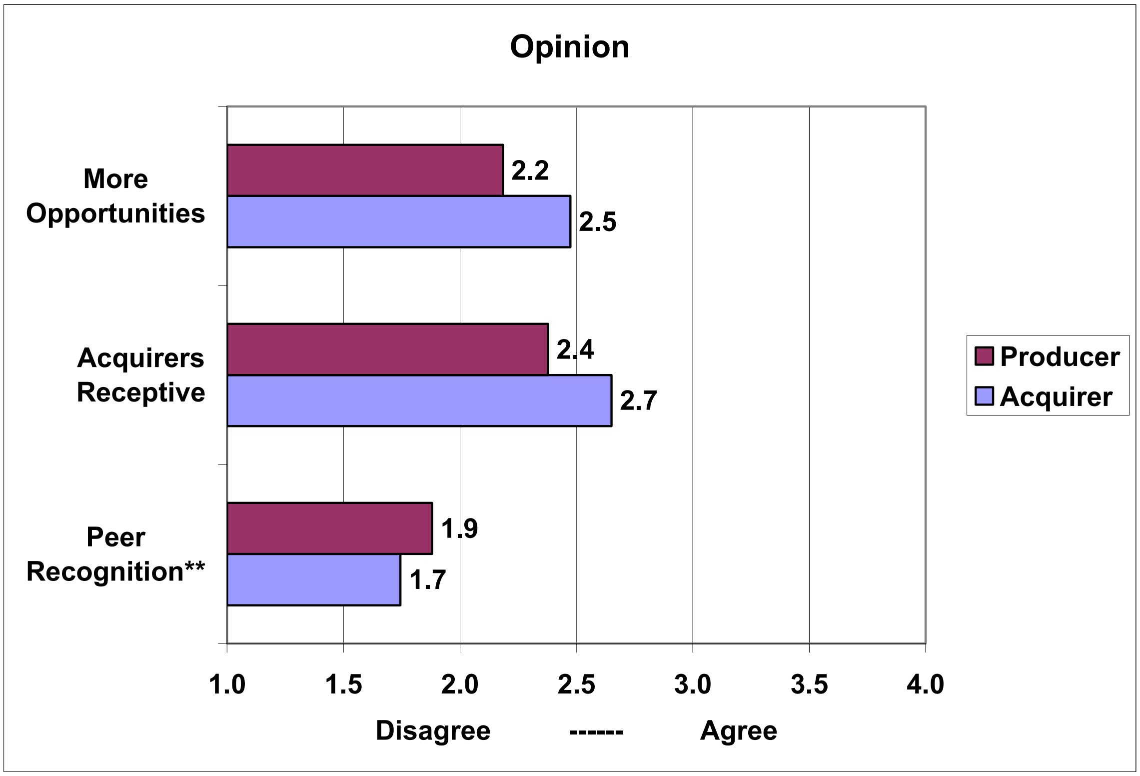
Here are three opinion statements that could be interpreted as critical of independent producers.

> *Acquirers often find that independent producers are difficult to work with*
>
> *If all of the independent programming disappeared from public radio, it really would not make much difference to the audience*
>
> *Independents who have solid training in professional journalism are more likely to produce valuable programming*

On these three, the opinions of acquirers and independent producers are not much different, but the acquirers are a bit more critical. For example, while the producers tend <u>not</u> to think that they are difficult to work with (2.1), the acquirers are ambivalent (2.4) on that opinion. Acquirers see a bit more value in professional journalism training (2.9) than do producers (2.7).

The good news for independents is that acquirers <u>do</u> think that listeners would notice the loss of independent programming, but the acquirers (1.8) are not as certain as the producers (1.4) on that opinion.

Acquirers and Independent Producers



**** Difference Not Statistically Significant**

The top two opinion statements illustrated on this chart were written in terms that favor acquirers.

> *Acquirers are generally receptive to new ideas pitched by independent producers*

> *In recent years there have been more and more opportunities for independent producers to get their programming material on public radio*

Acquirers and producers are not far apart on these opinions. On the first statement, acquirers were ambivalent (2.5) while producers tended toward the pessimistic side (2.2). On the second statement, the producers were also on the pessimistic side (2.4) relative to acquirers (2.7).

The third opinion illustrated on this chart is the only one of 16 with no significant difference between producers and acquirers. They both disagree with the statement that “recognition by peers, such as winning an award, is the most important measure of success for a public radio producer.”

Acquirers and Independent Producers

Opinions Ranked by Agreement

Another way to understand these findings is to rank the opinion statements.

The table below shows how acquirers ranked the opinion statements, with comparisons to producers. For example, 89 percent of acquirers agreed that audience research including ratings and focus groups has been useful to public radio. But 54 percent of independent producers disagree with that opinion.

Opinion		**Acquirer**	**Producer**
Research Useful	Agree	89	46
	Disagree	11	54
Stations Less Willing	Agree	78	90
	Disagree	22	10
Professional J Training	Agree	74	60
	Disagree	26	40
Appeal to Givers	Agree	71	56
	Disagree	29	44
Appeal to Minorities	Agree	64	79
	Disagree	36	21
Rates Improving	Agree	67	29
	Disagree	33	71
Acquirers Receptive	Agree	60	46
	Disagree	40	54
Indies More Innovative	Agree	55	81
	Disagree	45	19
Exclusive Club	Agree	53	65
	Disagree	47	35

Acquirers and Independent Producers

Our ranking of the opinion statements continues in the table below.

For example, acquirers are split 49/51 percent as to whether there are more opportunities these days for independent producers. But only 39 percent of producers think there are more opportunities.

Opinion		**Acquirer**	**Producer**
More Opportunities	Agree	49	39
	Disagree	51	61
Lots of Quality Avail	Agree	49	82
	Disagree	51	18
Difficult to Work With	Agree	46	37
	Disagree	54	63
Years Ago More Creative	Agree	38	71
	Disagree	62	29
Lost Mission Integrity	Agree	29	60
	Disagree	71	40
Not Make Difference	Agree	19	12
	Disagree	81	88
Peer Recognition**	Agree	18	21
	Disagree	82	79

**** Difference Not Statistically Significant**

Only 19 percent of acquirers and 12 percent of producers agree with the statement that if all independent programming disappeared, "it really would not make much difference to the audience."

Only 18 percent of acquirers and 21 percent of producers agree that winning an award is the "most important measure of success for a public radio producer."

Modes of Thinking

Of the 16 opinion statements, some were written from the point of view of those who criticize the evolution of public radio and others written from a more positive perspective. The way each producer or acquirer responded to the opinion statements probably reflects a deeper set of fundamental values.

Factor analysis is a statistical technique that identifies the underlying factors or modes of thinking among respondents, based on the patterns of correlation within the larger set of opinion variables.

We found that the 16 opinions reduced to three major factors. The table below shows the variables that define each mode of thinking. A negative loading score means that variable, as stated, is negatively associated with that factor:

	Factor One		Factor Two		Factor Three
Research Useful	0.7	Exclusive Club	0.7	Appeal to Minorities	0.7
Appeal to Givers	0.6	Stations Less Willing	0.6	Lots of Quality Avail	0.5
Rates Improving	0.6	Indies More Innovative	0.5	Difficult to Work With	-0.6
Professional J Training	0.5	Acquirers Receptive	-0.6	Not Make Difference	-0.8
Years Ago More Creative	-0.5	More Opportunities	-0.6		
Lost Mission Integrity	-0.6				

Interpretation of Factor One: Optimism

We called the first factor <u>Optimism</u>. Note which opinion statement loaded at the top of Factor One—the statement about audience research:

> *Audience research, including Arbitron ratings and focus groups, has yielded useful information leading to the improvement of public radio*

Recall that 89 percent of acquirers agree, but only 46 percent of producers agree, resulting in the largest difference of opinion in our survey.

Acquirers and Independent Producers

The line up of opinion statements on Factor One means that respondents who agree that audience research has been helpful to public radio also tend to agree with these statements:

> *It is important that public radio programming appeals to those listeners who are likely to contribute as givers*
>
> *The rates paid by acquirers for independently produced programming material have been improving in recent years*
>
> *Independents who have solid training in professional journalism are more likely to produce valuable programming*

The same respondents would also tend to <u>dis</u>agree with these statements:

> *As public radio has added listeners, it has joined the mainstream media and lost its mission-driven integrity*
>
> *Years ago, public radio programming was generally more creative and imaginative than it is now*

Acquirers, or for that matter producers, whose deep values resonate with Factor One have an optimistic perspective on the evolution of public radio.

