New Zealand media ownership 2020

AUT research centre for Journalism, Media and Democracy (JMAD)

Edited by Merja Myllylahti and Wayne Hope

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About this report

This report is part of JMAD's ongoing series of reports on New Zealand media ownership. Since 2011, the AUT research centre for Journalism, Media and Democracy (JMAD) has published reports that document and analyse developments within New Zealand media. These incorporate media ownership, market structures and key events during each year. The reports are freely available and accessible to anyone via the JMAD research centre: https://www.aut.ac.nz/study/study-options/communication-studies/research/journalism,-media-and-democracy-research-centre

2020 report team

To celebrate the JMAD research centre's 10th anniversary, this 10th New Zealand media ownership report is co-written by AUT lecturers who are experts in their fields. The report is co-edited by the JMAD Co-Directors Dr Merja Myllylahti and Professor Wayne Hope.

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10TH ANNIVERSARY OF *JOURNALISM, MEDIA AND DEMOCRACY RESEARCH CENTRE*

The AUT research centre for Journalism, Media and Democracy (JMAD) was established in 2010 by (then) Associate Professors Wayne Hope and Martin Hirst to promote research into the media and communication industries and to increase knowledge about news and professional practices in journalism.

Former directors of the research centre have included Associate Professors Martin Hirst and Verica Rupar. Currently, Professor Wayne Hope and Dr Merja Myllylahti are co-directors of the research centre.

JMAD has three ongoing projects, covering:

- Patterns in New Zealand media ownership and trends in media (JMAD)
- Election reporting in the media with AUT Media Observatory
- Trust in news in New Zealand (JMAD)

To date, the centre has produced 10 New Zealand media ownership reports; three election and media reports; and one report on trust in news in New Zealand. It has also organised five themed conferences with international keynotes and attendees. The centre has 10 active research members, whose research is regularly featured in New Zealand media.

CONTENTS

TABLES

FOREWORD: CO-DIRECTORS WAYNE HOPE AND MERJA MYLLYLAHTI

As our 10th report demonstrates, media ownership in New Zealand is still transnational, highly financialised and vulnerable to volatilities in advertising revenue. Yet, the general media landscape is rapidly changing. In 2020, we have more independent media outlets than at any other time since 2010. Funding models are also changing; many independents are funded by subscriptions, sponsorships, donations and memberships as advertising has been gobbled up by Alphabet/Google and Facebook. These major shifts beg the question about the Government's role in the future of media funding beyond the impact of Covid-19. In 2019, the Local Democracy Reporting scheme funded eight reporters across the regions. In 2020, the scheme was expanded to cover all media outlets belonging to the New Zealand Media Council and $1.5 million of new money was promised to support local journalism. Before the General Election, Labour pledged $75 million in new contestable funding for media, distributed via NZ on Air. This money may well give a great boost to many independent and local media outlets. In an age of misinformation and fake news, it is paramount to keep funding independent and local media. It is our duty to check that the Government is keeping its promises. Money spent on supporting local and independent reporting as part of a healthy media system advances democracy.

MESSAGES FROM THE COMMUNITY

Dr Gavin Ellis, media consultant:

Internationally, the media industry has a poor record when it comes to self-examination. That is no more so than where its business affairs is concerned. JMAD has filled a gap and provided an exceptionally valuable service by regularly examining, collating and analysing the state of New Zealand media and their relationship with their counterparts elsewhere. Its annual report on New Zealand media ownership is a unique record of one of the fundamental influences on journalism in this country and will provide a vital historical record. The centre's recent collaboration with the Reuters Institute at Oxford University adds yet another dimension to its research outputs.

Dr Peter Thompson, Director of the Communication programmes, Te Herenga Waka Victoria University of Wellington:

Congratulations on the 10th anniversary of the JMAD NZ media ownership report. Merja and her colleagues have done a fantastic job in maintaining a record of shifting ownership patterns and media sector arrangements during one of the most turbulent decades our media sector has ever faced. The report provides an invaluable resource for researchers and provides an important record of media developments for future scholarship.

Dr Tara Ross, Head of Journalism, University of Canterbury:

The JMAD NZ ownership report has become a go-to tool for keeping track of Aotearoa New Zealand's rapidly changing mediascape. It is essential reading for anyone with an interest in New Zealand media and is a fixture on the annual reading lists I assign my students!

SUMMARY

This 10th JMAD New Zealand media ownership report finds that in 2020, the country's media landscape changed dramatically. Stuff became an independently owned media outlet, Bauer Media was sold to a private equity firm, and MediaWorks's television arm was acquired by Discovery. As a consequence, New Zealand had more independently and privately held media companies than at any time in the past decade.

During 2020, the Covid-19 pandemic had a major impact on New Zealand media outlets. The majority of news websites reported a strong increase in their audience numbers, but at the same time their advertising revenue declined sharply. News companies' finances were boosted by the Government's $50 million crisis package and wage subsidy, but some of them also gained reader revenue enabling outlets such as BusinessDesk, The Spinoff and Newsroom to expand. However, the overall picture was not as rosy. During 2020, approximately 637 jobs disappeared from the New Zealand media industry.

In 2020, it emerged that Google was more involved in the New Zealand media sphere than was previously the case. During the pandemic, the search-engine company provided financial support to 76 news organisations across the Pacific, including non-profit news outlet Crux in Queenstown. Over the years, it has trained hundreds New Zealand of journalists in technical skills.

New Zealand media ownership – some key trends and events

- MediaWorks sells its television business to Discovery
- Bauer Media pulls out of New Zealand market
- Mercury Capital acquires Bauer Media magazines
- Stuff becomes independently owned by Sinead Boucher
- TVNZ and RNZ merger decisions still pending

1: TRENDS IN GLOBAL MEDIA OWNERSHIP

Author: Wayne Hope

Introduction

The Covid-19 pandemic had an uneven impact on the media industry as a whole. During the first phase of the pandemic, major platform companies such as Microsoft, Apple, Alphabet/Google, and Facebook experienced some losses, but they were able to increase their revenues by the year's end. From the outset, Amazon, Netflix, and Zoom benefitted considerably from the pandemic. Major newspaper groups such as The New York Times Co. gained in digital subscription numbers, but the pandemic had a devastating impact on the newspaper industry, especially in the US and UK, as advertising took a serious downturn. During the pandemic, major news groups in the US and UK lost $15 billion in market capitalisation.

Covid-19 and news publishing

Since February 2020, the Covid-19 pandemic has affected global media unevenly. Although a comprehensive and definitive assessment is not yet possible, certain patterns are clear. In the US and the UK especially, media organisations and news outlets have contracted or disappeared. However, web-based news content and traffic have proven more sustainable. Falling advertising revenues across all communication/ media sectors have negatively affected film, commercial television and broadcasting generally. During 2020, AT&T, News Corp, Disney, Viacom and other large media-entertainment corporations with diverse portfolios absorbed, and recovered from, initial revenue losses. The major ICT and social media corporations such as Microsoft, Apple, Alphabet/Google and Facebook experienced some losses from Covid-19 but were increasing their revenues by year's end. From the outset, Amazon, Netflix and Zoom benefitted considerably from the pandemic's consequences and continue to do so.

The impact of Covid-19 on the US newspaper industry was immediate and devastating. By early April, more than 1,000 newspapers and other publications were forced to cut wages, furlough or lay off staff, or cease operations. Small newspaper publishers reliant on local advertisers were especially vulnerable (Turvill, 2020a). In the UK, by mid-April, across the regional and national press, more than 2,000 staff had lost their jobs, permanently or temporarily. Local and regional papers were the worst affected. Research undertaken by the *Press Gazette* revealed a standard pattern. As the pandemic collapsed advertising and print sale revenues, staff were furloughed or laid off, wages cut and titles suspended (Mayhew & Turvill, 2020). However, the impact of Covid-19 also increased digital subscription numbers. By June 2020, 10 of the largest newspaper groups in the US and UK had collectively gained more than one million new digital subscribers. From the end of 2019, *The New York Times*, *The Wall Street Journal*, *London Times*, *Sunday Times*, *LA Times, Daily Mail*, *Mail on Sunday*, *Daily Telegraph*, *Boston Globe* and US regional publisher Gannett, on average, increased digital subscription numbers by at least 15 percent (Turvill, 2020c). World-renowned newspaper titles did not escape the economic impact of Covid-19. *The New York Times* lost US$1.1 billion in market capitalisation between February 28 and April 9, a 22 percent fall compared to the same period in 2019 (Turvill, 2020b). In mid-July, the Guardian Media Group, parent company of the *Guardian* and *Observer*, declared that they were facing "unsustainable annual losses in future years" without "decisive action to reduce costs". On July 15, the *Guardian* announced plans to cut 180 jobs (Waterson, 2020).

The plight of the McClatchy newspaper group illustrates how Covid-19 worsened the longstanding financial difficulties of newspaper chains. On February 14, before the pandemic, McClatchy filed for bankruptcy in a commercial environment where US newspaper circulation had, two years previously, fallen to its lowest level since 1940. Advertising revenues from newspapers nationwide declined from US$37.8 billion in 2008 to US$14.3 billion in 2018 (Grieco, 2020). Over the same period, newsroom employment at US newspapers dropped by 47 percent (Grieco, 2020). After declaring bankruptcy, McClatchy filed four monthly operating reports from February 13 to May 31. That timespan coincided with the arrival of Covid-19 and its damaging impact on the US newspaper advertising revenue. According to media analyst Joshua Benton, McClatchy responded to advertising cuts in early April by furloughing 4.4 percent of its employees. This was not necessarily a disastrous situation. From February to May, operating revenue exceeded operating expenses and the transition to digital subscriptions was well under way. However, Covid-19 exacerbated a 14-year-old debt that could not be repaid. After bankruptcy, McClatchy was absorbed by its chief lender and stockholder, Chatham Asset Management, a hedge fund that also owns the *National Enquirer* (Benton, 2020). Generally, the largest news businesses in the UK and US lost more than £15 billion in market capitalisation from February 28 to mid-April. In the private broadcasting sector, Fox Corporation, ViacomCBS and ITV (UK) shed a combined £9 billion over the same period (Turvill, 2020b).

