

Mapping Public Radio's Independent Landscape

FINAL REPORT

Opportunities for Innovation

February 13, 2006

INTERIM REPORT

Key Findings, Critical Questions

November 29, 2004



Dear Colleagues:

CPB is pleased to share with you the final report of the “Mapping Public Radio’s Independent Landscape” project. We believe that it provides a valuable perspective on the role of independent producers in public radio and the relationship they have with the stations and networks that acquire their work.

This report, which is the culmination of a two year study by SchardtMEDIA, grew out of CPB’s commitment to support independent producers and our recognition of the contribution independents make to the public radio airwaves every day. It articulates some of the challenges that are ahead for independent producers and wisely reminds all of us that these are challenges shared by everyone in the public radio system. It also encourages all of public radio’s program-makers to push themselves: be innovative, embrace diversity, and “put a fresh stake in the franchise of sound.” Listeners have been benefiting from the creative drive of public radio’s program-makers for decades; now is not the time to rest on our laurels.

The report also includes an exploration of the cultural divide that exists between the independent community and acquirers. We believe, as is detailed in the report, that there are many opportunities for stations and networks to work with independent producers – not only in commissioning and acquiring their work, but also by collaborating with them as programming partners.

Perhaps the report’s most important theme is that dialogue between independents and stations and networks would benefit all. Public radio is better able to meet the challenges of the changing media environment if it taps into the talents and experiences of all of its producers – independents, station-based and network-based – to bring compelling programming to our listeners.

Please give us your feedback on this report. If you’re interested in delving further into the project, you can see all the research and related information on the SchardtMEDIA web site at: <http://www.SchardtMEDIA.org/>

We hope you find this report as thought-provoking as we did.

Sincerely,

Greg Schnirring
Vice President, Radio
CPB

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Sue Schardt

February 13, 2006



Funding provided by the Corporation for Public Broadcasting, KCRW/Los Angeles, Minnesota Public Radio, Public Radio International, and WGBH/Boston. Project partner is National Public Radio.

In the last few years, the mandate of the print industry to raise profits has superceded the mandate to serve the needs of the public with strong, investigative journalism. We've witnessed the withering of what was once a strong institution. NPR really is one of the few remaining bastions in America of what journalism ought to be, with an obligation to provide citizens with information to allow them to evaluate and hold accountable, by virtue of a free press, powerful elected officials and candidates for office.

Bill Marimow
Vice-President for News, NPR (2005)

The subliminal depths of radio are charged with the resonating dimension of tribal horns and antique drums. This is inherent in the very nature of this medium, with its power to turn the psyche and society into a single echo chamber. The resonating dimension of radio is unheeded by the script writers, with few exceptions.

Marshall McLuhan
Understanding Media (1964)

P R E F A C E

I am grateful to those whose support made this work possible. At every stage, I have been mindful of the investors whose funds were the foundation for the project. Their confidence in me and the need for a better understanding of independents in public radio were touchstones. I've appreciated the counsel they provided in first shaping this idea and at every step along the way.

Thanks to NPR and Peggy Girshman, Dana Davis Rehm, Margaret Low Smith, Joyce MacDonald and Jackie Nixon. Special thanks to my editors Margo Melnicove, John Barth, and Richard Lawrence who supplied kindling as well as red ink. I appreciate AIR's help and support convening producers to discuss the findings.

Bill Siemering, my Contributing Editor, was a guiding force to whom I am grateful. The work of my Research Partners George Bailey and Craig Oliver, and the efforts of Steve Martin gave us the very "landscape" to study. Thanks to them for their diligence and help turning an idea into reality.

CPB, my principal investor, provided not only funding but guidance and encouragement. I have appreciated the support of my first grant officer, Jay Youngclaus; Senior Vice-President, Radio, Vinnie Curren; Vice President, Radio, Greg Schnirring and Project Manager Jacquie Gales Webb. I'm especially grateful to Kathy Merritt, Senior Manager of Radio Program Investments, for prodding me to go further and for her wise counsel.

In my 18-year tenure in public radio, I have relied on and appreciated its expansive spirit. Reviewing the findings of our research, dozens shared their ideas and insights without reservation. SRG's Tom Thomas and Terry Clifford, WNYC's Dean Cappello, KUOW's Jeff Hansen and WBEZ's Torey Malatia were especially generous, and on-the-money with their ideas and tough questions. My thanks to them.

I am proud to be counted among those who make up this industry. I was reminded, through the two-year course of this work, that public radio is, indeed, a place where smart people work, and where passion and respect for the medium still thrive. These are the ties that bind us.

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I. Introduction

Beginning in January 2004, SchardtMEDIA undertook an extensive, benchmark study of the public radio independent sector. The study consisted of analyses of nearly 2700 hours of content airing on public radio stations between September 2002 and September 2003, and surveys of 345 producers and acquirers representing a broad spectrum of the industry. One major finding of the study found that independent producers fill 2% of public radio's content stream. We learned, too, that of the 64 independent producers and commentators that contributed to programs in our sampling over the course of a year, 1 in 5 is based at a radio station.

The focus of the study was primarily individual freelancers who work on commission – that is, sole proprietors, commentators, and station-based producers who generate freelance income apart from their regular paying radio job. In December 2004 and January 2005, a report on the research study – *Key Findings, Critical Questions* – was released and widely distributed. The full report and the reports from the Research Partners are posted online at <http://www.SchardtMEDIA.org>.

Following the report's release, SchardtMEDIA began a series of stakeholder debriefings with seventy producers, acquirers and executives across the industry (Appendix A) with the intent to gauge reactions to the research findings. Participants included independent producers, station program directors, general managers, the Public Radio News Directors Inc. board (PRNDI), the Association of Independents in Radio board (AIR), executives from the Station Resource Group (SRG), Public Radio Exchange (PRX), executive producers of the leading news magazines, the Independent Television System (ITVS), network executives from PRI, MPR and NPR, researchers, and producer liaisons.

The agenda for these conversations focused on ten “critical questions” that emerged through the analysis of the independent sector (Appendix B). Discussion centered on topics such as whether or not there is a place for alternative formats such as long-form storytelling, evocative soundscapes, or extensively researched programming – programs that have no demonstrated ability to generate listener-sensitive income; whether the concept of “in-depth” has changed over time; ways to help foster stronger alliances between freelance producers, stations, and the networks; and where the source of money for new initiatives is to be found. The comments and ideas from these conversations provide the basis for this report.

The opinions you'll read throughout are attributed only when the individual quoted gave permission to use their comments. Others gave permission to include their comments in this report without attribution. All of these unattributed opinions come from high level decision makers – both producers and acquirers – who were hesitant about coming forward publicly with criticism, an indication of the sensitive relationship between the two groups.

In the context of this report, the term producer, independent, and freelancer are synonymous. There is another important sector of the independent landscape made up of independent production houses. Our study recognizes the contributions to the content stream of independent shops, which are different from those of freelance independents. A deeper analysis is required to help to provide a more complete understanding of the role and mechanics of this important sub-sector in the industry (see Section IV. Destinations).

Exploring the world of independent producers brings us, invariably, into the world of public radio programming and an industry both at the pinnacle of success and on the cusp of dramatic change. Many consider public radio's news franchise to be an indispensable public service – a “lynchpin” of our democracy. At the same time, as the system consolidates and becomes more centralized and

tightly focused, we ask the question, what are we leaving behind? This report is intended to provide the reader with a new lens through which to consider programming and establish a new context for programmers and producers to work together. There is much work to be done as program stakeholders explore new ideas for reinvigorating radio's unique power as the medium of sound, while at the same time strengthening and building the public radio news franchise.

In this report, I present key findings, define critical challenges, propose ten “destinations” – steps towards solutions – and address areas of concern. In each instance, the topics are not necessarily exclusive to the independent producer sector, but reflect a broad view of the challenges facing the industry as articulated by producers, acquirers, and others invested in programming.

II. Key Findings

At the start of this project, we set out to determine the value of independently produced programming in public radio. In this section of the report, we provide key findings from our research that address that issue and others.

In conversation, producers and acquirers expressed surprise and dismay at the finding that only 2% of the public radio content stream comes from freelance independents, primarily in the form of short news features and commentaries. A number of leaders in the producer community attribute the low volume, in part, to their failure to effectively communicate the value of independent work to the system. These leaders hear a clarion call for producers frustrated by misperceptions to do a better job of communicating the value of independently produced work. Bill Kling, of MPR agrees that visibility is an obstacle for producers, saying, “Many of the issues you try to find solutions for [in the *Mapping* study] could resolve themselves with compelling content, and some way to get visibility for that content.”¹

On this point related to the importance of producers doing a better job selling themselves to the system, Bill Siemering, creator of *All Things Considered* and one of public radio's visionaries, feels that the onus of ascribing value to independently produced work should not fall solely on producers.

“Independent work, by now, should have spoken for itself,” says Siemering. He calls for stronger leadership in exploiting radio's unique strengths, saying, “While it is important that producers be able to explicitly state the value of their work, greater carriage will not be the result of persuasion, but the belief from the highest level of public radio and throughout the system that using radio imaginatively to tell compelling stories that capture the listener's attention is one of the defining elements of public radio.”

The assumption in this statement is that independent work is, by nature, of a caliber in itself compelling enough to capture the listeners' attention. This is not a widely accepted view. It also leads us to the question, should good storytelling and the creative use of sound, then, be the only barometer of what is important? Should other determinants – power to generate money, ability to cultivate an audience – not matter, or not matter as much? This comes back to the relative nature of what is valued and what is not.

¹ Our research began just as the Public Radio Exchange (PRX) was launched. Since then, PRX has begun to emerge as a vibrant showcase for programming. Many producers look to PRX as an antidote to the visibility problem.

Marita Rivera, Vice President and General Manager for Radio and Television at WGBH in Boston expressed the point of view most common to acquirers, “Whatever role independents take,” said Rivera, “there must be a direct relationship to the audience... strengthening the audience.”

This direct correlation between building audience and programming, which is absolutely fundamental to most programmers’ logic, is an illusive concept for some producers who do not understand the mechanics of audience building. The wide range of opinions about this split and possible remedies are discussed later in this report.

To this question of value of independent programming, there are five findings from our research that give specific, useful insight:

1. **Independent producers with journalism chops are most prized:** those who are skilled at producing short news features or segments most suitable for national news magazines get the most work. Judging by the supply/demand ratio, the greatest value in terms of independently produced content is given to short feature pieces and commentaries, between 2 and 10 minutes long, dropped into NPR news magazines; 88% of the content demand fits into this format category. Our interpretation of this finding is that it is a reflection of the success public radio, and NPR in particular, of centralizing program service and developing the news/information franchise. This is the engine that drives public radio’s audience and economy and, in turn, dictates the demand for content and specific format from producers and reporters.

Jeff Hansen, PD of KUOW in Seattle, recently drew a controversial line in the sand with the decision that the station would no longer consider programs unless they had a top of the hour newscast hole. While opinions among both producers and acquirers have varied widely, it’s likely that other stations will follow his lead. Hansen’s decision and the constructive dialogue it sparked has brought the importance of format to the forefront. KUOW is now the top ranked radio news station in Seattle and, Hansen asserts, with this achievement comes the obligation to meet listeners’ demands to be kept up to date on breaking news. This is an important responsibility for many stations that has evolved in recent years, according to Hansen.

“Before 2001, public radio saw its news role being primarily about analysis and less about news breaking,” said Hansen. “We got a very sobering reality check on September 11. It became very clear that it wasn’t enough to just do analysis. Since then, it’s become increasingly clear – almost every week – that there is news happening almost constantly, and our listeners have come to expect us to be on it. We’ve been pushing in that direction steadily. It’s about serving a need.”

KUOW’s new policy is also reflective of a ten year trend among stations and the network toward widespread adoption of format specific aspects of programming. These format elements have, over time, evolved into barometers of what programming is valued. They lend a predictability and consistency that PD’s desire, making it easier for scheduling automation and inserting needed local ID’s and announcements. The common thinking (supported by research) is that these format details fulfill an important expectation of listeners.

With this more centralized programming environment, more and more stations are turning more of their airtime over to network programming. This results in fewer opportunities for independent producers to secure assignments. Both acquirers and producers acknowledge that a relatively small minority of producers’ work is most valued – the “cream of the crop.” They get the plum assignments again and again. Some producers who don’t fit this category feel a degree of frustration...undervalued and ignored by acquirers.

“There is a massive disconnect between producers’ ability and their expectation,” said one Executive Producer of a daily magazine. “There is a certain Darwinistic point where people rise to the top... this small group of producers that you can practically count on one hand will never go wanting. The place where there is a real problem is talented producers – especially young producers – getting noticed and getting past the bias against independent producers.”

2. **Listeners are perceived by the majority of producers and acquirers to value independent work.** 81% of acquirers and 88% of producers did *not* agree with the statement “If all independent programming disappeared, it would not make much of a difference to the audience.” It is notable, too, the majority of acquirers (55%) and producers (81%) believe programming from independent producers to be more “innovative” and “ground-breaking” than that produced by the stations or networks.
3. **There is disparity between acquirers’ expressed value of independent work and the reality of how much independently produced content is commissioned.** As noted earlier, only 2% of public radio content stream comes from independent freelancers. An additional 3% comes from independent production houses. Yet, our survey indicates a demand for more independently produced programming across a range of formats, with a majority of acquirers expressing a desire for more news reports, essays, reviews, art stories, special programs, and modules from independent producers. As we consider this finding, along with point 2 above, there appears to be a gap between what acquirers are saying and what they are actually commissioning.

