

music & media

A report on the
Music & Media Forum

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Prepared by

Global Business Network

for the conveners and sponsors



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Introduction

On January 19 and 20, 2006, a select group of nearly 60 leaders in music performance, music presentation, and electronic media gathered in New York City at the invitation of American Public Media, National Public Radio, Public Radio International, and WFMT Radio Network. They came together—in many cases for the first time—to explore how they could work together to expand opportunities for music and cultural programming in the changing media marketplace.

Although the meeting was hosted by the leading institutions from public radio—the premier presenters of classical music, jazz, and other ambitious musical forms rarely heard on commercial radio today—the meeting was not focused on the needs of public radio alone. Instead, participants involved in different aspects of music performance and presentation broadened the discussion to include such topics

as taking advantage of a variety of new or emerging technologies; building on a legacy but not being hemmed in by it; and looking for ways to strengthen their collective ability to present the music they are committed to and to grow an audience that will resonate with that music. The meeting, then, was ultimately about the future of music in a changing world.

The National Endowment for the Arts and the Corporation for Public Broadcasting provided essential financial support for the event, which was facilitated by Global Business Network, a consulting group devoted to helping organizations learn about and adapt to the trends that will shape their long-range futures. GBN is best known for its pioneering work developing scenarios as a tool for strategy, innovation, alignment, and learning.

This report, prepared by GBN, briefly describes the meeting, shares the key ideas that participants generated, and concludes with our observations on some of the broad themes that emerged over the course of the two days. It also includes, as appendices, a complete list of the conveners and participants, as well as the essential work produced by the group, both before the meeting began and during the session.

Finally, this report is designed not just to remind participants in the meeting what happened, although we hope it successfully does that. It is, more importantly, an invitation to a wider array of people and organizations to join what we, and the conveners of Music & Media, believe must be an ongoing conversation with a growing number of people and organizations with a stake in the future of music and the audiences that support it.

“(To M&M’s credit) we are recognizing a crisis point while we’re in it. The crisis from my point of view is that we are at risk of becoming obsolete from the public’s point of view. Audiences are splintering. If we are not addressing it in a unified matter, we will splinter as well. This is a joint issue and not one that we can address individually through our small, niche operations.”

M&M Participant

Meeting Overview

Many people expect a meeting to drive toward a single conclusion or specific action. Music & Media, however, was more of a public groundbreaking than actual construction. It was designed to create a context in which conversations could grow and connections could multiply. The actions that may result from these conversations might be quite different from anything discussed during the meeting. The important thing was that a new kind of conversation began: a forward-looking exploration of tomorrow's possibilities by a cross-disciplinary gathering of existing and emerging stakeholders.

The meeting did that by asking participants to explore together the uncertainties shaping their future as a starting point for acting together. They created a range of scenarios—coherent, plausible stories about what the future might look like—to challenge their current thinking about what the future is likely to bring, and to imagine more clearly opportunities and challenges for music and media. They then used those scenarios to identify specific options for working together in at least some of these possible worlds.

“The Forum took a very different shape than I had expected and that new shape exceeded my expectations. The most rewarding focus was the discussion of the need for much closer collaboration among music producers, presenters, and broadcasters (including all the new media).”

M&M Participant

The first challenge was to create a mix of participants whose diversity and range of experiences could combine to generate new possibilities. That required the conveners to invite an unusually broad cross-section of leaders and stakeholders, each of whom had some part of the knowledge or perspective essential to creating a new path forward. The final participant list, attached as Appendix B, included people from public media organizations, musicians, educators, artist managers, label representatives and music industry service organizations.

Work began in advance of the meeting with a survey designed to capture the issues and concerns that participants would bring with them to the meeting. (Responses to selected survey questions are collected in Appendix C.) GBN interviewed a performing musician, a public radio professional, a digital music distributor, and an author studying the evolution of niche and mass markets and shared the transcripts of those interviews with all participants before the meeting. GBN also circulated additional suggested pre-reads chosen to expand the range of ideas in play in the conversation. (The transcripts of the interviews are available at the Music & Media website, www.musicandmedia.org. The list of pre-reads can also be found there.)