Covid-19 and the media-entertainment sector

Media entertainment corporations experienced initial losses, but these were more than recoverable. News Corp lost US$1.6 billion in market capitalisation between February 28 and April 9, a total of 22 percent less than for the same period in 2019 (Turvill, 2020b). As of August 7, News Corp reported a US$1.3 billion loss for the full year (Mason & Gillezau, 2020). Such numbers should be put in context. The company reported a fiscal 2020 full-year total revenue of US$9.01 billion, an 11 percent decrease from US$10.07 billion in the previous year ("News Corp reveals sports rights savings offset Covid-19 impact", 2020). Similarly, Viacom has easily absorbed Covid-19-related impacts. Over the second quarter of 2020, total revenue fell 12 percent to US$6.28 billion compared to US$7.14 billion for the same 2019 period. Correspondingly, second-quarter advertising revenue overall went from US$2.6 billion in 2019 to US$1.93 billion in 2020, a drop of 27 percent. As of August 6, Viacom had experienced revenue falls in television operations, film businesses and publishing. However, ViacomCBS announced that streaming and digital video revenue had grown 25 percent to US$489 million, largely because of increased subscriptions (Steinberg, 2020). Comcast, parent company of NBCUniversal, received US$23.7 billion for the second quarter 2020, 11.7 percent less than for the second quarter of 2019. Cynthia Littleton, writing in *Variety*, noted that because “Wall Street was expecting a dismal Q2 for businesses in virtually every sector, Comcast was seen as surpassing lowered expectations for the quarter” (Littleton, 2020). In the case of Disney, the pandemic damaged its cruise, theme park, cable TV, live sports, cinema and retail businesses, resulting in losses of over US$4.7 billion for the financial quarter ended June 27. In response, three months later, a major restructuring of media and entertainment holdings was announced. Investment and growth priorities were to be centred around a recently launched streaming service, Disney+. This would lessen the reliance upon profits from theme parks, cruises, cinema releases and cable TV (Mudassir, 2020). The combined impact of Covid-19 on Mexico’s multimedia conglomerate Televisa was largely positive. Despite substantial second-quarter reductions in advertising revenue, profits increased for pay-television, internet and various telecommunication services (“Televisa reports mixed results in 2Q20 due to Covid-19”, 2020). AT&T also absorbed the impact of Covid-19 on its businesses. As of July 23, US$2.8 billion in revenue had been sapped, mostly from the Warner TV and film divisions. But the telecom/wireless sector was only marginally affected. Revenue slipped to a still massive US$17.15 billion (Arbell, 2020).

Covid-19 and platform companies

Social media and ICT corporations largely benefitted from the impact of Covid-19, some enormously. Thus, Facebook’s 2020 first quarter revenue of US$17.74 billion exceeded by 18 percent its US$15.08 billion for the first quarter of 2019. On these results, Facebook’s shares rose by as much as 10 percent despite a steep decline in advertising revenue during March (Rodriguez, 2020). Facebook’s overall second-quarter revenue grew 11 percent from US$16.89 billion in 2019 to US$18.69 billion in 2020 (Stewart, 2020). Alphabet/Google’s 2020 first-quarter results included a rise in total advertising revenues to US$33.76 billion from US$30.59 billion the previous year. In response to these numbers, Alphabet shares rose by as much as seven percent (Elias & Novet, 2020). For the quarter ending September 30, the company brought in total advertising revenue of US$37.10 billion compared to US$33.80 billion for the same period in 2019. Alphabet/Google's "other revenue" sector, including hardware such as pixel phones, generated revenue of US$5.48 billion compared to US$4.08 billion in 2019 (Elias, 2020). Microsoft's financial performance was relatively unscathed by the Covid-19 pandemic. As of April 30, the overall revenue in the latest quarter jumped 15 percent to US$35 billion from the same quarter in 2019 (Vanian, 2020). For the third quarter, Microsoft's favourable results were highlighted by those of the Intelligent Cloud unit including Azure, Git Hub, SQL Server, Windows Server and other enterprise services. This sector posted US$12.3 billion in third-quarter revenue, up 27 percent from the third quarter 2019 (Kinahan, 2020). Apple's profits have increased during 2020. On July 31, Reuters business analyst Stephen Nellis wrote that Apple Inc had "delivered blowout quarterly results reporting revenue gains across every category and across every geography as consumers working and learning from home during the Covid-19 pandemic turned to its products and services" (Nellis, 2020).

Covid-19 and streaming services

Home entertainment streaming corporate Netflix benefitted from the social impact of Covid-19. As of October 19, market capitalisation had risen by US$100 billion during 2020. Over the same period, the value of Netflix's shares increased by more than 60 percent. Netflix stated that it had added 26 million subscribers during the first half of 2020 (Klebnikov, 2020). Meanwhile, video conference company Zoom enjoyed a sales boom and record profits. Use of the company's software jumped 30-fold during April as the Covid-19 pandemic forced millions to learn, work and socialise remotely. During the three months to April 30, Zoom's sales increased by 169 percent compared to the same period in 2019 (Sherman, 2020). In the three months from May to July, Zoom reported higher sales and profits than for the whole of 2019 (Bond, 2020). Amazon was the chief beneficiary of Covid-19. Revenues from advertising in the first three months of 2020 were up 43.8 percent from the same period in 2019. By July 28, Amazon had gained half a trillion dollars in market value (Semuels, 2020). For the three months to the end of June, Amazon earned US$5.2 billion in net income, double that of the same period in 2019 (Lee, 2020). Over the first nine months of 2020, Amazon's revenue increased 35 percent compared to the same period in 2019 (Richter, 2020). Amazon's CEO, Jeff Bezos, the world's richest man, increased his personal holdings from US$113 billion to US$192 billion from mid-March to mid-October 2020 (Dillon, 2020).

2. Main patterns in New Zealand media ownership

Author: Merja Myllylahti

Introduction

In 2020, there were major changes in New Zealand media ownership. The most remarkable change concerns Stuff. In May, the company went from corporate ownership to private when Stuff CEO Sinead Boucher purchased the company from its Australian owner, Nine Entertainment, for a mere $1. The purchase means that Stuff has become an independent, New Zealand-owned media outlet. In 2020, MediaWorks sold its television operations to Discovery, and as a consequence, the American media corporation became a substantial broadcaster in the New Zealand market. Additionally, Bauer Media pulled out of its holdings in New Zealand magazines, and shortly after Bauer Media in Australasia was sold to private equity firm Mercury Capital. The private equity firm now owns the bulk of Bauer's former magazines in New Zealand. All these changes in media ownership mean that the majority of New Zealand media companies are now privately or independently-owned.

Ownership changes

In 2020, there were major shifts in New Zealand media ownership as Stuff and Bauer Media found new owners and MediaWorks television operations were sold to American company Discovery. In May 2020, **Stuff** CEO Sinead Boucher bought the company from its Australian owner Nine Entertainment for $1. Stuff is New Zealand's largest digital and print news publisher, owning 49 print titles, online news site stuff.co.nz and community site Neighbourly; it has 900 staff. Its main print newspapers include *The Dominion Post*, *The Press, Waikato Times* and *Sunday Star-Times.*

Nine Entertainment bought Fairfax Media in 2018, and as part of the deal Fairfax New Zealand became owned by Nine Entertainment. Before Boucher was confirmed as a buyer for Stuff, its rival NZME was trying to acquire the company. In May 2020, NZME released a stock market announcement stating that it was seeking from the New Zealand Government urgent legislation authorizing NZME to acquire the shares in Stuff Limited by the end of May 2020 for $1 (NZME, 2020a). NZME revealed that it had filed for a merger clearance, requesting the Commerce Commission to clear it as a matter of urgency. In 2017, the Commission had denied NZME-Stuff merger approval. In the May 2020 statement NZME said that the New Zealand media market was too small for the two major online-print publishers, and that NZME would be "the best owner for Stuff as it is best placed to preserve mastheads, newsrooms and jobs" (NZME, 2020a). Shortly after, Nine Entertainment said that it had terminated talks with NZME, but the latter claimed that it was still in exclusive negotiations with Nine and asked the High Court to grant NZME an interim injunction. This would have forced Nine Entertainment back to the negotiation table. The High Court did not grant NZME an injunction and shortly afterward NZME cancelled its application with the Commerce Commission and Stuff was sold to Boucher ("NZME declined an interim injunction against Stuff owner Nine", 2020). As a part of the deal with Boucher, Nine retained ownership of its Petone printing facility in Wellington, and additionally, the company received 25 percent the proceeds from the sale of Stuff Fibre, "plus up to a further 75 percent over the subsequent 36 months, depending on the Stuff business' ability to raise funding" (Nine, 2020).

Bauer Media announced in April that it was closing its publishing business in New Zealand "due to severe economic impact of Covid-19" (Bauer Media, 2020a). Brendon Hill, Australia and New Zealand CEO, said in the statement that the New Zealand Government's decision to move the country to Alert Level 4, which confined people largely to their homes, "has put our business in an untenable position" (Bauer Media, 2020a). The company said that it was engaging with the New Zealand Government to find solutions for its magazine publishing, but Broadcasting Minister Kris Faafoi said that the company "had not applied for

Government assistance such as the wage subsidy scheme or the business finance guarantee scheme" (Donnell & Peacock, 2020). Faafoi, as have many media commentators, pointed out that Bauer Media's magazine publishing was in difficulty before the pandemic (Donnell & Peacock, 2020). In July, Bauer Media announced that it had sold its New Zealand magazine titles to Australian private equity firm Mercury Capital, adding that the publication of the magazines would restart immediately (Bauer Media, 2020b). The magazines included *Woman's Day, New Zealand Woman's Weekly*, *Australian Women's Weekly NZ*, *Your Home & Garden*, *NZ Listener* and Air New Zealand's magazine *Kia Ora.* CEO Brendon Hill said that "the return of our New Zealand operation is a green shoot during a challenging time and hopefully a sign of more positive news to come in the local media industry" (Bauer Media, 2020b). He said that Bauer Media would have a team of 40 local editorial and advertising personnel, a fraction of its earlier staff (Bauer Media, 2020b).