One place to begin looking for new information and trends on the relationship between the producer and acquirer sectors is PRX. Executive Director Jake Shapiro provided some statistics. Since launching just over two years ago, there are 828 individual producers registered, and 334 stations. Of the site’s 4,464 pieces, 45% come from individual producers, 34% from producing groups, and 21% from stations. It will be important to see how these numbers evolve over time.

4. **Long-form programming from independent producers is a premium commodity.** We grouped pieces produced by freelance producers into three categories based on what appeared in the content analysis: 2-5 minutes, 5-10 minutes, and 10-30 minutes. Long-form programming was defined as anything longer than 30 minutes. The longest piece from a freelance producer that turned up in the study was 18 minutes in length – just one – which leads us to conclude that there are few opportunities outside the news-feature format for independents. We also learned from the content analysis that producers earn a higher fee for longer form pieces; acquirers are willing to pay more. From a strictly monetary standpoint, long form pieces carry a higher value. Following this logic, it would be beneficial to producers if there were more opportunities to produce long form. Not only is the pay better, but opening opportunities for long form programming would have the effect of diversifying and expanding the narrowly defined channel by which independents now contribute to the content stream.
5. **Value is relative.** Walrus Research’s segmentation analysis showed that independents are not one homogenous group, a commonly held perception going into this study. Producers break out in three segments – Outsiders, Realists, and Idealists – converging around opinions related to the evolution of public radio and the value of audience research, how they perceive themselves and their role in the industry, and what their respective contributions are in terms of specific content and format. Outsiders tend to have negative views of the impact research has had on the industry, and they earn most of their income outside of radio. Realists tend to hold full or part time jobs within the industry, in addition to their freelance work, and are responsible for a majority of the freelance material that flows through the system. This segment has a more positive view of research’s effect on public radio. The Idealists share the Outsider’s skepticism of research, and are also most prolific in the variety of formats they work in.

Breaking down the independent community in this way is revealing. It tells us that producers have a range of expectations and play different roles within the industry in what they contribute and how it fits into the “contemporary reality” and demands of public radio. What some freelancers are doing has specific and definable value to key decision makers; what others are doing does not hold much specific and definable value for those same key decision makers.

III. Challenges

I feel like public radio's in a situation where the journalism is great and has never been better...it's great coverage. Where public radio falls down -- and any program director in the system will tell you this -- is innovation. One of the prices of success is that now it has a sound, and the sound is really predictable. And so what do you do, 30 years into the vision?

Ira Glass, Host of *This American Life*
Columbia Journalism Daily, 8/12/05

The landscape of independents in public radio is difficult to chart. One reason is that the independent “identity” is as much a state of mind as it is a pattern of attitudes or practices. This report is one step in what I hope will become a constructive discussion about the role independents play. The ideas outlined in it are intended to inspire action and new ways to think about public radio programming and innovation.

My discussions with producers and acquirers concerning the role of the independent producer in public radio often moved quickly to ideas about the future of programming decision-making, sustainability of new and existing programs, and developing new ideas. Four broad areas of concern emerged through the course of these conversations:

> Revenue > Programming Culture > Diversity > Innovation

These ‘concerns’ are not tied specifically to independent producers nor limited to a particular program format, but are widespread, with far-reaching consequences for virtually all aspects of the industry, including the independent sector. These conversations have made it clear that, as an industry, we are challenged to develop a meaningful response to these concerns. I return to ideas for response later, in section IV of this report.

These areas are not independent of one another, but are closely tied. Without money, there is no programming. Without innovation and diversity, there are fewer reasons to listen. With fewer listening, it’s harder to raise money. These interrelated concerns frame the following “Challenges” as they relate to the independent sector:

Challenge 1 – Revenue

Pressure is on Public Radio at every level to develop a new model for funding program production. The nature and the economy of programming have changed dramatically in recent years, and many independent producers are not up to date with the forces that drive the content marketplace.

In recent years, major market stations in particular have become content centers in their own right. WNYC, WBEZ, WBUR, Wisconsin Public Radio, WAMU, KCRW, and WGBH are among those producing nationally syndicated programming on a daily and weekly basis. We've seen an entirely new entity emerge in just the last year from Minnesota in the form of American Public Media, which has redefined the syndication marketplace.

As many stations of all sizes strive to strengthen local service, news operations have grown more sophisticated and expensive. In Spring 2005, when we met to discuss the *Findings* report, Dean Cappello, VP of Programming at WNYC, had some telling comments on his station's use of independently produced material. "A lot of acquisitions money is now funneled into local programming rather than channeled out to producers; that's one big change," said Cappello. "The economy of public radio now has a new element: very strong station-producers that need to be sustained. It's getting harder and harder to raise foundation money. So the pressure is on local fund-drives, and that's where the money comes from. After that, [in choosing which projects to support or not], it comes to priorities."

In their report, *Having it All*, on the financial health of the public radio system commissioned by CPB in 2004, Brody-Weiser-Burns tell us that "an increase in [stations'] programming expenses was strongly associated with a decrease in net revenue" system-wide. Further, they report that 60% of stations' increased operating expenses from 1999-2003 came from increases in the cost of local production and programming. In a very tight program funding environment, stations now compete with each other, with freelance producers, and with the networks to subsidize this rise in the cost of programming. The fiscal consequence detailed in the Brody-Weiser-Burns report startles many of us: that, while total operating revenues have grown steadily over the last 5 years, public radio's spending has outpaced the growth. This gap can be traced to a minority of stations that have significantly increased programming produced at the local level.²

In this light, it's notable that WNYC, WBUR, and WBEZ are among stations that have in the last half year cancelled or suspended syndicated programming produced in their shops.

Acquirers at the station and network level feel that their financial reality is not understood by the producing community. Ron Jones, Program Director at WBEZ had this to say: "I had one producer ask me what the value of his work was. It's difficult to answer this question. In many cases, it's relative – it's a matter of my overall budget. It's true that we're steadily seeing our cost for creative acquisitions rise – it was up 15% last year. At the same time, American Public Media's emergence as a national program producer and their associated fee structure has added new pressure on our budget. As a consequence, this affects our decision for buying independent content."

As our *Findings* indicate, a third of the producers who say they're trying to make a living in radio report a net loss or zero earnings from their work. "Self-funding" is ranked as producers' number one source of revenue. The great majority earns most of its income from sources other than radio, and there is a pervasive feeling among producers that the system should do more to support their work. Some producers have a perception that the stations and the networks have the money but are unwilling to part with it, which is directly at odds with the reality described by Cappello and Jones, and other major market station managers. "We have to constantly remind people what they're not doing for the indie community," said one frustrated member of the AIR Board.

² *Having it All, How Public Radio Stations Can Provide Great Service and Live Within Their Means* Brody-Weiser-Burns, November 2004 http://www.cpb.org/stations/reports/havingitall_radioreport_04.pdf

Some independent producers strike a balance, devising original ways to form content partnerships or contribute material to the networks' news franchise on a regular, on-going basis: Jay Allison, Barrett Golding, Dave Isay, the Kitchen Sisters, Richard Paul, Bari Scott, Joe Richman, and a range of commentators. Oftentimes, however, producers who successfully sustain their independent radio production work full or part time within the industry at radio stations, doing freelance on the side.

Rates and developing financially sustainable projects are a central topic in the producer community. The frustrations voiced by producers regarding the financial reality of program making reflect an economic environment that is increasingly constrained. Another side of this frustration is expressed in more personal terms by producers dealing with station or network staffs; they often feel editors and network executives don't comprehend what goes into their work; they don't understand the "realities" of working as an independent producer. The feeling is mutual. Many acquirers have an implicit expectation that producers should have a better understanding of *their* reality – another indication of the "cultural divide" discussed in greater depth in the next section.

One major market program decision maker gave this insightful observation: "Public radio is a subsidized market economy. That means we're always going to be giving things away. On one hand, we're asking our funders to think of us as a mission-enterprise, and give money to us instead of, say, to a hospital. And on the other hand, [we have] producers who are out of touch, saying 'pay me so much for this work....pay me according to the cost of living. It's difficult to reconcile the two."

The bottom line, echoed by both producers and acquirers, asks, 'where is the money for anything new going to come from?' This question reflects not only on the economy that supports the work of independent producers, but also on the economy of stations, and the system as a whole. There is pressure from within the industry and keen awareness by program makers at every level of the system that the media landscape is changing, and public radio must adapt in order to remain competitive.

Many in the system are keeping a close eye on the numbers for fundraising and audience. The recent Public Radio Profile report issued by the Station Resource Group³ shows mixed results: AQH audience dropped 2.3% – the first ever such decline in history, according to a variety of sources – while net revenues increased by 2.1%. It's premature to know whether the loss of audience is cause for concern. This feeds industry worry that, with each new media gadget, there will be an erosion of our traditional base as listeners diversify their habits. Technology drives producers, stations, and the networks towards further diversification. With this comes the pressing need to develop new ways to account for listeners who may be switching from their public radio station to their iPod, to a live internet stream, or to Bob Edwards on satellite radio. There is a demand for new content to fill new platforms – podcasting, HD Radio, streaming media. Many believe this presents an opportunity for independent producers. Again, the vexing money question; from where will the money come to support new production for emerging platforms? Stations and the networks face the difficult challenge to sustain their core, while keeping up with the demands of time.

Bill Siemering, for one, believes a return to the mission-approach is something public radio needs now. "With a commitment to returning to sound as one of the defining elements of public radio, resources will be made available for producing this material within NPR and other national programs as well as local stations. Without this commitment, nothing will change."

³ <http://www.srg.org/funding/04RevenueUpdate.pdf>

This mission-driven attitude has been elemental to the culture of public radio from its beginnings, and, while the definition of mission has since expanded to include audience measurement, this attitude still often prevails as programmers embark on new program development. It goes something like this – [insert your soapbox issue here] is a good thing to do and is uplifting to humanity, therefore if we succeed in making an excellent radio program about [your soapbox issue], then the money will follow.

Unfortunately, in most cases today, this “faith-based” approach to program development leads invariably to program projects that are not sustainable over the long term. Faith-based producers tend to load all the money up front to develop the concept and the content. Marketing and fund raising are left as something to pick up “somewhere down the road” once the program is formulated. This approach worked well at a time when there was little competition, when there was not a glut of programming inventory, and when public radio was a new phenomenon and there was little competition for its obscure niche. But in today’s world, with the industry having reached maturity, this approach will usually lead to programs difficult or impossible to sustain financially over the long term.

There is, however, another important and implicit point in Siemering’s mission-oriented idealism that should not be lost: radio’s unique and defining power is sound, that is, the ability to get deep inside a listener’s ear and spark his imagination. The success of the industry has blinded us to this defining power – it is viewed with nostalgia, as a luxury....a remnant of the good ol’ days of NPR.

The power of sound is fundamental, however, with a critical place in the unique culture of public radio and suggests a direct connection between this defining power of the medium and the industry’s long-term sustainability. To convince someone to give you money, you have to tell them a good story. One of radio’s most compelling stories is about the power of sound. Public radio’s first and defining chapter is how a group of creative, passionate people understood how they could reach listeners hearts and minds in a new way – through their ears. We should still be telling this story about public radio.

Over time, the importance of a journalistically balanced, well-crafted script has moved to the forefront. Public radio has grown more sophisticated, sprouted new appendages, matured. Clearly these fundamental elements of excellent craftsmanship and the ideals embodied in this unique medium of sound are not enough. The demand on program makers has expanded and grown more sophisticated, but our understanding and mastery of the power of sound is still one of public radio’s most exciting stories. We would do well to renew this commitment: to practice the craft of sound vigorously and find new ways to tell the public radio story, and new financial supporters to hear it.

Challenge 2 – Programming culture

A cultural divide in public radio programming influences which programs are deemed to have value, and determines whose ideas are represented on the airwaves.

Sound is public radio’s first franchise. The premiere broadcast of *All Things Considered* in Spring 1971 opened listeners’ ears to the magic of what was possible when a microphone was used to tell a story. Those first listeners stood with the NPR reporter right in the middle of an anti-Vietnam war protest on a Washington DC street, listening closely as he spoke, unscripted, into his microphone, describing exactly what he was seeing and feeling. This was the lead news story of the day, and it was told in a way that we rarely hear today.

In the last dozen years, as the industry has matured and consolidated, a second franchise – the news-journalism franchise – has emerged, driven in large part by the evolution of public radio’s research culture and the failing fortunes of the newspaper and commercial radio news industries. The industry has, at its highest levels, experienced a tremendous influx of print, television, and commercial radio reporters and journalists who influence the development of radio – its craft and the use of sound. According to Bill Marimow, newly named Vice President for News, NPR is experiencing a “deluge of highly placed print people” who want to work for NPR. News, as the dominant franchise, is rightly credited for public radio’s success – the broad expansion in audience, in revenues, and the establishment of public radio as one of America’s preeminent sources for high quality, in-depth journalism.

