

Mapping Public Radio's Independent Landscape

Content Analysis

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Craig Oliver, Research Partner
Silver Springs, MD

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Steve Martin, Research Associate
Oak Hill, VA

Introduction

The focus of this quantitative analysis is independently produced content that comprises a portion of the overall public radio programming stream. For this study, which is one component of SchardtMEDIA's "Mapping Public Radio's Independent Landscape," we first define "independent producer" as an individual who is responsible for funding the cost of producing the content, either through a negotiated fee, corporation or foundation underwriting or grant, or with their own funds.

Secondly, we also consider as a group unto itself independently produced programs that, again, are responsible for their own funding. Programs such as *Living On Earth*, *Echoes* and *The Infinite Mind* fall into this category. *Living On Earth* is an independent production and may acquire independent content included for broadcast in the production.

We include independently produced content contained within nationally distributed programs, even if the program is not an independent production. Such non-independent programs that may acquire independent content include *Studio 360*, *Marketplace* or *Only a Game*.

We have not included foreign broadcasters who contribute to the weekly content of the public radio system. Therefore, BBC World Service, Radio Deutche Welle, Radio Nederland and CBC's *As It Happens* were not included in our study.

In order to conduct a thorough analysis, we required the cooperation of dozens of acquirers and stations covering a wide constituency across the public radio system. One on one interviews were conducted in order to a) verify the status of specific contributors, b) confirm program schedules and other details relevant to local and national productions, and c) determine financial expenditures for independent programming. While some organizations were more restricted than others in the level of detail they could provide us, we received universal cooperation and are confident of in the veracity of raw data that we analyzed.

Method

To properly capture the contribution of independents to public radio programming, we established:

1. 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:

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

The resulting group also yields desirable geographical variety as well as variety of station format-types, including network-affiliated public radio, community licensees, minority consortia, and Pacifica members.

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2. A composite week of programming broadcast from 6am to midnight (local time) on the sample stations.

A composite week was chosen to reflect programming that best represents the entire system over the course of a year, from September 1, 2002 through September 30, 2003, and which reflects changes in programming and seasonality and not a single point in time. We used a two-month interval and alternated weeks during the month (a Sunday in the first week, a Monday in the second week, etc.), and arrived at the following sample week:

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

Therefore, reflected in this analysis is the independent programming that aired on Sunday, September 1, 2002 and each subsequent date for each of the 21 public radio stations in our sample. We are confident that this is a representative sample of all public radio programming.

The project reviewed 2,646 hours of programming (18 hours a day, seven days a week on 21 stations – Mon-Sun 6a-12m) with the objective of identifying and isolating all independently-produced programming, including commentaries, feature reports, modules, and full-length programs. We worked closely with a range of acquirers and station managers across the system to ensure accuracy.

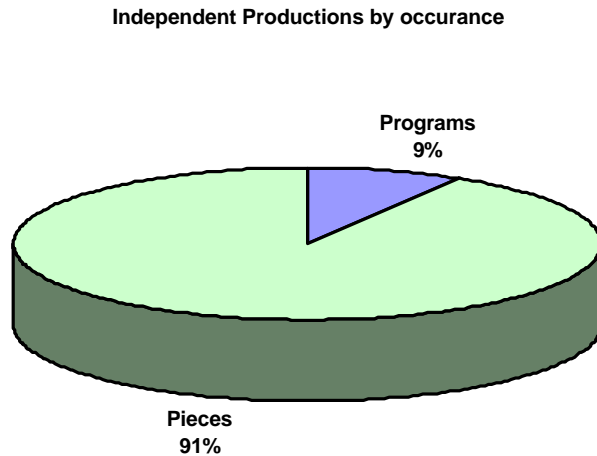
We did not include nationally distributed newscasts in this analysis. This decision, which we vetted with our project advisors and other principals, is based on two factors: a) it would be extremely labor intensive to gather this level of data, beyond the scope of the project, and b) that the contributions of independent producers to this format is negligible in terms of fees paid and format (<1:00 spots).

Independent Programs

A total of 30 independent programs were found across all stations. We counted station rollovers and repeat broadcasts since each was an “exposure” to the audience. (*see attached addendum B for which programs and the stations that aired them*) In the final analysis, this amounted to 80 hours of programming.