Interpretation of Factor Two: Grievance

We called the second factor <u>Grievance</u>. The opinion statement that leads Factor Two states that:

> *Public radio is an exclusive club. It is difficult for new producers to gain entry*

The difference between producers and acquirers is not large. Recall that 65 percent of producers agree, along with 53 percent of acquirers.

Acquirers and Independent Producers

The line up of opinion statements on Factor Two means that individuals who agree that public radio has become an exclusive club also tend to agree with these statements:

> *Stations have become less willing to take risks in programming*
>
> *Programming from independent producers is generally more innovative and ground-breaking than programming produced by stations and networks*

The same respondents tend to disagree with these statements:

> *Acquirers are generally receptive to new ideas pitched by independent producers*
>
> *In recent years there have been more and more opportunities for independent producers to get their programming material on public radio*

Producers, or for that matter acquirers, whose deep values resonate with Factor Two feel aggrieved and express complaints about how they think independent producers are treated by acquirers.

Interpretation of Factor Three: Upside Potential

We called the third factor Upside Potential. The opinion statement that leads Factor Three proclaims that:

> *Public radio ought to invest in more programming that appeals to minorities, disadvantaged and underserved listeners*

Recall that acquirers and producers are not far apart on that opinion. 64 percent of acquirers agree, along with 70 percent of producers.

Individuals who agree with that opinion also tend to think that:

> *There's a lot of high quality independent work out there that is rarely or never broadcast. Just in terms of quantity, there's enough to fill up an entire channel*

Acquirers and Independent Producers

The same individuals would tend to disagree with these statements:

> *Acquirers often find that independent producers are difficult to work with*
>
> *If all of the independent programming disappeared from public radio, it really would not make much difference to the audience*

Recall that 81 percent of acquirers and 88 percent of producers disagree with that last opinion statement, so it is really a strong affirmation of the value of independent programming to listeners.

Producers and acquirers whose deep values resonate with Factor Three are convinced that independent producers have a lot to offer. There is an upside potential for independent programming to improve service to listeners.

Acquirers and Independent Producers

Perceived Roles

We asked acquirers as well as independent producers how they perceive their role within public radio. Here is how we asked the question:

> *The public radio system is a big tent that covers the work of many different kinds of people. We want to know how you envision your role.*
>
> *For each of the statements below, please indicate whether you strongly agree, somewhat agree, somewhat disagree or strongly disagree:*
>
> *I'm a reporter*
> *I'm an artist*
> *I'm an activist*
> *I'm a performer*
> *I'm a writer*
> *I'm an educator*
> *I'm a critic*
> *I'm a journalist*
> *I'm an independent producer*
> *I'm a business entrepreneur*
> *I'm a professional broadcaster*

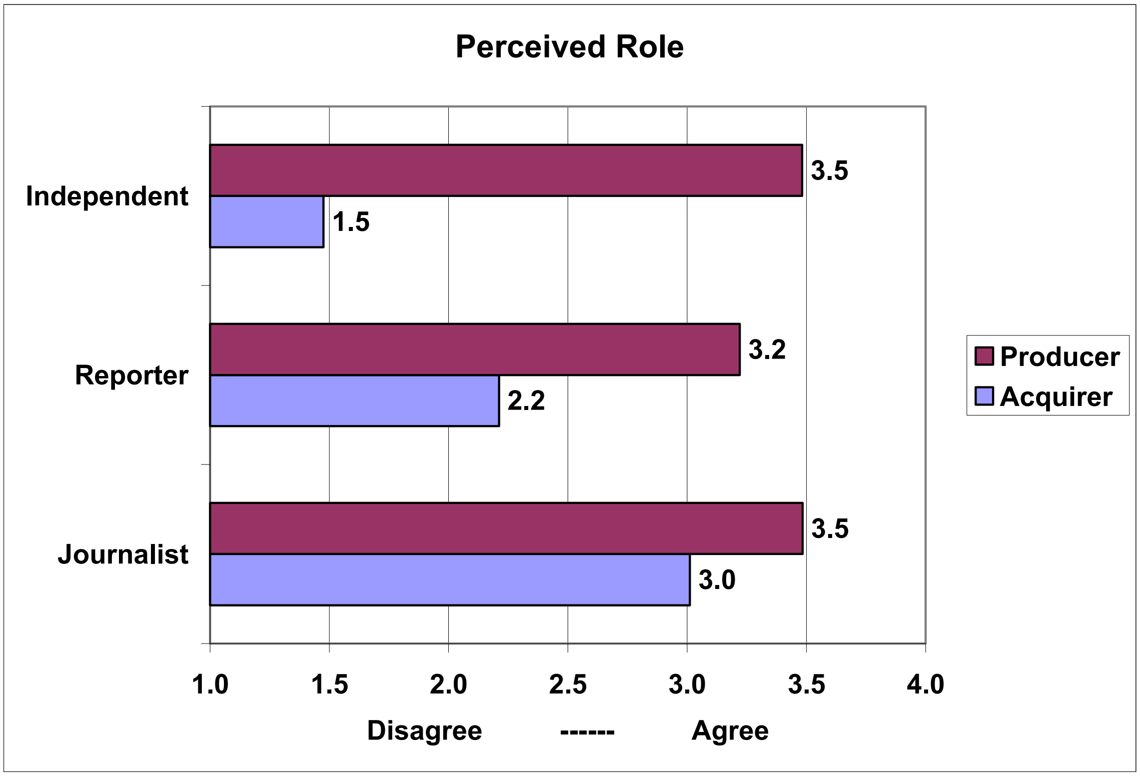
Detailed Tables

Detailed tables are provided at the end of this report. Differences in mean scores are illustrated in the following charts.

The average scores in each chart were calculated on a 4-point scale:

4 = Strongly Agree
3 = Somewhat Agree
2 = Somewhat Disagree
1 = Strongly Disagree

Acquirers and Independent Producers



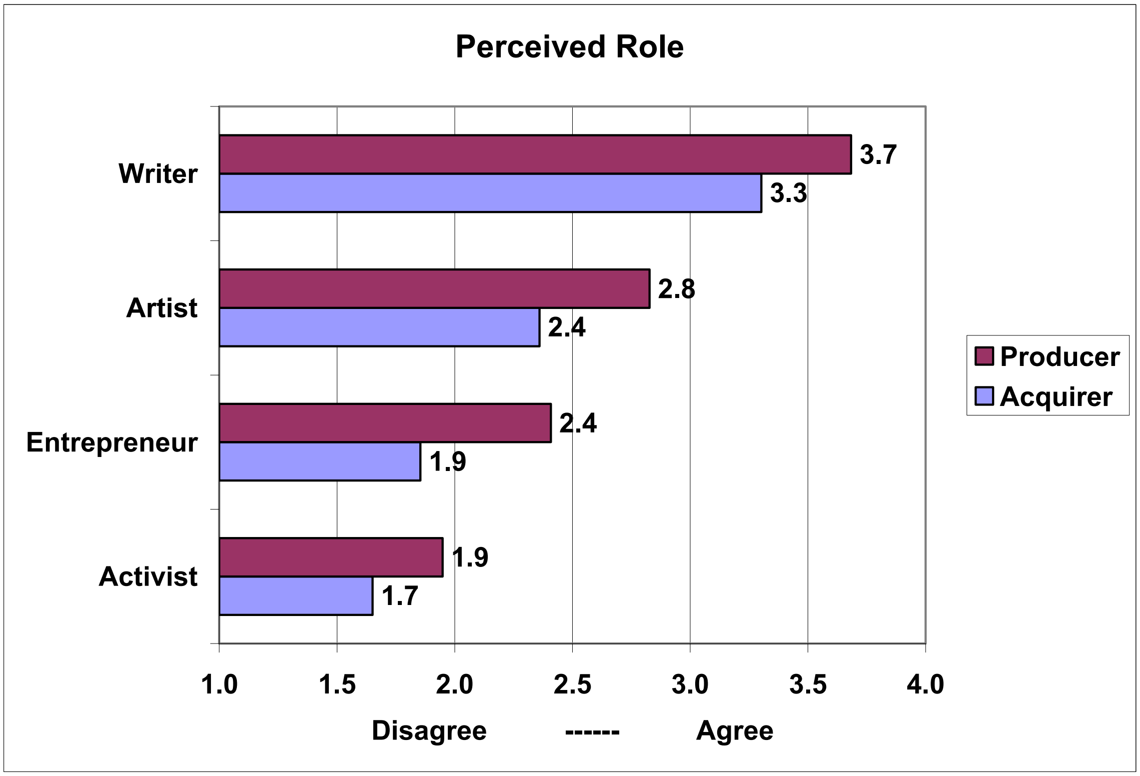
Not surprisingly, most acquirers (1.5) do not identify with the role of independent producer, while most producers (3.5) do identify with that role.

