

To 2020 and beyond: threats and opportunities to public service media across Europe

LSE blogs.lse.ac.uk/polis/2013/04/25/to-2020-and-beyond-threats-and-opportunities-to-public-service-media-across-europe/

2013-4-25

I recently chaired (and contributed to) an all-day seminar workshop with a group of European public service broadcasters who are trying to (re-)define the trends that are changing their work. Not just journalism, but across the board. They want to know what the change-making factors are and how to respond – not just to protect their institutions but to plan for strategic adjustments and, they hope, improvement. I blogged a few months ago about [my initial thoughts on the strategic landscape](#) but here are some notes taken under the non-attributable ‘Chatham House Rules’. It’s not a proper record of proceedings, just some ideas that caught my ear.

Disruption Ahead

It is clear that there is more disruption ahead. Cheaper production, an abundance of material (especially niche) combined with an explosion of distribution possibilities and ‘glocal’ competition means the rules of the game will continue to be re-invented.

You only have to take one factor: ‘mobile’ to realise that we simply don’t know how behaviour will change and how new contexts for content creation and consumption might yet unfold.

Linear and On-Demand

The difference between linear and on-demand broadcasting will fade away as we bid adieu to the idea of the channel. Yes, TV is remarkably resilient in terms of ratings and impact. Yes, radio is booming in the multi-platform era. But how we consume it and what we do around it is changing. We are headed for a world where ‘everything is a playlist’.



What’s Curation?

At the heart of this process is a the fight for curation. Curation was a word that kept popping up in significant places during our deliberations and yet it means a whole range of things – many still to be discovered. In Austria, a curator is a lawyer who acts on behalf of someone who can’t act for themselves. In the UK, we think of glass cases in museums. A curate is the executive assistant to a priest.

But the idea of either automatic or deliberation curation of content to connect, filter, shape, channel, grade, verify or otherwise direct the flow of information and content remained central for those trying to find a role for public service media organisations [PSMs] in this new world.

Yet how will it happen? At the moment – for TV – the curator is the remote control. But what happens when the remote becomes social, for example when it is an interactive, networked app on a smartphone?

Public Service Media Assets

It’s easy to see all this as a threat to the Old Order and PSMs place in it. PSMs are sometimes conservative, bloated and banal. But PSMs have assets:

- They have channels which may change but will still be forces for navigation.
- They have skills, especially in story-telling, be it drama, news or sports.
- They have a subsidy through taxes, fees etc for creativity which allows them to innovate and take risks
- They have a connection to society through their funding, governance and history which in the best cases is based on trust.

But budgets are down, visibility is down and possibly relevance is down as other platforms, providers and sources crowd upon the public sphere stage.

Tough Questions

So there are some critical and tough questions for PSMs to ask themselves.

- How much to produce?
- How much to curate?
- Go broad or niche?
- How to create shared events in a fragmented world?
- Decentralise or go for big impact?

Of course, not all these choices are either/or. For example, is it possible to connect to and work with third-parties but keep your branding? And sometimes, there might not be a choice. It's all very well wanting to share but what if property rights are tightened up and there is no reciprocity?

Change, colleagues and Competitors

Over all this hangs the problem of bringing your people and organisation with you even if you agree on priorities and a strategy. Change does not happen in neat steps. It is continuous. How can you get your producers – and your public – to jump to new paradigms?

And bear in mind that your competitors will be doing the same thing. If you think that the PSMs face radical change – go talk to commercial broadcasters who are painfully aware of the new environment.

The new media companies like Google are becoming more like PSMs in some ways. They are now building channels and charging subscriptions and investing in content – look at Netflix and their investment in the top quality content of 'House of Cards'. But these companies are more like a Personal Service Media rather than an overtly Public Service Media with all that suggests of a wider social role and ethical and political responsibilities.

Who Wins?

Of course, it's not as if people are not already working on these issues. And we think that we can already define some clear winners.

- Consumers will win. They are more in control and have more choice.
- Content producers will win. The one things driving profit and profile is the content.

We can also see some trends that have already gained momentum. Live will not only survive but thrive. Look at music and football.

Know Your Audience

Those trends will depend largely on audience behaviour. PSMs already have a lot of consumer data but don't use it

and don't work hard enough to dig down and compare with other outlets'. Other media platforms such as Tivo are investing heavily in continuous and detailed audience monitoring and PSMs need to do the same if they are to understand how their services are appreciated, used or ignored.

This isn't all about Old v New Media. The classical idea of websites is dying faster than the idea of linear TV and being replaced by Web 2.0 or Web 3.0 networks. Yet even in a multi-platform/on-demand world you should still respect your physical temporal opportunities such as scheduling windows for the release – or re-release of material.

It's also not just about commercial v public. Private media companies are facing the same contextual challenges.

Talking Generations

The fundamental demographic question underpinned a lot of these conversations and there was a debate about how to tailor services to young people especially without ignoring other groups – or the fact that one day young people will become older and will want different things from PSMs.

Crisis And Complexity

As you will see from the graphic realisation of one session looking at issues that need much more thinking through, things are going to get a lot more complex. Yet there are also some very simple problems such as the reduction in resources that almost all PSMs are facing in the face of the economic crisis. Yet, they do at least have public support and an institutional capacity. If this session was anything to go by, they are past the stage of institutional resistance to change and now well on the way to deciding priorities for decisive action. While all have very distinct media markets the benefits of sharing this debate were clear.

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