Sustaining the Mission
Radio Strategic Investment Scenarios

Digital Distribution Implementation Initiative[1]

Contents

Sustaining the Mission

Public radio and television stations present deceptively simple identities – NPR and PBS – to the general public, identities that mask a complex array of licensee types, mission elements, funding levels and sources, and operating modes. Within that complexity, **public broadcasting is delivering unparalleled quantities of high quality public service**, most of it to large audiences compared to our mission competitors, but increasingly to specific audiences over a wide variety of digital distribution technologies.

This initiative addresses a need within the public broadcasting community – in particular, for senior management and governance personnel – to garner **guidance in making strategic investment decisions**. We know that we are under economic stress and we know that changes in our environment will not wait for that to resolve in our favor. Change is impatient and disruptive. How can we be proactive about our future? **This paper will argue that the more we seek to understand and manage change, the more likely we are to emerge with our mission intact.**

This paper describes a meta-analysis of the public and commercial media landscape, offers a look at the future five years out, and makes recommendations concerning the direction of our strategic investments, individually and collectively. **Ironically, to sustain our mission, it will argue that we must begin to make *repositioning* strategic investments – rather than those that sustain the legacy modes of carrying out our mission.** Indeed, it will argue that it will become increasingly difficult to make strategic investments in the legacy modes without jeopardizing public broadcasting's ability to reposition itself to meet the challenge of disruptive technologies.[2]

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[1] Funded by the Corporation for Public Broadcasting.

[2] Here and in the rest of the paper, the term technologies means not just hardware and software but also new techniques or methods of doing business. The term and broad definition of technologies are from Clayton M.

Background

Public broadcasting is moving into a new space with new opportunities and challenges for which we must be prepared. This initiative, begun in 2002 to update earlier scenario-building efforts from 1991 and 1997,[3] has resulted in an interim pair of scenarios papers for public radio and television first published in February 2003 and now completed here. These scenarios are the product of the CPB-funded "Digital Distribution Implementation Initiative (DDII)" working group, formed to help coordinate and learn from the major public broadcasting digital distribution projects. The document was also reviewed in December 2002 by a multi-disciplinary group of more than 30 experts from inside and outside public broadcasting.[4] The thoughts expressed reflect the group's collective experience with the rollout of a variety of digitally distributed services.

Although the name of this initiative implies otherwise, **the DDII scenarios have more to do with the kinds of services that public broadcasting will provide in the future and the business models for providing them than they do with technologies used to distribute them**. The work reflected in these documents is generally consistent with other efforts to gauge the state of the system, for example, the Station Resource Group's "Charting the Territory."[5]

In earlier efforts there was a greater emphasis placed on television rather than on radio owing, to television's earlier digital conversion. But now, m*uch has changed beyond the digital conversion of transmission*. Today, to borrow from Shakespeare, **the urgency in public television might be characterized as "*to be or not to be*."** In contrast, **public radio's urgency is more "*to be all we can be*."** As a result, both media have received close attention in this work.

Both of these urgencies suggest strategies that will require substantial change and a willingness to take risks in the furtherance of our mission. Although we are not without encouraging examples, we have a history of being risk-averse. ***We must recognize, however, that doing nothing also entails substantial risks.***

This paper discusses our legacy as broadcasters, one which may make it all the more difficult to contemplate a future in which broadcast delivery is no longer the only, or even the most important means by which we provide our services. It presents a snapshot of today's media environment, anticipates the media environment five years hence, and suggests strategies for ensuring that public radio remains a vital part of that media environment.

Christensen, *The Innovator's Dilemma*, New York: HarperBusiness, 2000 (orig. pub., Harvard Business School Press, 1997).

[3] The 1991 work involved the Boston Consulting Group and the 1997 work involved Andersen Consulting (later renamed Accenture).

[4] See Addendum B for a full list of participants.