The other two roles shown on this chart, reporter and journalist, are of special interest given the continuing growth of news programming on public radio.

We found that both acquirers (3.0) and producers (3.5) identify with the role of journalist, even though one side is in the position of purchasing and the other side is in the position of selling journalistic material.

The role of reporter may be more specific. We found that producers (3.2) identify with the role of reporter, while acquirers (2.2) fall on the negative side.

Acquirers and Independent Producers

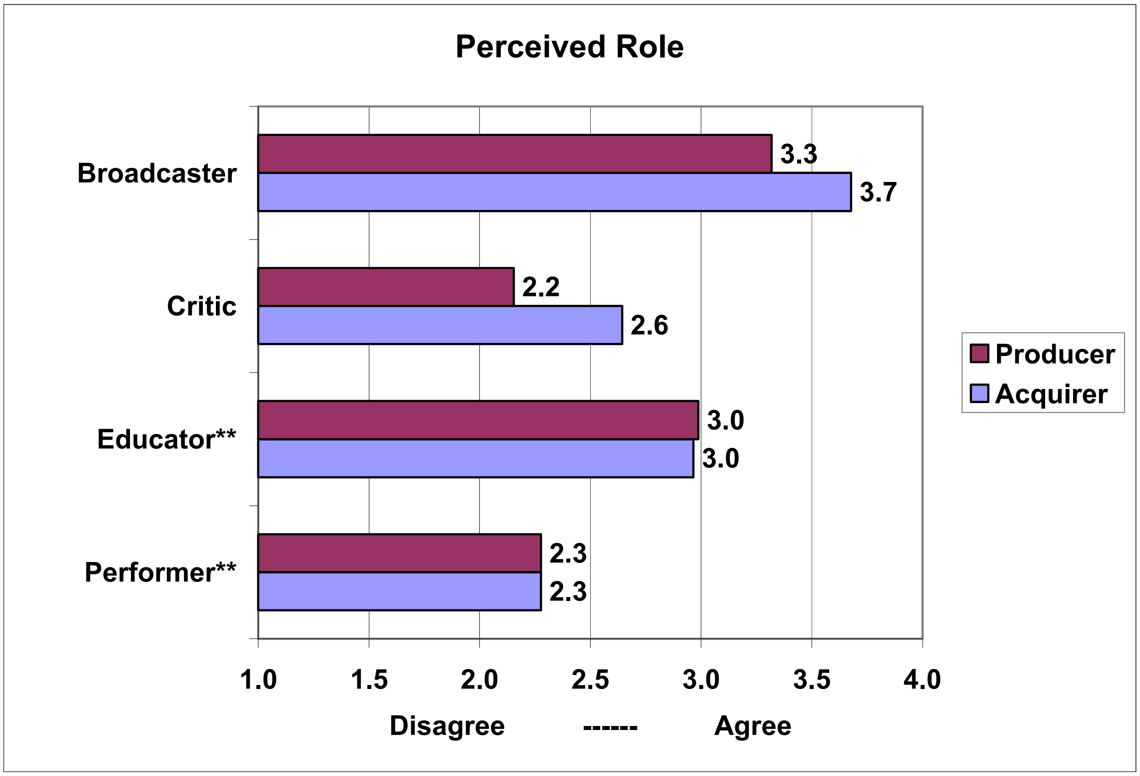


This chart shows four roles from writer to activist. The overall pattern is the same for acquirers and producers. For example, they both strongly identify with the role of writer, and both are least comfortable with the role of activist.

But for all four of these roles, the producers identify more than the acquirers.

For example, on the role of writer, the acquirers somewhat agree (3.3) while the producers strongly agree (3.7). Even though both groups do not identify with the role of activist, acquirers (1.7) are less comfortable with that role.

Acquirers and Independent Producers



**** Difference Not Statistically Significant**

At the top, this chart shows two roles that fit acquirers more than producers.

Both groups identify themselves as broadcasters, but acquirers (3.7) more than producers (3.3). Both groups are ambivalent about the role of critic, but producers (2.2) are less comfortable with that role than acquirers (2.6).

The bottom two roles are educator and performer. We found no difference between producers and acquirers. They both somewhat identify with the role of educator (3.0) and they both are less comfortable with the role of performer (2.3).

Acquirers and Independent Producers

Roles Ranked by Agreement

Another way to understand these findings is to rank the perceived roles.

The table below shows how acquirers ranked the perceived roles, with comparisons to producers. For example, 91 percent of acquirers identify with the role of broadcaster, compared to 81 percent of producers.

Perceived Role		Acquirer	Producer
Broadcaster	Agree	91	81
	Disagree	9	19
Writer	Agree	85	96
	Disagree	15	4
Educator**	Agree	80	77
	Disagree	20	23
Journalist	Agree	72	87
	Disagree	28	13
Critic	Agree	63	38
	Disagree	37	62

**** Difference Not Statistically Significant**

We found that acquirers perceive themselves, in rank order, as broadcasters, writers, educators and journalists. Independent producers also strongly identify with those roles, although the order is writer and journalist, before broadcaster.

Acquirers and Independent Producers

The table below continues the ranking of perceived roles. Acquirers are less likely to identify with these roles:

Perceived Role		Acquirer	Producer
Artist	Agree	53	69
	Disagree	47	31
Performer**	Agree	52	48
	Disagree	48	52
Reporter	Agree	48	82
	Disagree	52	18
Entrepreneur	Agree	29	52
	Disagree	71	48
Activist	Agree	24	34
	Disagree	76	66
Independent	Agree	18	86
	Disagree	83	14

**** Difference Not Statistically Significant**

Acquirers are split as to whether they identify with the roles of artist (53/47), performer (52/48) or reporter (48/52). But 82 percent of independent producers see their role as reporter.

Acquirers do not identify with the roles of entrepreneur (29/71) or activist (24/76). But 52 percent of producers want to be entrepreneurs and 34 percent see their role as activist.

Acquirers and Independent Producers

Interpretation

Here is a quote from our previous report, based on the survey of independent producers:

> "Independent producers and salaried employees within public radio can be the same people, functioning in different situations at different times."

Consider, for example, a local station news director. As an acquirer, that individual may purchase reports from freelancers. But that news director may also accept a freelance assignment from NPR, as an independent producer.

In addition, we found that independent producers sometimes function as acquirers of programming. For example, an independent who produces an hour-long documentary may pay for work from freelance subcontractors.

While the rhetoric about acquirers vs. independent producers may assume that they are two different groups of individuals, they can be the same people acting in different roles at different times.

Acquirers and Independent Producers

Demographics of Acquirers

We looked at the demographics of acquirers including their level of education, with comparison to independent producers. In this section we report differences between the two only when differences are statistically significant.

