

## KEY FINDINGS

### Profile

#### Not all independent Producers are alike

One fundamental reality that emerged from the project research is that the Independent Producer community is not one homogenous group of like-minded individuals, but is made up of a range of people who hold different beliefs, who spend varying amount of time on their independent radio work, and who are concentrated in different areas both inside and outside of the industry, flowing back and forth between the public radio system and other areas of employment and interest (addendum C).

Walrus Research's analysis concludes that "not all independent producers are alike," and sketches an Independent Producer community broken out into three dominant "clusters" or cohorts based on their perceptions and opinions of public radio and their place in it.

- ⇒ **Idealists** are self-described journalist-reporters who are, on average, 44 years old. They hold strong beliefs that programming from Independent Producers is more innovative than that of networks and stations. They also believe more strongly than other Producers that public radio programming was more creative in years past than it is today. Idealists tend to feel that audience research – Arbitron data and focus groups – has not been very useful in improving public radio programming.

Idealists see themselves more entrepreneurial than the other groups, and are the most likely to be trying to make a living as an Independent Producer. The most frequent type of production for this group is modules, with three out of four of Idealist reporting this as their most common short-form format. Idealists are also the most versatile group; their work appears in many forms ranging from news reports and essay/reviews to weekly programs. They are also the most prolific producers of weekly programs, and one-time specials or documentaries.

- ⇒ **Outsiders** are 46 years old on average and, when asked about their role in public radio, they responded strongly to "independent" as the best way to describe themselves. They do not identify strongly as journalists or reporters – a key factor differentiating them from the other categories of Independents – but do identify as artists and writers. Like the Idealists, they tend to see the evolution of public radio in a negative light relative to the current quality of programming and the reliance on audience research, and feel it is hard to gain entry to the industry. They are more often found working in places other than public radio; six in ten Outsiders report that – apart from their independent producing work – their full or part-time employment is outside public radio.
- ⇒ **Realists** are the youngest segment of producers, averaging 39 years old. Like the Idealist, they self-describe as journalist-reporters. They differ from their Idealist colleagues in having a slightly more positive outlook on the way public radio has evolved in recent years, especially with respect to the effect research methodologies have had on programming. They are neutral on the questions about whether public radio was more creative years ago. Of the three groups, they are the most prolific news/feature producers. Six in ten – more than either of the other two segments – are likely to have full or part-time employment within public radio in addition to their independent work. They are least likely to report that their independent income exceeds their other sources of income.

And while there are factors that differentiate Independent Producers, the three groups are in agreement about three things:

1. Stations have become less willing to take programming from independent producers
2. Rates paid by Acquirers for Independent programming are not improving
3. Independent programming delivers significant value to the public radio listener

**Public Radio's Independent Producers are intellectuals**, with significantly higher levels of education than even the NPR news listener. Nearly all Producers (96%) hold a college degree and nearly four in ten having an advanced degree. When not working in radio, we find many of them engaged in, as Walrus Research characterizes it, "mind work." Most identify strongly as writers. For those working outside public radio, when they take off their Independent Producers' hat, we find them working for print publications (25%) or teaching in a college (19%).

*Acquirers are high intellectual achievers, too, with 91% of them graduating college and more than one in three holding an advanced degree.*

**The Independent Producer community is well diversified** with a 50/50 gender split and one in five identifying as a racial minority, mirroring the overall US minority population composition (19.15%)<sup>2</sup>

*Acquirers are more often male than female (58%/42%) and minorities tend to be under-represented (15%) in the gate-keeper community, when compared to both the Independent Producer community and the US population.*

**We find most Independent Producers in the "coastal media power centers,"** with one in five Producers setting up shop in California, and another 13% in New York. Massachusetts and Washington DC are next in line with 8% and 5% of the Independent population, respectively.

**Public Radio stations are an important base for the Independent Producer community.** The results of our Producer survey indicate that nearly one in five independent producers working at a public radio station and producing independently on the side.

**There are a notable number of up-and comers in the Independent Producer community**, who are not yet careerists, and seem to be exploring radio as a profession. Looking at the generational break-out, we find about four in ten Producers are Gen X'ers who came of age during the '80s. A similar number who appear to be "test drivers," reporting 5 years or less experience working in radio.

*Acquirers are overwhelmingly (80%) Baby-Boomers, born between 1946 and 1964 and coming of age during the '60s. Further, at 45 years old, the average Acquirer has worked in the radio profession for about 15 years. The Independent Producer has been working in radio for average of 12 years, and is 42 years old, on average.*

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<sup>2</sup> Source: U.S. Census Bureau, Census 2000 Brief, March 2001, and National Population Estimates.