[5] See http://www.srg.org/chart/chart.html (last accessed 10/7/03)

Public Broadcasting's Legacy

Public broadcasting has an admirable history of broadcast service, extending more than eight decades for radio and nearly five decades for television.

Our broadcasts arguably achieve more aggregate voluntary usage each year than any other non-profit or governmental service – 11.5 billion *person* contact hours for public radio and 5.8 billion *household* contact hours for public television.[6] This is the equivalent seat time of people filling the Rose Bowl for some 73,000 football games! By comparison, the 16 museums of the Smithsonian Institution enjoyed some 40 million visits in 2000, according to its Secretary. **We have established ourselves as Gulliver in the Lilliputian world of public service organizations**. (We often forget to include the other organizations that share our mission – the arts, educators, museums, libraries, and the like – on our list of media competitors, looking only at other broadcasters, cable and DBS providers.) Overall, this "gross tonnage" of public service is increasing, as public radio's increases outweigh decreases in public television usage.

Our fortes have been great storytelling and serving as impresario of the arts to millions. We have tackled topics, issues and audiences that no one else will touch, often showing editorial courage. We present programming using award-winning production values and with outstanding technical quality. We've been able to schedule programming for optimal usage by what, among services with similar missions, is clearly a mass audience.

But our legacy also included a tradition of accommodation in public policy (funding, carriage and spectrum) that sometimes distances us from the marketplace. And it also includes a tradition of being self-contained independent operations for functions that make a difference to viewers as well as for things that do not (termed "baking your own cookies" below). Public broadcasters in other countries have demonstrated the ability to provide quality content and responsive local services, without approaching the investments in infrastructure that U.S. public broadcasting supports, and as a result have made substantially greater investment in relevant local and national services.[7]

The Media Environment In 2003

Consumers have certainly welcomed digital media into their homes, but not according to anyone's game plan. **Consumer control and choice are advancing** (for example, the kinds one gets using computers, "custom-built" CDs, and MP3 players). "Good enough" sound quality has repeatedly trumped various industry efforts at enhancing radio technical quality (e.g., AM stereo, FMX).

[6] One person listening or one household watching one hour equals one contact hour. The numbers shown for radio are Arbitron's Spring 2003 survey and include listening only by persons 12+ for CPB-qualified stations that meet minimum reporting requirements. The numbers shown for television are Nielsen Media's May 2002 survey and include viewing by persons 2+ for some 244 stations that met minimum reporting requirements for the 1998-2002 time period (about 100 were "BMS" for at least one of those years).
[7] See, for example, http://www.cbc.radio-canada.ca/htmen/annual_report/ (accessed 10/7/03).

NPR and a growing number of stations are making effective use of web sites to amplify and localize broadcast programming. However, we are only beginning to see examples of broadcasters developing the web as a new medium. For us, "being digital," to recycle Nicholas Negroponte's eight year old book title,[8] mostly carries legacy implications – cleaner sound, more convenient editing, etc.

We took credit earlier for substantially more "gross tonnage" of public service than our non-profit mission competitors. **However, things are busy in Lilliput.** With low barriers to entry using "disruptive" digital distribution technologies, the public service sector is building and implementing media content distribution capacity, often without our involvement.[9]

Changes in media ownership have also altered the landscape. In commercial broadcasting, a handful of conglomerates predominate. Not only do fewer companies own more terrestrial broadcast licenses, they also own distribution infrastructures that cut across technologies and markets. They are able to spread the costs of program production and delivery across a number of venues, and maximize advertising revenue at the same time.

