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ARTICLE

From Television to Multi-Platform

Less from More or More for Less?

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Abstract / This article examines economic aspects of convergence and of multi-platform expansion in the media sector. Focusing on television broadcasters in the UK, it analyses the recent migration of conventional media towards multi-platform strategies and asks whether digitization is making content delivery more resource–intensive than before or whether it is facilitating greater efficiency. Findings suggest that adaptation to a multi-platform outlook on the part of conventional media requires investment in staffing and re-versioning of content. Funding this, especially in a period of economic downturn, has encouraged a more selective approach towards content, with concomitant implications for diversity. Notwithstanding generally low commercial returns from online activities so far, the potential economic advantages to be had from multi-platform are significant. The experience of UK broadcasters suggests a well-executed '360-degree' approach to commissioning and distribution will increase the value that can be realized from any given universe of content, partly because of extended opportunities for consumption of that content, but also because modes of engagement in a digital multi-platform context allow for an improved audience experience and for better signalling of audience preferences back to suppliers.

Key Words / 360 commissioning / cross-platform / economies of scale / economies of scope / multi-platform

Introduction

The so-called age of convergence has precipitated many 'false dawns' (Ofcom, 2008a: 1) and extensive if premature 'hype' about its progress has in the past caused some critics to warn against allowing public polices or business strategies to be driven predominantly by convergence (Noll, 2003). But, with growing use of the internet and of multi-media devices, and with more and more media content now available on multiple platforms, it is widely accepted that convergence has actually arrived.

Across the media, many organizations have responded to convergence by migrating towards a diversified multi-platform approach to production and distribution of content.

This article focuses on the development of multi-platform strategies by television broadcasters. In the UK television industry, migration to multi-platform has been characterized by the introduction of '360-degree commissioning' and by the development of websites and other digital offerings capitalizing on popular content brands. A 360-degree approach means that new ideas for content are considered in the context of a wide range of distribution possibilities and not just linear television (Parker, 2007). A 360-degree strategy implies that, from the earliest stages of conceptualization, content decisions are shaped by the potential to generate consumer value and returns through multiple forms of expression of that content and via a number of distributive outlets (e.g. online, mobile, interactive games and so on) of which conventional television is just one, albeit still a very important one.

This article is concerned with the extent to which media organizations are benefiting from opportunities to disseminate content across multiple platforms. Is the migration to multi-platform enabling television companies to use their resources more effectively than before? The main emphasis here is on multi-platform distribution but, as reflects the interdependent nature of the relationship between distribution and earlier upstream phases of commissioning and production of content, the analysis embraces the wider context of related activities integral to supplying television. The most obvious benefits from extending distribution across multiple platforms are greater economies of scale and scope as additional consumption of content across new platforms is facilitated. But whether these benefits alone are sufficient to make sense of a multi-platform strategy depends on how any additional audience value generated relates to marginal costs.

Technological change is a constant feature in media industries and a number of studies have concerned themselves with how organizations have adapted their strategies to deal with convergence and growth of the internet (Aris and Bughin, 2009; Chan-Olmsted and Chang, 2003; Dennis, Warley and Sheridan, 2006; García Avilés and Carvajal, 2008; Küng, 2008; Küng, Picard and Towse, 2008; Raviola and Gade, 2009; Wirtz, 2001). Some earlier work has looked at the implications of convergence between television and online (Caldwell, 2006; Chan-Olmsted and Ha, 2003; Dowling et al., 1998). Convergence is used and understood in many different ways but in the current context refers to the use, right across the communications industry and in all stages of production and distribution of content, of common digital technologies. Such technologies have spurred on the development of new forms of content combining video with text, for example, and involving interactivity and multiple layers (Roscoe, 2004) and also the development of converged devices (such as mobile phone/media players). The transition towards digital platforms – the internet being the principal example – means that content of all kinds can circulate and be delivered to audiences across numerous avenues (e.g. television over mobile or radio via DTT or the internet). Adoption of shared digital technologies has impacted not only on content and delivery but also, as many earlier studies have shown, on the operational and corporate strategies of media and broadcasting organizations.

Television is changing in ways that make it increasingly difficult to consider linear broadcasting in isolation from other modes of distribution to audiences, such as the internet and mobile (Caldwell, 2006; Creeber and Hills, 2007; Meikle and Young, 2008). Processes of change, characterized by a much greater emphasis on multi-platform engagement with audiences, are evident in all stages of the television industry – from content production to product assembly to distribution – and, as earlier research has shown (Roscoe, 2004; Ytreberg, 2009), these changes are affecting media forms and how content is consumed and enjoyed. For broadcasters, a desire to capitalize on multi-platform distribution will inevitably shape and inform content acquisition decisions and, in turn, production activities at earlier stages, irrespective of whether production activities are located in-house or not. So, to find out how multi-platform approaches are enabling broadcasters to use their resources in improved ways, a focus on a range of broadcasting companies in terms of degrees of vertical integration is apt to yield a richer body of findings than looking solely at publisher-broadcasters or at producer-broadcasters.