Age and Cohort

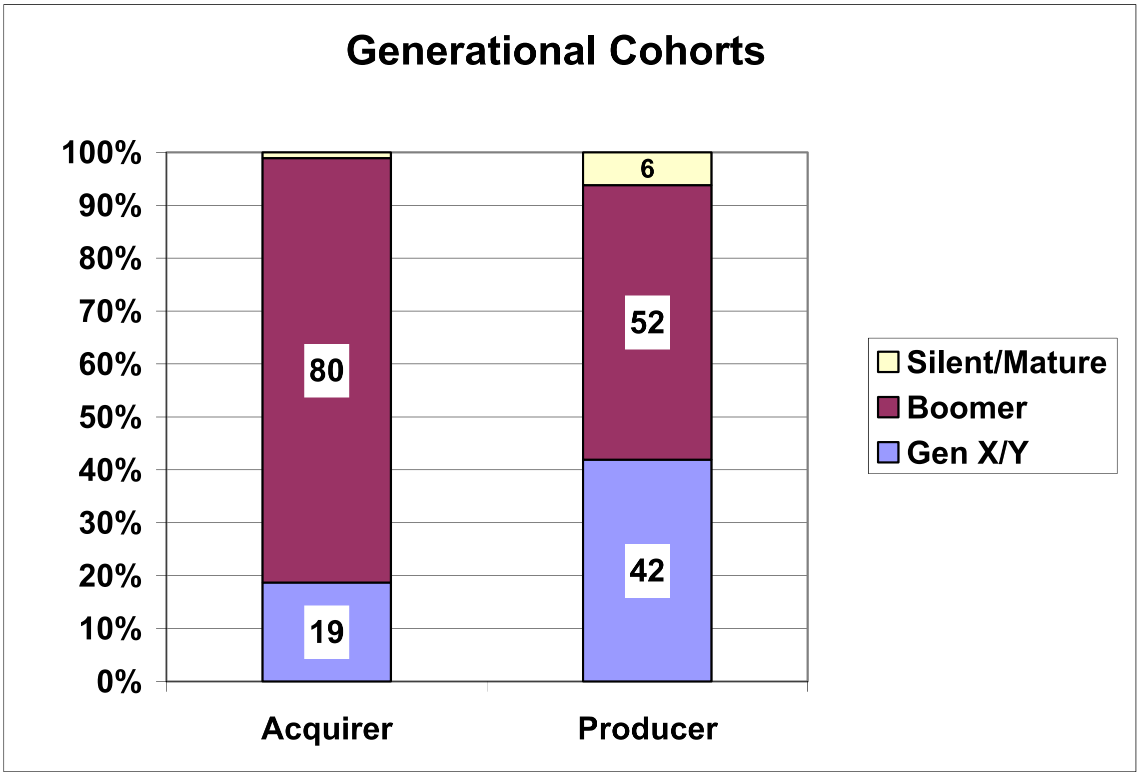
We found that the average acquirer is 45 years old, which is close to the audience for Morning Edition and All Things Considered.

In comparison, the average independent producer is 42 years old. That is only three years younger, but the difference is statistically significant. And when we looked at the distribution of age among acquirers vs. producers, we found important differences by generational cohort.

The values held by an individual are often generational. The Baby Boomers, even as they age, have tended to hold on to the values of their youth, which began with rebellion against their parents. Now that the Baby Boomers are becoming grandparents, Generation X has established its own set of values.

The generational differences between acquirers and producers are illustrated in the following chart.

Acquirers and Independent Producers



We found that acquirers are highly concentrated within one generation.

80 percent of acquirers are Baby Boomers, born between 1946 and 1964. Only one in five acquirers come from Generation X/Y, born in 1965 or later.

In contrast, while 52 percent of producers are Boomers, nearly as many, 42 percent, are Gen X/Y. We also found 6 percent of independents who qualify for the Silent or Mature generations, born before 1946, predating the Boomers.

Interpretation

The management positions within public radio stations and networks are largely controlled by Boomers. In this year, 2004, the Boomers range from 40 to 58. Their decisions are influenced by what they experienced during their formative years.

This year the oldest Gen Xer is 39. An independent producer from Generation X came of age during the 1980's rather than the 1960's.

Acquirers and Independent Producers

Education

The distinguishing characteristic of public radio listeners is their high level of education. Not surprisingly, we found that acquirers are also highly educated.

- 91 percent are college graduates.
- 32 percent hold advanced degrees.

In fact, acquirers are more elite than the elite NPR News audience. According to NPR's Profile 2002, 63 percent of NPR News listeners were college grads.

The educational attainment of independent producers is not significantly different than acquirers. They are also highly educated.

Ethnicity and Sex

We asked acquirers for their race and ethnicity per categories used by the year 2000 US Census. Hispanic is an ethnic category, because Hispanics may be of any race.

We found that 15 percent of acquirers would qualify as a racial or Hispanic "minority."

- 85 percent are non-Hispanic whites.
- 6 percent are Hispanics.
- 5 percent are Black.
- 2 percent are Native.

There were no Asians in our sample of acquirers. However, 2 percent of acquirers claimed dual or multiple race or ethnicity. That is the fastest-growing identification among young people according to US Census data.

The distribution of race or ethnicity among independent producers is not significantly different than acquirers.

In our sample of acquirers, 42 percent are female. The distribution of sex among independent producers is not significantly different than acquirers.

Acquirers and Independent Producers

Professional Experience

Given their generational differences, do acquirers have more years of professional experience in radio than independent producers? Here is how we asked the question:

> *Please enter your number of years of paid professional experience in the production of programming material for public or commercial radio:*

We found that acquirers on average have 15 years of professional experience in public or commercial radio. Independent producers average 12 years. The difference in years is small but statistically significant.

Yet when we looked at the distribution of this variable, we found a broad dispersion—some with relatively few years and others with many years of professional experience. The table below shows percentages.

Years of Experience	Acquirer	Producer
5 or less	16	37
6-15	37	29
16 or more	47	34

Nearly half of acquirers, 47 percent, have 16 or more years of professional radio experience. About one third of producers have that much experience.

37 percent of producers have 5 years or less professional experience, compared to only 16 percent of acquirers.

Interpretation

It would be a mistake to assume that all acquirers have more experience than all producers. There is a broad dispersion of experience within each group.

Acquirers and Independent Producers

Sources of Feedback

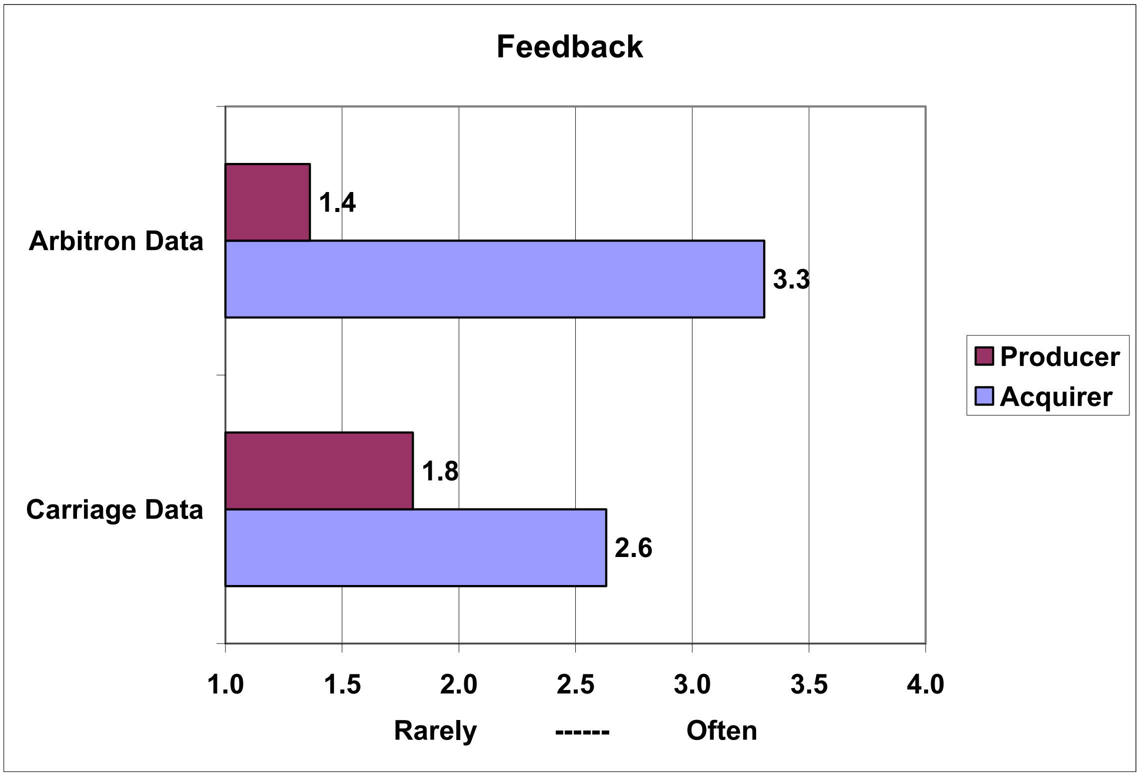
Program directors and network managers can evaluate their decisions by checking audience data, fund raising, listener surveys, focus groups and other systematic sources of feedback. We asked acquirers how they receive feedback.