The other important and closely related aspect is the consolidation of the industry. According to a December 2005 report from Audience Research Analysis, the great majority of public radio listeners are tuning in to syndicated programs, and it is a growing trend: over the last 7 years, the percentage of listening to nationally produced programming has grown from 49% to 62%. The same study reports that, in Spring 2005, half of all listening to public radio was generated by just 19 nationally distributed programs. Five years ago, it took 53 programs to generate the same amount of listening.⁴ What happens to producers in this sort of environment? According to Jeff Hansen, “You reduce the number of producers you need dramatically. Each station now has to only fill 5 to 10 minutes per hour of national programming. The more you centralize production, the fewer producers you need.”

The franchise of sound and the franchise of news are not mutually exclusive; no clear dividing line separates the two, however our research data and conversations reveal a distinct divide in public radio. On the one side there a programming universe that is attached to specifically defined values grown from program-research culture. On the other side is programming that is considered experimental, sound-based, or non-narrative in nature whose principal values are often subjective and not necessarily definable. I describe this as a split between public radio’s “culture of sound” and public radio’s “culture of news-journalism.”

Most people I spoke with share values of both cultures. Another way we might view this split is between head and heart, or the analytic and the creative. Talking with acquirers, for example, they seem in their hearts to recognize and embrace certain ideals associated with “sound” culture, and tend to attach related ideals – innovation, risk, creativity, breaking rules, experimenting with sound – to the independent sector. In the day-to-day crush of business, however, another set of values takes precedence, driven by the reality of maintaining and increasing the audience, and by the defined values of the dominant news-journalism franchise. This ability to communicate and define values is important to any mature business and public radio is no exception. Over time, these defined values translate into what is considered important in programming, and what is considered not important.

Each franchise’s priorities and values are influenced and reinforced by different forces. For example, the news-journalism franchise is connected very directly to audience service as defined by numbers, and by the news cycle. The sound franchise connects deeply to aesthetic, personal considerations. These priorities and values are translated into language and style, and when it comes to defining success and public service, producers and acquirers often speak entirely different languages. For example, “core listener,” “unique appeal,” “AQH,” is common nomenclature for most acquirers, and represent a complete set of values and determinants about programming.

Program decision-makers now rely on research methods and their ability to define previously intangible concepts such as “service” or “loyalty” in absolute terms. The central tenet of the research-

⁴ <http://www.aranet.com/library/pdf/doc-1001.pdf>

driven culture is that we exist in a world of absolutes. Right programming and wrong programming make fortunes rise or fall. Research allows stations, producers, and the networks to tell their story confidently, to define their failures and successes, and to justify their purpose to funders. One influential executive at a leading network had an off-the-record opinion that the reliance on research has made his brethren lazy. “To be candid,” he said, “there is a minority of PD’s who really want to broaden their envelope. For years, the general direction research has taken advocates for stations to simply play the network programming. A lot of programmers have simply become complacent.”

Most acquirers hold the view that the onus is on the independent producers to understand the news-journalism culture and adopt its standards.

“Sometimes, there is [a] disconnect between what producers want to create and what shows are looking for,” says Margaret Low Smith, Vice President for Programming at NPR, which commissions the majority of freelance content. “Producers tend to think their craft isn’t appreciated at the networks, and that isn’t necessarily the case. But they would do well to have a better sense of the shows’ priorities rather than wishing the appetites and needs were different.”

“I’m amazed at the gap in understanding,” said another station-based executive, speaking off the record for fear of attracting the ire of producers. “It seems like two different worlds. It seems that many indies don’t understand how listeners use radio.”

Programmers must feel confident that the producers they’re working with are on their same page, and that the content they’re getting is reliable. Many producers, whether working at a station or as a sole proprietor, would like to have more flexibility creatively, to shape ideas rather than simply respond to narrow assignments. Most producers feel they have few opportunities to develop trusting relationships with acquirers. Although there are exceptions, the differences between the cultures emerge in attitudes of disrespect and disregard. In a word, the problem is trust.

We see another “disconnect” between the sound vs. news-journalism divide in the widespread and growing expectation that freelance producers bring strong journalistic sensibility to their work. “Independent producers pitch incredibly redundant subject matter,” says an executive producer of one of the leading network news magazines. “And then there are producers who claim to approach a topic in a journalistic way, but have little training; weak journalistic standards.”

Some producers are supreme craftspeople with no interest in journalism. There is pervasive belief among producers and acquirers that these sorts of producers – some of whom were at one time successful in syndicating their programs to hundreds of stations – have no place in public radio anymore. One producer who is a master craftsman working in audio drama once had his programs carried on more than 200 stations. Today, he says, “I’ve given up on public radio”...and he’s now focused his business on selling his “serial entertainment” catalogue directly to his listeners.

WBEZ General Manager Torey Malatia is one of public radio’s respected program innovators, and one of a number of public radio executives who consider themselves “independent.” He gave Ira Glass a home-base to create *This American Life*, a poster child for public radio program innovation. With KCRW’s Ruth Seymour and WNYC’s Dean Cappello, Malatia is among the most unconventional thinkers among major market executives, and his opinions are often provocative.

“The commonly held assumption,” Malatia said, “is that the divide is a research-driven creative divide; that research is the filter through which creativity is measured. This is just not the way it works. Programmers often reference yardsticks like research, audience appeal, and standards as ways of explaining away what is in reality institutionalized caution. We shouldn’t forget that an

entire generation of programmers has been conditioned by public radio professional development organizations to replicate the tried and true, not innovate the next wave of successes. Producers may be accused of deluding themselves about the level of competency and value of their work, but programmers may be similarly accused of being oblivious to the narrowness of their critical processes.”

The discussion with station-based news directors and reporters revealed surprising views. This group, working on a freelance basis, delivers most of the independently produced 2-10 minute news feature programming to the system, and has the journalistic strength requisite to working with the networks. There is a view among station producers that the relationship with NPR has “definitely changed” over the last 10 years with the increased unrelenting demand for short features. Station based producers feel there is scant opportunity to work on anything outside of this format. Yet conversations reveal a desire – echoed by non-station producers – for opportunities to “stretch out” and work more intimately with sound and to experiment with their own ideas.

“I have got young people who have full time jobs and are desperate to produce long-form programming,” said one station news chief. “I don’t want them to be shut out, but they don’t want to do news...they think of it as uncool. I don’t have many options to offer.” She went on to say, “We pitch less to NPR because it’s less satisfying. You finish your news day, and the question is do I want to take extra time to file for NPR? It’s more often, ‘no, I just want to go home.’”

NPR is considered by some station based producers to be a “victim of its own success,” having evolved into a CNN-type 24/7 machine that must be constantly fed. NPR’s latest directive to station reporters is “we want three minutes, and we want quicker turn-around,” according to one news director. This did not come across as an indictment or criticism, but rather an awareness by station-based producers of the trade-off for NPR’s – indeed all of public radio’s – success as a journalistic standard-bearer.

If we accept that a cultural divide exists in public radio programming, then the challenge and the opportunity is to forge a common vision with a broader set of values. PRPD’s Core Values Project has taken important steps in this direction, recognizing qualities that are unique to public radio – qualities of the mind, heart and spirit, and of the craft, and is working to apply these values in a variety of ways. Some producers and acquirers struggle with the whole notion of assigning set values. One producer echoed what others expressed, “How do we measure qualities such as “spirit” or “authentic” in any meaningful or useful way in a world that is defined by absolutes? Do we really want to apply a 1 to 10 scale measure on “heart?”

At a time when there is an explosion of technology-driven experimentation in sound going on all around us and competitive pressures are mounting, it would serve the industry well to consider this critical divide and ask hard questions about public radio’s unique franchise. Creating venues for producers and programmers to “mingle” would be a positive step. There is an opportunity for the two groups – who are often defined by their differences – to come together to begin to forge mutual understanding and a broadened, common set of values.

Challenge 3 – Diversity

The independent community is a resource for youth and diversity that Public Radio should encourage and support.

Public radio is a success story. Over the last ten years, the industry has established itself as a respected, authoritative, and even necessary voice in contemporary society. With this success comes

the danger of complacency. There is a risk of hanging too tightly to the formulas that led us to the present achievements and of reinforcing a kind of predictability and routine that have the unintended effect of insulating the industry from fresh blood and new ideas.

All around us – just beyond the wall – is a world of new sound. With a bit of freeware and some practice, anybody can become a producer and send the sound of their craft to willing listeners. This is especially true of kids who are more technically savvy than the average public radio insider ever dreamed of being.

This is not to say that anybody out there cranking out a podcast is the next radio genius. Chances are, though, that if we become too focused on working over the same formulas, the same formats and types of programs that have been successful before, we may miss the chance to stake a claim to new talent – to the newest franchise of sound. We need to reach from the inside out, and find the bright and invigorating energy, bring it inside, cultivate it, and claim it.

Our research revealed a surprisingly strong contingent (40%) of independent producers to be “up and comers” who have been working in public radio for five years or less and are testing the waters of the industry, trying to find a place in it. Producers and acquirers alike expressed curiosity about these young producers and, as NPR’s Margaret Low Smith described it, are eager “to discover the brilliant young producers of tomorrow.” As both industry insiders and the public radio audience ages, there is a keen awareness of the need to cultivate the next generation of leaders in all sectors.

Considering the diversity of the producer community, it is notable that our study showed nearly twenty percent (20%) of independent producers to be racial or Hispanic minority, and an additional five percent (5%) who consider themselves to have dual or multiple race or ethnicity. This compares to an estimated 31% of the overall US population identified as non-white, and the 2% of multiple ethnicity or race⁵.

There is optimism about the diversity of the independent community, and the distinct group of young producers our study identified. Peggy Girshman, Assistant Managing Editor at NPR, is one of a number of stakeholders who feel there is more work for independents now than ever before. Because this is a first time study, we have no information on trends and can’t support or disprove this perception. A number of new programs for young and minority producers have recently emerged, however: Generation PRX, NPR’s Diversity Initiative and Next Generation projects, and the on-going grassroots cultivation of the youth radio culture through initiatives such as KOOP’s Youth Spin, Blunt Radio, WAMU’s Youth Voices, and WNYC’s Radio Rookies, to name a few.

WNYC’s Dean Cappello shares Girshman’s outlook. “I would argue that there is much more stuff being commissioned and bought by radio stations than ever before,” says Cappello. “The strength of local radio stations and the explosion of programming at the local level have led to a real opportunity for producers of all types.” He points to an innovative WNYC radio documentary project from Fall 2005 – *Feet in Two Worlds: Immigrants in a Global City*. The program was a collaboration between independent producer John Rudolph and the station, and an experimental attempt to draw on the resources of the ethnic journalism communities in New York, the most diverse of all cities.

The optimism is mixed with concern as to whether the system provides enough stimulating production opportunity and a strong economic incentive to hold on to new talent. “Competition from outside of public radio is stiffer for bright new talent,” said PRI’s Senior VP of Productions Melinda Ward. She wonders, “In this changing environment, are we losing talent to other media?”

⁵ US Census 2000: http://www.censusscope.org/us/map_nhwhite.html

Public radio holds strong appeal for newcomers: the distribution potential, the quality of the product, the audience, the social glamour that comes being associated with the NPR “brand.” The opportunities and collaborations I’ve cited are encouraging, but to attract and hang on to young and minority talent, the system must go further. Radical new voices must be brought to the center of program development. A new breed of hosts and producers must be given a seat behind the microphone and at the editorial table if the industry is to attract a younger, more diverse audience.

Challenge 4 – Innovation

There is desire, but little time or place, to develop new, experimental program ideas.

One impediment to innovation is fear; aversion to risk. “Damn the torpedoes, full steam ahead” requires chutzpah to buck station or listener expectations. This chutzpah comes with an understanding that there is danger in complacency, and that innovation, however small or large, is fundamental to the vitality of the industry.

Another impediment to innovation, say public radio insiders, is making the time and space for it.

Stakeholders refer to “innovation” when talking about the need and desire to break the mold, to create something new and never heard before, to develop a program that is fresh, different. Innovation is often attached to new platforms, and wrestling with how to come up with an original way to create programs expressly for these new media. The topic of innovation came up again and again in discussions about independent producers’ role in the industry.

“In terms of independents, I think there is a prime opportunity – with podcasting, with PRX – new places that I think are tremendous assets,” says PRNDI Chief and WUNC News Director Connie Walker. “But who has time to look at all of this programming there is to choose from? We’re going to have a lot of niches to fill, but where do you go, how do you find the good material to fill them?”

Virtually every successful industry recognizes the importance of innovation and invests heavily in R&D. Walter Sabo is a commercial radio consultant credited with inventing FM Talk Radio. Here’s what he had to say last year, in an interview with Radio Ink: “Smart CEOs give managers the resources to invest capital on new ideas, in the future of the company: Proctor & Gamble, 3M, Apple, NBC, ABC, and CBS Television have laboratories where new ideas are developed... new ideas are researched, and new ideas are expected. The ability to test a new idea gives executives the ability to be brave – but radio has no lab, no development budget, no system to test big, new ideas.”

NPR’s Margaret Low Smith mused about a “lab” approach. “We love the idea of having a place where we could play around with the medium a little bit,” she said. “There are many of us here [at NPR] who have an appetite for finding new, imaginative ways to make what we do come alive.”

Creating innovative programming is one thing, recognizing it is another. Acquirers making a place for it on the air – creating a demand – is another piece of the puzzle. It’s clear we’ve got a chicken-and-egg situation when it comes to the innovation dilemma. Joan Rabinowitz is a member of the AIR board and Executive Director of Jack Straw Productions, a Seattle-based incubator that brings together radio producers, sound and installation artists, writers, and area students. She worries and asks, “Audio art, radio theatre, and other things are marginalized. How can we encourage or preserve the places for this sort of programming?”