The meeting was organized around five segments or blocks of work:

- Share current ideas about the issues and opportunities for music in a changing social and technological environment

- Consider the emerging environment for media broadly, with an emphasis on what is happening as it affects music
- Imagine futures that might generate great opportunities, pose significant challenges, or challenge current expectations about what lies ahead
- Identify potential actions that participants could take in one or more of those imagined futures, especially in concert with others with similar interests
- Agree to next steps

The work began with participants sharing with one another, in small groups, the developments, trends, experiments, or observations they saw in music and media. Following that was a plenary discussion about the new ecology for media today, organized around a simple framework for interpreting changes that are most often considered in isolated bits. We used this plenary discussion to frame some of the current changes in the media environment expected to shape the efforts to promote and share music. We questioned how these might add up in new ways that would allow us to see new possibilities or opportunities as they emerged in the future.

“I was looking forward to the forum as a chance to problem solve with others in the community, as well as to learn more about what others perceptions are for the goals, problems and solutions inherent in the issues brought forth. The leadership was extraordinary, the conversation stimulating, the ‘casting’ incredible, and the solutions enlightening.”

M&M Participant

We then launched into the process of scenario thinking by focusing first on the key uncertainties that surfaced in the pre-meeting survey. Uncertainties are the essential building blocks of scenarios, and combining them in various ways allowed participants to see how these uncertainties come together to create new opportunities, new threats, and new directions.

Working in small groups, the participants generated eight scenario outlines—brief sketches about what the future may look like that help illuminate options for music and media—and then shared their initial observations. Participants built out different scenarios in order to consider what may unfold over time and to begin to see connections between external events and individual/organizational choices. (See Appendix D for fuller descriptions of the scenarios participants created.)

Finally, participants discussed the opportunities they saw emerge from these scenarios and discussed how to take advantage of them. They brainstormed ideas that would help meet the goals of the gathering and identified implications for action, including next steps and areas for further exploration.

On the second day of the meeting, participants were joined for lunch by Dana Gioia, chairman of the National Endowment for the Arts, who previewed some of the Endowment's own research about the state of classical music on radio.

What Do We Want to Create? (Highlights)

This section of the report describes key ideas generated by the group about where to focus their efforts for positive results. For each idea, we have included only a few key elements of what the working groups created: a brief description of the idea itself, the needs or opportunities it responds to, a definition of success for each, and key questions that need to be answered before moving forward. The complete record of each group's work is included in Appendix F.

Develop a national organization to act in the public interest for the mission of supporting musical arts and culture in media and life. We will forge relationships and alliances with media organizations, artists, institutions, and educators to stimulate and serve demand for the musical arts.

New needs and emerging opportunities: Fair, powerful/effective broker for advocacy for music and culture; public value around music; presence on the national, local, and global stage.

Definition of success: Raised profile and perception of music and culture. We need a buy-in by thought leaders, charter members, and anyone with a common interest. We need sustained and increased engagement among stations, networks, and allied fields. We need to break the cycle of defeatism and pessimism, and restore the ecosystem.

Key questions: Can we create an entity that serves many interests but is beholden to none? Will public media survive? Will music in public media survive?

Develop a national platform to create, host, and deliver local content online.

New needs and emerging opportunities: Listeners have a desire for on-demand content. Stations need to stay competitive and respond to changes in listeners' habits. We need to leverage existing capacities.

Definition of success: There will be more stations enabled to meet these needs, and it facilitates live attendance.

Key questions: Do recordings and broadcasts substitute for or compliment live performance? Do radio stations actually have the resources to do this? Is funding available?

Explore new ways of awakening interest in music through surprising new models of partnership and symbiotic collaborations.

New needs and emerging opportunities: We need advocates, arts education, replenished constituency for music, and more inspired and articulate artists. Opportunities include new energies around concert attendance, omnivore (demand for multiple forms and enhanced experiences), and inspired artists.

Definition of success: Artists are excited about their work in new ways. Listeners are engaged in the arts. Stations are more engaged in their community. Media and live music have a closer collaboration and are more symbiotic.

Key questions: Is there a will? What is the job description for the next generation of artists and managers? The new world of media encourages messiness, embracing change in the genres themselves.

