music & media

**A report on the
Music & Media Forum**

January 19 & 20, 2006

New York, New York

Prepared by

Global Business Network

for the conveners and sponsors

AMERICAN PUBLIC MEDIA

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PRI

WFMT Radio Network

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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.

> "(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

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.

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."

Appendix A: Meeting Organizers, Sponsors and Funders

Steering Committee. The following people organized the Music & Media forum:

American Public Media:
Sarah Lutman, Senior Vice President, Content and Media
Mary Lee, Project Director, Classical Music Initiative
Lauren Dee, Project Coordinator, Classical Music Initiative

National Public Radio:
Ben Roe, Director of Music Initiatives
Dianne Brace, Deputy Director of Development

Public Radio International:
Melinda Ward, Senior Vice President, PRI Productions
Mark Kausch, Program Marketing Manager

WFMT Radio Network:
Steve Robinson, Sr. Vice President for Radio

Crossover Media:
Max Horowitz, President

Consultant:
Wende Persons

Music & Media Charter Sponsors:

- American Public Media

- Americans for the Arts

- Association of Performing Arts Presenters

- Association of Music Personnel in Public Radio

- Canadian Broadcasting Corporation

- Classical Public Radio Network

- National Public Radio

- Public Radio International

- WCLV Seaway Productions

- WFMT Radio Network

Funders: Music & Media was also made possible in part by grants from the National Endowment for the Arts and the Corporation for Public Broadcasting.

Appendix B: Meeting Participants

Alberta Arthurs
Arthurs.us Cultural Consultant

David Bither
Nonesuch Records
Senior Vice President

Mia Bongiovanni
Metropolitan Opera
Media Consultant

Tom Bradshaw
National Endowment for the Arts
Research Officer

Alan Brown
Alan S. Brown & Associates LLC
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WNYC
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Sandra Gibson
Assoc. of Performing Arts Presenters
President & CEO

Dana Gioia
National Endowment for the Arts
Chairman

Scott Hanley
WDUQ / JazzWorks LLC
Director, General Manager

Scott Henderson
CPRN
Managing Director

Laura Johnson
free lance
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John Kieser
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Director of Operations and Electronic
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Helen Kim Music
Sales/Schirmer Media
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Anne L'Ecuyer
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Aaron Levine
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Robert Levine
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Principal Viola; President, Milwaukee
Musicians Association, Local 8 AFM

Ted Libbey
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Chris MacDonald
IndieFeed, Association of Music
Podcasting Founder, General Counsel

Teresa Malango
Magnatune
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Judy McAlpine
CBC Radio
Director International Relations/Strategic
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Jack McAuliffe
American Symphony Orchestra League
Vice President and Chief Operating
Officer

Kathy Merritt
Corporation for Public Broadcasting
Senior Manager Program Investments

Brian Newhouse
American Public Media
producer (classical)

Deborah Newmark
AFM
Director, Symphonic Electronic Media

Bonnie Nichols
National Endowment for the Arts
Research Analyst

Jenny Northern
WCLV
Senior Vice President/General Manager

Karen Painter
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Director, Research and Analysis

Elena Park
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Skip Pizzi
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Todd Reynolds
Ethel/Todd
Reynolds Music musician/Director

Frances Richard
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VP, Director of Concert Music

Marc Scorca
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Greg Seese
Palm Pictures
Head of Radio Promotion

Jake Shapiro
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Jenny Toomey
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Andrew Taylor
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Liz Wallace
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Practice Associate

Melinda Ward
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Sr. Vice President Productions

Appendix C: Key Findings from the Web Survey

In preparation for the Music and Media Forum, GBN conducted a survey of the people planning to attend the meeting. Forty-nine people answered at least some of the questions in this survey. We organized the responses into categories to give an overview of some of the beliefs and opinions of participants might carry into the meeting with them. The following offers highlights of participants' responses to a series of questions about their thinking going into the meeting.

The most significant changes or developments of the last 10 years: Technological

- The development of digital media formats and their delivery systems
- Availability of music via the Internet and music downloading
- iPods/portable mp3s
- Satellite radio
- Computer programs that impact how music is composed, how music is presented to a live audience, and how music is recorded
- Advances in technology that have enabled many more people to record professional-quality music
- The explosion in the availability of recorded music

The most significant changes or developments of the last 10 years: Economic

- Media mergers; consolidation of commercial media
- The declining viability of old economic models
- Changing economic conditions for the recorded music industry
- Collapse of record industry as we knew it (especially classical & jazz)
- Consolidation in commercial radio and the rise of public radio
- Changes in station formats away from lower margin music formats
- Rise of on-line music distributors and big box retailers and declining role for local music retailers.
- The independent labels' market share is at its highest point in decades.

The most significant changes or developments of the last 10 years: Cultural

- Change in listeners expectations: growing consumer demand for personalized programming
- Technology allows audiences to more easily bypass mass media
- Fusion of music genres; blurring definitional lines
- The break down in boundaries between high and popular art.
- The rise of Do-It-Yourself artistic movements
- Consumer access to music of all eras and cultures; Rise of alternative outlets for musically curious people; Globalization leading to wildly more diverse musics available to listeners. Proliferation of choice.

- The proliferation of "outlets" (i.e. new concert halls, expanded series, etc); More venues that aren't concert halls, and audiences are more favorable to them as listening spaces
- The dramatic increase in the number of people who perform and present music on the highest professional levels.
- Less demand for classical music as a 'live' genre
- More multi media works; the addition of visuals with music
- Contextual presentations at concerts (introductions, context, visuals surrounding or within live concerts, etc.); More interaction between artist and audience during the performance.
- Professionalization/increased economic performance pressures on non-commercial media
- Rise of public radio as significant news source
- Decline of adventurous music presentation on FM radio - commercial and non-commercial
- The escalation of the cult of celebrity
- Less basic cultural literacy by the general public
- The continuing struggle of classical music to find relevance in the public sphere

Is anything "inevitable"?