Producer Content

A total of 827 individually produced pieces were found across all stations, inclusive of roll-overs. In instances where a station rebroadcast a particular hour of *Morning Edition*, for example, we counted each independent piece that appeared in that hour by the respective multiple.

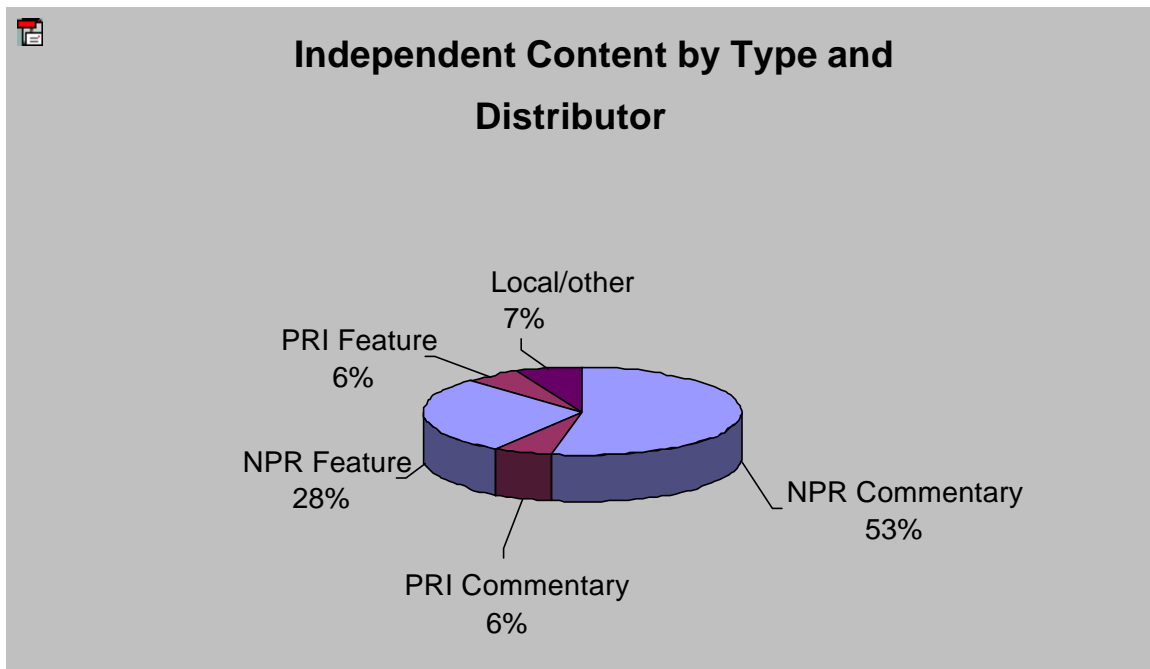


When looking at the occurrences of all independent productions, whether from an individual or from a production house, the number of full programs represents less than 10% of independent work. 91% of the independently produced content is comprised of less-than full-program content, mainly commentaries and features contained within news magazines and other programming.

Following is the format breakout for the 827 (less than full-program) pieces that aired during our sample week on our sample stations:

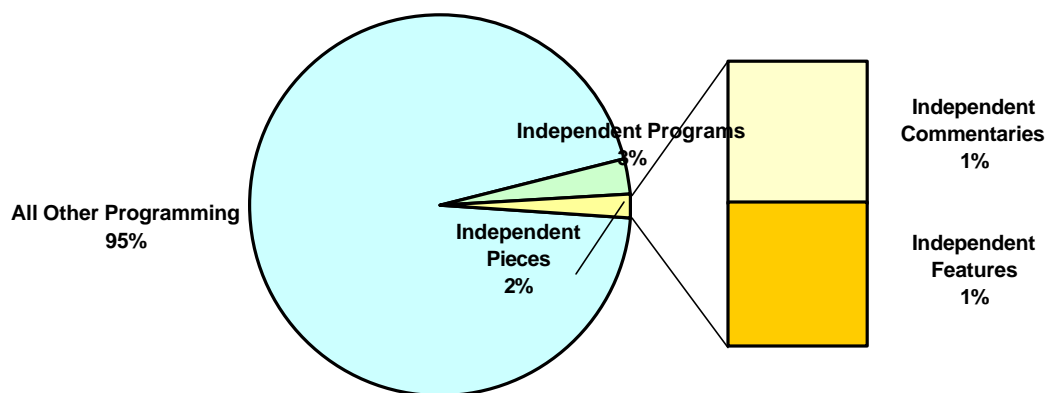
NPR Commentary	439
PRI Commentary	51
NPR Feature	233
PRI Feature	49
Station-based Commentary	1
Station-based Feature	15
FSRN Commentary	3
FSRN Feature	36