Most television broadcasters, irrespective of vertical structure, have hurried to embrace a 360-degree or 'multi-platform' strategy, though what this actually means in practice can vary widely. Multi-platform is generally about dispersal of content across multiple outlets (Bennett and Strange, 2008) and this may sometimes involve creation of multiple texts to enhance the suitability of content for different modes of delivery, although not necessarily so. One approach towards multi-platform distribution revolves around reuse of existing content across additional digital platforms, for example supplying linear television content online or via mobile devices. Another involves modification of existing output (e.g. re-editing) or adding additional layers of content. The creation of additional original (e.g. web) content as well as other ancillary materials to complement existing linear offerings can be central to multi-platform distribution strategies (Leaver, 2008). And multi-platform often involves content forms that combine or blend conventional alongside digital delivery. Event television (e.g. *Pop Idol*) and popular factual formats that draw on interactive technologies have led the way in demonstrating the potential for multi-platform content to engage audiences across a range of platforms, including the internet and mobile phones as well as television (Roscoe, 2004). So among broadcasters, multi-platform approaches towards distribution and, related to this, towards content decisions at upstream stages of commissioning and/or production can vary, with some involving much more significant levels of ambition, experimentation and innovation than others.

One of the most defining features of broadcast content in economic terms is its 'public good' quality – the fact that consumption by one individual does not reduce its supply to others (Collins et al., 1988). Because of this quality, the impetus to adopt a 360-degree approach towards creation and distribution of content seems to make a great deal of economic sense. Multi-platform distribution capitalizes on the public good characteristics of media content and, at relatively low marginal cost, allows much fuller commercial exploitation of intellectual property assets across additional distribution outlets (Küng et al., 2008: 133). Multi-platform repurposing of content is common practice amongst major media conglomerates (Caldwell, 2006) and a significant contributor to the high levels of profitability they achieve (Vukanovic, 2009).

Recycling of television content across additional audience segments is by no means new. The process of 'windowing', which is about calculating what returns can be earned from video content by selling it through different channels or 'windows' and then arranging the sequence of releases into the most profitable order, was described in detail in the early 1990s by Owen and Wildman (1992). This pre-dates the arrival of digital platforms but, in principle, the technique of windowing is more relevant than ever for media suppliers in the digital era, albeit that modelling the range of distributive outlets and the factors likely to dictate their sequencing is more complex.

The shared use of digital technologies in production, content management and distribution has made reversioning and reuse of content easier than before. But many publishers and broadcasters have struggled to generate any significant revenue from supplying content on the internet. Piracy, although not the main focus here, is clearly a part of the problem. As broadband capacity increases, illegal copying and intermediation of broadcast content on the internet poses an obvious threat to television industry revenues (Bates, 2008: 55; Duffy, 2006: 39). More generally though, a predominant culture of free access to content on the web has made it difficult to derive user-payments, especially for mainstream content. This was reflected in Rupert Murdoch's assessment that the newspaper industry's business model is 'malfunctioning' and that suppliers need to start charging for online content (Edgecliffe-Johnson, 2009).

Even so, thanks to digitization, the translation or reformatting of content from one media platform to another makes increasing economic sense and, given an ever-wider array of content offerings now available to audiences, brand building has become a crucial aspect of digital strategies (Duffy, 2006; Johnson, 2007; Ots, 2008). The impact on diversity of coordinated distribution of strongly branded content across multiple delivery platforms is questionable (Hesmondhalgh, 2002: 76), though it has been argued that, because only a small percentage of brands ever achieve widespread acceptance, any threat to diversity is limited (Murray, 2005).

Multi-platform digital distribution opens out numerous possibilities for public service broadcasters to offer new sorts of services and output to audiences (Bennett, 2008; Bennett and Strange, 2008; Born, 2003; Enli, 2008; Graham, 1999; Trappel, 2008). This article is not about public service broadcasting as such but about how multi-platform distribution strategies are enabling broadcasters, whether market or non-market players, to make better use of their resources. One outstanding example of this is the BBC iPlayer, an online catch-up service, which, since being launched in December 2007, has become quickly accepted and heavily used by viewers (BBC, 2010). The potential for multi-platform to facilitate greater audience value was summarized as follows by the BBC's Director-General in his *Creative Future* vision of strategy for the corporation:

> *Programmes won't be shown once and then forgotten. They'll be there forever to be linked, clipped, rediscovered, built into bigger ideas. (Thompson, 2006: 14)*

But migration to multi-platform strategies is not solely about more effective use of content. The impetus to re-envisage corporate missions in a more platform neutral way also reflects massive changes in media consumption patterns and in the appetites of (especially younger) audiences that threaten to leave conventional media behind unless they too change. Research conducted by, for example, UK regulator Ofcom, confirms that although broadcast television remains supreme in its popularity, audiences are embracing the additional choice, control and opportunities for participation offered by the internet and mobile connectivity (Ofcom, 2008b: 118). The ways in which convergence is enabling new forms of participation and collaboration are elucidated by Jenkins (2006). He argues that shifts in the strategies of media organizations towards a more multi-platform approach and towards a re-balancing of top-down versus bottom-up participatory culture 'is being driven by economic calculations and not by some broad mission to empower the public' (Jenkins, 2006: 243). But can the two be neatly separated? If digitized, platform-neutral, interactive and multi-layered forms of content is what audiences demand, it surely follows that more resources ought to be directed towards supplying this.

The aim in this article is to examine what are the main strategic motives encouraging television companies to embark on multi-platform distribution strategies, and to what extent digitization, convergence and multi-platform approaches are enabling broadcasters to operate more efficiently and effectively. In what ways is a 360-degree approach to content distribution affecting the ability of broadcasters to exploit their resources and serve audience demands effectively? Some have argued that audiences are being 'super-served' with multiple options and media suppliers ought to draw back from creating more and more new content and delivery formats (Bell, 2009: 4). To what extent are the costs of adopting a multi-platform strategy outweighed by new revenue streams or greater audience value or other actual or expected strategic benefits?

The sample chosen for this study – the BBC, Scottish Television, ITV, Channel Four and MTV – includes some organizations who are mainly focused on broadcasting and others involved in content production as well as broadcasting. This selection reflects the point that, because strategies for dispersal of television content are frequently interwoven with and interrelated to production decisions, the experience of a sample of broadcasters that is varied (in terms of vertical structure) is apt to provide fuller evidence about the impact of multi-platform strategies on the economics of supplying television. An exploratory investigation, based on analysis of reports and financial statements for these television broadcasters, and interviews with key television executives, was carried out in 2009. Interviewees were involved in functions including corporate planning, strategic management, content acquisition and management of digital operations. The sample includes not only leading UK broadcasters but also, for additional depth and range, the UK-based subsidiary of an international television company. In order to take account of the differing objectives guiding strategic development in an industry partly devoted to public service, the sample also includes both market and non-market players. Although a limited survey, focused only on the UK, the strategic issues related to convergence that are opened up by this research are of wider relevance to broadcasters and content suppliers based elsewhere. Findings are analysed under three main themes: motives for adopting a multi-platform approach; impact on conceptualization and exploitation of content; and implications for costs.

Economic and Strategic Motives for Multi-Platform

Amongst UK-based commercial broadcasters, Viacom subsidiary MTV has been one of the most advanced in devising and executing strategies that capitalize on a multi-platform approach. Philip O' Ferrall,[1] Head of Digital Media at MTV Networks explains that, while until a few years ago everyone perceived the business as being just about television, this has now changed irrevocably. It is now recognized that, for example, console games and online games involving virtual worlds are as much a part of the business and its future as production and broadcast of television and film content. According to O'Ferrall:

> *MTV in the UK is a completely 360-degree media owner . . . We're* not *a broadcaster; that's just part of what we do. We make programmes, we own brands and we media-cast multi-platforms. The media-cast continuum . . . that we provide is completely 360.*

While transformation to 'a completely 360' outlook has been achieved by niche broadcaster MTV, the extent to which this mindset has taken hold across the television industry more widely is questionable. Many UK broadcasters, despite adopting multi-platform strategies, are quick to point out that conventional broadcasting remains by far the most popular and powerful medium with audiences, notwithstanding growth in internet usage. A number of mainstream broadcasters account for their transition to multi-platform as being 'a defensive move' – a necessary strategy in order to defend their market position at a time when the behaviour of audiences and advertisers is changing, as exemplified by all available international data (Ofcom, 2008b: 118, 160).

Another issue is the age profile of television executives involved in programme decisions (Parker, 2007). Alan Clements,[2] Director of Content at STV Group plc and former independent producer, explains that although much more weight is accorded now than a few years ago to how well a prospective programme idea might perform in a multi-platform context, the chief concern is still whether or not it promises to be a great television show:

> *for the foreseeable future – for the people that are going to be in positions of authority in television over the next ten years – I don't think the first default position is going to be 'how does this work online?' . . . It is part of the thought. But less so than 'is it a killer format that'll work?'*

MTV's orientation towards youth audiences is reflected in a more committed approach to multi-platform development, as reflected in Philip O' Ferrall's view:

> *If we want to continue to grow our business there's no point saying 'let's make a great TV show and then put a bit of content online' – it just doesn't work. So everything we do, it's in the DNA now to think: 'right, we've got this audience and what do they want at the minute?' . . . [W]e create that audience and build it prior to just being a linear broadcast. Any of our shows start online, on mobile, on social networking sites and we build an audience. They migrate to television and when they're not watching on television they can continue to have a relationship with that media property on any platform. So that's basically how all of our shows work now.*

There are, of course, differences between how commercial players and public service operators explain their need to adopt a multi-platform approach. For commercial television companies, whether the aim is to mitigate the impact of declining audiences or, more positively, to build brand profile and diversify revenue streams, motives for moving to multi-platform distribution are usually traceable to long-term profit maximization. For PSB operators, the primary concern is public value and audience welfare rather than profits and so strategic motives are more wide-ranging. Matthew Postgate,[3] Controller of Research and Development within the BBC's Future Media and Technology Division, sums up the BBC's motives as follows:

> *there's a two-fold thing there in that the BBC should, we believe, be an innovative organisation but also we need to remain relevant. Both of those are strategic objectives: chasing audiences; serving audiences. [A]nd then there's the building digital Britain remit . . . [I]f you look at a society like Korea, there the Government chose to make a massive public intervention at a network level. Essentially*

> *they pay for everyone to have broadband . . . [whereas] in the UK, as a society we have chosen to have a large scale intervention at the content layer. But broadly speaking you're seeking the same social outcomes and you're trying to seek a balance between public sector and private industry arriving at the most competitive outcome. So building digital Britain is the third strategic driver for our cross platform convergence strategy.*

Economies of scale and scope are often thought to be the main incentive for multi-platform diversification. But the experience of UK organizations suggests that the range of motives driving broadcasters to embrace a converged 360-degree approach is usually much more complex. For some, a key attraction is the opportunity to engage with target audiences more comprehensively and more effectively. For many, the need to move beyond broadcasting is more of a defensive move. Multi-platform provides a means to remain relevant to audiences and advertisers whose interest has shifted away from broadcast to online and mobile media. For PSB operators, multi-platform diversification is also about trying to keep in step with evolving and, arguably, much more demanding conceptions of the key purposes public service provision ought to fulfil in the digital era.

Content Acquisition and Exploitation in a 360-Degree World

As the television industry adapts itself to an emerging appetite amongst audiences for what Mark Thompson (2006: 14) called 'Martini media' – that is, media available to access anytime, any place and any how users choose – a key question is how is this affecting the cost-efficiency of television companies? Does the reuse and reformatting of content across numerous products, services and digital delivery outlets generally enhance the economics of supplying television by allowing 'multi-casters' to wring much more value out of their content properties and intellectual property? Or, in a world of fragmenting audiences, is the additional return or value generated by multi-platform distribution matched and outstripped by additional costs?

In practice, the experience of UK television companies suggests there are two main ways in which digitally converged multi-platform distribution can improve efficiency in delivering value to audiences via television content. One relates to the opportunity, with a multi-platform approach, to provide more and improved access to content. A second advantage stems from the opportunity, because of the return path with digital delivery, to engage with users in ways that are different and that allow for audience needs to be understood and catered for better than before. Anmar Kawash,[4] Chief Operating Officer at STV summarizes the benefits of 360 distribution thus:

> *what you're seeing is more windows to exploit . . . more outlets for your content . . . also you've got a different way of your audiences connecting back to you.*

A 360-degree approach to content multiplies the number of windows or distribution outlets through which broadcasters provide audience access to television content and, related to this, it extends the time period over which content properties are able to deliver value and earn a return. As Kawash explains, the addition of a website as well as a conventional broadcast channel means that broadcasters are no longer constrained by the limitations of a linear television schedule in which access to content, especially at peak-time, is tightly restricted. A strong appetite amongst audiences to avail of more flexible access was demonstrated by, for example, record levels of online viewing for video clips from ITV's show *Britain's Got Talent* in May 2009 (Barnett, 2009). David Booth,[5] Head of Programming at MTV UK, confirms how crucial it is to be aware that exploitation of content assets is not just about the first transmission:

> *It is about* aggregate *viewing [across multiple outlets] . . . When we commission something we're thinking: what is the longevity of this show? You could have six 30-minute episodes – that doesn't mean the show is over in six weeks time. You've probably got two years sweating that content on different platforms . . . The commissioning model is about having high production, high quality, high-cost vehicles as opposed to just doing something that's a one off. So the economics of television has really come into it. I spend a lot of my time with Strategy and Finance working out return on investment across different platforms of doing an idea. Whereas in the past . . . if it was a great idea then people just thought: 'that's brilliant for linear; that's great for a Sunday night spot at 9 o'clock or 10 o'clock'.*

So, for commercial broadcasters such as MTV, a 360-degree approach partly means fuller exploitation of what has been described as 'the long tail' (Anderson, 2006). This gives rise to the need for careful strategic planning of how to maximize the return from any content property across all available distributive outlets. Both the necessity for and the complexity of 'windowing' in a 360 multi-platform context are reflected in David Booth's observation about time spent with the accountants. For public service broadcasters, a prolonged distribution period will not necessarily yield additional revenues but, as evidenced for example by the popularity of the BBC iPlayer, it can extend public value quite considerably.

However, another highly important if less loudly trumpeted benefit of digital technology is the potential for the return path to improve efficiency. Head of Digital Media at MTV Philip O' Ferrall explains how interactivity allows MTV to manage its resources much more effectively:

> *we run a whole load of music channels and we've got a bunch of experts that know music and none of them are the same demographic as our audience . . . So what we've done is tell them what the audience want and we do that through interactive charts. We do it through our relationship with, for example, a MySpace chart, we have an MTV.co.uk chart, we have a mobile chart, we have a chart that you can vote on online or through red button. Who better to shape the programming of music on the TV channel than the masses? . . . Everywhere [online] there are comments, part of the job of my team is to trawl the editorial, pick up comments, pick up important information, feed it back to me and into the production team so we can slightly change the way that a production is going . . . We can do that because we have a direct link between our audience and the TV.*

Interactivity and more effective use of systems of feedback allow broadcasters to know about and cater to the specific wants of a target audience. Through in-depth analysis of current trends, and through judicious use of online teasers and tasters for forthcoming programmes, a closer relationship becomes established whereby the target community of interest can be cultivated in advance and directed back and forth across platforms towards additional opportunities to engage with popular brands and content properties. So the emergence of a converged multi-platform media environment lends itself to new opportunities for management of audience flows – a concept that is by no means new to the television industry (Williams, 1974). Achieving a level of 'hyper-engagement' whereby audiences are progressively built up and can then be directed towards those distributive outlets where attention is converted to revenue is, as David Booth explains, very crucial:

> *If we didn't have 360 degree commissioning, just nothing would cut through. We wouldn't get the viewers and it's about hyper engaging back. That's the thing. We've connected with the viewers and we've given them what they want and the key over the next two years is to get all this traffic that we've got online and hyper-connect them back into the linear channels. If you do that, you're onto a winner. And I don't think anyone's quite got that right yet, because it is very difficult; it's complicated.*

Do Multiple Platforms Mean Multiple Costs?

Distribution of media content across numerous platforms and in multiple guises and forms can result in larger audiences, an improved experience for end-users and higher returns. On the other hand, supplying 'Martini' media may involve at least some marginal costs. Notwithstanding the public good features of media content, the need to adapt it to suit the platform it is being distributed on and, in some cases, to produce extra material, may involve additional effort and resource (Erdal, 2007; Bockowski and Ferris, 2005). A successful 360-degree distribution strategy requires that the specificities and strengths of each differing mode of delivery be taken into account, as Matthew Postgate at the BBC explains:

> *where convergence has been successful it is around companies who have been able to use different platforms to their strengths to create something that is greater than the sum of its parts. And where you have failure it is that people have put different platforms together and tried to layer a single-service proposition over them, when it was only ever optimal for one of them. So convergence is a concept that is in some ways defined by divergence.*

A converged approach within processes of content production can generate savings and help minimize the extra costs involved in multi-platform delivery. As earlier studies on newsrooms and on multi-platform journalism have shown, news is one area of content production where converged approaches have become relatively well established (Cottle and Ashton, 1999; Dailey et al., 2005; Deuze, 2004; Erdal, 2007; Killebrew, 2003; Lawson-Borders, 2003; Phillips et al., 2009; Singer, 2004). Many if not most broadcast and other news media operations are now well advanced in adapting their newsrooms and work practices towards a multimedia outlook, driven at least partly by managerial hopes of widening audiences and cutting costs (Quinn, 2005). How this impacts on journalistic standards, although important, is not the focus of investigation here but rather how multi-platform impacts on costs. BBC Scotland's headquarters at Pacific Quay in Glasgow is fully digitized and, as its Head of Corporate Affairs Ian Small[6] explains, savings in news creation costs are possible because news teams routinely produce content offerings not only for broadcast television plus radio (as per the BBC's long-established 'bi-media' approach) but also, now, for online and mobile delivery too. At BBC Scotland as elsewhere, news-gathering and production resources can be more fully utilized because they are shared across a wider number of news-based outputs.

But, because not all forms of content lend themselves so well towards converged production as news, a multi-platform distribution strategy will in some cases necessitate multiple production processes in relation to a single content property in order to construct a range of texts and ancillary material designed to enhance and ensure the suitability of that content across a range of platforms. To the extent that multiple production activities are needed then, although multi-platform dispersal will enable some economies of scope to be reaped (e.g. through shared use of story, characters, brand and so on), the cost of generating multi-platform outputs will clearly exceed that of making just one form of output such as a television show. As technologies have advanced, audiences have come to expect ever more dedicated and sophisticated tie-ins for content offerings that migrate across platforms. Meeting these demands can be expensive (Soun Chung, 2007), as Ian Small notes:

> *The best sites are those which are* dynamic. *We can see that with blogging sites, message boards, chat rooms and whatever. However, the difficulty with these sites is that they are labour-intensive. You have to have someone moderating on a regular basis, assessing the content etc. So, much as we would love to have these across the board, it gets back to resourcing. The appetite may be great out there but, even with convergence – even working as cleverly as you can – you might not be able to match the resources available with the increasing appetite for different sorts of websites.*

Multi-platform distribution strategies are apt to add to a broadcaster's costs but, at the same time, because of the ongoing fragmentation of television audiences discussed earlier, the impact of such strategies on any broadcaster's aggregate audience reach may be negligible. The experience of many UK broadcasters – see, for example, Tables 1 and 2 – suggests that 360-degree distribution will not necessarily produce a significant uplift in revenues (though it may be instrumental in stemming declining audiences). Therefore, against a background of tightly constrained and in some cases depressed budgets caused by advertising recession, the cost of meeting audience demands for additional volume, range and depth in multi-platform content delivery is something that all broadcasters are highly aware of. One commercial television executive summarized his sentiments thus:

> *I think if it wasn't for competition – if it wasn't for the consumer having more choices – broadcasters wouldn't want to deal with convergence, because it's a pain in the ass!*

Streaming of content on the internet may cost relatively little (provided rights are owned), but piping content into homes generally involves at least some marginal expenses, including payments from broadcasters to content delivery networks to ensure quality and avoid loading-time delays (Bradshaw, 2009). In addition, it is widely conceded that the design and upkeep of websites and the creation of innovative and appealing properties suited to digital multi-platform delivery requires investment. Sustaining a varied portfolio of digital channels, even where all channels are utilizing much the same content, involves more work than providing just one. Audiences now expect the many extra features or services (such as time-shifted channels, watch again facilities, and opportunities for more in-depth and for two-way engagement) that digitally convergent and multi-media distribution make possible, but only some of these will be successful in generating incremental revenues to a level that enables marginal costs to be covered.

Some sense of the cost of extending delivery across new media platforms may be gleaned from the financial statements of television companies who report separately on online or 'new media' activities.[7] The online division of ITV plc, which was loss-making both in 2007 and 2008, at that time consisted largely of itv.com, an advertising supported entertainment site built around ITV's popular programme brands, plus Friends Reunited, a reunions site (ITV, 2009: 31). Notwithstanding disappointing returns from online businesses, an analysis of the trend in average staff headcount by division – see Table 1 – underlines the extent to which this television broadcaster has focused on building up

TABLE 1

ITV plc – online v total segment analysis

ITV plc			
Year to 31 December	2006	2007	2008
Revenues:	(£m)	(£m)	(£m)
Online	23	33	36
ITV total	2536	2414	2350
Online as % of total revenues	0.9%	1.4%	1.5%
Average employees:			
Online	135	286	373
ITV total	5957	5700	5597
Online as % of total employees	2.3%	5.0%	6.7%

Source: Based on figures from ITV plc's Financial Statements 2007 and 2008.

its internet activities over recent years. The average number of employees in ITV's online division had reached 6.7 per cent in the year to December 2008 but, in the same year, the share of ITV's revenue accounted for by the online division was only 1.5 per cent.

Likewise at Channel Four, the scale of creative and financial investment into online and multi-media delivery far outstrips any return being earned from these activities at present. Table 2 shows how, across the three year period from January 2006 to December 2008, the average headcount involved in creating and maintaining 'future' media services such as the company's websites (C4.com and E4.com) and video on demand offerings grew from 12 per cent to 16 per cent of the company's total number of employees.[8] This

TABLE 2

Channel Four – new/future media v total segment analysis

Channel Four			
Year to 31 December	2006	2007	2008
Revenues:	(£m)	(£m)	(£m)
New/future media	18.5	26.7	33.4
Channel Four total	936.9	944.9	906.1
New media as % of total revenues	2.0%	2.8%	3.7%
Average employees:			
New/ future media	111	137	146
Channel Four total	917	965	905
New media as % of total employees	12.1%	14.2%	16.1%

Source: Based on figures from Channel Four Financial Statements 2007 and 2008.

level of investment is generous compared with an earlier survey focused on the US television industry which found that companies generally devote 1–5 per cent of their overall budgets to internet related activities (Chan-Olmsted and Ha, 2003: 590). At Channel Four, while average headcount involved in 'future' media reached 16 per cent in 2008, income from this source was less than 4 per cent of the organization's total.

There are currently two main aspects to Channel Four's online strategy: first, websites that seek to exploit the multi-platform potential of its existing strong television content brands and, second, an initiative called 4IP. In terms of sites offering content, the company broke new ground by making a major proportion of its back catalogue of popular programmes accessible to UK viewers for free from July 2009 through its 4OD catch-up service (Dowell and Williams, 2009). The 4IP initiative, by contrast, is actually not about television or reuse of content but rather, as Head of Nations & Regions at Channel Four Stuart Cosgrove[9] explains, about investment, in partnership with others, in 'social media platforms, participation platforms and technology enabling tools' that may over time generate public value and new income streams. When asked about why, despite high costs and low returns so far, investment in online is still considered worthwhile, Stuart Cosgrove explains:

> *Well, the answer is the same as with any other organisation. You* have *to have a stake in the future. And sometimes that stake is loss making. Sometimes it is not clear where the revenues are going to come from or what shape they're going to take. And some of it is about staking out whether the future is going to pan out the way that you strategically analyse it will. And we* have *to have a stake in that future. We can't not.*

Although, for many UK television companies, online activities have cost a lot and produced relatively little return so far, it is widely accepted that diversification – moving beyond broadcasting and into the new forms of engagement with audiences – is absolutely essential for survival. Earlier research in the USA has also found that building audience relationships is a key motive for greater investment in internet-related functions (Chan-Olmsted and Ha, 2003: 593). In the USA as in the UK, the strategic response of broadcasting incumbents to the growth of internet-based competitors such as YouTube, Facebook and Google has similarly focused primarily around development of online distribution services for their own content. The Hulu online video service run by NBC, News Corporation and Disney, which allows viewers to stream television shows from the major networks, has grown rapidly in popularity since its launch in 2007 (Edgecliffe-Johnson and Menn, 2009).

The conviction that new forms of engagement with audiences are essential for survival is as evident amongst public service broadcasters as commercial players. At the BBC, the proportion of public service expenditure attributed to online activities (including mobile) has gradually increased over time and reached 5.8 per cent in 2007–8 (see Table 3). While BBC managers were criticized in a review in 2008 for insufficient control and while curbs have since been imposed over the costs of the organization's web operations (Conlan and Sweney, 2008; Oliver, 2009), it is also notable that the BBC Trust concluded that that 'bbc.co.uk is an excellent service that is highly valued by users' (BBC Trust, 2008: 12). The iPlayer service introduced at the site in December 2007, which allows viewers a chance to see programmes missed, has proven especially popular and within only a few months of launch was reaching over 1 million viewers per week (BBC Trust, 2008: 31).

TABLE 3

BBC – analysis of online expenditure

BBC			
Year to 31 March	2006	2007	2008
Expenditure:	(£m)	(£m)	(£m)
Online	151	154	182
Television & radio	2755	2883	2954
Online as % of total BBC spend	5.2%	5.1%	5.8%
Cost per user hour:	(£)	(£)	(£)
BBC One	0.06	0.07	0.07
BBC Two	0.06	0.07	0.07
BBC Three (digital)	0.21	0.16	0.13
BBC Four (digital)	0.29	0.21	0.17
Cost per user reached:			
bbc.co.uk	0.17	0.16	0.18

Source: Based on figures from BBC Financial Statements for 2006–7 and 2007–8.

When it comes to evaluating the success or otherwise of investment across new delivery platforms, for commercial broadcasters indicators such as profit or return on investment (applied over the medium-term) will normally provide at least some sort of useful yardstick. But measuring return on investment in public service broadcasting is inherently a much more challenging and complex task. The BBC has sought to underpin accountability by offering a framework for assessing public value based around measures of audience reach, quality, impact and value (RQIV). The RQIV is, in the words of Matthew Postgate, an attempt to 'provide a common measuring system across all our technology' and which will help with making investment decisions across the BBC's entire portfolio of services. But the use of quantitative approaches towards public value in broadcasting is bedevilled by the problem of measuring essentially 'unmeasureable' characteristics such as quality (Collins, 2006: 41–3). And, even with such a comprehensive framework as RQIV, problems around comparability remain because the way in which audiences get value from content varies from one platform to another. Whereas 'time spent' is a positive indicator for an activity such as watching television, it is less clear that this always holds true for use of the internet. Longer time spent using an online news service, for instance, may indicate a negative rather than positive value if the explanation is that the user cannot find what they are looking for.

One of the key measures of value for money that the BBC reports each year is a calculation based on user hour, in other words, the cost of providing the service divided by the total audience multiplied by the number of hours of usage. Table 3 shows the cost per user hour of four of the BBC's television channels two of which are popular primary channels (BBC One and Two) available in all UK homes and two of which (BBC Three and

Four) are digital-only channels receivable in multi-channel homes. The per-user cost of the BBC's website – bbc.co.uk – at 17p is broadly in line with reported per-user costs for some of the organization's digital television channels and therefore can be said to be offering similar value for money. But note that the calculation of value for the website is based on cost per user *reached*, not cost per user hour. So, arguably, the per-user value being created in each case is not strictly comparable.

The need for improved means of measuring and comparing the value of audience experiences from one digital platform to another remains a challenge for the media industry, and one that affects not only public service broadcasters but commercial players too. There is widespread awareness, too, that because of budgetary constraints the costs associated with multi-platform delivery must be managed and controlled. Matthew Postgate explains that, in relation to investment in new digital media at the BBC, rather than seeking to expand the sheer volume and breadth of output, the objective is to achieve impact and to evolve editorial formats and new platforms:

> *Broadly speaking we're a fixed revenue organization. What that means is if you want to do something new then you have to stop doing something else . . . Delivering the* Creative Futures *strategy can be summarised in very simple terms: fewer, bigger, better . . . Fundamentally it's about trying to focus the investment that's warranted by the audience size around the kinds of experiences that are going to appeal to the people who are either there or nearly there on the platform . . . You're pulling resource out from what it used to do into the new things . . . What the BBC has to do is accept its total size and prioritise investment in line with audience behaviour, which is often tricky.*

Echoes of the mantra 'fewer, bigger, better' may be heard right across the television industry both as a response to recession and tighter programme budgets and, also, as a formula for managing adaptation to a converged multi-platform model. In order to perform the adjustment within a constrained budget, greater selectivity is being exercised at the stage of content commissioning with more concentration on ambitious and potentially high-impact ideas. Even at MTV where, compared with many other media organizations, the track record of earning extra revenues from multi-platform delivery has been very strong, it is fully recognized that success depends not on volume but on highly selective investment in content. According to Head of Programming David Booth:

> *it's not about having tons and tons of hours of content. I think every broadcaster has had to really rethink their programme strategies and at the end of the day do bigger picture stuff – doing less but being more cost effective because you're able to sweat that content across so many different platforms and you're getting longevity out of it.*

Conclusions

The experience of broadcasters in the UK suggests that there *is* potential for a convergent 360-degree approach to significantly improve the value provided to audiences by suppliers of television content. The reuse and reversioning of content into new outputs and across new platforms, which is characteristic of a 360 approach, yields substantial opportunities for additional consumption and additional audience value. This undoubtedly allows for an improved use of resources but is not a new practice. However, another way in which multi-platform digital distribution affects efficiency is that it brings unprecedented capacity for suppliers to match content to very specific wants and needs on the part of audiences. Increased distribution capacity plus effective search tools are facilitating more individually customized consumption. And thanks to the digital return path, systems for signalling preferences back to suppliers have improved greatly. No longer confined to a linear schedule, the total universe of content properties on offer from television companies may now, theoretically at least, be used and enjoyed much more fully by audiences than ever before. Also, stemming from the 'lean forward' rather than 'lean back' character of digital media consumption, content suppliers can now forge and capitalize on more engaged and intensive relationships with audiences than before (Lotz, 2007; Ytreberg, 2009).

While many broadcasters are still in the process of discovering how best to capitalize on this endowment from digitization, it is notable that search engines and alternative service providers such as YouTube that moved quickly to provide free access to video clips and other television content have reaped enormous advantages (Aris and Bughin, 2009: 6). The siphoning off of audiences by online service providers who generally do not own and have not borne the costs involved in producing content poses an obvious threat to the revenues of broadcasters and other conventional media suppliers worldwide (Picard, 2009: 3). But, as is evident from the situation in the UK as elsewhere, an increasing number of incumbent broadcasters are responding by themselves offering free catch-up services and access to a wide catalogue of older content.

In general, a major advantage of adopting a multi-platform approach is the ability to reap economies of scale and scope – being able, as reported by interviewees, to 'sweat' content across more windows and over a longer time period. The extent to which some forms of content and some audience segments are better suited than others towards capitalizing on the interactive qualities of multi-platform digital distribution was touched on here and this represents a worthwhile direction for future research. The ways in which the response of broadcasters to multi-platform opportunities is influenced by their status as commercial or public service entities is another issue that warrants additional, more focused, research. What is clear, however, is that as commercial broadcasters gradually find ways to improve returns from online distribution, complex windowing techniques – that is, careful planning and sequencing of the release of content across multiple outlets so as to maximize audience value and/or commercial returns – will occupy an increasingly important role in the full and systematic exploitation of television content assets.

But the transition from television to multi-platform also involves costs. The need for investment in specialist skills is reflected in altered staffing patterns at major broadcast organizations. An increasing trend in the proportion of employees who were engaged in online activities at UK television companies in the 2005–8 period provides a clear indication of the perceived requirement for high levels of creative and financial investment in new media.

Set against this investment, a problem faced by commercial broadcasters – and indeed most other conventional media suppliers too – is that deriving a return from online activities is difficult because, '[f]or well over a decade, the prevailing orthodoxy of the internet has been that information wants to be free' (Edgecliffe-Johnstone, 2009: 11). Deriving revenues from the online supply of media content – getting consumers to pay – is not easy (Tryhorn, 2009). The problem of coming up with a revenue model that is fully adapted to characteristics of digitization and the internet has yet to be resolved by many media firms who, in addition to negotiating economic recession, are also struggling through a period of 'creation destruction' as termed by Joseph Schumpeter (1942) – that is, a time when established businesses that are unable to transform successfully in response to new technologies are at risk of extinction. Their protracted difficulties support the view that new media technologies generally take longer than expected to become commercial successes (Fidler, 1997).

In practice, a common strategic response to the conundrum of how to meet audience and advertiser demand for multi-layered 360-degree output from within static or diminishing content budgets has been to focus on fewer, high-impact ideas. It has previously been argued that multi-platform distribution encourages brand extension and the 'market ubiquity of a limited number of franchises' (Murray, 2005: 431). The 'fewer, bigger, better' formula adopted at the BBC as part of its restructuring to a multi-media entity clearly acknowledges that breadth must suffer in order to support more innovative and potentially high-impact content proposals. In the commercial sector, because of recession in television advertising expenditure, many broadcasters are also embracing the need for greater selectivity in content decisions as part of their digital strategies. So, rather than contributing towards diversity and choice, multi-platform distribution is in some senses liable to encourage standardization around safe and popular themes and brands. In this respect, despite offering opportunities for improved exploitation of media resources, multi-platform distribution may in practice result in less from more rather than more for less.

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Notes

1 Interviewed in 2009 at MTV headquarters in London.
2 Interviewed in 2009 in Glasgow.
3 Interviewed at White City, London in 2009.
4 Interviewed at STV headquarters in Glasgow in 2009.
5 Interviewed in London in 2009.
6 Interviewed at Pacific Quay in 2009.
7 Differing definitions of 'online', 'future' and 'new' media detract from comparability of data between organizations and over time although in all cases internet activities appear to feature strongly. Reported employment trends at ITV and at Channel Four nonetheless confirm ongoing factor reallocation away from conventional broadcasting towards online and new media.
8 Channel Four has implemented a number of redundancies since 2008 resulting in fewer staff working in future media.
9 Interviewed in Glasgow in 2009.

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