- The trend in listeners demanding greater flexibility in the way they consume music; personal portable music libraries that are with you wherever you are; Demand and usage entirely driven by consumers
- More digital distribution of music; Radio gives way to podcasting and on-line streaming
- The eventual demise of physical media as the dominant delivery format
- Greater fragmentation of media and music choices and less common cultural ground
- Many more artists and art groups will have a few hundred dedicated fans, rather than a mass audience
- Sources of musical content and information will increase; Increase in number of people creating, and distributing music
- Diversification of consumer tastes; Continued blurring along genre lines (i.e., classical, jazz, rock, world)
- The music itself will change; Large orchestras give way to smaller ensembles of pro-am musicians (professional amateurs).
- There will be innovations in bringing artists closer to their audiences as they create new work.
- Rise in self-published and non-label affiliated recording/ distribution by middle and smaller budget ensembles
- Some of today's music and arts institutions will be forced to close or merge with other organizations.
- The demise of some major labels

What might change the course of things?

- Government intervention
- A major shift in public sentiment regarding the Internet or the use of portable devices for downloaded music
- New legal mechanisms that maintain the status quo
- If the cost to consumers increased dramatically
- Catastrophic economic collapse or other systemic disruption
- Nothing
- The sun goes out, nuclear holocaust occurs
- The end of the world as we know it

What are the critical uncertainties?

Critical Uncertainties: Technology

- What will the dominant platform for distributing/receiving music be a decade from now?
- Will technology devices/services tend to converge or fragment?
- Will recording and distribution formats proliferate or converge?
- What happens with intellectual property protection?
- How many people will have high-speed access?
- What will the impact of satellite radio be on terrestrial radio?
- How fast will classical/jazz audiences adopt new online tools to learn about artists and share music?
- Are classical and jazz artists more likely to put out their own work or work through others?

Critical Uncertainties: Listener behaviors and attitudes

- What are listeners looking for?
- What will happen with audiences for live classical and jazz performance?
- Will people be able to find what they need online on their own, or will they need help?
- How will recommendation engines evolve?
- Where will listeners to classical, jazz, and alternative music predominantly turn to hear the music they enjoy?
- Will the next generation of listeners organize their listening around today's genres?

Critical Uncertainties: The economics of music and media

- Will it be better to try to offer something that pleases a large audience or to serve many small audiences?
- What will the impact be of the growing amount of user generated content?
- Will the music industry tend to consolidate or fragment?
- What role will the performers' unions have?
- Will the many digital rights issues get resolved?

- What will people believe it means to buy music?
- What role will the current major digital media companies (e.g., Yahoo, Google, Amazon, Apple) play?
- Will government support for the musical arts grow or shrink?

Critical Uncertainties: Demography

- What will be the impact of the changing demographic composition of the US population?
- How likely is it that audience growth happens in the places we know and serve today? Could there be new places with growing interest?

Appendix D: Scenarios for the Future

Using a series of worksheets created by GBN, participants generated eight different scenarios about how the world might evolve in ways that would have significant effect on music and media. The process began with a set of 25 uncertainties derived from the survey that most participants responded to. Each table was asked to identify which of the uncertainties they believed were both quite important for the future of music and media, and quite uncertain (i.e., could not be predicted with any confidence). Once each working group had determined which uncertainties struck them as both important and uncertain, each one was given one of three assignments. Three groups were asked to combine those uncertainties that would produce an "opportunity scenario," defined as a plausible future where thing go "right" in ways that create lots of opportunities to expand music and cultural programming. Another three groups were asked to combine their uncertainties to produce a "challenge scenario," defined as a plausible future where outside forces make it especially hard to expand music and cultural programming. Finally, two groups were given a surprise scenario: rather than picking their own uncertainties, they were given two uncertainties and how they might resolve and told to develop scenarios based on forces that they did not get to choose themselves.

In the material below, each scenario is marked as either an opportunity, challenge, or surprise.

A Bigger Small World

(surprise)

Uncertainties

- Audience market dynamics: Micro markets/fragmented

- Digital rights issues among composers, performers, intermediaries, and audiences: resolved and stable

- Role of digital media companies (e.g. Yahoo, Google, Amazon, Apple): primarily enablers for today's providers

- Geographic sources of growth for classical/jazz audiences: non-traditional

Explore the future

This is a world in which …

- Preservation and unlimited archives available of existing music – classical, jazz, traditional fusion

- New music is created

- Music communities collect around shared interests

What are the challenges in this future?

- Will providers respond?

- Will flourishing global art trade be threatening to existing political structures?

- Homogenization of cultural music

- Rights protection

- Local economic realities – piracy, etc.

- Bigger multicultural media giants

What are the opportunities in this future?

- Raise profile in other countries and improve access in home country

- Bigger audiences

- Cultural and musical flows

- Invest in experiments and start-ups because legal and regulatory barriers are gone.

Build the scenario

If these uncertainties unfold as you describe, what also must be true?

- Openness, politically and culturally in China, India and elsewhere to opening their borders culturally and otherwise

- Development of clearinghouse structure(s) to locate and compensate copyright holders or to indemnify providers

- Ever wider and less expensive access to broadband, and proliferation of end-user devices

- Expanded relationships and viable business models that enable digital media companies to enter these countries

What is likely happening in the field as a result?

- Preservation of archival materials and the ability to disseminate this. Also the preservation of performance practices due to increased info and audience experiences

- Fusion of musical traditions = important new genres that attract new audiences

- More musicians are being paid for the music

Given what you said about the world in 2016, what happened in the preceding years?

- 2016: John Adams "Nixon in Chine" performed in Beijing

- 2012: international adoption of standard licensing

- 2010: thru enablers artists make money with open licensing – breakout artists who show the way.

- 2008: significant international markets open up. Olympics '08. Political freedom in China. Election year

- 2006: open licensing success

What evidence exists today that this scenario may already be unfolding?

- Artists are having internet success

- markets developing

- countries are beginning to open

- outsourcing happening

- France legalized P2P

- Alternate internets are being created

- Media companies expanding music, film, etc.

- Acquisitions

- long tail can be documented – niche markets happening

Take one minute to choose the most important thing you want your colleagues to know about this world…

- Have to solve DRM and intellectual rights issue NOW!

Implications

Who might be a surprising new entrant into the music world?

- Public broadcasting

- governments

What current organization might no longer exist?

- Public broadcasting

- Major record label

In this world what is growing and gaining strength?

- Digital media companies

- Advertising companies

- Social/cultural peer communities

- Wireless connectivity/ cell phone

What is shrinking and losing strength?

- Major record labels

- Traditional broadcasting

- Repressive governments/ censorship

What strengths do the people/organizations in this room have that will help expand the audience for music and cultural programming in this scenario?

- Thriving models

- Content providers

- Problem solvers

- Passion

- Research expertise

- Optimistic (except Doomsday group)

And how?

- Focus on digital rights research, pilot projects and experimental licenses

Is there anything the people/organizations in this room could be doing now to prepare?

- <no data>

Key messages to share with your colleagues…

- have to solve digital rights and IP issues first

- need to determine ad expand public broadcasting's leadership role

- create marketplace examples

Liberté, Fraternité, Egalité

(opportunity)

Uncertainties

- digital rights issue among composers: resolved and stable

- governmental support for the musical arts and education: increasing

- recording and distribution formats: proliferate

- audience growth and diversity (cultural, economic, geographic, genre) : growing the youth audience

Explore the future

This is a world in which …

- Every kid plays and instrument or creates music (computer based music application, etc.)

- offerings expand

What are the challenges in this future?

- navigation

What are the opportunities in this future?

- Greater musical literacy

- Music blogging

- Increased cross-cultural/ experiential understandings

Build the scenario

If these uncertainties unfold as you describe, what also must be true?

- Government intervention, more proactive engagement in media (return to the new Great Society)

- Greater global consciousness in the U.S., less isolationism

- Peace and prosperity worldwide (rise of middle class)

- Lowered barriers to technology adoption worldwide

What is likely happening in the field as a result?

- Increased arts education (life long)

- Increased and more effective cultural activism, institutional collaboration, lobbying – local and national

- More music, more channels, more time spent listening, more diversity in access, more reasonable compensation of artists

- Greater supply and demand increases need for strong music curatorial services – "public radio" extends its brand there

- Even while on air (FM analog) services migrate away from music formats.

Given what you said about the world in 2016, what happened in the preceding years?

- 2016: "The New Great Society" (music and money)

- 2012- 2014: peace and prosperity

- 2008: global government intervention established. Security focus – included media and culture. U.S. government shifts to 2012

- 2006-2008: terrorist tech attack and unrest

What evidence exists today that this scenario may already be unfolding?

- Unrest with current government

Take one minute to choose the most important thing you want your colleagues to know about this world…

- <no data>

Implications

Who might be a surprising new entrant into the music world?

- China/ Asia

- Government (U.S.)

What current organization might no longer exist?

- Single discipline arts lobbying groups

- Fewer mother ship arts groups

- Nationally based rights collection agencies

In this world what is growing and gaining strength?

- Creativity/ collaboration through technology

- Global awareness/ communication

- Individual participation (playing and listening) in the arts

- Proliferation of technology

What is shrinking and losing strength?

- Commercial terrestrial radio music

- Political boundaries/ individual isolation

- Cost of technology balanced with volume

- gate keeping

What strengths do the people/organizations in this room have that will help expand the audience for music and cultural programming in this scenario?

- Content creation/ curatorial

- Educators/ engagers

- Early adopters/ open minded

And how?

- Building content and carefully choosing distribution channels that will realize goals

- Challenge and entertain the audience

- Challenge each other

Is there anything the people/organizations in this room could be doing now to prepare?

- Explore new delivery platforms/ go to where the audiences or drive unified front with government

Key messages to share with your colleagues…

- Creativity abounds

- Diversity abounds

- Curatorial needs are huge

- "curate the curators" : online music critique/ recommendation, communities hosted/ moderated, managed by public radio stations (drive traffic there via on-air mentions)

- work together

For Everything Else, There's MasterCard

(challenge)

Uncertainties

- Digital rights issues among composers, performers, intermediaries, and audiences: Unresolved & subject to conflicting claims

- Audiences for live classical and jazz music performance: Shrinking

- Access to content limited only to wealthy: those who can pay

- Influence of changing demographic composition of growing U.S. population: Strong and broad influence over all musical consumption patterns

Explore the future

This is a world in which …

- Access is only fro those who can afford it

- Financial footprint is smaller

- Music is marginalized for those who have money or are elites

- Less relevant to American society

- Less liver performance

- Presenters can't operate in economic model – can't operate on a smaller scale

- Live off archived content to theater system at home leisure institutions will be cleaning house

What are the challenges in this future?

- Shrinking elites

- Pee wee to play – but not enough phantom music, music of ice dead and their estate

- But archived content can't be shared because of digital rights issues

- Is audience shrinking or do we just not find it?

- Live experiences on air?

- Localized?

- Music that we care about has become marginalized and available only with elites

- Audience for live performance are shrinking and institutions shutting their doors

- Access is limited to specific elite?

What are the opportunities in this future?

- <no data>

Build the scenario

If these uncertainties unfold as you describe, what also must be true?