As the following chart illustrates, commentaries in the NPR news magazines account for the majority – 54% -- of independently produced pieces. This is followed by feature reports produced for NPR news magazines (28%). Commentaries and features produced for PRI distributed programs, mainly *Marketplace*, are the next most prevalent, yet lag far behind.



When we then measure the amount of time devoted to all independently produced pieces relative to the total number of programming hours in our sample week, we see that a very small percentage of on-air time on public radio is devoted to the work of independent producers and commentators. Of the 2,646 total hours of programming in the sample, 74 hours are independently produced programs (3%), 53 hours are independently produced, less-than-full programs or pieces that aired within other programs (2%). Combined, this amounts to 5% of the public radio content stream which is devoted to independently produced programming.

Time On-Air Contributed by Independent Productions



The 2% of the on-air time comprised of independent producer less-than-full program content is split equally between independently produced features and commentaries. An additional mitigating factor worth noting is the 2% of the airtime devoted to individually produced independent content also reflects pieces that were rolled over. For example, on our composite Monday, feature reports by Missoula, Montana based Kathy Witkosky, and an arts report from Iris Mann aired as many as three times on one station and twice on many others during NPR's Morning Edition. A Morton Dean commentary also aired at least twice on many of the stations.

Contributors

There are a total of 64 independent producers who appeared in the programs that aired on our sample stations during the designated period. The list of them below includes sole-proprietor/independent producers, commentators, and station-based producers who are filing with one of the network programs or presenting something that is apart from their regular station work. As you'll see in the detail, one in five (19%) contributors are station-based. (*addendum A*).

The total count of "Appearances," reflects the total number of times a piece aired from each respective producer, rather than the number of times each producer was commissioned to produce a piece. NPR's *Morning Edition* and *All Things Considered* are far and away the programs that result in the most "appearances" for independent producers. Again, the rollover phenomenon tends to over-emphasize the actual impact independent producers have on public radio programming.

Reporter	Type-Prod	Appearances
Frank Deford	Ind	36
Alicia Zuckerman	Ind	36
Paul Schwartz	Ind	35
John Ridley	Ind	35
Iris Mann	Ind	35
Herbert Seward	Ind	35
John Myers	Sta	34
Kenneth Turan	Ind	33
Morton Dean	Ind	32
Kathy Witkosky	Ind	32
Maryann Gray	Ind	28
Katherine Schlatter	Ind	28
Alan Cheuse	Ind	22
Ralph Schoenstein	Ind	22
Julia Barton	Ind	21
Charles de Ledesma	Ind	20
Joellen Easton	Ind	19
Andy Borowitz	Ind	19
Anne McBride-Norton	Ind	18
Tamara Keith	Sta	16
Lars Hoel	Ind	16
Keith Seinfeld	Ind	16
Paul Williams	Ind	15
Joseph Stiglitz	Ind	12
Adam Davidson	Ind	12
Norman Solomon	Ind	11
Adam Hanft	Ind	10
David Johnson	Ind	9
Miriam Toews	Ind	7
David Bianculli	Ind	6
Scott Carrier	Ind	5
W.D. Wetherell	Ind	4