MediaWorks, an independent commercial broadcaster, announced in 2019 that it was selling its free-to-air television operations. In September 2020, they were sold to entertainment conglomerate Discovery Inc. In a press release, MediaWorks stated that "the transaction is subject to a number of pre-completion approvals and is expected to complete by the end of the year" (MediaWorks, 2020a). The assets sold included entertainment channels Three and Bravo, streaming service ThreeNow and news and current affairs service Newshub as well as Three+1, Bravo+1, The Edge TV and The Breeze TV. Discovery already operates six pay-TV channels in New Zealand, including Discovery Channel, TLC, Animal Planet, Food Network, Living and Discovery Turbo and two free-to-air channels HGTV and Choice TV. MediaWorks chairman Jack Matthews said that "Discovery is the ideal new owner to continue that momentum across the TV business" and that it enables MediaWorks to concentrate on its "highly successful and market-leading radio and out-of-home business" (MediaWorks, 2020a). Discovery is a "major free-to-air broadcaster across several European markets", operating in the UK, Germany, Italy, Poland and the Nordic countries (MediaWorks, 2020a).

General ownership patterns

After the ownership changes in 2020, New Zealand has more independently and privately-held media companies than shareholder-owned or Crown-owned media entities (table 1). There are now three Crown-owned media outlets and eight independently-owned media companies. Two are owned by private equity firms, and four are owned by shareholders and financial institutions. Spark is a telecommunication and digital services company, but it is also a major sports broadcaster through the Spark Sport service.

Crown-owned entities

Māori Television Service, RNZ and TVNZ are Crown-owned media companies with different mandates.

Māori Television Service is funded by the Government to contribute to the protection and promotion of Māori language and culture.

RNZ is Crown-owned and the only advertising-free, public interest broadcaster in New Zealand. Its operations are funded through NZ on Air and the Ministry for Culture and Heritage.

TVNZ is also Crown-owned, but it is commercially funded with no public service obligation. Approximately 95 percent of its operations are funded by advertising and its primary mandate is to pay a dividend to the New Zealand Government.

Independently-owned media companies

Independently-owned media outlets include **Allied Press, BusinessDesk, Crux, NBR, Newsroom, Scoop, Stuff** and **The Spinoff.** Their ownership and funding models differ, but they are owned mainly by individuals, editors, journalists or trusts. The main funding models are subscriptions, sponsorships, license fees, donations and memberships (see more in the section Independent Media).

Private equity-owned media companies

MediaWorks, which owns half of New Zealand's commercial radio stations, is owned by American private equity firm Oaktree Capital Management, and holds 60 percent of the company's shares. QMS, which is listed on the Australian stock exchange (ASX), owns the remaining 40% of the company. In 2020, after the MediaWorks television business was sold to Discovery, CEO Michael Anderson stepped down and Cam Wallace was appointed as the new CEO. Before the appointment, he had a long career at Air New Zealand (MediaWorks, 2020b).

Bauer Media in Australasia is 100% owned by Australian private-equity firm Mercury Capital. In New Zealand, Bauer Media publishes titles such as the *New Zealand Women's Weekly* and the *Listener*.

Shareholder-owned media/telecom companies

Discovery is a global content creator and free-to-air broadcaster across European markets, including the UK, Germany, Italy, Poland and the Nordic countries (MediaWorks, 2020a). The company has a "26-year heritage in the New Zealand market" (MediaWorks, 2020a) and is owned by shareholders. The company is listed on the Nasdaq Stock Market (NASDAQ) in New York, USA. In New Zealand, its main brands now include Three and Newshub.

NZME is a publicly-owned company listed on the New Zealand (NZX) and Australian stock market (ASX). NZME's main media brands include the *NZ Herald, nzherald.co.nz* and Newstalk ZB. In 2019, five financial institutions owned just over 48 percent of NZME shares (Myllylahti & Baker, 2019). In 2020, five financial institutions owned 46.5 percent of the company's shares (see Factsheet). In 2020, NZME Chairman Peter Cullinane resigned from the company's board.

Sky TV is owned by shareholders and listed on the New Zealand stock exchange (NZX). The company broadcasts live sports and offers pay-television services and subscription video-on-demand services. In 2019, six financial institutions held 38.5% of the company's shares whereas in 2020 five financial firms owned 38.6%

of the company’s shares, as seen in table 4 (Myllylahti & Baker, 2019). There were no changes in the company’s board (Factsheet).

Spark is a New Zealand telecom and digital services company listed on the New Zealand stock exchange (NZX). It streams sporting events for subscription customers and has rights to broadcast sporting events such as English Premier League, Formula One, Heineken Cup rugby and English cricket.

Table 1: General media ownership and market structure, New Zealand, 2020

Company	***Funding***	***Most important assets***
Crown-owned media companies		
RNZ	State	RNZ
TVNZ	Advertising	TV ONE, TV2, On Demand, onenews.co.nz
Māori TV	State	Māori Television channel, Te Reo channel
Independently-owned media companies		
Allied Press (family owned)	Advertising, subscriptions	*The Otago Daily Times*
BusinessDesk (owned by individuals)	Subscriptions	BusinessDesk
Crux (trust owned)	Donations	Crux
NBR (publisher owned)	Subscriptions	*The National Business Review*
Newsroom (editor owned)	Advertising, memberships, donations, sponsorships	Newsroom, Newsroom Pro
Scoop (trust owned)	Subscriptions, licenses, memberships	Scoop
The Spinoff (publisher/worker owned"	Donations, memberships, advertising, sponsorships	The Spinoff
Stuff (owned by individual)	Advertising, subscriptions, donations	*The Dominion Post*, *The Press, Stuff,* Neighbourly
Private equity- owned media companies		
Bauer Media	Advertising, subscriptions	*New Zealand Woman's Weekly*, the *NZ Listener*.
MediaWorks	Advertising	Mai, The Edge, George FM, The Rock, More FM, The Breeze, The Sound, Magic, Tarana.
Shareholder-owned media/telecom companies		
Discovery	Advertising, programme sales	Three, Bravo, ThreeNow, Newshub, Discovery Channel.
NZME	Advertising, subscriptions	*The New Zealand Herald*, The Radio Network
Sky TV	Subscriptions, advertising	Sky TV, My Sky, Prime, Igloo, Neon, Fan Pass
Spark	Advertising, subscriptions	Spark Sport

3: Key trends and patterns in media-market structures

Author: Merja Myllylahti

Introduction

The 2019 JMAD report stated that with major New Zealand news organisations up for sale, “hundreds of jobs were at risk” (Myllylahti & Baker, 2019). In 2020, approximately 637 jobs were cut from New Zealand media corporations. The ownership changes during 2020 also caused some major changes in market structures: MediaWorks pulled out of television broadcasting and Discovery became a large television and entertainment broadcaster in New Zealand. As a consequence, MediaWorks became a commercial radio broadcasting company. Additionally, Sky TV bought the streaming service Lightbox from Spark and merged it with its own NEON. A proposed major broadcasting shake-up including the merger of RNZ and TVNZ was pushed beyond the October 2020 general election. Just before the election, Labour party broadcasting spokesperson Kris Faafoi said that the merger would be back on the table if Labour won the elections.

Significant changes in market structure

In 2020, there were significant changes in the general media market structure as companies were sold and acquired, as explained above. During 2020, major news operators in New Zealand announced hundreds of job losses. These included NZME, MediaWorks, TVNZ and Bauer Media, whose cuts combined added up to approximately 637 jobs.

Table 2: Job losses New Zealand media industry, 2020

Company	Number of jobs cut
NZME	200
MediaWorks	130
TVNZ	70
Bauer Media	237
Total	**637**

Sources: NZME, TVNZ, MediaWorks, Bauer Media

The job cuts reflected challenging market conditions during the Covid pandemic, as NZME stated in a market announcement. The company said that it was "expecting April 2020 advertising revenues to be approximately 50 percent lower than April 2019", and indicated that revenue for the full year would be "significantly down on the corresponding period in 2019" (NZME, 2020c). During the level 4 lockdown in April, Stuff asked its personnel to take a voluntary 15 percent pay cut. However, in July the company announced that it was refunding "hundreds of staff who agreed to take a 15 percent voluntary pay cut" (Pullar-Strecker, 2020a).

In 2020, there were some notable changes in New Zealand media market structures that were influenced by ownership changes and audience preferences. The sale of MediaWorks' television businesses to Discovery did not change the television market structure as such, but it meant that MediaWorks became a radio broadcasting and outdoor advertising corporation. Spark sold its streaming service Lightbox to Sky TV and the deal was finalised in February 2020 (Sky TV, 2020). The acquisition meant that Lightbox's 130,000 customers were transferred to NEON in July 2020. Spark decided to sell Lightbox to Sky for $6 million as the company decided that "there was not space for two locally-owned subscription-based streaming television services" (Pullar-Strecker, 2020b).

In 2019, the Labour Government announced that it was considering a fundamental shake-up of public broadcasting, and it sought advice on the merger of TVNZ and RNZ. Just before General Election in October, Labour's broadcasting spokesperson Kris Faafoi said that the TVNZ-RNZ merger would be considered if the party won the election – which it did (Mitchell, 2020). In September, a draft plan of the merger was published by consultancy firm PwC and the Ministry for Culture and Heritage. According to Stuff, the plan stated that “it is unlikely that even together New Zealand’s public media organisations will be able to take on the likes of Netflix and Amazon”, but acknowledged that pooling the resources of TVNZ and RNZ would give them more leverage (Pullar-Strecker, 2020c). The draft plan “did not spell out benefits of combining the broadcasters into a single entity or state how TVNZ or RNZ’s services would change if the proposal was approved” (Pullar-Strecker, 2020c).

General audience trends

An annual audience report by NZ On Air revealed a significant shift in audience habits. The report noted that if current trends in the broadcasting market continue, by 2021, “online video will attract the biggest daily audience in New Zealand – SVOD will have overtaken radio, and perhaps linear TV, to deliver the second or third biggest audience” (NZ On Air, 2020a). The report showed that YouTube had overtaken TVNZ1. The most popular channels, stations and services in 2020, as measured by daily reach, included YouTube (51 percent), TVNZ1 (44 percent), Netflix (36 percent), Facebook (36 percent), Spotify (28 percent), Three (23 percent) and TVNZ2 (14 percent) (NZ On Air, 2020a). The daily reach of the television was 61 percent, online video 60 percent, radio 50 percent, subscription video on demand 48 percent, pay-TV 36 percent and newspaper 32 percent (NZ On Air, 2020a).