Rights issues are a major obstacle to the growth of emerging media, and we want to work together to resolve them.

New needs and emerging opportunities: Digital content (i.e., podcasting, downloads, streaming), archiving, education about how to utilize and participate, and increasing the relevance of the arts in the broader community.

Definition of success: Having a simplified, organized, uniform, rights clearance model that addresses critical questions and is widely adopted.

Key questions: Who are the rights holders? Can we identify the rights holders and their interests? We need to explore fair compensation, identify the people involved, and identify the process by which we can solve rights issues.

Develop a way of enhancing the experience of listening to music by tying the music to deeper information and performance.

New needs and emerging opportunities: Reaching young adults. Filter, navigate, and direct vast amounts of information/sound. Deepen the music experience. International data/audio/visual sharing. Chat room and community sharing.

Definition of success: Identified source of music information tied to the station play list and other distributions (as well as other access).

Key questions: Is this usable by commercial and public stations as well as satellite? What is the model for other languages and cultures? What might public or school access entail? How do we build in a local info component? Funding?

Create the next generation of public radio listeners and supporters.

New needs and emerging opportunities: Aging audience, ongoing need to increase/keep audience base, lack of diversity on community radio, new media-savvy generation, continued splintering into niche genres, ownership of brand/lifestyle.

Definition of success: Programming that caters to/engages a younger audience. There is an opportunity for communities (online/offline) to interact socially.

Key questions: What kinds of content does the next generation of listeners want? How do they want it? Trust, ownership, contract? Action based on these questions (strategy and small steps).

Convene a series of cultural conversations about the public interest in public radio.

New needs and emerging opportunities: The changing demographics of American culture. Technology opportunities and multiple paths.

Definition of success: Tolerance. Allow for deeper reflection, laughter, expression, and engagement. Connecting us culturally in a way that doesn't happen in the market. Examples such as WNYC's cultural news integration.

Key questions: We need to clarify public interest in public radio's mission. How do we reach people (audiences) in this new format?

Public media now provides unprecedented access to the most exciting music and musicians in the world. We want to work to create a multi-platform, multi-layered experience for the most exciting music in the world.

New needs and emerging opportunities: Opportunities include the public's hunger for interesting content and context, branching capability of digital media, a void of deep content, and web communities gathered around music. Needs include access to stories and perspectives, more and better talent, and the constant need for new and established artists to reach audiences.

Definition of success: Sustainable, fun, compelling, users are driving it forward, consistent with values, you learned something that expands young audiences, and it works for the time constrained.

Key questions: Will the public radio audience participate? What would bring them or will this be for a different audience? How do we pay for this? Who are the outside partners (business, arts)? We need to explore the issue of securing rights.

Initial Observations

Over two days of wide-ranging discussions, participants in Music & Media grappled with a number of opportunities and challenges, raised numerous critical questions, and imagined an array of possible futures and desirable paths forward. What they didn't do was come up with all the answers.

“There was a real energizing factor from this conversation, and that is tremendously valuable.”

M&M Participant

The real gain was that participants came together and imagined common futures, both positive and challenging, and that they worked together to identify common areas for future solutions. The conversations this meeting spawned are, we hope, only beginning. In that spirit, we would suggest that it is premature to identify conclusions. Based on what we experienced, though, we can begin to make some initial observations about the work to date and what will be required in the future.

Addressing the Rights Issues Is Essential

Participants felt that, in order for experimentation to flourish, complex copyright and digital rights management issues must be worked out in a way that addresses everyone's needs (e.g. public media organizations, artists, labels, audiences, publishers and agents). Given the range of perspectives in the room (as well as those not in the room), there was no consensus on what the outcome might be. But there was a consensus that we now live in a media ecology under sustained pressure and that things must and will change. How to move beyond today's impasse isn't clear, but no other issue got as much attention, and there seemed to be real interest in cooperative efforts to find new approaches that would be in everyone's interest.

Understanding the Changing Audience

It was clear that the audience for this music is evolving in tandem with the aging of the baby boomer population, the growing power of youth media habits, the integration of immigrant populations into a changing mainstream, and other huge cultural and demographic shifts. Young people, in particular, inhabit an omnivorous media and musical environment with many more choices, fueled by a global internet and an “iPod culture” that allows them to find, sample, and experience a dizzying array of musical genres and cultures with much lower barriers than ever before. We must adapt the creation and presentation of “ambitious music” to this pervasive, user-driven, self-defining musical culture.

Harnessing the Power of Accessibility

The internet is creating extraordinary opportunities and making the creative arts extremely accessible. The internet doesn't substitute for what today's music presenters are doing, but it does create new pressure on the assumptions they have made in the past. The pressures on the old institutions, combined with the emergence of new models of creating, presenting, and promoting music, suggest it is time to experiment with new possibilities

together, rather than to tinker with traditional mechanisms that will not serve us in a changed world.

Separating Signal from Noise

We live in a world of pervasive, noisy, and fragmented media. (Think iPod and wi-fi; the internet and blogs; cable TV and satellite radio.) Anyone can be a critic or curator through their own sites and playlists. As these media forces (and choices) increase, they put a greater premium on the trusted role of curators of musical tastes. Participants in Music & Media already enjoy a trusted relationship with their audiences and the power of a strong brand. One open question is how to optimize these assets in an increasingly user-controlled environment, as well as one with many more organizations competing for the attention of every listener.

Thriving in a Long-Tail Future

What will the organization that thrives in a “long-tail” world look like? As Chris Anderson of *Wired* said in his pre-meeting interview, we should take what we’re doing now—aggregating, filtering, presenting, commenting, and so on—and figure out how to do it at one-tenth the current cost. That requires that we view our audiences as collaborators and begin to harness the power of “peer-production” platforms like MySpace, Wikipedia, or Flickr. We live at a moment in which the evolution of the media environment creates a set of tools for us to solve problems in new ways. The old way required us to think about scale; today it’s about niches and decentralized networks of people organized around their passions.

“Everything about the experience of M&M has stayed with me as a constant flame under a pot of ideas and impressions. What a shot in the arm.”
M&M Participant

Debating Capacity vs. Alignment

Many people came into the meeting thinking that they, or people at other organizations, do not have the capacity to act in ways more consistent with the new media environment we’re in—that is, that they don’t have the right skills, people, or relationships to deal with these issues. This may be an issue of alignment. Do we, individually and collectively, agree on what needs to be done or are we moving in different directions?

New Institutions or New Arrangements?

One person commented about how there must be something in our “muscle memory” that makes us reflexively want to create new fixed institutions in response to new challenges. But one problem is the lack of fluidity in our existing institutions and their economic assumptions, which makes them unable to adapt. Are there other organizational forms that may be more successful, such as ad-hoc networks and collaborations? The question is “What is the appropriate institutional form to address this problem?” rather than “How do we start a new organization?”

Building Community

We have observed the burgeoning communities that networks create around music and ideas as well as places. This new form of community may not be the kind we imagined in the past, or have the stability or strength that we associate with our aspirations for community. But how can we tap or promote that sense of community among people who are especially passionate about the music we create, promote, and present?

Broadening the Conversation

Several people expressed the need to introduce more perspectives and more specific kinds of expertise into the conversation, so that we can make sure we hear and respond to more of the voices and patterns shaping American culture today. We also acknowledge that it will be key to engage the specific knowledge of attorneys, technologists, musicians, composers, cultural demographers, and other specialists who are conversant in issues like rights management or cultural change to help design workable solutions.

Connecting with New Resources

Finally, several new resources resonated with participants, including the Future of Music Collaboration (<http://www.futureofmusic.org/>); the Arts Industries Policy Forum at Vanderbilt University's Curb Center for Art, Enterprise, and Public Policy (<http://www.vanderbilt.edu/curbcenter/aipf/>); and the Public Radio Exchange (<http://www.prx.org/>). No doubt there are many others, but the important point is that people are already organizing around these subjects in interesting and fruitful ways.

But perhaps the last word should go to one of the meeting participants, whose evaluation of Music & Media captured the sense that while the meeting had ended, something new had begun:

“[I] left full of hope and desiring to continue the conversation.”