There is a pervasive view among acquirers and producers I spoke with that the current programming environment and the few opportunities to produce sound-rich or experimental programming are

limiting for non-news producers, both those established, and those who are new to the field. This desire for more experimenting is not relegated to the group of “outsiders” or those working on the fringes of the industry – quite the contrary.

Jonathan Ahl, News Director at WCBU in Peoria, says, “A lot of people are going to view the notion that the public radio station system is somehow responsible for nurturing this group of outside producers who do this fabulously complex storytelling as a selfish plea. I wish my news staff was big enough that I could let people break loose to do this sort of thing. There is going to be resistance that we should be paying some 24-year-old to do the interesting work, while the rest of us do the day-to-day in the salt mines.”

This question arose throughout various conversations: In a world where there is so much competition in news/talk, how can program makers find a way to flex the creative muscles? Chris Turpin, Executive producer of ATC, reiterated this view, “You also have the pressure from your own staff, who would love to have the plum assignments. They say, ‘If you gave me that much time...’”

While no one category of program makers has the corner on creativity or innovation – my conversations reveal an underlying attitude across various camps that independent producers do, in fact, represent certain ideals associated with innovative thinking and the creative use of sound. This idea is reinforced in our research underscored earlier in this report – the majority of acquirers and producers alike believe that programming from independent producers is “more innovative and ground-breaking than programming produced by the stations and networks.”

Dana Davis Rehm, NPR’s Vice President of Member and Program Services, looks ahead, “I don’t think it advances the discussion to say, let’s take a trip back to the past and recapture what we lost. But what we’re saying is that we share with independents an aspect of story-telling and radio that is not strictly ax and trax. We should build on what we share.”

“An ideal to strive for within our lifetimes might be to find a method by which – and now I am speaking on behalf of our station – where you could have a sort of studio system,” said WBEZ’s Malatia. “Where there is not everybody on earth, but a group of people you feel confident about; that you think can produce programs that call for a certain price at a certain time.”

There are a couple of realities that make “outside-the-box” visions of innovation challenging for some: the aforementioned relentless and firmly established 24-7 demand of the news engine that drives public radio listenership and revenues; adoption of the 20-40 clock; and the 5-minute top-of-the-hour newscast.

Freelancers and acquirers of all stripes expressed a certain level of frustration with “clocks written in stone.” Says ATC’s Chris Turpin, “Every time we do a format breaking piece, I get angry e-mails from stations complaining about having to reset their automation.”

These industry-format standards are directly tied to station service and PD expectations, and it’s very likely that future innovation will have to consider and incorporate standard formats as a framework for innovation.

One other reality that impedes innovation is, once again, money. ‘Great idea! Who’s paying?’ is a common refrain. One PD put it this way, “I don’t think there’s any one of my colleagues that wouldn’t love a chance to invent the next new hit program from whole cloth.” He went on, “But at the end of the day, it’s difficult to find the budget to spare to experiment with ideas, especially if it means bringing in talent from outside.”

There is no simple formula, but it is certain that solutions lie in shifting priorities and strengthening the appetite for risk, looking for and cultivating new talent, and renewed commitment and bold out-of-the-box thinking with respect to developing new revenue streams. We see some high level positions at the networks and stations being filled with television and print professionals who are being drawn to public radio in large part because of the failing fortunes of their own industries. This will certainly add strength to public radio, however we must also be deliberate about cultivating and giving opportunity to a new leadership that includes radio visionaries whose roots are from within the industry.

Public radio has a proud history and tradition of innovation. Our history, however, is just that. If, looking to the future, innovation is a priority, then public radio can't rest on its laurels. We need to ask: who are the innovators among us? We need to look aggressively beyond our own walls to attract and support a new generation of innovators. We need to create the space for them to work.

IV. Destinations

We have learned in the course of the study that public radio program stakeholders – acquirers and producers alike – share four concerns that are closely linked: revenue, programming culture, diversity and innovation. These concerns are universal and have an impact on virtually all sectors of the industry.

Our study paints a picture of a divided programming culture in an increasingly consolidated programming environment, and a resource of producers both underutilized and restricted in the craft of radio-making.

We see technology-driven competitive realities banging on the door of public radio, demanding the ideas and energies of our best and brightest. At the same time we hear a clarion call to return to the distinctive values that some feel have been lost; values that set public radio on its path to success in the first place – evocative use of sound, programming that transcends the use of word or script.

We look to recent hopeful signs – Jad Abumrad and Ellen Horne's evocative and original *Radio Lab*, Steve Rowland's masterful Leonard Bernstein documentary series, PRX's fresh mingling of producers and acquirers, David Isay, Piya Kochhar, and Gary Covino's drive-time format-breaking *My Lobotomy*, KCRW's wonderful roster of podcasts, to name just a few.

Public radio is at an unprecedented crossroads shaped by a combination of technology, politics, and demands put upon the industry by its success in establishing itself as a pre-eminent and indispensable service to the American public. It is not a time for complacency nor mourning over what may have been left behind. Program makers – that is, producers, acquirers, and funders – have an opportunity and a desire to join together in a bold way to create a new culture of programming. Bruce Warren, PD at WXPB, considering the *Findings* report, observed “Now that we know that there is this content out there, and have some idea as to how it's being used, we [PD's] should go on to begin saying ‘Hey...here is what we need.’ Or saying [to producers], ‘there is a need for *this* kind of content.’ We need to have an open-mindedness to the approach.”

If there is to be change, it must be personal. The risk of over-reliance on a system of absolutes, especially with respect to programming, can lead to complacency and fear of change – two qualities that will impede our ability to prepare for a future of increased competition for listeners' ears and

time. We must reach deeper, and commit ourselves to a culture that blends, in equal parts, the collective wisdom of research and the mastery of the craft. The task, and the challenge, is innovation.

I pointed out earlier that there is no clear or single formula for the way forward. The ten destinations that follow are intended to help provoke discussion and forge new channels of communication, marking new byways on our map that will, if followed, more closely connect the energies and ideas of all who are invested in public radio programming:

1. **Invite independents to the local programming table.** Localism is a central strategy for many stations throughout the system; by strengthening local service and developing programming that is specific to the community, the thinking goes, a station will remain vital in this “listener-choice” era brought on by satellite radio, live streaming, podcasting, and the plethora of technology driven competitors. The independent producer network is nationwide; our research indicates heavy concentration in the coastal urban-media centers spread out across 44 states. AIR conducted a station survey in 2003 aimed at learning how stations work with independent producers and identifying what opportunities might exist.

From major markets down to small community radio outlets, nearly half of the station respondents expressed interest in a proposed “producer-in-residence” program.⁶ AIR has joined forces with Interlochen Radio to create a fledging residency program, now entering its third year.

Station managers and PD’s should explore PRX’s and AIR’s on-line producers’ directories⁷ and locate the independent producers living within range of their signal. Invite them – individually, or all together – to an informal brainstorming lunch. Include a couple of the brightest in-house producers, and be sure to invite those who work in-house filing for NPR on the side. Keep an open agenda, and begin simply by sharing new ideas for what is exciting, interesting, and local.

2. **Plant a fresh stake in the franchise of sound.** There is a tremendous opportunity for local stations to take a visible and leading role in their communities around podcasting. Stations should make a commitment to tap into the reservoir of amateur producers. It is perfectly reasonable to consider that the next major talent is out there – you have to go find her or him. Start up a series of free “how-to” station seminars on podcasting – maybe something similar to Torey Malatia’s vision of a “studio system.” Recruit participants over the air. Consider sending a young intern out to the street corner – in front of the student union, in the working class neighborhood in town, at the junior high school when classes are letting out, to scope out anybody wearing an iPod and give them an invitation. Take a first step toward bringing what is outside inside.
3. **Establish public radio’s “First Franchise” Fellowship.** Academic and art institutions reward and support innovation and professional development through fellowship programs. Public radio has an opportunity to draw on this model and put renewed emphasis on the importance of the craft and the need to elevate the best and brightest. NPR is undertaking an ambitious and important Local News Initiative that is intended to work at the member-station level to further build and strengthen public radio journalism. NPR has an opportunity to also work on that same frontier to reenergize public radio’s innovation in sound by leading the system in establishing a one year fellowship program. This is, perhaps, one way to make Margaret Low Smith’s “lab” idea a reality. Industry leaders have an opportunity to come together with a handful of key public radio funders to explore how a fellowship program might be established. Representatives from the Knight Fellowship, Nieman, or Radcliffe Institute could

⁶ Survey results listed at http://www.airmedia.org/ops/local_stations.php#questions

⁷ <http://www.airmedia.org> and <http://www.prx.org> click on “members” tab

be invited in to advise public radio on creating a high visibility program to preserve and expand public radio's "sound franchise." The Fellowship would attract a wide range of producers from inside and outside the public radio industry. The emphasis would be on experimentation, innovation, and the creative use of sound expressly for public radio. Recipients would receive the support of the larger community to develop their ideas, and they would be given a generous stipend. Their work would be broadcast within existing news magazines and/ or perhaps used to create a stand-alone program or special series.

4. **Convene a Program-Makers Table.** In this report, we suggest there is a trust issue between producers and acquirers. Acquirers and independent producers are in the business of creating programming, yet there are no venues where they can meet, share ideas, or forge a common vision of programming – build trust. Comments throughout my conversations spoke to this need, "We need a new language ...develop a new grammar... assimilate the two cultures...tease out a better understanding..."

CPB has an opportunity to convene various stakeholders from the independent producer, station, and network communities for the first time to take steps to address the critical needs and ideas put forward in this report, and begin the process of forging a common vision of programming.

PRPD has a unique opportunity to play an important role filling this void by developing a Program-Makers' track at its next conference. There is an opportunity to reach out to independent and station-based producers to bring them into the fold with PD's in a proactive discussion. The assignment is innovation. This type of convergence could help to facilitate the needed trust, provide a new venue for relationship building, and begin to overcome the divisions that exist between producers and gatekeepers.

5. **Sound = money. Money = Power.** Producers or fundraisers who are calling on new funding prospects should always bring tape. You are in the business of sound. Make it standard practice to touch your prospect's imagination through their ears before you ask them for money. You can also tell the story of public radio's First Franchise. How many baby boomer prospects have heard tape from the first broadcast of ATC? How many have heard something more recently produced that has the same qualities of sound "taking you there?"

Staying with the idea of how to draw money to innovative sound, Development Exchange, Inc. Executive Director Doug Eichten has been considering ways for his organization of fund-raising experts to collaborate with the producer community. The time is right for AIR or PRX to come together with DEI. Station fundraisers need to meet the invisible talent in their communities and vice versa. This is a resource that may have fundraising potential for all. DEI should work with AIR or PRX to create a track at the next PRDMC devoted to how independent producers and stations might partner to raise money. Activities shouldn't be contingent on attending a conference, though. DEI could partner with producers to convene a series of on-line intensives intended to inform and professionalize independents' fundraising, e.g.: how to craft a compelling story for funders, how to build a well-balanced budget from the inception of a project, how to decide whether an idea has fundraising potential or not. [note: as this report was being edited, AIR announced that it was in discussion with DEI about creating conference tracks.]

6. **Make the invisible visible:** PRX and AIR are unique junctions where producers and acquirers meet. PRX in particular, as a conduit for supply and demand, has given powerful shape and dimension to the work of the independent producer sector. As the service grows, PRX can play an important role in the system by issuing periodic reports on activities and trends. By quantifying the relationship between independents and acquirers – putting concrete numbers to

a range of questions about supply and demand – they will help confront the perception that the system is underutilizing an important resource. It will be useful to understand, over time, which formats are most in demand, and to learn how stations are using independent features. PRX is beginning to encourage invention with incentives to stations to produce local programs with independent programming... an important step in the right direction.