TV broadcasting

In 2020, there were four major television broadcasting companies in New Zealand: TVNZ, Māori Television Service, Sky TV and Discovery. TVNZ had 56 percent of the net daily audience reach; MediaWorks had 25 percent and Sky TV 22 percent (NZ On Air, 2020b).

Print and online publishing

In 2020, Stuff and NZME were the largest print and online publishers measured by online metrics, audience reach and readership. The data from web-analytics company SimilarWeb shows that in July-September 2020, Stuff had a total number of 118 million visits to its website compared to the *NZ Herald's* 116 million (SimilarWeb, 2020). As seen in table 3, TVNZ had more visits to its website than Newshub, and The Spinoff had more visits than Newsroom (SimilarWeb, 2020).

Table 3: Total visits to media websites from Jul-Sept 2020

Website	***Total visits from desktop and mobile (millions)***[1]
Stuff	118
NZ Herald	116
TVNZ	29.3
Newshub	24.4
The Spinoff	5.2
Newsroom	3.3
RNZ	0.4

Source: SimilarWeb, 2020

According to Stuff, it is New Zealand's "largest website", connecting with 3.2 million New Zealanders (Stuff, 2020). Additionally, its community online

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[1] Total visits is the sum of all visits to the domain within a country and time period analysed. SimilarWeb calculates a visit for the website if the visitor accesses one or more pages. SimilarWeb (2020, n.d.). Website analysis. https://pro.similarweb.com/#/website/home

platform has "more than 830,000 members" (Stuff, 2020). According to NZME, its media brands had a "strong audience of 3.2 million representing 80 percent of the New Zealand population and a NZ Herald weekly brand audience of 1.7 million" (NZME, 2020b). In September 2020, the *NZ Herald* said that daily readership had "skyrocketed to 546,000 in the 12 months to June 30 [2020] – up 16 percent" ("New Zealand Herald and NZME readership soars during Covid-19 crisis – Nielsen data", 2020).

Magazines

After Bauer Media was sold to Mercury Capital, it sold *North & South* to independent publishers Konstantin Richter and Verena Friederike and *Metro* was sold to Simon Chesterman (Bauer Media 2020b). Former magazine editor Sido Kitchin also started a new publishing venture, School Road Publishing, in October and launched four new magazines: *Woman, Haven, Thrive* and *Scout* (School Road Publishing, 2020). Additionally, former Bauer workers Kelly Bertrand, Emma Clifton, Nicky Dew and Alice O'Connell launched an online site, *Capsule,* targeted at women (Capsule, 2020).

Commercial radio

In 2020, there was a duopoly in New Zealand's commercial radio network, with the market split between MediaWorks and NZME. MediaWorks's main radio brands include Mai, The Edge, George FM, The Rock, More FM, The Breeze, The Sound, Magic and Tarana. NZME's radio brands include NewstalkZB, Radio Hauraki, ZM, The Hits, Coast, The Country, Flava, Hokonui, Gold, Humm and iHeartRadio. The latest commercial radio industry survey from October shows that almost 3.4 million people were listening to commercial radio stations (GfK, 2020a). NZME's Newstalk ZB had a total station share (all people 10+) of 12.7 percent, followed by MediaWorks' Breeze (9.5 percent), Magic (9.0 percent) and More FM (7.7 percent). After the sale of its television businesses, MediaWorks said that its radio business would maintain its "leading position with over 2.4 million weekly listeners" (MediaWorks, 2020a). CEO Michael Anderson said that the sale of the television arm was "the best possible outcome for the future of MediaWorks TV" (MediaWorks, 2020a).

Online video and streaming

In the New Zealand media market there were multiple online video and streaming services available. These included YouTube, Facebook, Netflix, Acorn TV, Amazon Prime, Apple TV, NEON, Disney+, Sky Sport Now, Spark Sport, ThreeNow, TVNZ On Demand and YouTube Premium. Additionally, news sites such as Stuff and the *NZ Herald* provided online video content. The NZ On Air report shows that YouTube is the most popular online site, reaching 48 percent of New Zealanders, followed by Facebook (36 percent) (NZ On Air, 2020a).

4: PRINT AND ONLINE NEWS OUTLETS

Author: Greg Treadwell

Introduction

In 2020, newspapers in New Zealand saw sharp increases in their audience as readers sought information from trusted news brands. For example, *Wanganui Chronicle*, *Hawkes Bay Today*, *Wairarapa Times-Age* and *Ashburton Guardian* experienced sharp increases in their cross-platform audience (print and online). The *NZ Herald* also saw strong growth in its subscriptions, reporting in November 2020 that it had 49,000 paid digital-only subscriptions. However, after the first Covid-19 lockdown in late March, newspaper advertising was deeply affected as some papers stopped print publishing, with some titles reporting 50-70% decreases in their advertising revenue. Newspapers were partly stabilised by the Government's wage subsidy. Of the largest news publishers, Stuff received NZ$6.2 million from the wage-subsidy scheme, and NZME's earnings were boosted by an NZ$8.6 million subsidy.

Duopoly in print and online maintained

Despite the unpredictable terrain created by the global Covid-19 pandemic, the stability provided by the Government's wage subsidy 2020 saw Stuff and NZME maintain their duopolistic dominance in print and online markets. On May 25, Stuff's chief executive, former journalist Sinead Boucher, announced she had bought the nation's biggest news organisation for just NZ$1, the peppercorn price NZME had controversially claimed it was itself hoping to pay (Gay, 2020). Attempts to merge Stuff and NZME had already been rejected by the New Zealand Commerce Commission in 2017. Appeals against the ruling were also rejected at the High Court and Court of Appeal, largely for the risks a merger represented to the quality of news and the plurality of voices in the news (Hunter, 2017). In 2020, NZME's subsequent attempt to buy Stuff faltered as well, and interest from a third party attracted the attention of Stuff owner, Australia's Nine Entertainment, which had been keen to divest its New Zealand asset. Unlike NZME, the new buyer was unencumbered by any need for the market regulator's approval. In 2020, the High Court disagreed that NZME had exclusive rights to buy Stuff, in part because of the risk to the news organisation and its workforce, and therefore to competition in the news business. The third party turned out to be Boucher, who said she was keen, in what was effectively a staff buyout, to actually hand over a gold coin for the company (Carroll & Pullar-Strecker, 2020). Stuff, which has more than 900 staff and employs about 400 journalists across its websites and 49 newspaper titles, is the nation's largest publisher of news online and in print. Stuff Ltd also owns community network Neighbourly.

Boucher said the surprise sale would mean "local ownership" for the country's largest news organisation after a decade and a half of Australian ownership (Rutherford, 2020); staff would be offered a chance to buy into the company. Other investors, though, were likely to be found at some stage (Graham-McLay, 2020). Stuff was now in "control of its destiny" (Carroll & Pullar-Strecker) and Boucher hoped the Government might find supporting two major print and online news businesses easier if both were New Zealand-owned. Boucher told *The Guardian* newspaper she planned a staff-ownership model and a charter to ensure editorial independence (Ainge Roy, 2020). She said neither a merger with another company nor staff layoffs would take place. In October 2020, as this media ownership report was being compiled, Boucher said the ownership model was still being worked through and an announcement was likely to be made next year (S. Boucher, personal communication, October 19, 2020). While senior Stuff journalists acknowledged the uncertainty lying ahead, one called the buyout a "great move for New Zealand journalism" and another said Stuff staff would "rise or fail with Sinead" (Ainge Roy, 2020).

News sites' page views and traffic up

So, in 2020, a key element of New Zealand media plurality was maintained as Stuff and NZME continued their paths as separate media corporations. The sale of Stuff to Boucher was made against a background of further substantial damage to the news industry inflicted by the Covid-19 pandemic. Strong public need for information during the global health crisis saw traffic at New Zealand news websites sharply increase as the virus arrived, affirming the public's reliance on professional and trusted journalism (Myllylahti & Treadwell, 2020). In March, managing editor of *The Spinoff,* Duncan Greive, said that "The Spinoff's March pageviews were up 63 percent year-on-year, while a source said that Stuff's pageviews grew more than 20 percent" (Greive, 2020a). The *NZ Herald* also saw substantial audiences for coverage of Covid-19 across both premium and free platforms, while in November Newshub had the most Facebook interactions of any New Zealand news site (Greive, 2020a). Independent news site Newsroom saw its traffic leap by "four to five times" its normal levels ("Epidemic Response Committee meeting discusses how Covid-19 has affected the media", 2020). However, at the same time, a fast-shrinking advertising market effectively disappeared as businesses around the country closed their doors under the national lockdown response. Media consultant Dr Gavin Ellis stated in April that "advertising revenues in New Zealand are absolutely in free-fall. I estimate the declines since the lockdown to be between 50% and 70%" ("Journalism in crisis: NZ media bosses at the Covid-19 committee", 2020). While the Government increased some of its advertising spending on television, radio and news sites during the pandemic, Ellis observed that it was disturbing that the government continued to use Facebook and Google at "an exponentially growing rate, and only a fraction of their digital spend is going to local media platforms" ("Journalism in crisis: NZ media bosses at the Covid-19 committee", 2020). While the need for public-affairs journalism had perhaps never appeared so obvious and urgent than during the Covid-pandemic, the imperilled business model supporting it had never looked so vulnerable. In 2020, declining print revenues were still required to offset loss-leading websites and even the largest sites, including Stuff, still relied on subsidisation from the advertising sales of their affiliated newspapers (Greive, 2020a). In 2020, the news media was reeling under the impact of social media giants on their markets, before facing an immediate and existential threat. Editors and news executives appeared online before the government's ad hoc Epidemic Response Committee (ERC) on April 15, arguing for a state-funded crisis-support package, noting the increased traffic rates on their websites as a sign of strong public engagement with their content. Their pleas were made against a background of escalating job losses in the media sector.