- Economic "shocks" – reduce discriminatory income

- Bottom line = public good

- Continued government disinterest in culture and civic engagement

- Best brand choice technology remains costly and out of reach to a significant minority

What is likely happening in the field as a result?

- Local "significant" performance and broadcasting limited to just a few markets

- Full time teachers, part time composers and performers

- Rise of amateur performance groups

- Musical education only for elites and clubs; college programs continue

Given what you said about the world in 2016, what happened in the preceding years?

- 2016: funding is not relevant

- 2014: classical and jazz now one format, live music performance rare with Opera, ballet and Opera, and musicians and performers trust that the fund is dissolved

- 2012: Google and Amazon merge and take care of all your cultural needs, digital rights handled by individual contracts, RIAA moves back to being a trade association, and public funding for the arts vanishes

- 2010: government controls begin to grow on the internet, HD radio reaches significant market penetration, and all music moves to supplemental channels (public)

- 2008: big government/ big business focused remains in control, and an AFM strike in New York.

- 2006: large media interests mandate more data from users for access to content.

What evidence exists today that this scenario may already be unfolding?

- Current cultural, economic, and political climate

- What used to be free is becoming pay for play

Take one minute to choose the most important thing you want your colleagues to know about this world…

- You will pay – with money or personal data

- Culture is a commodity

Implications

Who might be a surprising new entrant into the music world?

- Pro-AM

- Corporate virtual marketing support of performing arts

- Google "local"

What current organization might no longer exist?

- AFM

- NEA

- CPB

- Large organizations

- Opera companies

- "Big Box" culture

In this world what is growing and gaining strength?

- Content and data aggregators

- Pro-AM's – the new "guilds"

- Global Gen "Y" booms and crosses all borders

- India, China, South America, and Hispanic culture

- "Booksellers"

What is shrinking and losing strength?

- Telco's and ISP's

- Baby boomers

- American cultural influence

- Mass media – common shibboleths

- Libraries

What strengths do the people/organizations in this room have that will help expand the audience for music and cultural programming in this scenario?

- Local and global networks

- Passion knowledge about music

- Growing knowledge and experience on reaching audiences

- Many pro-AM's – composers and performers

- Technical knowledge and experience

- Marketing knowledge and experience

And how?

- Learn new tricks

- Prove our relevance/ be relevant

- Build relationships/ be accountable

- Aggregate influence – political, social, marketing

- Sacrifice for the greater good

- Compromise

- Faster local performers and audience development

- Share resources and information

- New partnerships and funding opportunities

Is there anything the people/organizations in this room could be doing now to prepare?

- See "How" – work together to foster the goals

- Aggregate the influence and power of our separate activities

Key messages to share with your colleagues…

- Aggregate our influence and power

- Foster local and regional performances

- Promote the common goal, not the specific channel

57 Channels and Nothing to Watch

(challenge)

Uncertainties

- Industry wide consolidation
- Rights resolution
- Fragmenting demographics
- Declining subsidies

Explore the future

This is a world in which …

- <no data>

What are the challenges in this future?

- <no data>

What are the opportunities in this future?

- <no data>

Build the scenario

If these uncertainties unfold as you describe, what also must be true?

- Polarization
- Media culture = mass culture
- Corporate politicians
- Profit in software
- Everyone has hardware
- Creativity/ dissention goes underground
- Middle/ mid-range most challenged
- All or nothing (opt in or opt out)

What is likely happening in the field as a result?

- Organization churn

- Rise of star system/ decline of regional professionals, including art and media professionals

- Tastes being defined by smaller groups of programmers, supported by research

- Tastes being driven toward middle

- New inequalities in direct access to culture

- Artistic experience becomes more local/ personal

Given what you said about the world in 2016, what happened in the preceding years?

- <no data>

What evidence exists today that this scenario may already be unfolding?

- <no data>

Take one minute to choose the most important thing you want your colleagues to know about this world…

- there is an ever-decreasing number of connections across communities which accelerates all of the growing inequalities

Implications

Who might be a surprising new entrant into the music world?

- <no data>

What current organization might no longer exist?

- Mid-range professional producers (includes media)

In this world what is growing and gaining strength?

- Big media conglomerates/ grassroots passion driven organizations

- Business savvy, entrepreneurial artists, and producers

- Viral marketers

- People who own rights, who own their own rights

What is shrinking and losing strength?

- Service organizations

- NEA, CPB, state arts organizations/ councils

- Vanilla groups – non-differentiated organizations

What strengths do the people/organizations in this room have that will help expand the audience for music and cultural programming in this scenario?

- Good survival skills – plucky!
- Rooted in communities
- Low level of cynicism
- Charismatic personalities, dedication
- Smart, strategic – thinkers
- Passionate
- Art forms have value and merit (has true believers and followers)
- Belief that economics won't drive artistic expression out of businesses

And how?

- <no data>

Is there anything the people/organizations in this room could be doing now to prepare?

- <no data>

Key messages to share with your colleagues…

- entrepreneurs have an advantage – adaptability is important in this world
- Natural desire for people is to form communities. People are engaged – as consumer and provider
- belief that art endures, and that it doesn't require a specific organizational form

McMusic Wins

(challenge)

Uncertainties

- Influence of changing demographic composition of growing U.S. population: strong and broad influence over all musical composition patterns.

- Music industry dynamics (both survive): consolidation continues, big players dominate

- Audiences for live, classical, and jazz music performance: shrinking

- Digital rights issues among composers, performers, intermediaries, and audiences: unresolved and subject to conflicting claims

Explore the future

This is a world in which …

- current trends continues

- reduced depth of art form

- reduced funding

- inability to sustain existing structures/systems

- inability to nurture new systems

- no economic model for increasing population of artists

What are the challenges in this future?

- Competing and shrinking funds to work with

- How does society value/react to homogenization, cultural extinction

- Smaller "venue" to express

What are the opportunities in this future?

- Guerilla market tactics

- Cultural "refocusing"

- Reinterpretation of genres

- Implement education counter movement

- Efforts to reinvigorate "uniqueness" through trends and fashion

- Individualism – renaissance

Build the scenario

If these uncertainties unfold as you describe, what also must be true?

- No government $

- No arts education

- Technology is so expensive --> access is limited

- Government censorship of artistic expression

- Globalization

- The power of business

- Aging boomers

- Limited diversity of artistic expression

- Homogeneity --> reaction opportunities for individual

What is likely happening in the field as a result?

- Creation is marginalized

- Audience shrinks (no education, live concerts, etc.)

- Less linkage: creation <--> audience

- One-stop shop device

- Closed format

- DRM enabled control of device

- "Locked-in" technology (i.e. XM also makes the radio)

- companies invest in hit-makers at the expense of quality and diversity

Given what you said about the world in 2016, what happened in the preceding years?

- 2016: 50% of all operas, orchestras, CM presenters = closed

- 2014:

- 2012: AFM closes. Increased number of performances in alternative venues (opportunity for entrepreneurial thinking grows)

- 2010: 25% CM inst. Closed

- 2006-2008: litigation, mergers, and satellite radio grows to 10 million

What evidence exists today that this scenario may already be unfolding?

- <no data>

Take one minute to choose the most important thing you want your colleagues to know about this world…

- Consolidation produces homogenization ("creative destruction") which produces opportunities for the individual. New products, services, art, distribution.

Implications

Who might be a surprising new entrant into the music world?

- Expanding minorities give rise to new CD's

- New non-traditional partnerships

- Pre-permitted "copy-left" rights enabled content, i.e. attribution per individual

- New artist rights organizations

- Maverick individual innovators

- New forms of distribution

- Government regulation

- One monopoly company owns everything

What current organization might no longer exist?

- Traditional CM institutions (at risk)

- CM formats or traditional radio

- Presenters

- National union, AFM

- Record stores and records

In this world what is growing and gaining strength?

- Cult of celebrity

- Corporations

- Government

- Popular music

- Crossover music

- Satellite

- Blogs

- Pressure to decrease $

- Curators

- Last FM play list sharing virtual/personal referral

- Guerillas

- More self-produced music

- Peer reviewer/critic

- Power of buzz

- Word of mouth "Red Bull"

What is shrinking and losing strength?

- Traditional/inflexible institutions which can't adapt i.e. orchestras, opera, ballet, radio – critics, trad.

- ASCAP/ BMI P.R.O.'s (trad.)

- Number of research labels (CM)

- CD sales

- Traditional print media

What strengths do the people/organizations in this room have that will help expand the audience for music and cultural programming in this scenario?

- Represent substantial audience numbers

- Good partnering i.e. PRI, BBC, GBN

- Passion, personal and institutional

- Relationships

- Openness to new ideas

- Understanding value of creativity

- Diversity of perspective

- Knowledge of public radio infrastructure

- Knowledge of alternative technology options

And how?

- Build workable distribution networks/ workable financial model

- Unite

- Professional training

- Education and outreach

Is there anything the people/organizations in this room could be doing now to prepare?

- Communication

- Personal and professional networking

- Convene locally

Key messages to share with your colleagues…

- Partner

- Awareness, education, get up-to-date

- Take steps now both small and large

Musical Micro-breweries

(surprise)

Uncertainties

- Influence of changing demographic composition of growing U.S. population: strong and broad influence over all musical composition patterns.

- Audiences prefer music as: a service to subscribe to

- User generation of content: disruptive to existing media players

- Music industry dynamics: new fragmentation, small players increasingly competitive

Explore the future

This is a world in which …

- New intermediaries emerge and offer subscription services that incorporate user generated content and are driven by demographic change, such as youth, culture, and ethnic Diasporas. A world of shifting, temporal communities, fluid identities, and loyalties in which there exists a plethora of musical microbreweries.

What are the challenges in this future?

- <no data>

What are the opportunities in this future?

- <no data>

Build the scenario

If these uncertainties unfold as you describe, what also must be true?

- Political representation is far more diverse

- Broadband/media access is far more universal

- Technology standards have settled/inoperable

- Increased access to capital for entrepreneurs

What is likely happening in the field as a result?

- Everyone is a creator, explosion of subgenres, spectrum of creators from amateur to pro

- Open distribution – everyone can find a niche with the help of the microbrewery (or create your own)

- Music experience is multimedia and interactive, blurred lines between participation and performance

- Use of media is ubiquitous

- Flow of resources: subscriptions embedded in other services (ISP's, cell, other)

- Federation(s) of microbreweries

Given what you said about the world in 2016, what happened in the preceding years?

- 2012: iTunes top 100 includes less than 50 English language titles

- 2010: digital rights resolved universal access to hi-speed media

- 2008: China and India music markets explode

- 2006: MySpace creates own label

What evidence exists today that this scenario may already be unfolding?

- <no data>

Take one minute to choose the most important thing you want your colleagues to know about this world….

- Everybody in the room would represent only one slice of a diverse universe.

Implications

Who might be a surprising new entrant into the music world?

- Kids/teens

- Ethnic communities: e.g. India, China immigrants

- Non-music industries as curators

- Automated generation of music – algorithm music

What current organization might no longer exist?

- Clear channel radio/ major (mass audience defined) centralized broadcasters

- Major record labels as they currently exist

In this world what is growing and gaining strength?

- User-driven individualized content

- Amount and diversity of music available

- Tools, devices, platforms.

- Explosion of secondary meta-content about creators and content

- Expert filters

- More capacity

- Music videos

- Musician middle-class

What is shrinking and losing strength?

- Hard copies of anything

- Mass audiences

- Current ownership class

What strengths do the people/organizations in this room have that will help expand the audience for music and cultural programming in this scenario?

- Mission: commitment to underserved audience. Commitment to diversity as a goal. Commitment to education as a core value.

- Ability to mentor in collaborative skills

- Ability to mentor in creative skills

- Increased innovative skills as a result of collective participation in the "art of the limited resource" AKA scrappiness, aesthetic or "less to lose"

- Shared openness to new technologies

And how?

- <no data>

Is there anything the people/organizations in this room could be doing now to prepare?

- Take on leadership roles in resolving rights issues.

- Practice diversity in hiring for your organizations

- Interact and engage with your audience from a technological perspective

- Create and manage successful online communities

Key messages to share with your colleagues…

- There is an extraordinary opportunity which aligns with our missions to create new models

- Great taste, less filling

- Learning to manage and create online communities is essential to impact and survival.

The New Seekers

(opportunity)

Uncertainties

- Influence of changing demographic composition of growing U.S. population: strong and broad influence over all musical composition patterns.

- Role of digital media companies: primarily competitors to today's providers

- User experience of information environment: users will increasingly need guidance to navigate a complex world

- Digital rights issues among composers, performers, intermediaries, and audiences: resolved and stable

Explore the future

This is a world in which …

- Unprecedented numbers of people are seeking unique connections (locally and globally)

What are the challenges in this future?

- <no data>

What are the opportunities in this future?

- <no data>

Build the scenario

If these uncertainties unfold as you describe, what also must be true?

- "critical mass" of access and convergence (economics and technology)

- social fabric continues to unravel and reconnect in new ways

- "catastrophes" continue (of many kinds)

- increasing alienation/distrust of political institutions

What is likely happening in the field as a result?

- Rise of independents

- Peer to peer sharing increases in importance

- Orchestras become more regional, adjust to supply in proportion to demand

- Experience of music is more intimate, less formal

- Lines between genres become blurred

Given what you said about the world in 2016, what happened in the preceding years?

- 2014: interactive broadcasting

- 2012: another big catastrophe

- 2010: "open" university

- 2008: P.A.D. ubiquitous

- 2006: negotiations on digital rights begin in earnest

What evidence exists today that this scenario may already be unfolding?

- Home schooling and other alternatives

- Alternative medicines

- "mega" churches

- silk road/ yo-yo ma

Take one minute to choose the most important thing you want your colleagues to know about this world…

- as institutions crumble, music replaces/or becomes more central to peoples lives: information, education, faith

Implications

Who might be a surprising new entrant into the music world?

- U.S. state department

- Organized religion (again)

- Disney

What current organization might no longer exist?

- Symphony orchestras (as currently organized)

- GM

- Media conglomerates

- AOL

In this world what is growing and gaining strength?

- Navigational tools

- Curatorial expertise

- Globalization

- Better virtual communities

What is shrinking and losing strength?

- "one size fits all" approaches

- Drive time (as mass transit grows and telecommuting increases)

What strengths do the people/organizations in this room have that will help expand the audience for music and cultural programming in this scenario?

- Archive of content

- Credibility as a source of cultural discovery

- Relationships with audiences and existing institutions

- Commitment to civic/non-profit model

And how?

- Train a new generation in inter-disciplinary skills (i.e. presenters learn about art; artists learn about presenting)

Is there anything the people/organizations in this room could be doing now to prepare?

- Recast the relationship between music and media to go beyond the "plug"

Key messages to share with your colleagues…

- Resolve the rights issue for us

- Identify, recruit and train next generation

- Music and media organizations need to understand each others challenges/objectives

Adam Smith's Dream

(opportunity)

Uncertainties

- Intellectual property protection: evolving but stable

- User experience of information environment: users will increasingly need guidance to navigate a complex world

- Rate at which classical/jazz audiences adopt new online tools to learn about artists and share music: fast

- Music industry dynamics: new fragmentation, small players increasingly competitive

Explore the future

This is a world in which …

- Perfect economic market ("Smithian")

- Easy for artists to produce

- Easy for consumers to locate and purchase

- Rights are protected and fairly priced

- Shrinking digital divide

- Media players adapt to consumers demands

- Emphasis on guidance vs. gate-keeping

- Rights and license holders respond quickly (and adapt)

What are the challenges in this future?

- <no data>

What are the opportunities in this future?

- <no data>

Build the scenario

If these uncertainties unfold as you describe, what also must be true?

- Information in the global currency – no bars.

- All platforms resolved.

- World economics have been progressive.

- Disparities of wealth are not barriers.

- Technology --> instead of books --> "My first iPod!"

- Poverty is gone.

- All politics visible and transparent

- Medical breakthroughs are the result of shared information globally

- Resurgence of government intervention

- global middle class

- lower barriers to technological adaptation

What is likely happening in the field as a result?

- Live performance is shared (in real time) for everyone --> at a cost --> active, thriving live music

- Potential for audience to be more diverse

- Non-traditional venues

- Concert experience will be multi-media

- Depth is available

Given what you said about the world in 2016, what happened in the preceding years?

- 2012: Eastern and Western music issues and resolutions. Acoustic qualities increase

- 2010: convergence of platforms. Broadband/Wifi become ubiquitous

- 2008: digital rights resolved

What evidence exists today that this scenario may already be unfolding?

- This conference

- Milwaukee's online distribution successes

- Adoption rate for technology

- Cross-pollination of pop and classical worlds --> both artistic and promotion

Take one minute to choose the most important thing you want your colleagues to know about this world…

- This is a world of synergy for live music and media

Implications

Who might be a surprising new entrant into the music world?

- Chinese artists into western music world
- Music and Media Inc.
- Computer implants
- Growth of music education – new models

What current organization might no longer exist?

- Record companies
- Publishing (commercial)
- gatekeepers

In this world what is growing and gaining strength?

- Performance and presenting organizations
- Guidance providers
- Multi-discipline consortia
- Content
- Content aggregators

What is shrinking and losing strength?

- Gate-keeping

What strengths do the people/organizations in this room have that will help expand the audience for music and cultural programming in this scenario?

- Willingness to change/courage
- Core missions with adaptability
- Access to creative content
- Support content

- Diverse channels of distribution

- Provide access to audience

- Identify potential audiences

And how?

- Use these attributes to attract and educate new and diverse listeners

Is there anything the people/organizations in this room could be doing now to prepare?

- Music and Media, Inc.

- This is news – publicize the movement

- push for resolution of rights issues

- Nurture communicators

Key messages to share with your colleagues…

- "Get off our duffs" Frances Richard

- we have to expect to do things we haven't done before

- disseminate information of objectives to our industries and music communities

Appendix E: The Uncertainties that Participants Used to Build Their Scenarios

Except for the two working groups assigned to develop "surprise" scenarios, each group could choose up to four uncertainties from the candidates GBN provided that the group believed were both very important issues facing the field and very uncertain as to their outcome. By looking at what the groups chose, one can see which issues seemed most important and uncertain to the greatest number of groups: digital rights issues, industry dynamics, and audience demographics. This list only has 21 uncertainties on it because it does not include those uncertainties that were not chosen by any group.

	Opportunity	Opportunity	Opportunity	Challenge	Challenge	Challenge	Surprise	Surprise	Total
Geographic sources of growth for classical/jazz audiences - non-traditional							1		1
User experience of information environment - increasingly need guidance		1	1						2
Audience market dynamics - micro markets, fragmented							1		1
Digital rights issues among composers , performers... - unresolved					1	1			2
Digital rights issues among composers , performers... - resolved	1	1					1		3
Intellectual property protection - evolving but stable				1					1
User generation of content - disruptive to existing media players								1	1
Role of digital media companies - primarily enablers							1		1
Role of digital media companies - primarily competitors		1							1
Influence of changing demographic composition of US - strong and broad influence		1			1	1		1	4
Audiences for live classical and jazz music performance -shrinking					1	1			2
Rate at which classical/jazz audiences adopt new online tools - fast				1					1
Recording and distribution formats - proliferate	1								1
Music industry dynmaics - consolidation continues					1	1			2
Music industry dynamics - new fragmentation			1					1	2
Government support for the musical arts - declining				1					1
Government support for the musical arts - increasing	1								1
Audience growth and diversity (cultural, economic, geographic, genre, growing the youth audience	1								1
Access to content - limited only to those who can pay						1			1
Demography - fragmentation				1					1
Rights - solved in favor of major corporations				1					1

Appendix F: What Do We Want to Create? (Complete transcription)

The following notes are from templates used during the forum to develop a set of ideas about steps towards action. The information is organized by the original kernel of the idea and then further developed into the subcategories of new needs and emerging opportunities, the definition of success for this idea, an explanation of why the idea will attract new audiences, resources and talent needed to make the idea possible, barriers to success, external forces that might support success of the idea, and unintended consequences. This is followed by a more formal explanation of the idea, and key questions that need to be investigated for the idea to move forward.

Formalize Music and Media

- 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, stations, networks, organizers and performers, along with all of the other great ideas we generated throughout the meeting.

- Definition of success:

    - Raised profile and perception of music and culture. A buy-in by thought leaders, charter members and anyone with a common interest. Sustained and increased engagement among stations networks and allied fields. Break the cycle of defeatism and pessimism. Restore the ecosystem.

- This idea will attract new audiences because…

    - cultural media will have a more clarified and focused voice. There will be a marketing plan to promote it. We will aggregate the influence of the many thought leaders in the world. There will be a venue for rights clearance and collaborative/common license making new music and platforms possible.

- Resources and talent needed:

    - Full time staff persons, professional marketing support, technical support, money, 50-100 charter members ($5000 each), the combined people and talents from the meeting.

- Barriers to success:

    - Turf wars, shrug factor, and a lack of money

- External forces for success:

- Growth of new media and platforms such as broadband and HD radio, continued pressure on public radio news and information formats, educational interest, and buy-in from performing arts and others.

- Unintended consequences:

    - Disenfranchised parties, too much success, mission creep and conformity to outside pressures.

- Explanation of idea:

    - 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.

- Key Questions:

    - Can we create an entity to serve the many interests but is beholden to none?

    - Will public media survive?

    - Will music in public media survive?

Repository of rights cleared content delivered locally with local voice 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.

- This idea will attract new audiences because…

    - It offers a diverse content, a sense of place and community, and it provides opportunities for discovery.

- Resources and talent needed:

    - Rights clearance expertise, technical expertise, funding, partners, and an identification of existing assets.

- Barriers to success:

- Rights holders, inertia, and lack of demand and competition could stop this from happening because of a lack of incentive or a lack of cooperation.

- External forces for success:

    - Rights holders, artists endorsement and participation, and new technologies.

- Unintended consequences:

    - Cannibalizes radio service, and discourages live attendance.

- Explanation of idea:

    - A national platform to create, host and deliver local content online.

- 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?

Create a laboratory for cross-boundary and multiple arts experiences to engage and stimulate demand (public corp. for the musical arts)

- New needs and emerging opportunities:

    - We need advocates, arts education, replenished constituency for music, more inspired and articulate artists. Opportunities include new energies around concert attendance, omnivore (demand for multiple forms and enhanced experiences), 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. There exist many formats (multiplicity).

- This idea will attract new audiences because…

    - It is a fun and interesting immersion in personal experience; it is plucky. It is also cumulative and customizable and it creates demand for more.

- Resources and talent needed:

- We have talent and resources, but we need partnerships (educators, labels, broadcasters, presenters, producing organizations), time, money, training, and a risk capital fund.