> *We want to know how you measure the impact of programming on your station or network. For year 2003, please indicate how often you used these measures—very often, somewhat often, rarely or never.*
>
> > *Confirmed station carriage data, to verify how many and which stations cleared particular programming*
> >
> > *Arbitron data, so you know how many and what kind of listeners heard your programming*
> >
> > *You received letters, phone calls or email directly from your listeners*
> >
> > *You received awards from your peers or the judges of a competition*
> >
> > *Your programming was reviewed by critics*
> >
> > *You relied upon your own sense of aesthetics for personal satisfaction*

The following charts compare results for acquirers with independent producers. The average scores in each chart were calculated on a 4-point scale:

4 = Very Often
3 = Somewhat Often
2 = Rarely
1 = Never

Acquirers and Independent Producers



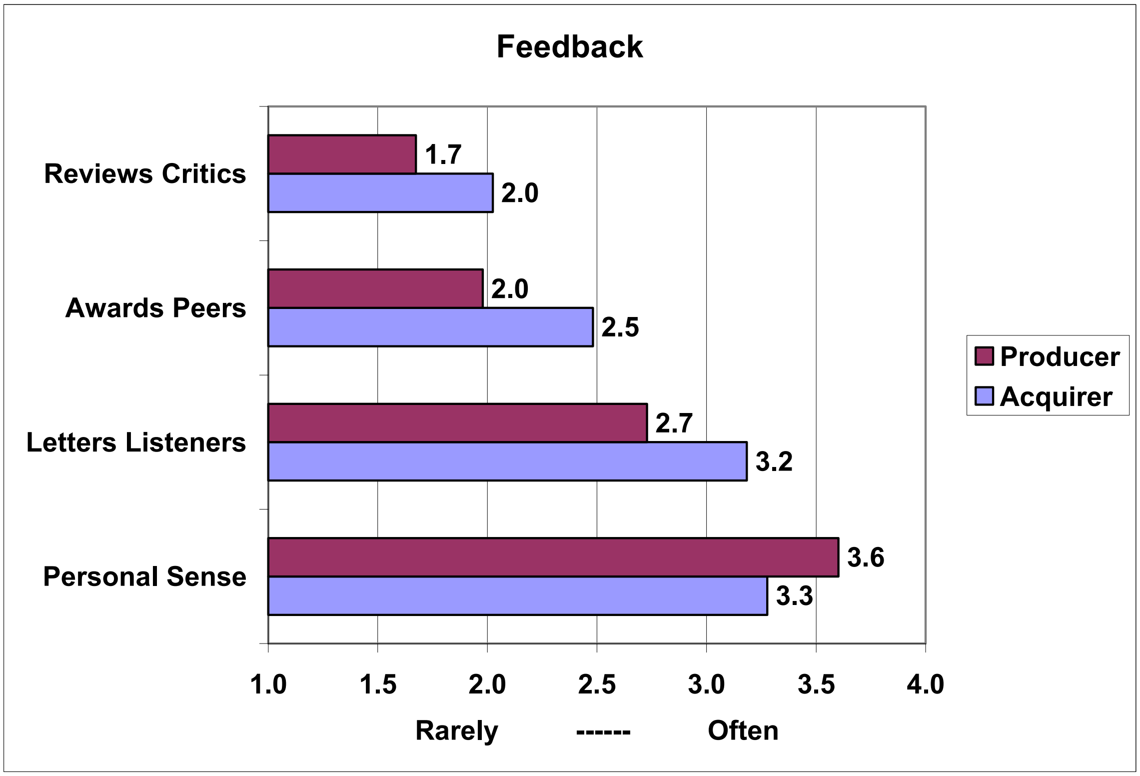
We found a very large difference between acquirers and independent producers on their use of Arbitron data.

Acquirers often (3.3) use Arbitron data to measure the impact of their programming decisions. Independent producers rarely (1.4) use audience data.

We also found a difference in how acquirers and producers use carriage data.

The acquirers (2.6) are more likely than producers (1.8) to use carriage data to measure the impact of their programming.

Acquirers and Independent Producers



This chart shows four other sources of feedback. On these sources the differences between acquirers and producers are not so large, although they are statistically significant.

Both acquirers (3.3) and producers (3.6) often rely on their personal sense of satisfaction to measure the impact of their programming. Another important source is letters from listeners, although the acquirers (3.2) may have more access to letters than independent producers (2.7).

Neither acquirers (2.0) nor producers (1.7) measure their impact by critical reviews. Acquirers (2.5) are a bit more involved with awards from peers than are producers (2.0).

Acquirers and Independent Producers

Sources of Feedback Ranked

The table below shows how acquirers ranked the sources of feedback in terms of percentages. We collapsed the four-point scale into two values.

Feedback		Acquirers	Producers
Personal Sense	Often	87	96
	Rarely	13	4
Letters Listeners	Often	80	63
	Rarely	20	37
Arbitron Data	Often	79	11
	Rarely	21	89
Awards Peers	Often	57	34
	Rarely	43	66
Carriage Data	Often	54	27
	Rarely	46	73
Reviews Critics	Often	25	21
	Rarely	75	79

Personal satisfaction is the top-ranked source of feedback for both acquirers (87 percent) and producers (96 percent).

But there is a large difference in the use of Arbitron data. 79 percent of acquirers often use audience estimates, as opposed to only 11 percent of independent producers.

Only 25 percent of acquirers receive or pay attention to critical reviews, about the same as 21 percent of producers.

Acquirers and Independent Producers

Interpretation

While both acquirers and independent producers rely overwhelmingly on their own sense of satisfaction for feedback, that is really no source of feedback at all. Feedback must come from others. Arbitron data comes from diary-keepers, reviews come from critics, carriage is determined by program directors, awards are given by peers and letters are written by listeners.

In our list of possible sources of feedback, the most reliable and systematic measures were Arbitron data and carriage data—both used by acquirers more than producers.

The finding that 80 percent of acquirers and 63 percent of producers often rely upon letters from listeners raises further questions. While letters may be personal and direct, they are not representative of the audience.

Acquirers and Independent Producers

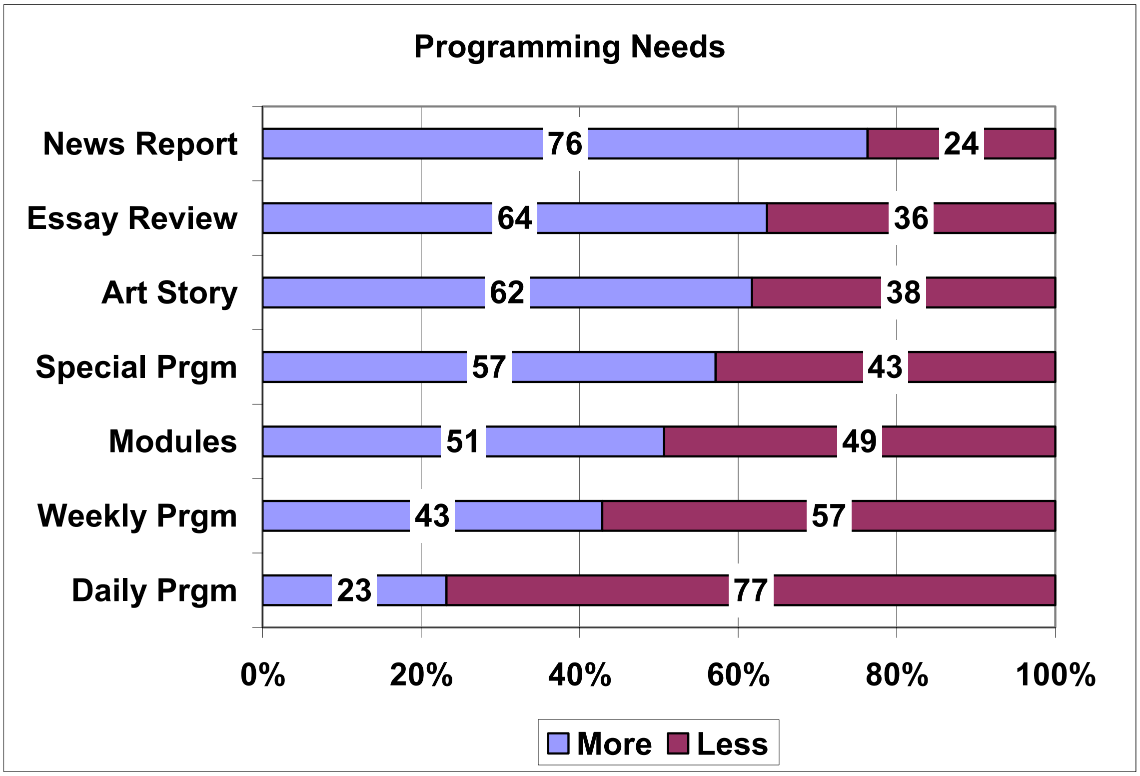
Programming Needs

Acquirers purchase programming from independent producers in various forms ranging from hour-long documentaries to an essay for Weekend Edition.

In our previous survey, we asked independent producers about the forms of programming they had produced in year 2003. In this survey of acquirers we asked about their needs for programming, to compare demand with supply.

> *Think about the variety of programming material that might be produced by freelance producers or independent contractors and made available for your purchase.*
>
> *The current supply of independently-produced programming may or may not be sufficient to meet your needs.*
>
> *For each listed below, indicate whether you need much more, somewhat more, somewhat less or much less of such programming:*
>
>> *Hard or soft news reports for a local or national newscast, news magazine or informational program*
>>
>> *Essays, reviews, commentaries or opinion pieces that aired within a larger program*
>>
>> *Audio art, story telling, personal narrative, cultural or performance pieces that aired within a larger program*
>>
>> *Regular weekly (once a week) programs or documentaries of 30-120 minutes designed to air 52 weeks a year*
>>
>> *Regular daily (5-7 days a week) programs or documentaries of 30-120 minutes designed to air 52 weeks a year*
>>
>> *One-time special programs or documentaries (30-120 minutes) or a limited series of programs*
>>
>> *Modules—short, stand-alone features, five minutes or less, designed to be dropped into a station's format*

Acquirers and Independent Producers



For this chart we collapsed the four-point response format into two values, a need for more or less of that form of programming.

We found that the highest demand is for news reports. 76 percent of acquirers need much more or somewhat more of this form of programming from independent producers.

64 percent of acquirers need more audio art or personal narrative pieces, while 62 percent need more essays or reviews. Both of those forms would air within larger programs—perhaps a news magazine.

The demand is weaker (51 percent) for modules that would stand alone, designed to drop within a station's format.

Only 23 percent of acquirers expressed need for a daily program from independent producers.

Acquirers and Independent Producers

Supply and Demand

It is difficult to make a direct comparison of supply and demand with reference to independently-produced programming.

Yet we found that the needs of acquirers and the output of producers seem to be generally in synch. This table, from our previous report, ranks independent producers by the forms of programming they produced in year 2003.

Independent Producers	Percent
News Report	66
Art Story	40
Special Prgm	38
Modules	35
Essay Review	29
Weekly Prgm	12
Daily Prgm	2

News reports ranked at the top of the demand list from acquirers, so it is good that two thirds of independents produced news reports.

Only 29 percent of independents produced an essay or review, although that form ranked second on the demand list from acquirers.

Audio art or personal narrative ranked towards the top of both lists.

This survey of acquirers is one component of a larger project titled Mapping Public Radio's Independent Landscape directed by SchardtMEDIA. For another component, Craig Oliver conducted a content analysis of public radio programming that helps to inform our understanding of supply vs. demand.

Acquirers and Independent Producers

Sampling Frames

While protecting confidentiality, lists of email addresses for producers or acquirers were provided, directly or indirectly, by Third Coast, Latino USA, AIR, Latino Summit, CPB, Native News, Living on Earth, KCRW, WGBH, PRPD, MPR, Savvy Traveler, Free Speech Radio News, SoundPrint, PRI, PRX/Transom, NFCB, PRNDI, Native America Calling, Native American Public Radio, Koahnic Broadcasting, The World and NPR.

92 acquirers who are in a position to purchase programming from independent producers completed the survey.

- 47 percent were station program directors
- 35 percent were NPR employees
- 12 percent were PRI employees
- 7 percent worked for national syndicators

The cooperation rate was 71 percent among NPR acquirers and 73 percent among PRI acquirers.

253 independent producers had completed a previous survey with similar questions.

Before reporting any differences between acquirers and producers in this report, we ran the appropriate tests of statistical significance (T-Tests or Chi Square). We are confident of the findings we report.

Acquirers and Independent Producers

Detailed Tables

In this report we used mean scores or collapsed percentages to explain our findings. For readers who prefer more detail, we provide tables that show the complete results for acquirers and producers.

The exact text of each question was provided earlier in this report.

Acquirers and Independent Producers

Demographics

Education * SAMPLE Crosstabulation

% within SAMPLE

		SAMPLE		
		Acquirer	Producer	Total
Education	HS		.4%	.3%
	Some College	8.7%	4.0%	5.2%
	College Grad	44.6%	42.9%	43.3%
	Some Grad Study	15.2%	16.3%	16.0%
	Adv Degree	31.5%	36.5%	35.2%
Total		100.0%	100.0%	100.0%

Sex * SAMPLE Crosstabulation

% within SAMPLE

		SAMPLE		
		Acquirer	Producer	Total
Sex	Female	41.8%	51.6%	49.0%
	Male	58.2%	48.4%	51.0%
Total		100.0%	100.0%	100.0%

Ethnic * SAMPLE Crosstabulation

% within SAMPLE

		SAMPLE		
		Acquirer	Producer	Total
Ethnic	Hispanic	5.7%	5.8%	5.8%
	White	85.1%	81.3%	82.3%
	Black	4.6%	3.3%	3.7%
	Asian		2.5%	1.8%
	Native	2.3%	2.1%	2.1%
	Dual	2.3%	5.0%	4.3%
Total		100.0%	100.0%	100.0%

Generational Cohort * SAMPLE Crosstabulation

% within SAMPLE

		SAMPLE		
		Acquirer	Producer	Total
Generational Cohort	Gen X/Y	18.7%	41.9%	35.5%
	Boomer	80.2%	51.9%	59.6%
	Silent/Mature	1.1%	6.2%	4.8%
Total		100.0%	100.0%	100.0%

Acquirers and Independent Producers

Experience Group * SAMPLE Crosstabulation

% within SAMPLE

		SAMPLE		
		Acquirer	Producer	Total
Experience Group	5 or less	16.3%	37.5%	31.8%
	6-15	37.0%	29.1%	31.2%
	16 or more	46.7%	33.5%	37.0%
Total		100.0%	100.0%	100.0%

Role

Reporter * SAMPLE Crosstabulation

% within SAMPLE

		SAMPLE		
		Acquirer	Producer	Total
Reporter	Strongly Agree	14.1%	52.6%	42.8%
	Somewhat Agree	34.1%	29.3%	30.5%
	Somewhat Disagree	10.6%	5.6%	6.9%
	Strongly Disagree	41.2%	12.4%	19.8%
Total		100.0%	100.0%	100.0%

Artist * SAMPLE Crosstabulation

% within SAMPLE

		SAMPLE		
		Acquirer	Producer	Total
Artist	Strongly Agree	8.1%	26.9%	22.1%
	Somewhat Agree	45.3%	42.2%	43.0%
	Somewhat Disagree	20.9%	17.7%	18.5%
	Strongly Disagree	25.6%	13.3%	16.4%
Total		100.0%	100.0%	100.0%

Activist * SAMPLE Crosstabulation

% within SAMPLE

		SAMPLE		
		Acquirer	Producer	Total
Activist	Strongly Agree	3.5%	9.0%	7.5%
	Somewhat Agree	20.9%	24.9%	23.8%
	Somewhat Disagree	12.8%	18.0%	16.6%
	Strongly Disagree	62.8%	48.1%	52.0%
Total		100.0%	100.0%	100.0%

Acquirers and Independent Producers

Performer * SAMPLE Crosstabulation

% within SAMPLE

		SAMPLE		
		Acquirer	Producer	Total
Performer	Strongly Agree	12.0%	15.7%	14.8%
	Somewhat Agree	39.8%	32.2%	34.2%
	Somewhat Disagree	12.0%	16.1%	15.1%
	Strongly Disagree	36.1%	36.0%	36.0%
Total		100.0%	100.0%	100.0%

Writer * SAMPLE Crosstabulation

% within SAMPLE

		SAMPLE		
		Acquirer	Producer	Total
Writer	Strongly Agree	54.7%	75.1%	69.9%
	Somewhat Agree	30.2%	20.6%	23.0%
	Somewhat Disagree	5.8%	2.0%	2.9%
	Strongly Disagree	9.3%	2.4%	4.1%
Total		100.0%	100.0%	100.0%

Educator * SAMPLE Crosstabulation

% within SAMPLE

		SAMPLE		
		Acquirer	Producer	Total
Educator	Strongly Agree	26.4%	32.3%	30.7%
	Somewhat Agree	54.0%	45.2%	47.5%
	Somewhat Disagree	9.2%	11.7%	11.0%
	Strongly Disagree	10.3%	10.9%	10.7%
Total		100.0%	100.0%	100.0%

Critic * SAMPLE Crosstabulation

% within SAMPLE

		SAMPLE		
		Acquirer	Producer	Total
Critic	Strongly Agree	21.8%	13.8%	15.9%
	Somewhat Agree	41.4%	24.6%	29.1%
	Somewhat Disagree	16.1%	25.0%	22.6%
	Strongly Disagree	20.7%	36.7%	32.4%
Total		100.0%	100.0%	100.0%

Acquirers and Independent Producers

Journalist * SAMPLE Crosstabulation

% within SAMPLE

		SAMPLE		
		Acquirer	Producer	Total
Journalist	Strongly Agree	49.4%	68.4%	63.4%
	Somewhat Agree	22.5%	18.4%	19.5%
	Somewhat Disagree	7.9%	6.4%	6.8%
	Strongly Disagree	20.2%	6.8%	10.3%
Total		100.0%	100.0%	100.0%

Independent * SAMPLE Crosstabulation

% within SAMPLE

		SAMPLE		
		Acquirer	Producer	Total
Independent	Strongly Agree	6.3%	67.3%	52.6%
	Somewhat Agree	11.3%	19.1%	17.2%
	Somewhat Disagree	6.3%	8.0%	7.6%
	Strongly Disagree	76.3%	5.6%	22.7%
Total		100.0%	100.0%	100.0%

Entrepreneur * SAMPLE Crosstabulation

% within SAMPLE

		SAMPLE		
		Acquirer	Producer	Total
Entrepreneur	Strongly Agree	9.8%	21.6%	18.7%
	Somewhat Agree	19.5%	30.6%	27.8%
	Somewhat Disagree	17.1%	14.7%	15.3%
	Strongly Disagree	53.7%	33.1%	38.2%
Total		100.0%	100.0%	100.0%

Broadcaster * SAMPLE Crosstabulation

% within SAMPLE

		SAMPLE		
		Acquirer	Producer	Total
Broadcaster	Strongly Agree	84.4%	61.1%	67.5%
	Somewhat Agree	6.7%	19.7%	16.1%
	Somewhat Disagree	1.1%	9.2%	7.0%
	Strongly Disagree	7.8%	10.0%	9.4%
Total		100.0%	100.0%	100.0%

Acquirers and Independent Producers

Opinion

Years Ago More Creative * SAMPLE Crosstabulation

% within SAMPLE

		SAMPLE		
		Acquirer	Producer	Total
Years Ago More Creative	Strongly Agree	9.9%	31.5%	25.5%
	Somewhat Agree	28.6%	39.9%	36.8%
	Somewhat Disagree	30.8%	18.9%	22.2%
	Strongly Disagree	30.8%	9.7%	15.5%
Total		100.0%	100.0%	100.0%

Indies More Innovative * SAMPLE Crosstabulation

% within SAMPLE

		SAMPLE		
		Acquirer	Producer	Total
Indies More Innovative	Strongly Agree	7.9%	41.9%	32.8%
	Somewhat Agree	47.2%	39.0%	41.2%
	Somewhat Disagree	36.0%	16.3%	21.5%
	Strongly Disagree	9.0%	2.8%	4.5%
Total		100.0%	100.0%	100.0%

Stations Less Willing * SAMPLE Crosstabulation

% within SAMPLE

		SAMPLE		
		Acquirer	Producer	Total
Stations Less Willing	Strongly Agree	28.0%	54.2%	47.5%
	Somewhat Agree	50.0%	35.8%	39.4%
	Somewhat Disagree	15.9%	9.2%	10.9%
	Strongly Disagree	6.1%	.8%	2.2%
Total		100.0%	100.0%	100.0%

Appeal to Minorities * SAMPLE Crosstabulation

% within SAMPLE

		SAMPLE		
		Acquirer	Producer	Total
Appeal to Minorities	Strongly Agree	23.9%	39.0%	34.9%
	Somewhat Agree	39.8%	40.3%	40.1%
	Somewhat Disagree	31.8%	16.9%	21.0%
	Strongly Disagree	4.5%	3.8%	4.0%
Total		100.0%	100.0%	100.0%

Acquirers and Independent Producers

Professional J Training * SAMPLE Crosstabulation

% within SAMPLE

		SAMPLE		
		Acquirer	Producer	Total
Professional J Training	Strongly Agree	29.2%	19.2%	21.9%
	Somewhat Agree	44.9%	40.4%	41.6%
	Somewhat Disagree	15.7%	28.6%	25.1%
	Strongly Disagree	10.1%	11.8%	11.4%
Total		100.0%	100.0%	100.0%

Research Useful * SAMPLE Crosstabulation

% within SAMPLE

		SAMPLE		
		Acquirer	Producer	Total
Research Useful	Strongly Agree	52.9%	8.5%	21.3%
	Somewhat Agree	36.5%	37.9%	37.5%
	Somewhat Disagree	8.2%	31.3%	24.7%
	Strongly Disagree	2.4%	22.3%	16.6%
Total		100.0%	100.0%	100.0%

Difficult to Work With * SAMPLE Crosstabulation

% within SAMPLE

		SAMPLE		
		Acquirer	Producer	Total
Difficult to Work With	Strongly Agree	8.5%	2.4%	4.4%
	Somewhat Agree	37.8%	34.3%	35.5%
	Somewhat Disagree	42.7%	30.7%	34.7%
	Strongly Disagree	11.0%	32.5%	25.4%
Total		100.0%	100.0%	100.0%

Not Make Difference * SAMPLE Crosstabulation

% within SAMPLE

		SAMPLE		
		Acquirer	Producer	Total
Not Make Difference	Strongly Agree	4.4%	4.4%	4.4%
	Somewhat Agree	14.4%	8.0%	9.7%
	Somewhat Disagree	36.7%	15.3%	20.9%
	Strongly Disagree	44.4%	72.3%	64.9%
Total		100.0%	100.0%	100.0%

Acquirers and Independent Producers

Acquirers Receptive * SAMPLE Crosstabulation

% within SAMPLE

		SAMPLE		
		Acquirer	Producer	Total
Acquirers Receptive	Strongly Agree	8.1%	5.3%	6.1%
	Somewhat Agree	52.3%	40.9%	44.1%
	Somewhat Disagree	36.0%	40.0%	38.9%
	Strongly Disagree	3.5%	13.8%	10.9%
Total		100.0%	100.0%	100.0%

Appeal to Givers * SAMPLE Crosstabulation

% within SAMPLE

		SAMPLE		
		Acquirer	Producer	Total
Appeal to Givers	Strongly Agree	28.1%	11.0%	15.6%
	Somewhat Agree	42.7%	45.3%	44.6%
	Somewhat Disagree	22.5%	31.8%	29.3%
	Strongly Disagree	6.7%	11.8%	10.5%
Total		100.0%	100.0%	100.0%

Peer Recognition * SAMPLE Crosstabulation

% within SAMPLE

		SAMPLE		
		Acquirer	Producer	Total
Peer Recognition	Strongly Agree		2.5%	1.8%
	Somewhat Agree	17.8%	18.5%	18.3%
	Somewhat Disagree	38.9%	43.6%	42.3%
	Strongly Disagree	43.3%	35.4%	37.5%
Total		100.0%	100.0%	100.0%

Lost Mission Integrity * SAMPLE Crosstabulation

% within SAMPLE

		SAMPLE		
		Acquirer	Producer	Total
Lost Mission Integrity	Strongly Agree	3.4%	17.8%	14.0%
	Somewhat Agree	25.8%	42.5%	38.1%
	Somewhat Disagree	31.5%	28.3%	29.2%
	Strongly Disagree	39.3%	11.3%	18.8%
Total		100.0%	100.0%	100.0%

Acquirers and Independent Producers

More Opportunities * SAMPLE Crosstabulation

% within SAMPLE

		SAMPLE		Total
		Acquirer	Producer	
More Opportunities	Strongly Agree	6.4%	4.4%	4.9%
	Somewhat Agree	42.3%	35.0%	37.0%
	Somewhat Disagree	43.6%	35.4%	37.7%
	Strongly Disagree	7.7%	25.2%	20.4%
Total		100.0%	100.0%	100.0%

Exclusive Club * SAMPLE Crosstabulation

% within SAMPLE

		SAMPLE		Total
		Acquirer	Producer	
Exclusive Club	Strongly Agree	4.6%	27.9%	21.6%
	Somewhat Agree	48.3%	36.9%	40.0%
	Somewhat Disagree	36.8%	23.2%	26.9%
	Strongly Disagree	10.3%	12.0%	11.6%
Total		100.0%	100.0%	100.0%

Rates Improving * SAMPLE Crosstabulation

% within SAMPLE

		SAMPLE		Total
		Acquirer	Producer	
Rates Improving	Strongly Agree	8.8%	2.5%	3.9%
	Somewhat Agree	57.9%	26.1%	33.2%
	Somewhat Disagree	28.1%	33.2%	32.0%
	Strongly Disagree	5.3%	38.2%	30.9%
Total		100.0%	100.0%	100.0%

Lots of Quality Avail * SAMPLE Crosstabulation

% within SAMPLE

		SAMPLE		Total
		Acquirer	Producer	
Lots of Quality Avail	Strongly Agree	17.6%	45.0%	37.8%
	Somewhat Agree	31.1%	36.8%	35.3%
	Somewhat Disagree	32.4%	12.4%	17.7%
	Strongly Disagree	18.9%	5.7%	9.2%
Total		100.0%	100.0%	100.0%

Acquirers and Independent Producers

Feedback

Carriage Data * SAMPLE Crosstabulation

% within SAMPLE

		SAMPLE		
		Acquirer	Producer	Total
Carriage Data	Very Often	28.9%	12.0%	16.1%
	Somewhat Often	25.0%	15.0%	17.4%
	Rarely	26.3%	14.5%	17.4%
	Never	19.7%	58.5%	49.0%
Total		100.0%	100.0%	100.0%

Arbitron Data * SAMPLE Crosstabulation

% within SAMPLE

		SAMPLE		
		Acquirer	Producer	Total
Arbitron Data	Very Often	61.7%	2.9%	17.9%
	Somewhat Often	17.3%	8.4%	10.7%
	Rarely	11.1%	10.5%	10.7%
	Never	9.9%	78.2%	60.8%
Total		100.0%	100.0%	100.0%

Letters Listeners * SAMPLE Crosstabulation

% within SAMPLE

		SAMPLE		
		Acquirer	Producer	Total
Letters Listeners	Very Often	40.2%	21.9%	26.6%
	Somewhat Often	40.2%	40.9%	40.7%
	Rarely	17.2%	25.5%	23.4%
	Never	2.3%	11.7%	9.3%
Total		100.0%	100.0%	100.0%

Awards Peers * SAMPLE Crosstabulation

% within SAMPLE

		SAMPLE		
		Acquirer	Producer	Total
Awards Peers	Very Often	8.4%	11.9%	11.0%
	Somewhat Often	48.2%	22.6%	29.2%
	Rarely	26.5%	17.0%	19.5%
	Never	16.9%	48.5%	40.3%
Total		100.0%	100.0%	100.0%

Acquirers and Independent Producers

Reviews Critics * SAMPLE Crosstabulation

% within SAMPLE

		SAMPLE		
		Acquirer	Producer	Total
Reviews Critics	Very Often	4.9%	5.9%	5.6%
	Somewhat Often	19.8%	15.5%	16.6%
	Rarely	48.1%	18.8%	26.3%
	Never	27.2%	59.8%	51.6%
Total		100.0%	100.0%	100.0%

Personal Sense * SAMPLE Crosstabulation

% within SAMPLE

		SAMPLE		
		Acquirer	Producer	Total
Personal Sense	Very Often	41.0%	65.1%	59.0%
	Somewhat Often	45.8%	30.7%	34.6%
	Rarely	13.3%	3.3%	5.9%
	Never		.8%	.6%
Total		100.0%	100.0%	100.0%

Acquirers and Independent Producers

Programming Needs

News Report * SAMPLE Crosstabulation

% within SAMPLE

		SAMPLE	
		Acquirer	Total
News Report	Much More	15.8%	15.8%
	Somewhat More	60.5%	60.5%
	Somewhat Less	14.5%	14.5%
	Much Less	9.2%	9.2%
Total		100.0%	100.0%

Essay Review * SAMPLE Crosstabulation

% within SAMPLE

		SAMPLE	
		Acquirer	Total
Essay Review	Much More	3.9%	3.9%
	Somewhat More	59.7%	59.7%
	Somewhat Less	22.1%	22.1%
	Much Less	14.3%	14.3%
Total		100.0%	100.0%

Art Story * SAMPLE Crosstabulation

% within SAMPLE

		SAMPLE	
		Acquirer	Total
Art Story	Much More	11.1%	11.1%
	Somewhat More	50.6%	50.6%
	Somewhat Less	27.2%	27.2%
	Much Less	11.1%	11.1%
Total		100.0%	100.0%

Weekly Prgm * SAMPLE Crosstabulation

% within SAMPLE

		SAMPLE	
		Acquirer	Total
Weekly Prgm	Much More	3.9%	3.9%
	Somewhat More	39.0%	39.0%
	Somewhat Less	31.2%	31.2%
	Much Less	26.0%	26.0%
Total		100.0%	100.0%

Acquirers and Independent Producers

Daily Prgm * SAMPLE Crosstabulation

% within SAMPLE

		SAMPLE	
		Acquirer	Total
Daily Prgm	Much More	1.4%	1.4%
	Somewhat More	21.7%	21.7%
	Somewhat Less	33.3%	33.3%
	Much Less	43.5%	43.5%
Total		100.0%	100.0%

Special Prgm * SAMPLE Crosstabulation

% within SAMPLE

		SAMPLE	
		Acquirer	Total
Special Prgm	Much More	13.0%	13.0%
	Somewhat More	44.2%	44.2%
	Somewhat Less	22.1%	22.1%
	Much Less	20.8%	20.8%
Total		100.0%	100.0%

Modules * SAMPLE Crosstabulation

% within SAMPLE

		SAMPLE	
		Acquirer	Total
Modules	Much More	13.0%	13.0%
	Somewhat More	37.7%	37.7%
	Somewhat Less	16.9%	16.9%
	Much Less	32.5%	32.5%
Total		100.0%	100.0%

Acquirers and Independent Producers

Statistics

Factor Analysis

Component Matrix[a]

a. 4 components extracted.

Rotated Component Matrix[a]

	Component			
	1	2	3	4
Years Ago More Creative	-.539	.450	.213	9.379E-02
Indies More Innovative	-.382	.482	.322	.251
Stations Less Willing	-.274	.599	.237	.178
Appeal to Minorities	1.581E-02	.264	.734	.128
Professional J Training	.533	.234	.266	-.202
Research Useful	.733	-.121	-.204	-6.61E-02
Difficult to Work With	.297	.220	-.643	.257
Not Make Difference	2.058E-02	-7.06E-02	-.775	3.291E-02
Acquirers Receptive	-7.26E-03	-.611	6.442E-02	.232
Appeal to Givers	.647	3.821E-02	-.119	.212
Peer Recognition	-2.94E-03	-8.21E-02	-4.89E-02	.858
Lost Mission Integrity	-.633	.381	.254	.252
More Opportunities	.201	-.643	-4.04E-02	.122
Exclusive Club	6.897E-02	.706	.150	7.884E-02
Rates Improving	.637	-.330	8.647E-02	.124
Lots of Quality Avail	-.160	.396	.475	1.825E-02

Extraction Method: Principal Component Analysis.
Rotation Method: Varimax with Kaiser Normalization.

a. Rotation converged in 5 iterations.

Total Variance Explained

	Rotation Sums of Squared Loadings		
Component	Total	% of Variance	Cumulative %
1	2.717	16.983	16.983
2	2.691	16.817	33.800
3	2.213	13.833	47.633
4	1.168	7.301	54.934

Extraction Method: Principal Component Analysis.