Government's support package and subsidies

The Epidemic Response Committee was chaired by then opposition leader Simon Bridges. Dr Gavin Ellis argued that traditional media needed support first and magazines needed to be considered as essential services ("Epidemic Response Committee meeting discusses how Covid-19 has affected the media", 2020). He predicted further closures and job losses if they weren't, although, as noted below, some magazine publishers and editors have responded to the crisis with new online opportunities for feature journalism and the revival of some print products. Sinead Boucher told the committee that the company's revenue had been halved since the lockdown began. She appealed for financial support for commercial news media as well as state media, noting the public need for high quality information. She pointed out that advertising on social media was helping fund online conspiracies such as false claims about linkages between 5G technology and Covid-19. NZME managing editor Shayne Currie told the committee the New Zealand media could be proud of its response to the crisis. Like Stuff, NZME had seen half its income simply vanish and had to perform "some pretty quick manoeuvres" in response ("Epidemic Response Committee meeting discusses how Covid-19 has affected the media", 2020). Currie also flagged potential closures of NZME's community newspapers. David Mackenzie, president of the New Zealand Community Newspapers Association (NZCNA), told the committee that its 80 members had no capacity to take on debt to survive the crisis. Two thirds of its members were not able to publish during the first lockdown. The association stated that "any Government financial assistance must apply to all New Zealand media, not just a few big corporates whose balance sheets are challenged, and were challenged before Covid-19. Support all New Zealand media and let's see who survives after that" ("Epidemic Response Committee meeting discusses how Covid-19 has affected the media", 2020). Mark Jennings, a founding editor of Newsroom, told ERC members that social media companies were taking up to 90% of the advertising market, and warned that fierce competition for the remainder was producing "clickbait" journalism ("Epidemic Response Committee meeting discusses how Covid-19 has affected the media", 2020). Meanwhile, The Spinoff's Duncan Greive said state support should be evenly spread across the news media sector. BusinessDesk editor Patrick Smellie noted that the pandemic was accelerating trends already affecting media, and he was sceptical about the idea that the Government should save legacy media. "It needs to be given opportunity and responsibility to save itself, in my view" ("Epidemic Response Committee meeting discusses how Covid-19 has affected the media", 2020).

In April, news media executives were rewarded for their efforts before the ERC with a $50 million media crisis-support package, but print and online media watched broadcasters receiving the lion's share of the money. Rather than a direct handout, the package involved Government agencies reducing transmission fees for broadcast organisations, cutting NZ On Air contributions to 20 percent of their normal rate and paying in advance for news subscriptions and advertising (Ministry of Culture and Heritage, 2020a). The NZCNA's appeal was unsuccessful and both community newspaper owners and magazine publishers were shocked by their exclusion from the rescue package (Greive, 2020b). Subsequently, however, a NZ$4 million publications grant for smaller newspapers and magazines was also established. The Ministry for Culture and Heritage Manatū Taonga said that mastheads, rather than publishing companies, were targeted and this saw more than 330 publications, including community newspapers owned by Stuff, receive more than $12,000 each from the fund (Ministry for Culture and Heritage, 2020b.). The full impact of the pandemic on Aotearoa New Zealand's magazine and newspaper sector is still unclear but it is likely to be severe. To exemplify, Fiordland's *Advocate South* left its print product behind altogether to launch its Southland App.

What stability the print and online sector might have maintained during the Covid-19 crisis should be attributed strongly to players in the private sector, particularly NZME and Stuff. They received significant state subsidies because of their wider status as employers, rather than for the public-service nature of their work. At the time of writing, Stuff had received NZ$6.2 million from the Government's wage-subsidy scheme (Work and Income, n.d.). On August 25, NZME was reported to have tripled its 2020 half-year profit (from the same period in 2019) to NZ$3 million, on the back of $8.6 million in wage subsidies (Pullar-Strecker, 2020d). In April, the company cut its workforce by 15%, meaning the loss of more than 200 jobs (Edmunds & Pullar-Strecker, 2020).

The impact on magazines

Bauer Media's sudden closure of its operation in New Zealand on April 2, 2020 brought home the depth of the crisis striking the nation's print and online media. Other magazines and their journalists had also been affected by the suspension of insert magazines and other smaller closures. When Bauer's German owners pulled the plug on Bauer NZ, the country watched many of its most-read titles simply shut down. Closures included the *NZ Listener, Woman's Day, New Zealand Woman's Weekly, North & South, Next, Metro, Kia Ora, Home NZ* and *Your Home & Garden.* At the time, Prime Minister Jacinda Ardern said she was "gutted" by the news of the loss of such longstanding titles ("Covid-19: Major magazine publisher Bauer Media closing down", 2020).

The New Zealand Woman's Weekly, which was launched in 1932, reached its peak weekly circulation of 250,000 copies in the mid-1980s. *Woman's Day* also began in 1932 and had a readership of about 525,000. *North & South* was founded in 1986 ("Covid 19 coronavirus: Bauer Media closing – publisher of the Listener, Woman's Day, North & South", 2020). The multiple closures saw 237 staff lose their jobs, including numerous leading editors and other top journalists (Greive, 2020c).

However, after the lockdown, there was revival in the magazine industry with the reversal of some of major closures and the introduction to market of some new titles. Independent buyers have emerged for both *Metro* and *North & South,* while iconic titles *NZ Woman's Weekly* and the *NZ Listener* were taken over and revived by Mercury Capital Ltd. Meanwhile, online ventures such as Capsule and new print-and-online titles such as *Woman* were initiated by journalists who had been made redundant. At the time of writing, such was the rebirth of titles, changes in ownership and introduction of new ones, that a seminar titled New Mags was planned by the Magazine Publishers Association, to be hosted by Auckland University of Technology.

Newspaper readership

According to the results of a 2020 survey by Roy Morgan Research, more than 75 percent of New Zealanders (14 years or older) accessed newspapers in print or online in an average week. More than 1.9 million New Zealanders (48.5 percent) read magazines in print or online (Roy Morgan Research, 2020). The data was gathered via a survey of 6393 New Zealanders aged 14+ over the 12 months to June 2020.

Current circulation figures for print and online publications are a regular feature of JMAD New Zealand media ownership reports. The figures are extracted from annual circulation and readership data provided to the public by Roy Morgan Research and the New Zealand Audit Bureau of Circulations (ABC). However, in 2020, ABC cancelled two scheduled circulation audits in March and September due to Covid-19, and expects the next published newspaper audit results to be for the 12-month period to March 31, 2021 (New Zealand Audit Bureau of Circulations, n.d.). Instead, below (Table 4) are cross-platform audience figures for newspapers that also have an online audience.

In terms of cross-platform readership, the *NZ Herald* continues to be the most read newspaper in New Zealand with a cross-platform audience of 1,844,000. In the 12 months to June 2020, its total audience was down 41,000 (2.1 percent) compared to the same time in 2019. *The Dominion Post* had the second-largest audience, at 432,000, followed by *The Press* (314,000) and the *Sunday Star Times* (273,000). In a statement, Roy Morgan Research said that "impressively both *The Press* and *Sunday Star Times* have managed to increase both their digital audience as well as their average seven-day print readership in the June quarter 2020 compared to the earlier March quarter as New Zealanders sought the latest news on the pandemic" (Roy Morgan Research, 2020). Indeed, in the face of the pandemic, and arguably in part because of it, four publications in the top 10 managed to grow their cross-platform audience. These included the *Otago Daily Times* (+6.3 percent), *Hawkes Bay Today* (+21.2 percent), the *Northern Advocate* (+9.3 percent) and the *Taranaki Daily News* (+5.3 percent).

However, overall, this year saw falls in cross-platform audience numbers when compared to 2019 for others in the 10 most-read publications, including the *NZ Herald* (-2.2 percent), the *Dominion Post* (-10.9 percent), *The Press* (-8.7 percent) and the *Sunday Star Times* (-11.7 percent).

Table 4: Cross-platform audiences for print and online, New Zealand

Publication	***Print*** June 2020 (000s)	***Online*** June 2020 (000s)	***Total cross-platform audience*** *June 2019 (000s)*	***Total cross-platform audience)*** *June 2020 (000s)*	***Year-on-year % change in total audience***
NZ Herald	674	1,537	1,885	1,884	-2.2%
Dominion Post	245	282	485	432	-10.9%
Northern Advocate	71	70	118	129	9.3%
Waikato Times	104	138	250	214	-14.4%
Bay of Plenty Times	73	112	172	155	-9.9%
Rotorua Daily Post	40	63	87	94	+8%
Gisborne Herald	42	49	73	73	No change
Taranaki Daily News	52	91	114	118	+3.5%
Wanganui Chronicle	44	44	56	85	+51.8%
Hawkes Bay Today	92	115	146	177	+21.2%
Manawatu Standard	37	67	98	93	-5.1%
Wairarapa Times-Age	26	42	45	59	+31.1%
The Press	185	195	344	314	-8.7%
Otago Daily Times	111	194	238	253	+6.3%
Nelson Mail	29	71	78	89	+14.1%
Ashburton Guardian	19	25	29	40	+37.9%
Timaru Herald	22	39	60	54	-10.0%
Southland Times	49	72	121	101	- 16.5%
Sunday Star Times	217	69	309	273	-11.0%
Sunday News	35	32	90	66	-26.7%

Source: Roy Morgan Research

Digital leadership in free and paid content

Stuff continues to be a “clear leader” (Roy Morgan Research, 2020) in the contest for digital news audiences in New Zealand, however. The total digital audience for stuff.co.nz in an average week is more than 1.8 million New Zealanders, ahead of nzherald.co.nz, whose audience is 1.55 million (Roy Morgan Research, 2020). The *NZ Herald*, which introduced its premium-content paywall in 2019, says it now has more than 90,000 digital subscribers (NZME, 2020d) and plans a more national approach that includes localised homepages.

5: INDEPENDENT MEDIA

Author: Merja Myllylahti

Introduction

During 2020, the number of independently-owned news companies grew as Stuff was bought by Sinead Boucher. In 2020, there were nine independent news outlets and news sites. During the Covid-19 pandemic, independent outlets expanded, reporting strong traffic and readership. However, their operations were supported by the Government's wage-subsidy package as advertising revenues rapidly declined. Despite the Covid pandemic, BusinessDesk doubled its personnel in 2020, and The Spinoff's full-time personnel grew to 28. Both The Spinoff and Newsroom reported strong increases in their readership, donations and memberships, and this revenue aided them through the hard times and even allowed them to expand.