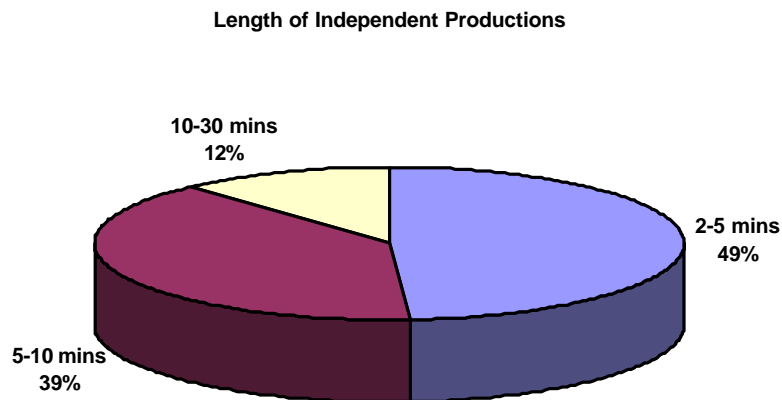
Reporter	Type-Prod	Appearances
Lloyd Schwartz	Ind	4
Mitch Teich	Sta	4
Local	Sta	3
Clay Scott	Ind	3
Verlyn Klinkenborg	Ind	3
Katie Davis	Ind	2
David Johnson	Ind	2
David Edelstein	Ind	2
Local	Ind	2
Steven Starck	Ind	1
Scott Carrier	Ind	1
Sandina Robbins	Ind	1
Rudy Maxa	Ind	1
Renee Feltz	Sta-KPFT	1
Nick Thorpe	Ind	1
Local	Sta	1
Kevin Seibold	Sta -WMNF	1
Kelia Ramarez	Ind-KPFA	1
Katie Curren	Sta	1
Josh Chaffin	Ind	1
John Ryan	Ind	1
Joe Gardner Wesley	Sta-KUNM	1
Jay Toboli	Ind	1
Jake Warga	Ind	1
Ian Forest	Ind-WBAI	1
Estelle Fennell	Ind	1
Deborah S. Sutter	Sta-KJZZ	1
Deborah Martinez	Sta-KUNM	1
David Bouchier	Sta-WSHU	1
Bourzou Daraghai	Ind	1
Alix Spiegel	Ind	1
Aaron Glantz	Ind	1
Susan Wood	Ind	1

Format

For the purposes of this study, we established three program-length categories by which to evaluate, among other things, which are the most prevalent formats for short-features:

1. 2-5 minutes
2. 5-10 minutes
3. 10-30 minutes

Following is the breakout of format-length for independent productions appearing at these lengths within other programming



Nearly half the independent contributions to the public radio programming stream are between 2 and 5 minutes. This reflects the dominance of commentaries on network news programs. Nearly 40% were 5-10 minutes long. These were mostly news reports and features. 12% were longer pieces, such as features that aired in *This American Life*.

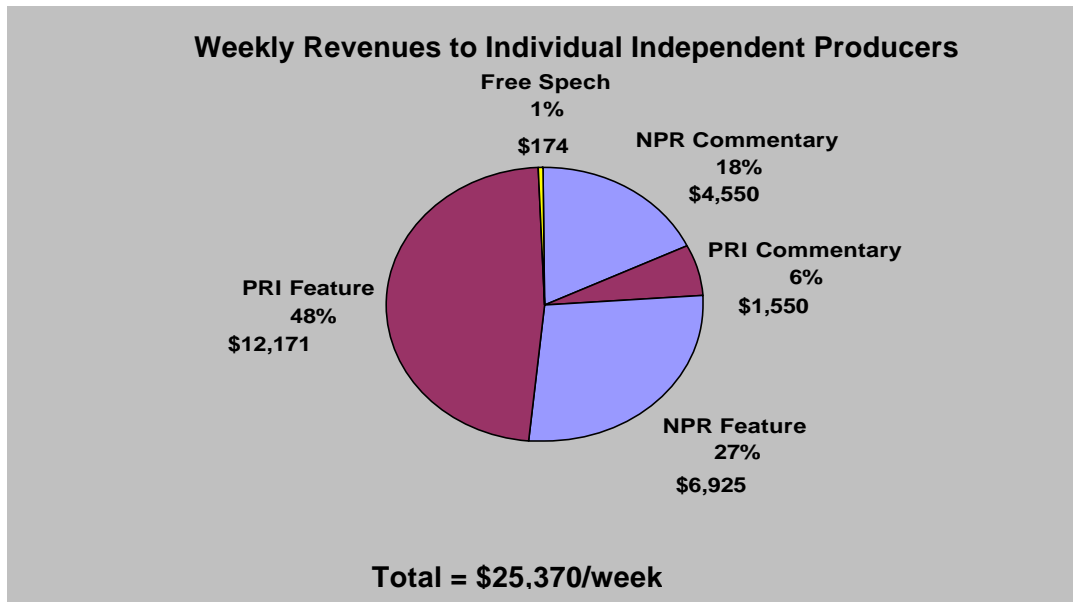
Among the longer-form content that appeared in nationally distributed programming, the longest was 18:00. Pieces longer than 10 minutes but less than 20 minutes were found in *Living On Earth* (1), *The Savvy Traveler* (3) and *This American Life* (2).

No independently produced long-form (30 minutes or longer) pieces appeared in our analysis.

The Independent Producer Economy

We faced limitations in the amount of detail we could gather, and thus report, with respect to the economy of independently produced programming in public radio. Our methodology required that acquirers be forthcoming with specific fees paid for the pieces that appeared in the analysis. Not all were willing to provide this, citing issues of privacy and potential breach of their agreements with producers. In one case, for example, an acquirer could only give us an aggregate dollar amount by category: the total expenditure for all commentaries in the inventory we provided them was XX, the total for all 5-10 minute features was YY, etc... Still, from these data we are able to project an average amount per piece in each category.

The total expenditure for all independent content in our sample was \$25,370. Breaking this figure down, we see that, while there were more commentaries in the sample, news and feature stories were more valued by acquirers.



The average price for a commentary was \$235 while \$796 was the average paid 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 pieces aired on NPR programs, but PRI programs spent more money on independently produced programming. PRI distributed programs skewed higher in rates paid for feature stories because of the presence of longer produced pieces in *This American Life*.

While some Acquirers pay a flat rate for commentaries or feature stories, others pay what is negotiated with an individual. In our sample, negotiated rates skewed the average cost upward. In some cases we determined the producer was paying for a level of expertise from a commentator.

The \$25,000 expenditure per average week for independent programming is merely a blip on the screen of public radio's total station programming economy. To further detail this, in FY 2002, the last year for which CPB financial data were available, the total amount of money public radio stations spent on programming annually was \$259,141,197.* This breaks down to a weekly estimated programming expenditure for programming of \$4.98 million for the entire system.

PRI distributed programs lead the way by 9% in total revenues paid to Independent Producers, with the short news-features showing as the dominant format for both PRI and NPR expenditures. PRI revenues skewed higher in this sample, again, because of longer form pieces commissioned by individual programs. Even though this margin is relatively narrow, it is significant because NPR dominates in the absolute number of pieces it commissions.

Furthermore, we can conclude that expenditures for independently produced content, as a percentage of stations weekly public radio cost of programming is 0.5%. One half of one percent of all dollars spent by public radio stations on programming is spent on independent producers. In other words, half-a-cent per dollar goes to the individual Independent Producer.

* CPB, FY 2002 (Line E1, Schedule E of the Annual Financial Report that Grantees file with CPB) represents the total costs of production and/or acquisition of programming. This is not inclusive of network fees paid to producers.

Content Analysis: Addendum A

Sampling detail of independently produced features and segments

Program	Distributor	Commentary Minutes	Feature Minutes	Reporter
Monday Nov. 11, 2002				
ME Hour 1	NPR		5:27	Kathy Witkosky
ME Hour 1	NPR			Morton Dean
ME Hour 2	NPR		6:13	Iris Mann
ATC Hour 1 2nd half	NPR	3:15		Ralph Schoenstein
ATC Hour 2 1st half	NPR	3:30		Joellen Easton
ATC Hour 2 2 half	NPR	4:15		Charles de Ledesma
MRKTPLC	PRI		5:12	Adam Davidson Bourzou Daraghai
The World	PRI	2:30		Steven Starck
Local Insert				Katie Curren David Bouchier
Tuesday January 21, 2003				
ME Hour 1	NPR	3:15		Herbert Seward
ME Hour 2	NPR	3:15		Alicia Zuckerman
Marketplace	PRI	2:39		Joseph Stiglitz
ATC Hour 1 2nd half	NPR	2:00		Alan Cheuse
Local				Deborah Martinez
Local				Joe Gardner Wesley Nick Thorpe
Wednesday March 26, 2003				
ME Hour 1 2nd half	NPR	3:15		Paul Schwartz
ME Hour 2	NPR	3:30		Frank Deford
Mrkplc	PRI	2:36		Norman Solomon
	Local			Local
Thursday May 8, 2003				
ME Hour 2	NPR	3:17		John Ridley
ATC Hour 1 1st half	NPR	2:00		Alan Cheuse
ATC Hour 1 2nd half	NPR	4:00		Anne McBride-Norton
Fresh Air	NPR	4:45		David Bianculli
Fresh Air	NPR	4:45		Lloyd Schwartz
Mrktpic	PRI		4:30	Adam Davidson
Mrktpic	PRI	2:35		Adam Hanft
Mrktpic	PRI			David Johnson
The World	PRI		4:00	Amy Radil
ATC	NPR			Paul Williams

Friday July 18, 2003				
ME Hour 1	NPR		5:13	John Myers
ME Hour 2	NPR	3:11		Kenneth Turan
ATC Hour 1 1st half	NPR		3:30	Katherine Schlatter
ATC Hour 1 1st half	NPR	2:30		Maryann Gray
ATC Hour 1 2nd half	NPR		4:00	Julia Barton
Mrktplc	PRI	3:40		David Johnson
Local				Deborah S. Sutter
Saturday September 27, 2003				
WE SAT			None	
ATC			None	
This Amer Life	PRI		18:00	Scott Carrier
Only A Game	NPR		5:30	Mitch Teich
Only A Game	NPR	3:00		W.D. Wetherell
Weekend Frsh Air	NPR	4:45		David Edelstein
Sunday September 1, 2002				
WeSun Hr 1	NPR	2:58		Andy Borowitz
WeSun Hr 2	NPR		5:13	Tamara Keith
WeSun Hr 2	NPR		6:00	Keith Seinfeld
WeSun Hr 2	NPR		6:10	Lars Hoel
Local				
Latino USA	NPR		6:09	Sandina Robbins
Latino USA	NPR		6:45	Reese Erlich
Weekly Programs				
This Amer Life 9/02	PRI		11:00	Miriam Toews
Savvy Traveler 9/27/03	PRI		5:25	Jake Warga
Savvy Traveler 9/27/03	PRI		2:03	Rudy Maxa
Savvy Traveler 9/27/03	PRI		13:58	Scott Carrier
Savvy Traveler 9/27/03	PRI		5:12	Paul French
Savvy Traveler 9/1/02	PRI		12:48	Katie Davis
Savvy Traveler 9/1/02	PRI		13:58	Alix Spiegel
Savvy Traveler 9/1/02	PRI		2:10	Rudy Maxa
Latino USA 11/08/04	NPR/Indie	2:47		Katie Davis
Living on Earth 11/08/02	NPR	6:00		John Ryan
Living on Earth 9/02	NPR	3:35		Verlyn Klinkenborg
Living on Earth 3/21/03	NPR		13:00	Clay Scott
Free Speech Radio News				
			0:51	Kevn Seibold
			0:48	Susan Wood
			0:42	Kelia Ramirez
			0:55	Josh Chaffin
			0:42	Jay Tamboli
			3:54	Ian Forest
			3:51	Aaron Glantz
			4:58	Renee Feltz
			3:00	Estelle Fennell

Content Analysis: Addendum B

Sampling detail of independently produced programs and carriage

New Letters KCUR KUAR WBLV	Living on Earth KUNM WBUR KUNC KUAR WVIK WUIS WVNP	Infinite Mind KUAR	New Dimensions KUNM	Thistle/Shamrock WUIS KFAE WBHM WVNP	Music/Hearts Space KBLA WUIS WNYC WSHU WBHM KUNC KFAE KCUR WETA
Prairie Home Comp WCUR (2) WNYC (1) WBHM (2) KJZZ (2) KFAE (2) KUNC (2) WBLV (1) WETA (2) WUIS (2) WVNP (2) WSHU (1) WVIK (2)	Common Ground WVIK	Comm Club WVIK	Pwr Point WFSS	Parents Jrnal WFSS WFIT	
Prime Time Radio WFSS	Latino USA KUNM KUAR	Democracy Now KUNM WBAI	This Way Out KUNM	Native Am Calling KUNM	
Nat'l Native News KUNM	Counterspin KUNM	Echoes WSHU WBHM KUNC	Car Talk WSHU WBUR WBMH KFAE	Schickele Mix WNYC	
SoundPrint WBUR KJZZ	American Routes KUNC	Motley Fool KJZZ	Peoples Pharmacy WVNP	Adventures/Music KBLA	
Humankind WBLV	FM Odyssey WFIT	Blues/Sunrise WUIS WFIT	SanFran Symphony WVIK		