7. **More research.** Our report on *Mapping Public Radio's independent Landscape* presents a fresh view of the freelancer – the individual producer – and is only a partial picture of the full “Independent Landscape.” The system is also home to dozens, if not hundreds, of independent production houses that make important contributions to the networks and to public radio stations and their service to listeners. These shops often operate as 501(c)(3)'s and, in many instances, are the natural evolution of successful freelancers who have hired staff and developed an infrastructure around their work. In our content analysis, we had a glimpse of how much freelance work these independent shops are commissioning themselves, and what portion of the content stream is devoted to their programming (3%). There is a compelling need to fill out the rest of the picture of public radio's independent sector. CPB, and perhaps a consortium of investors, should consider commissioning this analysis.
8. **Adopt the clock:** Independent producers who are making long form information programming should produce one hour programs to fit the 20/40 clock, and be sure to conclude by 58:00 to give stations enough time for local ID/credits. Inserting a newscast hole from :01 - :06 is another format consideration that should be carefully weighed by producers, particularly for programs featuring topical news or current affairs. Make a round of phone calls to top station prospects to determine how important providing a newscast hole is going to be.
9. **Break the clock:** Count on one hand the producers for whom public radio newsmagazines will break format. This is sanctified space, where listeners converge in greatest number, and offering a unique and exciting platform for a producer to show their talent and, at the same time, get instant feedback on their work. *All Things Considered* and *Morning Edition*, the two flagship magazines, and other programs such as *The World* and *Day to Day* should consider broadening the roster of format-breaking producers by soliciting pieces to run once or twice per quarter and aim to rotate the assignment between station-based, independent, and in-house producers. Public Radio in the US can learn some things from the BBC model of working with independent producers, whereby they issue each year a catalogue of RFP's to a selected list of producers whose work meets established standards. Breaking format risks the ire of stations, as *ATC's* Chris Turpin points out earlier in this report. It's important, of course, that there be clear communication with stations well in advance of a format-breaking piece. Perhaps it becomes a “first-Monday-of-the-month” occasion... something stations can count on and plan for accordingly. NPR would need to assert their leadership, and emphasize the importance of allowing more experimental, in-depth exploration of a single topic: giving producers a chance to “stretch out” as they desire, and giving listeners a new way to hear public radio, especially during non-breaking news cycles.
10. **Scare yourself.** Stations and network staff should encourage and even demand risk-taking in editorial meetings by seeking out or assigning stories that go beyond the boundaries of what is considered the norm...stories that genuinely give reason for the editor to squirm a bit; stories that can only be done if you throw away conventional wisdom. Suspend your aversion to failure. Adopt a try-it-again attitude. Make it a priority to go with one of the “scare yourself” pitches regularly. (note: Recommendation #9: “Break the Clock” could fall into an NPR's “scare yourself” category.)

V. Setting the Table

There are new conversations to be had about the role of independent producers, public radio programming, and a vision of the future. In part III of this report, I outlined the challenges to public radio centered on four broad areas of concern: Revenue, Programming Culture, Diversity, and Innovation. I have distilled these concerns into a framework of “needs” for producers, acquirers, program stakeholders to consider as they come to the discussion table in a new way. These points below, along with the “Critical Questions” (Appendix B), help form the agenda and “set the table” for the new types of programming forums I’m encouraging. These points also provide a framework for session topics at professional gatherings, or as agenda points for board and editorial meetings.

Public radio has a need to:

- ensure its competitive edge.
- consider that a sector of experienced, high quality producers may be under-utilized.
- expand the index of values that define successful programming. PRPD Core Values project and PRX’s peer review system are examples of positive steps toward the next level of defining value.
- make time and resources available for program innovation so program makers can incubate and experiment with bold new ideas that can be smartly, reliably executed and supported.
- find a home for sound-rich or experimental formats; reinvigorate and renew the distinguishing characteristics of the medium.
- re-examine and redefine what is meant by “in-depth.”
- take a fresh look at the economy of independent production and determine to what extent the system bears responsibility for supporting it.
- build trust and foster stronger alliances between producers and stations for mutual benefit.
- bridge the cultural divide that exists between producers and acquirers in programming by instigating dialogue – gathering places – where a common vision is forged and a new culture of program-making can take root.

VI. Last Words

In this report, I have put forward some new information and some new ideas. I’ve proposed that public radio, now stronger and more vital than ever before, is at a critical crossroads. Those who have worked over many years to shape this industry must now forge a new direction. This new direction must include the space and place for innovation and risk, and bring the diversity, energy, and skill of the independent community more closely into the mainstream fold.

My hope is that my ideas will inspire your ideas; that you’ll be moved to pick up your phone, send an e-mail, pipe up in an editorial meeting, bang your gavel, ring your bell, take a risk. It comes down to individual action. Be bold. It’s up to you to chart the next set of byways on the map we’ve begun to explore.

Appendix A

Participants in review of *Key Findings, Critical Questions* interim report

In addition to the formal briefings convened by SchardtMEDIA, there is an extensive on-line resource available that includes the full *Key Findings, Critical Questions* report (November 2004), all of the original research from the project partners, and the means to send feedback and questions at <http://www.SchardtMEDIA.org>. The *Findings* report was distributed upon publication by e-mail to 348 individuals who had, either by participating in the Walrus surveys or some other means, asked to receive a copy of the report on its release. Three announcements went out to the system via various industry listserves announcing the report and pointing to its availability on-line.

Project Director Sue Schardt presented preliminary findings in two forums sponsored by the Association of independents in Radio (AIR): their annual “open” membership meeting convened on-line on October 12, 2004 and at PRPD in September 2005 during an open session that included AIR members and others. Project advisors gathered at the end of October 2004 at the Third Coast International Radio Festival in Chicago for the first formal briefing on the report. The subsequent six months – through spring 2005 – Schardt convened more than a dozen key groups of producers and acquirers to reflect on the findings and inform the final recommendations and action steps. Following is a list of those who participated in organized discussions, the public forums, or via response to the report on-line:

1. Ahl, Jonathan; News Director, WCBU/Peoria
2. Allison, Jay; independent producer and Executive Director, Atlantic Public Media
3. Barrington, Helen; independent producer
4. Beach, Geo; independent producer, AIR Board
5. Bernstein, Barbara; independent producer
6. Berryhill, Peggy; Director of Services and Planning, CNAPR (Project Advisor)
7. Bevilacqua, Joe; independent producer
8. Bond, Stacy; independent producer
9. Brandon, Dolores; Executive Director/AIR (Project Advisor)
10. Brown, Karen; independent producer
11. Cameron Lawrence, Diane; independent producer
12. Cappello, Dean; Vice President of Programming, WNYC/New York
13. Clifford, Terry; Co-CEO, SRG
14. Coombs, Amy; independent producer
15. Davis Rehm, Dana; VP Member Services, NPR
16. Donahue, Kerry; independent producer, AIR Board
17. Doyle, Doug; News Director, WBGO/Newark
18. Drake Oldenbourg, Nannette; independent producer
19. Ellcessor, Mikel; Operations Manager, WNYC/New York
20. Fifer, Sally Jo; President, ITVS
21. Freedman, David; General Manager, WWOZ/New Orleans
22. Gehl, Robin; Vice President of Programming, WGUC/Cincinnati
23. Gevins, Adi; Real Reality Research/independent producer
24. Girshman, Peggy; Assistant Managing Editor, NPR (Project Advisor)
25. Gronau, Kathy; Creative PR
26. Hennessey, Erin; News Director, KPLU/Seattle
27. Jackson, Maureen; AIR Board
28. Jones, Ron; Program Director, WBEZ/Chicago
29. Kling, William; President and CEO of American Public Media Group
30. Low Smith, Margaret; Vice President, Programming, NPR
31. MacDonald, Joyce; Director of Program Services, NPR
32. Malatia, Torey; General Manager, WBEZ/Chicago
33. Manilla, Ben; independent producer
34. Marimow, Bill; Vice President for News, NPR
35. Marzahl, Thomas; independent producer
36. McVicar, Gregg; independent producer
37. Melby, Todd; independent producer
38. Melnicove, Margo; Producer Liaison, NPR (formerly)
39. Miller, Jonathan; independent producer
40. Mills, Ken; Ken Mills Agency

Participants, continued:

41. Myatt, Alice; Public Television consultant, Center for Digital Democracy.
42. Nelson, Davia; independent producer, Kitchen Sisters (Project Advisor)
43. Nixon, Jackie; Director of Strategic Planning, NPR
44. Nuzum, Eric; Program/Acquisitions Manager, NPR
45. Ott, Tanya; independent producer and News Director, WBHM/Birmingham
46. Paul, Richard; independent producer
47. Payne, Matthew; AIR Board
48. Rabinowitz, Joan; Executive Director of Jack Straw Productions, AIR Board
49. Rivera, Marita; Vice President/General Manager for Radio, WGBH/Boston (investor)
50. Roberts, Dmae; independent producer, AIR Board
51. Robinson, Steve; Vice President Radio, WFMT/Chicago
52. Rowland, Steve; independent producer
53. Rueger, Barry; independent producer, AIR Secretary
54. Russell, Jim; Senior Vice President and General Manager, American Public Media
55. Schultz, Heidi; Program Manager for Specials and Limited Specials, PRI
56. Selik, Laurie; Managing Producer, Marketplace Productions
57. Shapiro, Jake; Executive Director, PRX (Project Advisor)
58. Spear, Dale; VP of Programming, PRI (formerly) (Project Advisor)
59. Spencer, Steve; General Manager, WYSO/Yellow Springs (formerly)
60. Stevens, Sue; News Director, WNII/Rockford
61. Thomas, Tom; Co-CEO, SRG
62. Turpin, Chris; Executive Producer, NPR's *All Things Considered*
63. Voci, John; Station Director for WNAN-WCAI/Woods Hole (Project Advisor)
64. Walker, Connie; President, PRNDI and News Director, WUNC/Chapel Hill
65. Ward, Melinda; Senior Vice President of PRI Productions
66. Warren, Bruce; Program Director, WXPB/Philadelphia & PRPD board chairman
67. Wasser, Fred; Executive Producer, WUNC/Chapel Hill
68. West, Margaret; independent producer
69. Wynn, Audrey; Senior Producer, NPR
70. Zorn, Johanna; Executive Director of 3rd Coast International Radio Festival (Project Advisor)

Appendix B

Critical Questions

At the outset of this project, we formulated research questions and, in the process of finding answers, have begun to draw our 'map' of the independent landscape. The "10 Critical Questions" that were first presented in the "Key Findings, Critical Questions" report (November 2004) are, in a very real sense, the points we've marked on the map. These points represent a convergence of stakeholders as they considered the findings of our research:

1. There is growing competition for listeners' attention. What opportunities does the industry have to utilize the resources of the independent producer community to meet this challenge?
2. Is it sufficient to have independent producers filling 2% of the content stream, as reported by Craig Oliver in his content analysis? Should there be a "quota" or a goal for how much of the stream comes from the independent sector?
3. Are alternative formats, such as long-form storytelling, evocative soundscapes, or extensively researched programming important to public radio's continuing success? Given the incredibly crowded and competitive programming field, and the lack of demonstrated ability to generate listener sensitive income, where would such programs find a home?
4. Has the definition of "in-depth" changed over time?
5. Does the industry have a responsibility to ensure the economic viability of independent producers?
6. Is it best to take a survival of the fittest approach to the independent economy, and assume that the best negotiators or "cream of the crop" producers who get the most airtime are a natural and sufficient use of the resource in serving listeners?
7. Do opportunities exist that foster stronger alliances between freelance producers and local radio stations?
8. What is the best way to foster mutual understanding between producers and acquirers of the trends and forces driving their respective realities?
9. From where will money for any new initiatives come?
10. Should network or station-based producers have more opportunity than solo independents to spread their wings creatively if they are so inclined?

Appendix C

The Economy: Critiquing the methodology

There were useful observations and suggestions worth noting specific to the project methodologies developed with my Research Partners Craig Oliver and Walrus Research. I found the discussions with stakeholders regarding the quantitative analysis in particular to be quite insightful. I include here a summary of the points raised with the view that it will be important to evaluate and consider them should future studies be undertaken.

Because this was a benchmark study, we were called to develop new methods for gathering data and break new ground to gain access to sensitive or proprietary data. This included contact information for hundreds of freelance producers working with the various programs and networks throughout the system, and also details concerning producers commissioned to do work and the commensurate pay for that work. Acquirers were bound ethically and sometimes legally to respecting the privacy of their freelance contractors. We worked hard to find compromises that provided us with what we needed to properly conduct our analysis, while respecting the limitations set by those from whom we were seeking the data. Complete details of our methodologies can be found at <http://www.SchardtMEDIA.org>. I'd invite interested readers to take time to read in particular Craig Oliver's full report.

Following are three key areas of interest and discussion that surfaced during the debriefings:

The Economy. The most controversial conclusion I presented in the *Findings* report was, based on Craig Oliver's quantitative analysis, public radio spends just one half of one cent per programming dollar on content from independent freelancers. It is important to summarize here conversations on this aspect of our study, and explain how we devised the carefully considered formulas that led us to our conclusion on this aspect of the independent economy.

One of the goals of the project in addressing the question of "value" relative to independent producers was, logically, to assess the independent producer economy and establish some financial benchmarks. Our analysis showed that, based on our definition of independent producer, the system invests approximately \$1.3 million per year in commissioned work. It was important to next ascertain how this figure compared to the overall investment public radio makes in programming. To this end, we asked the acquirers who showed up in our sample analysis of 2700 hour of programming to provide us with their programming acquisition budgets for the year. Key organizations were unable or unwilling to provide this data, which presented a limitation.

In spite of this, and in order to complete our analysis of the programming economy and independents' place in it, we pursued a second option and ultimately settled on the figure of \$259 million provided by CPB. This represents the "total programming economy" as reported in 2002 by all qualified stations, and this is the figure against which we measured the \$1.3 million per year spent on independent work, leading ultimately to the one half cent per dollar conclusion.

I had discussions at length with several stakeholders who were concerned about the use of this figure to represent the system's programming economy, and who felt that the conclusions or our study with respect to the economy were "overstated and misleading."

In the end and in spite of the limitation, it was important to begin to scrutinize the economy of independent production. With this study, and with the figures we've presented, we've opened the door to considering the value of independent contributions in a new way. One of the outcomes of

this aspect of our study will perhaps be to encourage stakeholders to be more forthcoming with the data needed for continuing analysis. I strongly recommend that future analysts work carefully with acquirers and producers to secure the financial data. Using the lessons learned from this report, I believe it will be possible to explore new methods for presenting an even deeper view of the independent programming economy. This is critical to the systems' overall understanding of programming choices as it considers opportunities and challenges ahead.

Sampling: This was a benchmark study. Another stated goal of the project was, therefore, to take an even-handed look at all of public radio. Rather than focus on NPR, PRI, or major market stations, we endeavored to ensure that minority consortia, Pacifica programs and freelancers, and small community stations were counted in the study. There are commonly held assumptions about which stations are the leading “clients” for independent content. Because we wanted to approach this without conditions, and not based on assumptions, we devised sampling methods that ensured that smaller stations that commission independently produced work were included.

In settling on our 21- station sample, therefore, we gave equal weight, for example, to KBAI in Columbia MO and WNYC-FM in New York. This led some to the opinion that, in order to have an accurate view, the sample should have been weighted more toward stations that are known to be the principal outlets for independent work. (These would be stations that attract the largest audiences for NPR news programs, such as WNYC, KQED, WBUR, etc..)

I am confident that, through the methodology we settled on, we've provided a solid “benchmark” and new insight into a number of areas. This new insight will certainly help define the parameters for future studies and decisions about sampling.

Terminology. The term “independent” – as in independent producer, or independent landscape – is subject to a variety of interpretations. For example, NPR’s definition of ‘independent producer’ includes production houses and organizations that produce programming distributed by NPR, but are not produced by NPR. CPB has another definition, AIR another.

Plenty of people have more casual definitions for the concept of “independent.” Through the course of this study, I learned of several leading station managers who proudly consider themselves to be independent producers. I found in many quarters that a certain badge of honor attaches to “independent.” It would be worthwhile to further explore the value system producers and acquirers ascribe to the concept of “independent producer.”

For the purposes of this study, we worked carefully to formulate specific definitions of “the subject” and, as put forward throughout the course of our work – in discussions with advisors, in the surveys themselves, and in our *Findings* report – we focused our attention on the individual independent producer. Still, we found a number of readers sensitive to the use of the term, expressing concern that some of the findings might be misinterpreted and used in broader ways than intended.

This study – *Mapping Public Radio's Independent Landscape* – examines just one sector of the independent community. While we did glean useful information in our content analysis about the niche filled by independent production houses such as *Living on Earth*, *Democracy Now*, or *Lichtenstein Creative Media*, we did not have adequate resources in this round to do a complete analysis of that sector.

As put forward previously in section IV (Destinations), it would be worthwhile to consider a follow-up study that examines the economy and contributions of this sector of “independents” as well.

INTERIM REPORT

Mapping Public Radio's Independent Landscape

Key Findings, Critical Questions

We think in relations. This is truly the form of all thought; and if there are any other forms they must be derived from this.

Herbert Spenser, First Principles (1867)

November 29, 2004

Steve Martin, Research Associate
Craig Oliver, Research Partner
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Sue Schardt, Project Director

CREDITS

Thanks to the project Advisors who helped a great deal in shaping the research, provided advice, and opened doors as we gathered the data needed for the study: Peggy Berryhill, Native American Public Radio; Dolores Brandon, Executive Director of AIR; Craig Curtis, Director of Research and Station Relations at MPR; Peggy Girshman, Assistant Managing Editor at NPR; Will Lewis, Management Consultant for KCRW/Los Angeles; Davia Nelson, Kitchen Sisters; Jake Shapiro, Executive Director of PRX; Dale Spear, Vice President of Programming and Acquisitions at PRI; John Voci, Station Director/WCAI-WNAN and WGBH; and Johanna Zorn, Executive Director of the Third Coast International Audio Festival. Jackie Nixon, Dana Davis Rehm, and Joyce MacDonald at NPR also offered valuable advice and assistance.

Jay Youngclaus, our liaison at CPB, has been a critical sounding board and readily available with his frank perspective, and to him I am grateful.

Mapping Public Radio's Independent Landscape is a project of SchardtMEDIA. This study would not have been possible without the financial support of the Corporation for Public Broadcasting, KCRW in Santa Monica, Minnesota Public Radio, Public Radio International, and WGBH in Boston. Our research would not have been as complete without assistance from our Project Partner, National Public Radio.

Bill Siemering serves as Contributing Editor, and the project's Research Partners are Walrus Research and Craig Oliver, with Steve Martin of SFM Consulting contributing as Research Associate. I'm grateful to each of them for their diligence and flexibility as we developed the methodologies, carried out the research, and navigated the occasional, unexpected turn in the road.

Sue Schardt, Project Director
Boston, MA

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INTRODUCTION

Mapping Public Radio's Independent Landscape set out to answer the question “what is the value of independently produced programming in public radio?” Our goal was to provide a thorough and objective analysis of a range of areas, including formats for commissioned work, funding, employment patterns, the programming economy, supply and demand, methods for evaluating programming, general business affairs, and the interrelationship between Acquirers and Independent Producers.

“Independent Producer” has a variety of definitions throughout the public radio system. For the purposes of this study, “Independent Producer” is considered to be an individual who is responsible for funding the cost of producing content, either through negotiated fees, corporation or foundation underwriting or grant, with their own funds, or some other means. We provide a glimpse into the role and contributions of financially independent production houses in the content analysis portion of the study, but the primary focus is freelancer reporters and Producers, commentators, and station-based Producers who shop out work independently of their station responsibilities. Our scope is domestic; foreign broadcasters or Producers who contribute to the content of US public radio are not included.

This is a benchmark study. It will set a bar for future studies, using the methodology we created for this project, to examine how certain measures evolve or whether perceptions shift over time. For example, while the findings detailed here give new insight into the volume of independent content that flows through the public radio system, it cannot tell us how this compares to five years ago. It will, however, provide a basis by which we may now make comparisons five years from now, if we choose to. Likewise, when we ask Acquirers and Producers whether they believe rates paid to Independent Producers is improving or not, we are not able to shed light on whether the opinion has shifted at all over time. In setting a baseline with this report, we will now be able to ask this question in the future and have perspective on whether opinions have shifted or not.

The research, which commenced in January 2004, was comprised of an analysis of nearly 2700 hours of content airing on a sample group of 21 public radio stations between 6am and midnight from September 1, 2002 to September 30, 2003 (addendum D) well as two extensive on-line surveys – one of Producers and a second survey of Acquirers. The 345 freelancers, reporters, and Acquirers who took time to complete the surveys are affiliated with dozens of public radio programs, including those produced or distributed by NPR, PRI, Pacifica, and AIROS, as well as those originating at local stations, independent production houses and minority consortia. Nearly half the Acquirers who participated in the study (47%) are Program Directors, 35% NPR employees, 12% work for PRI, and 7% work for other national program Producers or syndicates. The profile of the Producer-participants is detailed extensively beginning on page 6 of the report.

Research is most useful when it informs action. Now that we have this report in hand, the Findings detailed in this report will serve as a common “table” around which stakeholders will convene in the period ahead to consider, together, this question of the “value of independently produced programming” with new insight that’s offered in these pages.

FOREWORD

By Bill Siemering, Contributing Editor

We look at maps to see relationships: distances that separate and options for getting to our destination. One assumption of this study is that understanding the relationship between Independent Producers and Acquirers will enrich public radio. As in any exploration, we make discoveries. This takes us to a core question: how do we define public radio in 2004? How we answer that determines whether or not we have the same destination.

The Key Findings in Mapping Public Radio's Landscape are an important first step to answering this question. I'm reminded of a map I bought before traveling to Mongolia, where there are few paved roads and you often travel the countryside following tracks. The map had this disclaimer: "Road/track information is unreliable. Does Hasagt really exist without some sort of track to it? If so where? Do the roads/tracks shown on this map really end where our available research indicate? ... Please regard this map as a provisional map."

Likewise, while this study is an excellent way of understanding the landscape, it is only a first step and to some degree provisional.

Because of world events and the decline of commercial broadcast journalism¹, public radio has evolved into "a competitive news source for influential listeners." The Acquirers who respond to this survey, who are mostly station program directors, but include a healthy contingent of network staffers, are most interested in acquiring commentaries and news pieces, and the Realists producers are successful in supplying this need.

At the same time, both the Independent Producers and Acquirers agree that the producers make a valuable contribution to public radio. However, according to the content analysis, only two-percent of the programming is from individual Independent Producers. And much of this is in the form of commentaries and essays, not evocative, sound-rich pieces.

The PRPD Core Values characteristics include "curiosity, idealism, and a uniquely human voice; conversational, authentic and intimate; attention to detail, music, sound elements, language." They are the result of extensive audience research and describe the ideals that listeners value most in public radio programming, whether from Independent Producers, local stations or the networks.

Research is what has also driven the evolution of public radio into a primary news source. When considering PRPD's descriptions of the craft in the context of what we've learned in this study about the effect public radio's news success has had on limiting demand and air space for more adventuresome uses of the medium, I wonder if we've arrived at different destinations.

The differences between Acquirers and Producers uncovered in this study regarding the use of Arbitron and focus groups are understandable. While producers can benefit from some research, some of it is irrelevant to how they work or their objectives and assumptions. *New Yorker* editor David Remnick said, "I have never been to a focus group. I'm not interested. It's not because I don't care about readers but because I do. The *New Yorker* reader does not want to be anticipated or

¹Based upon "The State of the New Media 2004 Annual Report on American Journalism" by the Project for Excellence in Journalism (journalism.org). Some key findings: 61% of national television and radio journalists say that the state of journalism is moving in the wrong direction. 51% are concerned about the quality of journalism. 78% say too little attention is given to complex issues. In the last seven year, newsroom staffing dropped by 57% -44% full-time and 71% part-time. Decline of journalism is also documented in "The News about the News" American Journalism in Peril" by Leonard Downie and Robert Kaiser, both editors at the Washington Post.

pandered to. Our reader wants to be surprised or thrilled. Thrilled never comes out of a focus group." In other words, research can be valuable, but it is very difficult to calculate to what degree research does, or should, influence the creative process.

Over the years, both when I was Executive Producer at *Soundprint* and as a listener, I've regarded the pieces from independent producers as:

- Reflecting the diversity of place, viewpoint and ethnicity that is America
- Taking listeners to neighborhoods they may only glimpse from the expressway, or to a town they recognize only as a name on an exit sign on the Interstate
- As a source of innovative audio techniques
- A way of bringing new talent to the system.
- Enhancing the news magazines with features that breathe, and that engage the listeners' imagination

In this research, the Acquirers seem to see the value of Producers' in a more limited light.

With the ascendancy of satellite radio and the increasing use of the Internet for information and music, it's important for us to define the unique role for public radio now while continuing to serve our core audience. So we ask, what is important? Is it still important to reflect diversity? To celebrate the human experience? To capitalize on the strengths of radio as a sound medium? To be a creator and curator of culture? To inspire young people to the medium through innovative examples? As the research in this study shows, there are at least three different mindsets (Addendum B) at work here whose visions vary.

To me, the most disturbing finding is the little use of the work of Independent Producers, given the value they have added to public radio in the past. In addition to projects such as "Hearing Voices" and "Worlds of Difference" that are working to use independently produced programming in new ways, the Public Radio Exchange (PRX) is working to connect with station program directors who are interested in creating a distinctive sound by drawing upon Independent Producers. PRX facilitates the relationship between producers and acquirers by finding available productions reviewed and rated. In turn, the process encourages a higher level of craft. And transom.org on the Web is another place for producers to present their work and encourage each other.

I don't like to see anyone impose limits on what radio can do. This is my bias after working in other places where the medium of radio is often the most important. In developing countries, for example, I've seen radio create a Commons by giving voice to people and helping them to solve their problems. I've seen how soap operas create a model for Tutsis and Hutus to live together in peace in Burundi and at the same time be the most popular program. In South Africa I've seen violent disputes settled on-air, and life saving information offered by health workers, where public officials are held accountable.

Radio can literally save lives by providing accurate information and by teaching conflict resolution and peace making. At the same time it still inspires listeners to sing and dance to the music. So I see radio with a new sense of purpose.

Most importantly, public radio needs to define itself in relation to the challenges to our older democracy, which has one of the widest gaps between what the people want and what the government does. People are hungry for community connections that transcend those things that divide us.

Retuning to this “mapping”, and the differences within our small community of public radio, informed about our differences, let’s focus on our common goals. This paper, this study, is but a first step. Using this information, the stakeholders need to come together to define ourselves and see how each contributes to the whole.

Let’s continue drawing the map so we can travel together once we agree on our destination.

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)

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 (31%)²

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.

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

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.

A c q u i r e r s / P r o d u c e r s

Converge...

Acquirers and Producers alike believe that Independent Producers have an important role to play. Both groups responded strongly and favorably to the idea that a) Independently produced programming brings significant value to listeners, and b) it would make a difference to the audience if there were no independent programming

Acquirers and Producers are wordsmiths, strongly identifying as writers. As a group, Independent Producers see themselves as writers first and foremost. Acquirers also strongly share this view of themselves, but identify primarily as broadcasters. Both groups also share the opinion that, in addition to being broadcaster and writers, they are journalists, and are responsible for educating their listeners.

The system should invest more in programming for minority, disadvantaged, and underserved listeners, and Producers and Acquirers agree that stations have become less willing to take risks in programming.

Producers with journalism training will produce better programming. While the response was not overwhelmingly positive, both Producers and Acquirers were in close alignment (2.7 and 2.9 respectively, on a scale of 4), indicating a slight bias in favor of Producers with journalism chops.

The power of the ear reigns supreme. When asked what methods they use to evaluate the impact of programming, both groups ranked their "own aesthetics" first, with "listener letters" ranking second. From there, the two groups split in their methodologies (see "the great divide," below).

Public radio is an exclusive club. Both Acquirers and Producers lean towards a view of public radio as an exclusive club, though not in overwhelmingly so. 65% of Producers and 53% of Acquirers believe that it is difficult for a newcomer to gain entry to the industry.

"Independent Producers are difficult to work with" was one of the stereotypes we tested in this study. In the end, the majority of both Acquirers and Producers did not agree with this statement.

Diverge...

The great divide: Arbitron research. Acquirer and Producer views of audience research to evaluate programming reveals the study's biggest divide between the two groups, both in the disposition to use research, as well perceptions of the benefits these methods bring to programming. When asked whether Arbitron data and focus groups were important tools that led to improvement in public radio, nine out of ten Acquirers answered affirmatively. Slightly less than half of Producers responded positively. As for audience data, eight in ten Acquirers say they "often" rely on Arbitron versus just one in ten Producers. The use of carriage reports also shows disparity with about half of the Acquirers and only a quarter of Producers citing this as useful tools.

One in ten Independent Producers say they "rarely or never" receive Arbitron data. This is, perhaps, a factor in why Producers don't value research in evaluating their work.

There is great disparity in the perception of how Independent Producers are compensated for their work. Our study indicates that the majority of Acquirers – nearly seven in ten – believe rates paid to Independent Producers are improving, while seven in ten Producers hold exactly the opposite view... believing rates have not improved in recent years.

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

Opportunity and demand

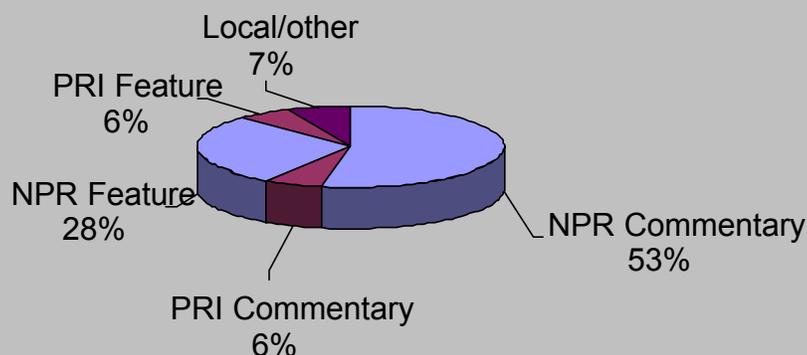
Short news features in the drive-time magazines are the name of the game

NPR leads the way in commissioning work from Independent Producers. We find in our content analysis that the vast majority (82%) of public radio's independent content stream is comprised primarily of segments aired during *Morning Edition* and *All Things Considered*. Breaking this down further, more than half of the independently produced programming NPR buys from Independents is in the form of commentaries, with short feature reports comprising just over a quarter (28%) of Independent output commissioned and distributed via NPR.

Over the course of one year, our respondents collectively produced 6323 news reports, which we've learned is the most in-demand format and holds the most potential to generate revenue for Independent Producers. More than half of the news reports were produced by Realists, 44 percent by Idealists and only 1 percent by Outsiders. In the same time period, our respondents also produced 991 audio art or story telling pieces, 874 essays or reviews and 2206 modules (56% for national distribution, 44% local distribution)³

³ Newscasts were not included in the content analysis

Independent Content by Type and Distributor



Mapping Public Radio's Independent Landscape: Content Analysis
 Craig Oliver, September 2004

Independently produced programming makes up a relatively small portion of the overall public radio program stream. Our content analysis indicates that just 5% of the programming flowing through the public radio system comes from Independents, that is, from either financially Independent production houses (such as *Living on Earth*, *Human Kind*, or *Democracy Now*) or from individual producer-reporters who identify as Independent. When we break this down further, we see 3% of this programming comes from Independent production houses, and only 2% comes from individual Independent Producers, mostly in the form of NPR commentaries and short feature reports inserted in the news magazines. These percentages are reflective of pieces or programs that were 'rolled over,' which suggests the amount of Independent programming actually commissioned is even lower than what these percentages represent.

Non-NPR distributed independently produced content makes up a very small portion of the overall public radio stream, with PRI distributed commentaries/features (mainly *Marketplace*) a distant second to NPR (12%). Other non-NPR program sources such as local stations, Pacifica, or minority consortia comprise about 7% of the content stream

Short features are in, long features and documentaries are out. In study of formats and lengths of pieces, we found half of all independent pieces fall between 2 and 5 minutes in length. Another 40% of independent programming falls into the 5 to 10 minute range. Pieces longer than 10 minutes comprise a relatively negligible portion of public radio's program stream, and there were no programming in the content analysis longer than 18 minutes. In light of the demand, it is not surprising to find that a minority of Producers report they are producing any work outside the short-form report, essay, or module format.

This study focused on the period between September 2002 -September 2003, While we know that long-form documentaries distributed as one-off's or in limited series are, especially in more recent times, a part of the landscape of public radio programming (American Radio Works, Leonard Bernstein: An American Life, Comedy-O-Rama), this format did not register at all in this analysis. This suggests that, when judged quantitatively, the long-form independently produced format was a negligible component of the public radio programming stream during the period of

our study. In such a programming environment, Producers generating anything other than news-feature reports will have a difficult time selling material and, therefore, a harder time making a living through independent production. Opportunities are few and prospects bleak for Producers interested in long-form radio (documentary series or one-offs), or those wishing to use public radio as a medium for self-expression or as an art-form.

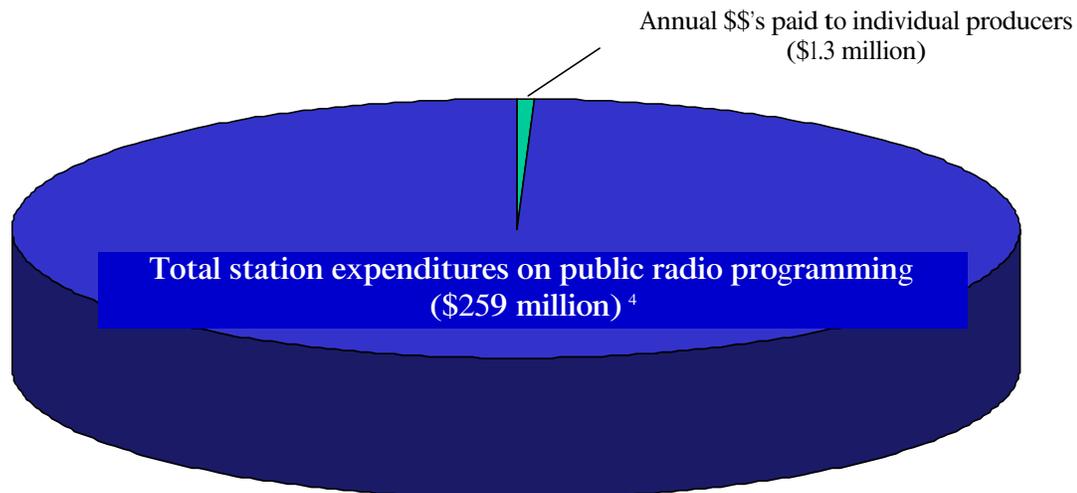
The majority of Acquirers say they want more Independent programming, so long as they conform to the short-format and can be easily dropped into another program or between programs in the schedule. Next to news reports, essays/reviews are what Acquirers say they want more of (64%), followed by art stories (62%). Given that the nearly half of the Acquirers participating in this study are Program Directors at local stations, and the dominant outlet for Art Stories (51%) are local stations, this may be indicative of an acquisitions market that holds potential for growth.

A slight majority of Acquirers (57%) did say they'd like to have more one-time special programs, documentaries, or special series.

The Economy

Independent radio production is not a thriving business

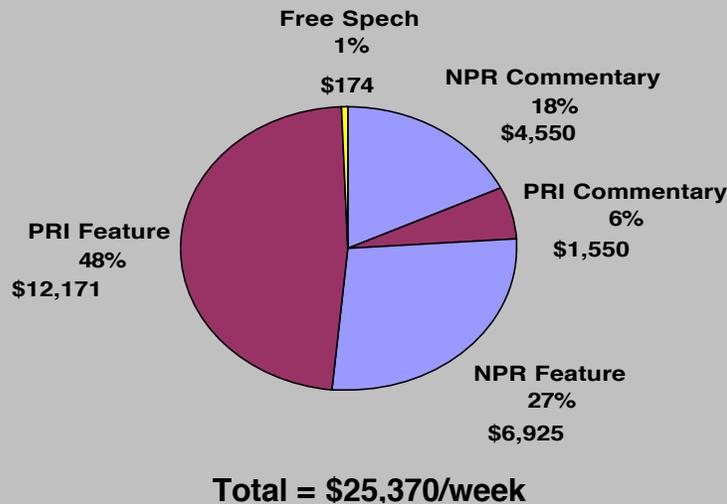
For every programming dollar flowing through the public radio system, about one half cent goes into the pocket of the Independent Producer. Our content analysis reveals that public radio as a whole – both nationally and locally – spends a weekly average of \$25,000 on independently produced programming from individual producers, or \$1.3 million each year.



In order to give some perspective on the economy of independent production, we measure this weekly expenditure against the total public radio station programming economy for 2002 (\$259,000,000)⁴ and find that, in this context, the percentage of revenues expended on independent produced programming is .5%. This is not inclusive of network fees for independent work, which would yield an even lower total percentage of the total economy.

⁴ CPB, FY 2002 (Line E1, Schedule E of the Annual Financial Report that Grantees file with CPB) represents the total public radio station costs of production and/or acquisition of programming. This does not include fees paid by networks for independent work.

Weekly Revenues to Individual Independent Producers



PRI distributed programs leads the way total revenues paid to Independent Producers (54%), with NPR expenditures making up 45% of the total revenues reported during the period of the project sample week. FSRN registers with 1% of the revenues spent. Other Acquirers such as Pacifica, National Native News, or station-based productions did not register in the analysis. PRI revenues skewed higher in this sample because of longer form pieces commissioned by individual programs. Newscast spots were not included in the analysis and, though this margin between PRI and NPR expenditures is relatively narrow, it is significant because NPR dominants in the absolute number of pieces they commission.

The average fee paid for Independent work ranges from \$235 for a commentary to \$796 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 news and features aired on NPR programs.

While we found that some Acquirers pay a flat rate for commentaries or features, others pay what is negotiated with an individual. In our sample, a few producers with negotiated rates skewed the average cost upward. In some cases we determined Acquirers pay more for a higher level of expertise from a commentator.

Three quarters of Independent Producers earn most of their income outside of their radio work and more than four in ten producers (43%) report that their gross income does not exceed their expenses; that they did not generate net income from their Independent work.

A quarter of Independent Producers consider their radio work to be a hobby.

There is some disparity between what Producers are aspiring to economically and what they are actually achieving. When we look at Producers as an entire group, more than half said they are trying to make a living with their Independent radio work. Of this total group, the majority – 77% – report that most of their income comes from sources other than their independent production. When we focus a bit deeper on that half of the group who are trying to make a living, we find that 64% earned some net income through their Independent Production work, though we cannot tell from our analysis how much net income. Another third of Independent Producers who are trying to make a living report a net loss or zero earnings.

Independent Producers are not succeeding in expanding beyond public radio. When we queried entrepreneurial initiative and opportunities Independent Producers are pursuing to expand into new markets or sources of revenue outside of public radio, we find little success. The vast majority (95%) of Independent Producers say they receive “minimal or no” funding from streaming or downloading, and little to no revenue coming from sales or merchandising. Even with respect to more conventional forms of fund-raising, the great majority (88%) answered “minimal or no” to securing underwriting as a source of revenue to support their work. The same number indicated that they have developed few if any secondary markets for their work.

The leading source of funding for independently produced programming, outside of negotiated fees, comes from Producers themselves. When we asked about sources for supplementing the income earned from Acquirers fees, more than four in ten Producers (43%) report “self-funding” as “Major or Minor” source. Foundation grants rank as the next leading source for Producers (39%). Partner stations are reported by one out of five of Independents to be a source of supplemental income. CPB is listed as source of financial support for only 7% of Independent Producers through direct contract, and another 14% through subcontracting with other projects.

One in five Independent Producers cite “station partnership” as a source of funding.

Funding	Major/Minor	Minimal/Not
Self-Funding	43	57
Grant Foundation	39	61
Partner Station	20	80
Partner Network	15	86
Subcontract CPB	14	87
Secondary Mkts	13	87
Corp Underwriting	12	88
Sale Merchandise	8	92
Grant CPB	7	93
Partner Company	6	94
Stream Download	5	95

Independent Producers: Who They Are, What They Think, What They Produce
Walrus Research, Spring 2004

CRITICAL QUESTIONS

Bill Siemering, in his Foreword to this report, describes our “mapping” as a first step and, in this section of the report, we provide a framework for what the next step for the project will be.

The following Critical Questions were posed by project Advisors as they proof-read a draft of this report. This is not an exhaustive list, by any means. The correlations of various findings and related questions are meant to stimulate new thinking and ideas, and help to inform the agenda for convening stakeholders throughout the system as we begin to discuss the project’s Findings.

1. **Looking at the total sector of Independent Producers, it appears that public radio’s traditional funding sources don’t provide a strong economic base.**

Q: Does the industry have a responsibility to ensure the economic viability of Independent Producers? If so, what is the reasoning?

Q: Is it wiser to take a survival of the fittest approach to the Independent economy, and assume that the best negotiators or the ‘cream of the crop’ producers will rise to the top, and have the best chance of thriving, and of serving listeners with their work?

Q: If the public radio system values independently produced programming, is it logical or necessary that the barometer of economic support should register more highly?

Q: Are there any opportunities to build on the foundation of support for freelance producers that exists at the local radio stations?

2. **The community of Independent Producers is smart, diverse, and includes a contingent of young producers who are not yet committed to radio as a profession.**

Q: At a time when we see growing challenges to the industry, is there an opportunity to better harness the resources of the Independent Producer community in a way that could enhance public radio’s competitive stance? Or is it best to play to the proven strength of the industry’s programming and not risk trying to upset a successful formula?

Q: How important is it to try to foster environment where younger producers would have a chance to thrive?

3. **Acquirers say they are interested in a range of formats from Independent Producers.**

Q: Is there an onus on individual producers to learn to market their programming better to Acquirers?

Q: Are we in a situation where there are too many suppliers but not enough shelf space?

4. **Conventional thinking right now is that satellite radio and streaming audio threatens to erode public radio’s listener base. As a result, many stations are thinking about how to be more strategic locally to strength their position.**

Q: Is there a way for stations work more closely with the Independent Producer community to build their local program identity and bolster their position strategically?

Q: Along these same lines, is there an opportunity with HD Radio or streaming for stations to form stronger ties to Independent Producers?

5. We are currently in period where public radio is considered, by all measures, a tremendous success story. The growth of the industry in terms of revenues and the size of listenership can be attributed, in large part, to its overwhelming success in serving its audience with high quality in-depth journalism. This study seems to indicate that one of the consequences of this success is that public radio has evolved into a limited platform for programming produced by Independent Producers, both in terms of the volume of the programming stream comprised of independent work, and also in the dearth of opportunity for formats other than short-form reporting or commentary.

Q: Are alternative formats, such as storytelling, evocative soundscapes, or extensively researched programs a necessary sacrifice of public radio's enormous success as a provider of in-depth journalism?

Q: Are there incentives for increasing airtime for independently produced, alternative formats?

Q: Given the incredibly crowded and competitive programming field, and the lack of demonstrated ability to generate listener sensitive income, where would such programs find a home?

Q: Should public radio simply stick to its successful "brand" as a high quality provider of in-depth news as it considers strategies for the future?

Q: Given that 90% of independently produced programming that turned up in this study is less than 10 minutes in length, has the description "in-depth" changed in meaning over time? Does 10 minutes allow for 'in-depth'? Does 5 minutes allow for in-depth?

Following are additional "critical questions" that have emerged during debriefings after the December 7, 2004 release of "Key Findings, Critical Questions":

6. Some consider it a luxury to take the time to produce long-form programming that focuses on a single-topic, is in-depth, sound-rich, and generally requires some sort of special funding.

Q: If the Acquirer has an in-house Independent Producer – someone working full or part time on the payroll, producing independently on the side – is the incentive to keep such an assignment in-house greater than looking outside?

Q: From an Acquirers P.O.V., what is the incentive for giving this sort of an assignment over to an Independent Producer who works outside their usual infra-structure? Is there something an outside Independent brings that is of unique value?

Appendix A : Research Questions

We convened *Mapping Public Radio's Independent Landscape's* research partners, advisors and investors over the course of several months beginning in September 2003 to develop a set of research questions that would be used to develop the surveys and focus the goals of the project. Following is a distilled list of the questions, grouped according to the findings outlined in this report.

Profile:

- What other things are independents doing to supplement their income (i.e.: teaching)?
- Do independents involved in station partnerships fare better than those who seek to go it alone?
- Get at a breakout of how much of the Independent pool are veterans. Ask the question “how long have you been producing content for US public radio?” to get at a break-out of old-timers vs. mid-career vs. newcomers.
- Where do producers live and work?
- How many minorities are there in the Independent Producer community?

Acquirers and Producers converge, diverge

- How many Producers have journalism training? Do acquirers favor those with journalism background?
- Where do producers and acquirers' definition of “public service” converge or diverge?
- How to best assess what their respective perceptions are of the relationship between radio programming and the listener... the relative importance of it, what their methodology is for assessing it, how often they assess it, etc
- Do public radio stations and network gatekeepers and independent producers have the same or differing programming values? How do the various constituencies “rate” their values relative to other groups...more important, less important, equally as important?
- What perceived relative value do public radio gatekeepers have for independent producers? Likewise, what perceived relative value do independents have for public radio gatekeepers?

Opportunity and demand

- What kind of appetite do stations have for long-form work?
- Are opportunities for independents in public radio are growing? Shrinking? Staying the same?
- What is the preferred format for producers?
- Who are the acquirers and what are the pools of money?
- What format do they actually produce the most of?
- What are buyers looking for in terms of content, length, format?
- Is NPR the big controlling entity that everyone imagines it is?
- Of the 40+ hours of NPR News programming each week how much is Independent work?
- What contributions do independents make to the system in terms of hours of content, program length that independents prefer or gravitate towards?

Economy

- Which sector is making the biggest investment in the independent economy?
- Are independent producers adequately compensated for their work? How are they valued as measured by the economics of the system-at-large?
- Do independents who are involved in station partnerships fare better than those who go it alone?
- What is the norm in terms of payment? What is the range? What are the differentiating factors?
- Do you do your radio work @ a deficit? What is the gain?
- How are Independent producers paid compared to station based producers?

Appendix B : Mindsets

Walrus Research applied a common research methodology called Factor Analysis to distill the many opinions gathered from the Acquirers and Producers respondents into central “modes of thinking¹.” The goal is to help us understand how opinions sometimes converge into a central belief systems. The 16 opinion questions presented in the survey were reduced down to three basic Mindsets, as follows:

Conventional.

- Comfortable with way public radio has evolved and the role of audience research; it has had a positive impact on public radio.
- It is important that public radio programming appeal to potential “givers.”
- Rates for Independent Producers have been improving.
- It’s best if producers have journalism training.
- Growing the audience has not led to a loss of mission-driven integrity
- Not nostalgic for the ‘old days.’ Public radio programming was not more innovative or creative years ago than it is today

Grievance

- Public radio is an exclusive club that sets a high bar for newcomers to enter.
- Stations have become more risk averse in their programming
- Independent Producers are more innovative than the stations or the networks.
- Acquirers are not very receptive to new ideas from Independent Producers
- Opportunities for Producers to place their work are diminishing

Potential

- The system needs more programming that appeals to minority, disadvantaged, and underserved listeners.
- There is a lot of high quality work from Independent Producers out there – “enough to fill an entire channel” – that is rarely if ever broadcast.
- There is little merit to the idea that Acquirers believe Independent Producers are difficult to work with
- It would make a difference to the audience if Independent work disappeared from public radio.

These Mindsets are not distinguished by a respondent’s role as an Acquirer and/or a Producer. Both categories of individuals can ascribe to a particular set of beliefs and, in this analysis, one who holds one of the beliefs is likelier to hold the other opinions in that category. Further, while this exercise can be useful in revealing underlying views that are at the heart of some of the thinking throughout the industry, it’s important not to assume that all people necessarily fall neatly into one of these categories. This is just one, reliable way to look through the multi-faceted and ever-changing prism of the public radio industry in order to understand some core belief-systems that drive opinions and, ultimately, decisions about programming and strategy.

¹ The Walrus Report describes the Mindsets in a section entitled “Modes of Thinking” (*Acquirers and Independent Producers* pg 17). The labels given each mode by Walrus Research are “Optimism, Grievance, Upside Potential” respectively.

Appendix C : Producers, in their own words

Not all Independent Producers are alike

At the conclusion of the Walrus Research survey, we gave Independent Producers an opportunity to describe themselves in their own words. Following is a selected sampling of those responses, which reveals the breadth of expertise, interests, and personalities:

I am a schoolteacher.

I am a general assignment news and feature reporter

My interests range over the entire panoply of American life.

All things animal, domestic and wild, are my main interests, and areas of expertise.

I'm especially interested in how such unavoidable immediacy in communications will/is radically changing people, society, and business relations.

[My interests lie in] culture, broadly defined.

It does take a lot of perseverance to get through and to have an idea that clicks with them (the Acquirer). They are the only arts show that allow you to be artistic so I find it worthwhile to keep on trying. I really don't think it's an issue of disrespect but one of the stresses of working on a weekly national show. [You have to] keep on trying and follow up with phone calls.

An interfaith, nonsectarian approach to religion, spirituality and/or ethics, especially where these topics intersect with public policy or culture.

Work that helps create community through story work at the intersection of public radio and the Internet new distribution models for public radio

I received a BA in Communications, minoring in Journalism and Music. I have taught Journalism FT at the college level -- and after graduate school worked for three years as a telecommunications policy analyst.

The skill I have here is to get people to tell me their stories and then relate those stories to their larger culture

I find that I produce a lot of spot news to keep the money flowing into my account. Granted, it's a trickle of money but consistent.

The reselling of pieces is how I (sort of) survive.

My interest is to expand the landscape of possibilities, and consequently, the multitude of choices available to the listener.

As a full-time reporter and radio (and soon to be television) producer, I have to be a Jill of all trades. I do four or five full-length (five-minute) pieces a week for our daily news program...I try for a rich sound piece about once a week.

*Mapping Public Radio's Independent Landscape: Key Findings, Critical Questions
November 29, 2004*

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Being a physician who works in social justice issues in medicine I'm interested in producing stories that focus both on health in society and the effects of large policies on individual people.

I am a Fellow at a think tank in Washington, DC. My experience is in legal issues, especially those relating to crime, law enforcement, and (more recently) civil liberties and the war on terrorism.

I'm a generalist, and believe in being a generalist. I believe everyone should have an interest in many different things, and my job as a reporter and producer is to spark listener's curiosity in the world around them. If I have made someone think outside the corporate mind set, I have done my job.

I'm interested in so many stories; I find new ones all the time, all around me. I'm fascinated by family dynamics, the intimate intricacies that form a family's interaction with one another -- especially Southern families, since that's where I live right now. Funny stories, small stories -- things people believed as children that they now know to be false.

I was trained as an anthropologist and my co producer was trained as a sociologist. So I guess you would say we're deeply-rooted in the humanities. Our main interest is non-traditional documentaries that incorporate oral histories. We usually take an issue and humanize it.

I mostly handle pieces about sports.

My area of interest is radio drama. Radio drama that has a social activist message. That deals with the struggle of mankind to be better and do right.

I come from an ocean conservation background and think that there is not enough science and long-term environmental content.

Radio Oddio

Any issue related to the use of American military forces and the Administration's commitments requiring the use of those forces, particularly in combat. The impact of U.S. foreign policy on the daily lives of professional military families.

I am a roving regional reporter with expertise in covering politics, policy, business, environment and breaking news in my home territory

My work as a freelance producer has focused on early American Christmas music, most of which is unfamiliar to the American public, or when it is familiar, is not generally understood to be music created in North America.

I have a master's degree in opera/music, so I specialize in arts and culture reporting. I am also a professional musician in my off hours. I did not have any training in journalism before I started working in radio, but I work at a station in a top ten market and produce for NPR regularly.

I have a degree in broadcast journalism and cover environmental topics. My family has a number of scientists/writers who spurred my interest in environmental journalism.

I have been an international economics correspondent for over 40 years.

*Mapping Public Radio's Independent Landscape: Key Findings, Critical Questions
November 29, 2004*

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My expertise is in puzzles -- which I create weekly

In addition to my work as a public radio reporter, I am a professional violinist.

No expertise

I've got an American Dream and the push to make life better and more enjoyable for listeners.

I am a parent with children in the public school system. I also taught music in 12 private preschools in NYC.

I am a conceptual artist driven to make art that helps people to think and feel about their community, society and self.

My expertise is also in artful programming, humor, wit and maximizing the use of music to evoke feelings. My interest is in bringing more engaging and thought-provoking material to listeners.

I survive by doing temp work in between assignments.

I have some training from college in journalism, however, most of what I know I learned from working for NPR.

Appendix D: Station sample

...excerpted from Craig Oliver's "Content Analysis" report, 9/24/04

To properly capture the contribution of independents to public radio programming, we established 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, which yields desirable geographical variety as well as variety of station format-types, including network-affiliated public radio, community licensees, minority consoritia, and Pacifica members stations.

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

Appendix E : Sample week

NPR provided us with detailed carriage data for one year of programming for each of the sample stations. This, in combination with DACS rundowns and other materials supplied by producers forms the pool of data for the content analysis. Beginning the week of January 12th, we commenced analysis of this carriage data dating from September 1, 2002 through September 30, 2003 identifying and categorizing programming that fits our definition of independently produced based on a random sampling of weeks as follows:

1-Sep	2002	Sunday	Wk 1
11-Nov	2002	Monday	Wk 2
21-Jan	2003	Tuesday	Wk 3
25-Mar	2003	Wednesday	Wk 4
8-May	2003	Thursday	Wk 1
18-Jul	2003	Friday	Wk2
27-Sep	2003	Saturday	Wk 3