Independent media landscape

In 2020, there were nine independent media outlets that provided at least some news and current affairs content. The majority were funded by subscriptions, license fees, sponsorships, advertising, donations and memberships.

The independents included:

- Allied Press, a regional newspaper group
- Asia Pacific Report, an independent news site
- BusinessDesk, a business, economics and politics newswire
- Crux, a non-profit local digital-only news site
- National Business Review, a financial newspaper group
- Newsroom, a digital-only news site
- Scoop, an independent digital-only website
- Stuff, online and print publisher
- The Spinoff, a digital-only media site

Allied Press is an independent, Otago-based media company that employs more than 400 people. It is owned by Sir Julian Smith and his family. The company's leading newspaper, the *Otago Daily Times* (odt.co.nz), was founded in 1861. The publisher holds a majority interest in the *Greymouth Evening Star* and has a range of community and farming newspapers throughout the South Island including *North Canterbury News, The Ashburton Courier*, *The Timaru Courier*, *The Oamaru Mail*, *The News*, *The Mountain Scene*, *The Star* and *The Ensign*. In 2018, the company bought the 124-year-old community paper *Clutha Leader* from Stuff. Allied Press also owns a television station in Dunedin, Chanel 39, which is the only local television provider in the area.

In March 2020, the New Zealand Government ruled that local and community newspapers were not essential services and should close down, but in early April revised its decision. In an interview with Newsroom, Allied Press group editor Barry Stewart outlined the impacts of the Covid pandemic on its advertising. "Yes, fallen off a cliff. The real estate industry, the car sales, all those things are gone as far as the potential for advertising" (Williams, 2020).

Asia Pacific Report news website was launched by the AUT's Pacific Media Centre in 2016. It is a joint venture between Multimedia Investments Ltd and AUT's Pacific Media Centre. The core of its content is produced by the postgraduate students attending the Pacific Media Centre's journalism studies course at AUT's School of Communication Studies (Asia Pacific Report, 2019). The students report on issues related to the Asia-Pacific region, ranging from "climate change and the environment to education and health to politics, media, law social justice and sustainable business" (Asia Pacific Report, 2019). Editor of the site is AUT Professor David Robie.

BusinessDesk is a Wellington-based independent business, economic and political news service, established in 2008. In the last two years, the news outlet's ownership has changed, and it has become a subscription-only, hard paywalled news service. Its primary sources of revenue are subscriptions, advertising and sponsored content. According to BusinessDesk co-founder

Pattrick Smellie, its "subscriber base of individual, corporate and government agency users now numbers in the several thousands and is experiencing strong monthly growth" (P. Smellie, personal communication, October 2, 2020). The growth means that the company can "choose to repay the Government wage subsidy that it applied for and was granted in April during NZ's Level 4 covid-19 lockdown" (P. Smellie, personal communication, October 2, 2020).

During 2020, Business Desk's Auckland bureau expanded from a single reporter to five. Its operations are led by publisher and former Fairfax executive editor Matt Martel. Its staff now numbers 15, a doubling since 2019 (P. Smellie, personal communication, October 2, 2020). The BusinessDesk reporting team includes senior reporters such as Jenny Ruth (formerly of *NBR*), Rebecca Stevenson (ex-Stuff business editor), Rebecca Howard (ex-AP-Dow Jones), Gavin Evans (ex-Bloomberg and *Freeman Media Energy News*) and Victoria Young, (ex-*NBR*). In May, the wire service launched a lifestyle and travel section, The Life, which is edited by former *Kia Ora* magazine editor Jacqui Loates-Haver. Additionally, it launched a technology section in late September 2020.

BusinessDesk has been able to grow and take a new direction since Brian Gaynor took a 35 percent shareholding in the company. Gaynor is a long-time investment market commentator, having written for the *NZ Herald* for more than two decades before his BusinessDesk involvement. Gaynor is a co-founder of Milford Asset Management, a New Zealand-based investment company with NZ$7 billion of assets under management. Pattrick Smellie, co-founder of BusinessDesk, has a 32 percent holding in the media outlet, chief reporter Paul McBeth owns 25 percent and Martel 8 percent. According to Smellie, the company is developing an employee share scheme (P. Smellie, personal communication, October 2, 2020).

Crux launched in May 2018 as a public-interest news site covering Queenstown, Wanaka and Cromwell. The media outlet says that it is "activating the voices of our community on fundamental issues such as over-tourism, public health, council transparency, local democracy and water quality" (P. Newport, personal communication, October 12, 2020). Its founder and managing editor is Peter Newport, an experienced New Zealand journalist and television producer who has also worked overseas for the BBC, Channels 9 and 10 Australia and the Discovery Channel. Crux is operated by the not-for-profit Crux Media Trust, and it has three regular journalists as well as a group of freelancers and video production partners. The site has had more than 2 million pages views since launch, and now averages up to 100,000 page views a month. Additionally, the site has approximately "150,000 engagements on Facebook a month" (P. Newport, personal communication, October 12, 2020). Although Crux's initial funding has come from local donors, it has "targeted on developing new community revenue models with a view to eventually becoming 100% community owned" (P. Newport, personal communication, October 12, 2020). The site has received funding from NZ On Air for four major video series: *Living in La La Land, House Talk* (with RNZ) *and Southern Lens Series 1 and 2.*

NBR, a publisher-owned financial news provider, celebrated 50 years in publishing in August 2020. The publication is funded by subscriptions – it was the first media outlet to launch a paywall in July 2009. Its flagship product is the *National Business Review* which is published in a digital format. In 2020, faced with temporary closure of the weekly print paper during the first lockdown, NBR decided to transfer its subscribers to the digital offering. According to publisher Todd Scott, "NBR was able to pivot 100% to online and thus pull off a remarkable pureplay in the most challenging times. Online member subscriber numbers doubled and now exceed 12,000" (T. Scott, personal communication, October 1, 2020). In 2019, nbr.co.nz had 102,257 unique users, 35,000 email subscribers and "100+ corporate IP company subscribers" (Myllylahti & Baker, 2019). According to Scott, the lockdown showed that "the IP license agreements were no longer fit for purpose" so they were replaced with premium group memberships that allow NBR to charge for each user and count them as a member subscriber (T. Scott, personal communication, October 1, 2020). Scott says that NBR is "on track to achieving $400,000 in monthly recurring subscription revenue in 2021, with little to no reliance on advertising" (T. Scott, personal communication, October 1, 2020). In 2020, NBR had a "crew" of 23 people, including journalists, editors, commentators, interviewers, presenters and producers (NBR, 2020).

Newsroom is a digital-only news site that has become known for breaking investigative news stories; it has won multiple awards for its journalism. It was launched in 2017 by Tim Murphy, former editor of the *NZ Herald,* and Mark Jennings a former head of news at TV3. It is primarily owned by Murphy and Jennings, with support from private investors. Bernard Hickey has 12.6 percent, Melanie Reid 8 percent, Craig and Selwyn Pellett 3 percent, and "an early individual investor" 2.5 percent of the company.

In 2020, Newsroom.co.nz and Pro had an editorial staff of 19, including co-editors Murphy and Jennings plus four staff based at RNZ working on a daily Newsroom/RNZ podcast The Detail (T. Murphy, personal communication, October 28, 2020). In 2019, the outlet had 15 full-time and part-time employees (Myllylahti & Baker, 2019).

In July 2020, Newsroom announced that Newsroom Pro editor Bernard Hickey was leaving the media outlet while retaining his shareholding; former *Sunday Star-Times* editor Jonathan Milne was appointed editor ("Change of editor for Newsroom Pro", 2020). In 2020, environment and science journalist Eloise Gibson moved from Newsroom to Stuff, followed by Press Gallery reporter Dileepa Fonseka. Newsroom re-engaged former senior political reporter Laura Walters for the second half of 2020 and added a new social media specialist, Stacey Oliver, from Stuff. In October, Jo Moir from the RNZ press gallery team (formerly of Stuff) became Newsroom's new political editor and political editor Sam Sachdeva moved to cover foreign affairs and national issues in Wellington. Additionally, Newsroom hired two staff for its business side to support new reader revenues (T. Murphy, personal communication, October 28, 2020).

Newsroom consists of a free public site, newsroom.co.nz, and Newsroom Pro which is a paid subscription service. It also receives voluntary donations to support its operations. The site's major sponsors include Kiwibank (banking), Kiwi Wealth, Vodafone Business (telecommunications), Bell Gully (law firm), Victoria University of Wellington, Auckland University, Otago University, Catalyst, (technology firm) and Sky TV (for LockerRoom). In April, Jennings said that "financial support from the public has always been an important part of our revenue but now it is a vital lifeline for us" (Jennings, 2020a). He said that during the Covid-19 crisis, the readership of Newsroom "skyrocketed" and it had a significant spike in donations. While donations from readers were not yet replacing commercial revenue, "the upward trend does make us hopeful to negotiate our way through the difficult time ahead" (Jennings, 2020a).

Scoop is an independent, digital, free news website that celebrated its 20th birthday in 2019. It is owned by Scoop Publishing Limited, a social enterprise wholly-owned by the Scoop Foundation for Public Interest Journalism, a not-for-profit charitable trust established in 2015. Scoop is funded by subscriptions, commercial-use licensing revenue and member donations via PressPatron. In 2020, Scoop reached "more than 500,000 readers a month" (J. Cederwall, personal communication, October 27, 2020). In 2020, ScoopPro had over 300 "subscribers" who paid the license fee for commercial use of Scoop's site (J. Cederwall, personal communication, October 27, 2020). ScoopPro features a paid e-mail service and other media intelligence tools to aid funding of Scoop's newsroom operations.

Scoop's editorial team includes co-editors Joseph Cederwall and Ian Llewellyn, Gordon Campbell (political editor), Lindsay Shelton (Wellington editor), and Howard Davis (arts editor). According to Cederwall, Covid-19 restricted Scoop's operations "as it has made new commercial license sales slower than expected. However, readership levels and citizen donations via ScoopCitizen have both been above 2019 levels, which has been encouraging" (J. Cederwall, personal communication, October 27, 2020).

In 2019, Scoop launched ScoopCitizen, a voluntary donation-based member service for non-professional readers, and a new online platform thedig.nz - a "new public-interest, in-depth, engaged journalism platform" (The Dig, 2019). In 2020 Scoop formed a partnership with NextElection, a tech start-up based in

Bangalore, India to launch NextElection NZ, which is "New Zealand's first social network for politics" (J. Cederwall, personal communication, October 27, 2020). The free platform features profiles for each New Zealand political candidate and party, and provides a newsfeed of relevant stories on the election and Covid-19 from a range of publishers. The interactive site "gained 350 signups and 22,900 views over the election campaign and 312 posts" (J. Cederwall, personal communication, October 27, 2020).

The Spinoff, an independent, New Zealand-owned digital-only media outlet, celebrated its sixth birthday in 2020. The media outlet considers itself as "a magazine for the digital age, not always racing to break stories, but striving to analyse what they mean" (Myllylahti & Baker, 2019). According to the publisher Duncan Greive, the outlet has "more than 20 staff, over 130,000 followers across various platforms and millions of views on our stories and shows every day" (Myllylahti & Baker, 2019). The largest shareholders in the company are Greive and his wife, who each hold 46.5 percent of the company's shares. The rest are held by Toby Manhire (editor) and Scott Stevenson (senior sportswriter). The site's operations are funded by partnerships, including those with Lightbox (Spark), Kiwibank, Unity Books and Callaghan Innovation, and it also publishes sponsored content. The site has also gained funding from NZ on Air and Creative New Zealand. In 2019, The Spinoff launched memberships, and its readers can pay voluntary donations to support its journalism via the PressPatron platform. As of August 2020, the site had 10,000 members (D. Greive, personal communication, October 8, 2020). According to Greive, The Spinoff "was initially hit very hard by Covid-19, losing our largest client and a number of others along the way. Yet within a couple of weeks we started to see something quite extraordinary – hundreds of new members coming in, helping make up for the lost revenue" (D. Greive, personal communication, October 8, 2020). During the pandemic The Spinoff saw significant traffic flows into its site – "we smashed records for our largest day, week and month in short order" (D. Greive, personal communication, October 8, 2020). The traffic was boosted by the collaborative work of illustrator Toby Morris and scientist Siouxsie Wiles, "which was viewed millions of times", and led to an ongoing contract with the World Health

Organisation. These factors helped the media outlet grow to a full-time staff of 28 (D. Greive, personal communication, October 8, 2020).

Stuff became an independently-owned print and online news publisher in May 2020 when Sinead Boucher completed a management buyout from Nine Entertainment. The buyout gained much attention; Newsroom co-editor Tim Murphy called it a "gutsy, big-hearted and highly risky play" (Murphy, 2020). The company is now "a 100% locally-owned, independent media company" (C. Robertson, personal communication, October 20, 2020). Boucher is CEO, supported by an executive team (C. Robertson, personal communication, October 20, 2020). Stuff does not provide further details about its executive team or its plans around ownership structure. Immediately after buying the company, Boucher indicated that she was keen to develop a worker-ownership model, but that has yet to materialise: "My plan is to develop an ownership model which will give staff a shareholding stake in the business. It will take some time to work through how best this might be structured, and I look forward to providing you with more information as we develop those plans" (Murphy, 2020a). In May, Boucher did not comment about possible backers involved in the deal, and has not commented on financing structures since then (Malpass & Pullar-Strecker, 2020). In October 2020, Stuff employed 873 people and operated in 21 locations across New Zealand (C. Robertson, personal communication, October 20, 2020). The company's revenue comes from advertising, subscriptions, retail sales and supporter contributions (C. Robertson, personal communication, October 20, 2020). After the buyout, Stuff's main brands include Stuff, Neighbourly, and Play Stuff. It had two Sunday newspapers; nine metropolitan papers; 34 community newspapers; and seven magazines and magazine inserts (C. Robertson, personal communication, October 20, 2020). According to Murphy, "Stuff, despite mid-double-digit declines in advertising revenues over the past few years, still makes a profit", but it is predicted that the company needs to sell assets and cut some costs to make the company viable (Murphy, 2020a).

6: MĀORI-LANGUAGE AND MĀORI-INTEREST MEDIA

Author: Atakohu Middleton

Introduction

The year 2020 was a turning point for Māori-language and Māori-interest news and current affairs – but as the sector is Government-funded under the state's obligations to language and culture, the issue was not the Covid-19-related crash in advertising revenue that hit commercial media so hard. Rather, it was the release of a suite of proposals to reform and restructure the entire Māori broadcasting sector, with plans relating to news and current affairs meeting stiff opposition. In contrast, in mainstream media, the year 2020 saw a surge in the use of Māori language on some of the country's biggest English-language media platforms, a sign that the media is reflecting and amplifying wider society's willingness to understand and embrace Māori language, culture and aspiration.

The Māori media landscape

Māori-language news and current affairs is funded by the Government under its statutory Treaty of Waitangi obligations to Māori language and culture, both of which have been severely compromised by colonisation (Anderson et al., 2014). Just 10.6 percent of Aotearoa's population can speak Māori "well" or "very well" (Statistics New Zealand, 2014, p. 8); the language is now "somewhere between definitely endangered and severely endangered (Te Māngai Pāho [TMP], n.d., para. 17).

Funding for reo-Māori news is channelled primarily through broadcasting agency Te Māngai Pāho (TMP), whose remit is to promote Māori language and culture through funding initiatives in music, radio, television and new media

(TMP, n.d.). Māori-language news is, technically, state-funded for language revitalisation purposes, not information dissemination in and of itself; news is viewed as a necessary part of the reo-Māori 'languagescape' to support rejuvenation.

In order to secure funding from TMP, all shows must provide a language plan that aligns with the agency's funding and policy framework, which divides shows into three classes. Shows targeting fluent speakers must be 70-100 percent in te reo; shows for second language learners must be 30-70 percent in te reo, and shows for receptive audiences – that is, those who are open to watching content with Māori-language content – must be up to 30 percent (TMP, 2018). For background on the political and social developments that led to the current Māori broadcasting sector, see Matamua (2006) and J. Middleton (2010). For information on how the national language-revitalisation framework informs newswork in the Māori-language and Māori-interest sector, see A. Middleton (2020a).

In 2020, the TMP-funded Māori media sector comprised the following:

Iwi radio

There are a total of 21 TMP-funded stations from Kaitāia to Christchurch; a list is here. Iwi stations must be controlled by recognised Māori tribal interests and broadcast within specific tribal areas for a primarily Māori audience. The stations broadcast on licences reserved for the promotion of Māori language and culture; they must air at least eight hours of Māori language a day (Pauling, 2012; TMP, n.d.). Each station receives $500,000 a year; the network is overseen by umbrella body Te Whakaruruhau o te Reo Irirangi, the National Māori Radio Network (Mill, 2005; TMP, 2018).

Te Māngai Pāho funds a news and current affairs contract for the iwi stations, and since 2004 that has been held by an Auckland member of the network, the pan-iwi station Te Reo Irirangi o Waatea (Radio Waatea). Waatea, based in Māngere, Auckland, produces two reo-only news shows. News bulletin *Waatea News* runs for five minutes on the hour from 7am-6pm, Monday to Friday; some of its content is provided by regional stations. Waatea's current affairs offering, *Manako,* is a 55-minute show that airs Sunday to Thursday nights from 7-8pm. It features lengthy, discussions of topical events with high-profile commentators, politicians and community leaders (A. Middleton, 2020a). The iwi stations are not obliged to take *Waatea News* or *Manako;* however, all of them take some or all of the programming (Bernie O'Donnell, personal communication, August 1, 2016). The Waatea news contract is currently worth $1,104,000 a year (TMP, 2018).

Maori Television Service

Māori Television Service (MTS), known as Whakaata Māori in te reo, is a statutory entity launched in 2004 to contribute to the protection and promotion of Māori language and culture. MTS's approach to its audience is inclusive, with its slogan, "Mā rātou, mā mātou, mā koutou, mā tātou" (for them, for us, for you, for everyone) addressing an array of possible viewers, not just Māori (Smith & Abel, 2008). The station's offering is diverse, with news and current affairs, programmes about Māori culture and customs, documentaries and shows about waiata (song) among the most popular (F. Cassidy, personal communication, October 9, 2010).

MTS takes a digital-first approach to news dissemination under the banner *Te Ao*. Evening news show *Te Ao Mārama* is presented in te reo in online and linear formats and runs for an hour on both MTS and its second, reo-only channel, which is named Te Reo. *Te Ao Mārama* features short, standard news stories as well as longer, unedited interviews with newsmakers wholly in te reo. This year, MTS introduced a live, online breakfast show called *Te Ao Tapatahi*, with news bulletins in te reo and magazine-style interviews in English.

Māori Television receives approximately NZ$35 million per annum from the Government: 46 percent (NZ$16m) is administered by Te Māngai Pāho for content creation and 54 percent is administered by Te Puni Kōkiri, the Ministry of Māori Development, for operational activities (Māori Television Service [MTS], 2019). In this year's Budget, MTS's news and current affairs service received a NZ$3.5 million top-up (MTS, 2020).

Māori language and Māori-interest shows on television New Zealand

Te Karere was the country's first permanent Māori-language television news bulletin, beginning in February 1983 on the flagship channel of state broadcaster Television New Zealand (TVNZ). Running in the five minutes before the network news, *Te Karere* was initially a no-frills, straight-down-the barrel production (Walker, 1984). It is now 22 min 30 s long and airs Monday to Friday at 3.55pm; stories must be 70-100 percent in te reo. *Te Karere,* which is still produced in-house, received NZ$2.295m for the 2019/2020 year (T. Hood, personal communication, September 29, 2020).

TVNZ is also home to the Sunday morning current-affairs show *Marae,* which started in 1990 on the state broadcaster. It is required to broadcast 30-70 percent in te reo. Until 2014, *Marae* was produced in-house; since then, its production has been contracted out to independent content maker Pango Productions, which received NZ$1.5 million for the 2020 series of the show (figure drawn from TMP's funding results database).

Māori language and Māori-interest shows on Three

The Hui is a Sunday-morning current-affairs show that began airing in 2016 on private channel Three. Made by Great Southern Television, the show bills itself as "Māori current affairs for all New Zealanders" (Great Southern Television, n.d., para. 1). *The Hui* is partially funded by TMP, which requires the show be up to 30 percent in reo (TMP, 2018). It gained TMP funding of NZ$895,500 in 2020. It also gained NZ$623,375 from NZ On Air which funds public broadcasting to "reflect and develop New Zealand identity" (NZ On Air, n.d.). (Figures drawn from NZ On Air website and TMP's funding results database).

Māori print and online media

Māori society is organised along tribal lines, with tribal bodies responsible for managing tribal communications. These entities push much of their news and information to their websites, but some also continue to print newspapers and magazines. English predominates in the iwi publications, given that relatively few people speak te reo, but many of the magazines include stories and sections in te reo. Among iwi print publications are the magazine of the Waikato-Tainui confederation, Te Hookioi, and Ngāti Kahungunu's newspaper *Tihei Kahungunu*, which is available online and as a monthly hard-copy insert in daily paper *Hawke's Bay Today*. Just one of the iwi publications, *Te Karaka*, produced by South Is iwi Ngāi Tahu in hard copy and online, consciously takes a broader view. With the subtitle "About Ngāi Tahu, About New Zealand, About You", *Te Karaka* signals its intention to speak to a national audience. Its stories display an outward-looking, current-affairs focus in which the experiences and understanding of tribal members drive the narratives (Smith & Ruckstuhl, 2011).

The Māori media in 2020 and the impact of Covid-19

As described above, Māori news media, whether explicitly catering for a Māori audience (such as iwi radio) or drawing in the general public as well (such as MTS), are publicly funded. Their income is stable, if not lavish; revenue gained from advertising is negligible against their budgets.[2] After Covid-19 hit in March 2020 and the country went into lockdown, daily news was deemed an essential service and was permitted to continue. The preoccupation for both English-language and Māori news media was how to best protect staff and adapt in order to keep the news coming. The operational challenges were, to a large extent, shared across all news media. Many of the changes were obvious to viewers: Reporters shifted their interviews to Zoom, Skype or the phone; if journalists did

[2] For example, MTS generates about $1.5m a year in advertising and sponsorship (MTS, 2017), which represents 3.4 percent of its core funding.

in-person interviews, they wore gloves and masks, standing well back from their interviewees with microphone on stands between them.

However, there was also much happening behind the scenes to ensure that newswork was safe. Arana Taumata, head of news at MTS, said that during the level-four lockdown, news staff were divided into two separate teams that did not mix in order to contain any potential infection. Only essential staff, such as presenters, studio crew and editors, were present at the company's East Tāmaki newsroom. Reporters worked largely from home, doing interviews via video call and using supplied phone footage. They logged remotely into MTS servers to edit their stories. MTS commissioned content from areas where it didn't have permanent reporters, and took content from several iwi stations, such as Tūranga FM, based in Gisborne, and Te Hiku o te Ika, based in Northland.

Staff in the field accepted that traditional greetings, such as the hongi, in which participants press noses to share the breath of life, were out of the question. If interviewees were not comfortable with reporters entering homes, said Taumata, interviews were done outside; he estimated that this was the case for about 30 percent of reporters' in-person interviews. Camera equipment was disinfected frequently with disposable wipes. Despite the challenges, the experience showed how agile and productive digital news delivery could be (A. Taumata, personal communication, October 6, 2020).

The newsroom at *Te Karere* worked on the same lines, with the newsroom divided into two teams; reporters worked primarily from home and when in the field, took precautions. *Te Karere* producer Harata Brown said that a benefit of the upheaval was that staff were now better placed to work remotely (H. Brown, personal communication, October 2, 2020).

Iwi radio stations played a critical role in keeping Māori communities informed during Covid levels 3 and 4 and providing information on services such as Covid-19 testing, food banks, and flu vaccinations (Dewes, 2020; The Spinoff, 2020). Radio Waatea news staff usually work from the station's Māngere office. As the first lockdown loomed, the station invested in laptops and a software product that enabled kaimahi (workers) to record and broadcast live to air wherever they were; the extra costs, said operations manager Kura Ratapu, were manageable. When staff were able to return to the office, they were encouraged to stick to their team bubbles, maintain physical distancing, and plan ahead to minimise risk (K. Ratapu, personal communication, September 27, 2020).

The Māori Media Sector Shift: A restructuring of the sector

However, there was another cloud hanging over Māori media in 2020, and it had settled well before Covid-19. In October 2018, the then-Minister for Māori Development, Nanaia Mahuta, announced a review of the entire Māori broadcasting sector to ensure that it was "fit for purpose" in the digital age, calling the process Māori Media Sector Shift (Mahuta, 2018, para. 2). Consultation and situation documents identified a range of issues, among them a number of silos with little cooperation, minimal investment in talent development, low production budgets compared to mainstream media and queries over whether the sector's policy and legislation remained relevant (Mahuta, 2019).

Following consultation, Mahuta released her proposals for change in June 2020. In general, they envisioned a more connected and collaborative sector. Among Mahuta's proposals was a Centre for Media Excellence, based at MTS, to provide skills training in journalism and technical areas through partnerships with academic institutions. This was greeted positively, as a lack of journalism and technical training has been an ongoing issue (A. Middleton, 2019; Te Puni Kōkiri 2020b). Mahuta's proposal of a 100% reo-Māori national Māori radio service met a mixed response, with concerns that it would have a negative impact on iwi radio (Te Puni Kōkiri, 2020a, 2020b).

The Minister also promoted setting up a single Māori daily news outlet at MTS, with iwi media funded to contribute content. This proposition met stiff and immediate opposition. It is important to clarify here that such centralisation would affect *Te Karere* and the iwi radio news contract held by Waatea, but not current affairs programmes such as *Marae* and *The Hui*. Resistance centred on the ways on which a single outlet would limit the diversity of Māori voices, opinions and stories (Forbes, 2020; McLachlan, 2020; A. Middleton, 2020b).

This is not the first time that there has been an attempt to rationalise the news resources stretched between *Te Karere*, *Waatea News* and Māori Television. In 2009, Te Māngai Pāho, under then-CEO John Bishara, tried to encourage discussion about amalgamating *Te Karere* and MTS's news show, then named *Te Kāea*; the attempt was fruitless (Tahana, 2017).

Change was again mooted in 2017, by which time much had changed in local news media, with co-productions, converged newsrooms, story-sharing agreements and the transmission of news via social media common. At the time, current TMP head Larry Parr said that the Māori news sector might be ready to have "a sensible conversation" about the situation (Tahana, 2017, para. 10). He said that TMP wasn't necessarily looking to end any of the established news programmes, but wanted to streamline news gathering into some sort of collaborative one-stop shop, with shows curating their own content (A. Middleton, 2019). However, the Māori Media Sector Shift was then announced and effectively incorporated TMP's plans. At the time of writing, the sector is awaiting a decision from the Minister, with no announcement expected this year (N. Mahuta, personal communication, September 29, 2020).

Māori – and te reo Māori – in mainstream news media

There are still relatively few Māori journalists in mainstream news media. While there are no formal statistics, anecdotally, five to eight percent of Aotearoa's working journalists are Māori (Mane, 2019). Among the most high-profile are TV One political reporter Maiki Sherman, a bilingual product of Māori immersion education who previously worked for Māori Television; her colleague Yvonne Tahana, who reports on Māori affairs and general news; Miriama Kamo, who hosts Television New Zealand's *Marae*, and Mihingaarangi Forbes, currently presenting *The Hui* on TV3.

However, the representation and the inclusion of Māori and indigenous perspectives in mainstream news in Aotearoa has accelerated markedly in the past four years. Demand for courses in te reo from Māori and non-Maori alike have hit unprecedented highs (Buckleton, 2018). We can, perhaps, attribute this to a new maturity in society as Aotearoa addresses and redresses the damages of colonisation and engages with the notion of a Māori-tauiwi (non-Māori) partnership under the Treaty of Waitangi. Certainly, the latest New Zealand General Social Survey shows support for Māori culture and language (Kukutai & Rata, 2019) and this appears to be influencing newsroom decision-making. The start of this sea-change appears to be 2016, and, in particular, from the time Radio New Zealand journalists began an assertive, continuing promotion of Māori language.

Every year since the 1970s, Māori Language Week has celebrated the country's first tongue, and in recent years, media outlets have generally made efforts to use greetings in te reo in that week, Radio New Zealand among them. For Māori Language Week in July 2016, reporters Mihingaarangi Forbes and Shannon Haunui-Thompson suggested that their colleagues, the majority non-Māori, might like to extend themselves beyond straightforward greetings by signing off their stories with phrases such as "this is [name]" or "I am [name]." The idea was supported by managers and taken up with enthusiasm, and Forbes and Thompson supported their colleagues by texting them recordings of various phrases.

At the time, said Haunui-Thompson, reporters signing off in te reo was a "big step" for the organisation. At week's end, then news leader Brent Edwards suggested that reporters keep going, and they did (S. Haunui-Thompson, personal communication, September 6, 2016). The new words and phrases reached a big audience; for example, RNZ National's *Morning Report,* which runs from 6am-9am five days a week, draws more than half a million listeners. The work of RNZ's journalists was amplified in 2017, when high-profile Pākehā host Guyon Espiner started learning te reo and frequently spoke words and phrases on air, brushing off racist criticism from a minority (Brookes, 2019a; Espiner, 2017). RNZ supported listener understanding by putting recordings of the most commonly-used phrases on a webpage.

At the time of writing, the majority of RNZ's on-air staff use brief Māori greetings and sign-offs, and some are going further as their confidence grows, using longer phrases such as "This is [name] reporting from the High Court in Auckland". Haunui-Thompson is now the manager of RNZ's first Māori strategy, which, among other things, sets goals for coverage of Māori and increased numbers of Māori reporters; staff "using te reo is just normal now". However, back in 2016, she didn't realise how much impact the station's move would have: "We just wanted to do it for ourselves, and then it grew organically." (S. