

## EXECUTIVE SUMMARY

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

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

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

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

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

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

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

**Realists** identify as journalist/reporters who have a more positive view of the usefulness of audience research and its effect on programming than their colleagues. They are the most prolific producers of the short-form news features and reports. The majority of the -- six in ten -- have full or part time employment within public radio.

2. **The Independent Producer community has a strong contingent of up-and-comers.** Four in ten Independent Producers are Gen Xer's, coming of age in the '80s, and a similar portion of the community reports five years or less experience working in the industry.
3. **Independent Producers are intellectual achievers, outranking even the highly educated public radio news listener in holding college degrees** (96% v 63%). Acquirers are rank high, too, with 91% of them graduating college and more than one in three holding an advanced degree.

4. While the study reflects a range of differences, **Independent Producers agree** that a) stations have become less willing to take programming from Independent Producers, b) rates paid by Acquirers for independent programming are not improving, and c) independently produced programming delivers significant value to public radio listeners.
5. **Acquirers and Independent Producers converge in number of areas**, as well, including: a) Independent Producers have an important role to play in the industry, b) the “ear” – personal aesthetic or sense of satisfaction – is ranked as the number one method for evaluating the impact of programming, and c) public radio should invest more in programming for minority, disadvantaged, and underserved listeners.
6. **The greatest divide between Producers and Acquirers is in their opinions about Audience research.** While there are differences between the segments of Producers, as detailed above, fewer than half Producers have a positive view of the effect audience research has on public radio, while the vast majority of Acquirers believe these tools have led to an improvement in the system. It is not surprising to learn, too, that the vast majority of Acquirers (80%) say they ‘often’ rely on audience data, versus just one in ten Producers.
7. **There is significant disparity between Producers and Acquirers their perceptions of compensation for Independent Producers.** The vast majority of Acquirers believe rates are improving, and a commensurate number of producers hold the opposite view.
8. **Stations are an important base for Independent Producers.** More than four in ten Independent Producers responding to the survey indicated that the program inserts they’d produced – reports, features, or essays -- were for local distribution. We also find one in five Independent Producers based at a radio station, filing freelance on the side.
9. **Independently produced programming makes up a relatively small portion of public radio’s content stream**, with just 2% of the stream coming from individual Independent Producers, and another 3% originating at independent production houses such as *Living on Earth*, *Democracy Now*, or *Humankind*.
10. **In terms of supply and demand, the drive-time news magazines are driving Independent radio content.** NPR commissions the greatest volume of content from Independents, with commentaries and short form pieces – between 3 and 5 minutes in length – dropped into *All Things Considered* and *Morning Edition* comprising the vast majority (82%) of the independent content stream. Independently produced material longer than 10 minutes is a negligible, with long form documentaries or special series not registering at all during the period of this study.
11. **For every programming dollar flowing through the public radio system, one half cent goes into the pocket of the Independent freelance producer.** The system expends approximately \$25,000 per week on programming from freelance producers. (see page 11)
12. **PRI distributed programs expend the most revenue on Independently produced content**, with 53% of the fees for Producers coming from PRI programs, and 45% from NPR. (see page 11)
13. **Three quarters of Independent Producers earn most of their income outside of the freelance radio work, and nearly four out of ten do not generate net income from their Independent radio work.** At the same time, more than half of Independent Producers say they are trying to make a living through independent production.
14. **Public radio’s traditional funding sources do not provide strong economic support to Independent Producers.** Four in ten producers report self-funding as the “major or minor” source of revenues outside of the fees they negotiate with Acquirers. Foundation grants rank second to self-funding, and CPB is listed as a source for 7% of Independent Producers through direct contract, and another 14% through subcontracts with other projects. The vast majority of producers have little to no success expanding income streams beyond public radio via internet, secondary sales, or sales or merchandising. (see table on page 13)

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