- Barriers to success:

    - Fear of the unknown, rights, investment in the status quo disguised as protection of the arts, the pretense of management. All of this could happen because people fear change.

- External forces for success:

    - Economic pressure, economic carrot, collective group of vocal leaders.

- Unintended consequences:

    - Institutional change, conservatories revise training, collaborative funding/funders, revised definition of classical music, genres evolving.

- Explanation of idea:

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

- Key Questions:

    - Is there a will?

    - Can we drown our kittens?

    - What is the job description for the next generation of artists and managers?

    - The new world of media encourages messiness, embracing the change in the genres themselves.

Simplify rights clearance process for emerging media operated by non-profit

- New needs and emerging opportunities:

    - Content (i.e. podcasting, downloads and streaming), archiving, education on how to utilize and participate, and increase 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.

- This idea will attract new audiences because…

- It generates content and better access. Content will improve because more are involved.

- Resources and talent needed:

    - Representatives of all stakeholders (rights-holders, distributors, artists agents, and broadcasters), legal advice for I.P. issues, funding, leadership/facilitation, technological expertise.

- Barriers to success:

    - Anyone from the right-holders/stakeholders group because agreement from all parties is required.

- External forces for success:

    - Working models to emulate and inspire, foreign competition, competition from for-profit sector.

- Unintended consequences:

    - Cannibalizing audience for existing media and live performance (concert hall attendance), and the evolution of employment opportunities (winners and losers that we can't predict)

- Explanation of idea:

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

- Key Questions:

    - Who are the rights holders?

    - Can we identify the rights holders and their interests?

    - We need to explore fair compensation and identify the people involved.

    - Identify the process by which to solve rights issues.

Design and prototype a guidance system for music listeners

- New needs and emerging opportunities:

    - Reach young adults. The need to 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:

- A station – identified source of music information tied to the station play list and other distributions (as well as other access).

- This idea will attract new audiences because…

    - They won't feel intimidated. It provides insights and information not available elsewhere ("Lifelong learning"). It offers interactive ways to heighten the experience and engage listeners. It leads listeners to further listening and live performance.

- Resources and talent needed:

    - Money. Sources of info/audio are plentiful. Librarian/creator educator. Creative resource that is enjoyable and interactive. Translation services (cultural differences). Information management and updating. Rights clearance. Partners in similar work.

- Barriers to success:

    - Station adoption fears or technical roadblocks or lack of money. Limitations on sources of info/audio because of copyright. Difficulty of a coherent presentation. Competition.

- External forces for success:

    - External support from record labels, the industry, private funding or government funding. Cooperation of information sources, and support local and national performance organizations.

- Unintended consequences:

    - Disincentive to program new works, increased use of supporting/related programming such as podcasts, webcasts, or local performance organizations.

- Explanation of idea:

    - A way of enhancing the experience of listening to music by tying the music to deeper information and audio and performance.

- 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?

Develop Initiatives to attract and keep younger audiences (and future pledges)

- 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…

- This idea will attract new audiences because…

    - It will attract new audience because of market demand, because it is qualitative and specific, and because the mission of public radio is not age-specific.

- Resources and talent needed:

    - Young people (all functions), creative resources, management that is open-minded and experimental, a long term commitment, research, a physical/online gathering space.

- Barriers to success:

    - Old guard management, competition (beats to the punch!), or no interest in programming. All of this because of fear.

- External forces for success:

    - Sponsors, artist endorsement, and organization wide commitment.

- Unintended consequences:

    - Alienation of current listener base, or spreading things too thinly ("all things to all people")

- Explanation of idea:

    - Create the next generation of public radio listeners and supporters.

- Key Questions:

    - What kind of content do the next generation of listeners want?

    - How do they want it?

    - Trust, ownership, contract?

- Action based on these questions (strategy and small steps).

A series of cultural conversations about the public interest in public radio

- New needs and emerging opportunities:

    - Changing demographics of American culture. Tech opportunities – multi paths

- Definition of success:

    - Tolerance. Allows for deeper reflection, laughter, expression, and engagement. Connecting us culturally in a way that doesn't happen in the market. WNYC cultural news integration.

- This idea will attract new audiences because…

    - <no data>

- Resources and talent needed:

    - <no data>

- Barriers to success:

    - Under value of PI in the public radio system

- External forces for success:

    - Homogenization of culture

- Unintended consequences:

    - <no data>

- Explanation of idea:

    - <no data>

- 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 that provides unprecedented access to the most exciting music and musicians in the world. We want to create a

multi-platform, multi-layered experience for the most exciting music in the world

- New needs and emerging opportunities:

    - Opportunities include a hunger of public for interesting content and context, branching capability of digital, a big honking void, and web communities gathered around music. Needs include access to stories and perspectives and 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.

- This idea will attract new audiences because…

    - They will want to be there. Trust. It isn't available anywhere else, It is differentiated, viral, and fun. The audience feels ownership and it offers specific qualities of access to artists.

- Resources and talent needed:

    - Money for talent and design production (web, radio, etc.), willingness to collaborate, ideas for interesting programming, lawyers, trust partners and audiences, new business models/monetize it, institutional support, marketing, technical infrastructure.

- Barriers to success:

    - Overbuilding or much scale (not all things to all people), money, peoples time overload, rights agreements. These could stop this from happening because competitors get it right faster/better.

- External forces for success:

    - Devices converging (radio and web), broadband/wifi, driven content/on-demand audience, lack of authenticity in other spaces, strong constituent orientation.

- Unintended consequences:

    - "better" than radio with a bigger audience (cannibalizes audience). It also might need to migrate/redirect money fast.

- Explanation of idea:

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

- 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 (biz, arts)?

    - We need to explore the issue of securing rights.