Terrestrial radio broadcasting remains strong. Nonetheless:

- Satellite radio and real-time Web streaming of broadcast signals are both emerging as opportunities for incumbent broadcasters, new entrants into the business, or both. Additionally, the web is giving radio a visual component through linking of broadcast material with companion web sites at NPR and a growing number of stations. Stations are also using the web to provide additional localization and depth to national programming efforts. These technologies can be used to expand markets well beyond the geographic limits imposed by terrestrial broadcasting, and to deliver new formats and niche programming services.
- Asynchronous distribution channels, *e.g.* streaming-on-demand and "peer-to-peer file sharing" technologies (e.g. KaZaA), may begin to erode broadcasting's traditional share of the demand for long-form programming and for music sampling. The sole developer and licensor of terrestrial digital radio ("HD Radio"), iBiquity Digital, has acquired exclusive rights to Personal Digital Recorder-like software.
- Due to the consolidation of group ownership and the general availability of satellite-delivered 7x24 program streams, national voices and play-lists are replacing local ones on many stations.

The relaxation of multiple ownership rules has led to even greater consolidation in commercial radio than in television, leaving fewer and larger nationwide ownership groups, and much less diversity of ownership within individual markets. Because of various regulatory and technological developments most radio programming is originated remotely, using "virtual localization" for all announcing and program hosting. In fact, in a growing number of markets, public radio stations may represent the only media outlets in which there is local ownership and production, though the value of such is important only to the extent it reflects local taste or sensibility, or topics of purely local interest.

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[8] Nicholas Negroponte, *Being Digital*, Knopf, 1995.

[9] See, for example, the J. Paul Getty Museum, http://www.getty.edu, which in early 2003 had 2 terabytes of media material accessible to the public.

The *Wall Street Journal* proclaims that with 22.5 million broadband households by the end of 2003, "The Age of Broadband is here" and that, "It has critical mass."[10] A recent study by Arbitron and Edison Media Research found that 13% of Americans have used Internet audio or video in the past week (30 million people), 21% in the past month and 45% have said they have tried it at least once. Public radio had the second highest level of Internet audio listening by its partisans in the last 30 days (22% of public radio listeners who listened to Internet audio).[11] Despite the "dot com bust," residential broadband access has continued very strong growth, tripling since January 2001. Among Internet audio and video users, 50% of monthly users and 57% of weekly users have broadband access.

The Radio Landscape In 2008

The DDII core working group made the following educated projections about our environment five years hence.

- Local ownership of commercial radio stations will have all but disappeared and perhaps along with it most local voices except for the "basics" – local news, sports, traffic and weather.
- Digital broadcasting on the AM and FM bands will be an established technology; however, the landscape is likely to remain littered with insufficiently compelling or failed digital radio innovations. If the effort underway in 2003 to acquire the capability within the HD Radio standard for additional programming and/or data streams and if that capability is embraced by both commercial and public broadcasters, HD Radio could well prove by 2008 to have been a successful exception to earlier failures.
- NPR, PRI and other organizations controlling sufficient public radio content will have found ways to distribute some of that content directly to consumers.
- Satellite audio providers along with Internet broadcasting will provide noticeable competition to public radio programming as will new media entries from mission competitors like museums, libraries, archives and educators. In this time frame, it is likely that these will challenge the music and arts component of our business rather than the news component (with the possible exception of certain niches) due to the lower barriers of entry.
- The lack of available spectrum for public radio programming will be even more acute and will be exacerbated by the commercial licensees' interest in limiting competition.[12] This will cause commercial competitors to seek Web and other outlets (perhaps including the audio capacity of digital television broadcasting and/or the newly established video/multimedia broadcast service – both of which could enable "surround sound" radio stations) for distribution opportunities.

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[10] Dennis K. Berman, "Profiting From the Broadband Revolution," *Wall Street Journal*, October 13, 2003, p. R1.
[11] Bill Rose and Larry Rosin, *Internet and Multimedia 11: New Media Enters the Mainstream*, Arbitron, Inc./Edison Media Research, 2003, http://www.arbitron.com/downloads/Internet_Multimedia_11.pdf (last accessed 10/6/2003).
[12] If software-defined radios gain a foothold by 2008 outside their current implementations in the telephony, military and amateur telecommunications arenas, they could dramatically change the scarcity factor. See "The myth of interference, *Salon.com*, March 12, 2003, http://archive.salon.com/tech/feature/2003/03/12/spectrum/ (last accessed October 7, 2003.

- Asynchronous listening and the use of platforms other than terrestrial broadcast will continue to grow, but at an uncertain rate.
- New forms of distribution will gain a foothold and in some instances may even be economically viable, in this time frame they are unlikely to displace much of the listening to traditional terrestrial broadcasting.
- In the new mobile video/multimedia broadcast service carved out of the former high UHF television spectrum (700 MHz), the first stations will be just beginning operation, some perhaps with radio stations as partners.

Our Capacity for Change[13]

As we progress toward this not-so-distant horizon, one of the important assumptions we need to make is that we have the capacity to change.

The case for fundamental change might be described this way: **Licensees need to broaden not only their delivery platforms but also their notions of whom they serve.** They must move from being duchies – relatively small, independent, self-contained operating entities – to federations that achieve strength and scale by creating alliances horizontally (with each other) and vertically (within the communities they serve). Without either a path or willingness to change, local licensees will lose out to their commercial broadcasting counterparts, who have rapidly aggregated since deregulation in 1996. In most markets, public radio licensees are competing with commercial affiliates that are owned by multi-channel providers and they increasingly compete, too, with media products and services that are for some consumers cheaper, simpler, smaller and more convenient.[14]

Both public radio and television are heavily involved in "baking their own cookies" – devoting resources to performing functions *at the station* which are transparent to viewers that could be better and less expensively done elsewhere. Inevitably, being able to operate self-contained comes at the price of reducing the resources available to serve communities or to acquire increased 'shelf space.' This keeps us from making the larger investments in content and mission we need to be truly significant in our communities. Ironically, increased collective investments in the back office should lead to greater individual investments in our communities. **Mustering the *will* to shed these demonstrably duplicative functions has never been easy, but the *means* of shedding them have never been easier than they are today.**

There are those who will also hold that that the past is prologue to the future. Much of the evidence *at the station level* indicates that the present is a lot like the past, despite substantial change *at the industry level*. In other words, because we have survived great industry changes over the past two or three decades without much fundamental internal

[13] For an expanded essay on change, see DDII Dispatch No. 12 at http://www.technology360.com Also see "We need not bake our own cookies," *Current*, June 2, 2003, http://www.current.org/pb/pb0310cookies.html (last accessed 10/7/03).
[14] Christensen, *ibid.*

adjustment, we can probably continue to do so. However, the facts do not appear to substantiate this view this time.

Even when station management is open to change, a licensee may resist or delay change for institutional or community reasons, or, when public broadcasting is only one aspect of an institution's broader responsibility, a licensee may simply be less aware of the need for change in the public broadcasting organization.

And, for many, it is personal. Whether it was the romance of being a DJ, producer, news anchor or RF engineer that initially inspired us, we were able to fulfill those dreams within a public service setting. Few of us were inspired to take up our present professions by dreams of being librarians, curators, arts administrators, or even teachers.

Change may be necessary and is certainly possible, but we can all agree it's very difficult. Alliances are key.

Investment Scenarios: Sustaining Versus Repositioning

Consider now two fundamentally different strategic investment scenarios: one for investments made to ***sustain*** the legacy (broadcasting) business, and the other to ***reposition*** public broadcasting in new directions consistent with its mission. As with all allocations of limited resources, there are natural tensions between these scenarios.

The following are some examples of repositioning investments – those that take public radio in a direction different from the legacy business of broadcasting mission-appropriate and professionally-selected programming to as large an audience as is possible:

Mission Elements	**Early 90s Trend**	**Repositioning Investments**
Arts & culture	•	portalwisconsin.org
Digital collections & libraries	•	PRSS ContentDepot, Public Radio Exchange (prx.org), Hearts of Space (hos.com), Public Radio Online (proposed)
Homeland security & public safety	•	Enhanced EAS
News & public affairs	•	Minnesota Public Radio News (news.mpr.org), National Public Radio News (news.npr.org)

While these investments may be made ***individually*** by licensees or ***collectively by smaller or larger groups of licensees, not all strategies will work unless sufficient scale is achieved to render them economically viable***.

Enhancements to the legacy business, for example, may include *individual* investment tactics or modalities or they may be collective investments. Public radio has demonstrated the ability to successfully grow self-supporting audiences vertically within markets by filling available shelf space with compelling programming. Acquiring shelf space will continue to be an attractive and appropriate investment strategy for individual public radio licensees. Collective efforts (*e.g.*, Public Radio Capital) can also help to make these individual investments possible.

Both sustaining and repositioning strategic investments may be implemented using different tactics or modalities. For our purposes, we will group these into three types of modalities:

- ***Toolkits*** – These are investments made in activities or "tools" that enable licensees to improve practices within their own organizations without the need for large-scale collaboration. *Most Toolkit investments tend to be modest and favor a sustaining scenario.* Toolkits generally don't threaten the status quo, are relatively inexpensive to implement, and have an established history of adoption in public broadcasting. Public radio's research and development toolkits over the past 20 years have imbued a best practices culture within a substantial number of licensees of varying size and type. The toolkits, along with coverage growth, can be largely credited for the solid future that the medium now seems to enjoy.

- ***Service Clouds*** – These are investments in collaborative activities or "clouds" (to borrow the Internet networking term), in which stations collaborate either to aggregate significant activities at some scale among themselves or to create another organization that can provide the required service or facilities at lower cost. *Service Clouds investments tend to be of moderate-to-large scale and may be equally effective in either scenario.* They date from the collaborative program exchanges first seen in educational radio in the 1950s, and later in television. The public broadcasting interconnection systems are "service clouds" and were high among the reasons that NPR and PBS were founded. A successful station-based service cloud servicing a wide variety of station functions is the five-station CoastAlaska collaboration.[15] Service clouds can significantly lower capital and operating expenses and often extend best practices. They can extend the life of a legacy business, and also point the way toward innovation and repositioning. Public Radio Capital, mentioned earlier, is a service cloud that provides public broadcasting access to capital for investments that would not be otherwise possible.

- ***Pioneers*** – Much more threatening and difficult to comport with our conventional wisdom, Pioneers are systematic investments designed to "plant a flag" in new and unfamiliar territory. These investments are usually made in an organization or in a manner that is independent of any licensee's legacy agenda. Pioneers address mission in new ways, and can often exist on a stand-alone basis. *Most Pioneer investments will also be of moderate-to-large scale and tend to lend themselves to a repositioning scenario though are also applicable to the sustaining scenario.* Pioneer investments will have a significantly higher failure rate than investments in the other modalities, so public broadcasting will need to place multiple bets in this area in order to have successes. NPR's service on Sirius Satellite Radio is an example.

[15] See DDII Dispatch No. 14 at www.technology360.com for details on this collaboration.

When making plans for the near future (one to three years), individual public broadcasters are likely to want to preserve their operational independence and as much of the "gross tonnage" of local public service they currently enjoy. This would argue for *sustaining* strategies: a high investment priority in expanding shelf space on an individual basis and, collectively, in Toolkits that substantially improve local performance, a somewhat lower investment in collective activities Service Clouds, and almost none (collectively) in Pioneers.

For individual public radio licensee investments, the current availability of new shelf space opportunities may be either exhausted or too expensive five years out, *so the real urgency is avoiding missed opportunities*. **With the dramatically altered media environment in that timeframe, it is clear that our *collective* investment strategy should more strongly favor the *repositioning strategies*** outlined above (though *individual licensees* may continue to make substantial and effective investments in the sustaining scenario, especially in the area of expanding shelf space where revenue is reasonably predictable and risks are small). Regrettably, decisions about investing in new rather than traditional places within the station's legacy business are likely to take on the familiar form of tension we now see in "local versus national" investment decisions. However, this characterization could be a terrible distraction; **if we want our mission to survive locally or nationally, we must provide leadership in developing processes that provide "public broadcasting" products and services that are more responsive to the needs of our constituents, and cheaper, simpler, smaller and more convenient to use**.[16] Technology initiatives now underway – e.g., ContentDepot, PRX – will make collaboration much easier than ever before.

A *repositioning* strategy would include increased investments in Service Clouds~~,~~ in which capacity is created at a collective level to which licensees can outsource activities that do not provide direct and/or apparent benefit to local constituents. These kinds of investments do not inherently threaten the independence of licensees; in fact they could provide an anchor for continued local ownership and a renewed emphasis on editorial, rather than operational independence.

Equally, if not more important in the *repositioning* strategy are investments in Pioneers. These endeavors may help public broadcasting keep a "seat at the table" in new technologies and services, one or several of which could emerge as "killer apps." They also can and indeed some will fail!

Conclusion

As we contemplate repositioning our industry, it is helpful to keep in mind that **services can, like the Smithsonian example mentioned earlier, be successful and have substantial impact with significantly lower usage numbers than we have historically enjoyed as broadcasters**. The recent "once in a decade" publishing phenomenon, Alice Sebold's novel, *The Lovely Bones*, took four months to reach two million copies in print, something public broadcasters can reach in hours.[17] Success in the repositioning

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[16] Christensen, *Ibid*.
[17] Daniel Mendelsohn, "Novel of the Year," *New York Review of Books*, January 16, 2003, pp. 4-8.

environment might more resemble that of our mission competitors or the publishing industry.

Ultimately, regardless of how we weigh *sustaining* versus *repositioning* investments, public broadcasting is facing profound change. We will not look the same in ten years regardless of the actions we take or refrain from; nor will the environment in which we work. This transformation will be uncomfortable at best, catastrophic at worst, and will require creative leadership. **The more we seek to understand and manage change, the more likely we are to emerge with our mission intact.**

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Addendum A – Diverging Fortunes of Public Radio and Television

Public television is undergoing a mandatory transition to digital terrestrial television transmission (DTT), at a capital cost approximating its annual revenues. Meanwhile, standards for digital terrestrial radio transmission have been approved, but the transition is voluntary (though it may achieve a *de facto* mandatory status if consumer adoption should prove rapid and pervasive).

There is evidence that, even if public television could agree on a multi-channel strategy cable that MSOs and DBS operators would find compelling enough to support with voluntary carriage, we couldn't afford it, and would not agree on a cohesive programming strategy.

In public radio, both listening and private support vectors have moved upward. Although overall radio listening is eroding, public radio's listener support and share of the radio audience have about doubled since 1990. With expanded coverage, public radio seems to have significantly more headroom than television. Public television viewing is steadily declining, just as the viewing of commercial television networks is. Membership numbers are directly correlated to viewership, and so public television's are also in continuing decline. Income from most other sources is declining as well.

With the significant exception of NPR, content production in both media is largely the province of stations and independent producers, and most distribution is done by a handful of entities.

There has been a significant growth in the number of public radio stations in recent years in markets large and small. Licensees have acquired additional stations in their markets in order to provide differentiated formats and programming services. However, there has been no significant trend toward nationwide ownership groups.

Public radio stations, program producers, and national program distributors have ventured into synchronous and asynchronous Web streaming and, in a more limited way, into satellite radio.

Given these circumstances, public radio should have the capacity to make substantial investments in both the sustaining and repositioning scenarios. Public television does not have that capacity now. Unless it shifts its current spending toward functions that that have a direct bearing on how viewers value its services, public television will be able to make only limited investments and will have to choose either the sustaining or the repositioning scenario in which to make them.

Addendum B – Participants

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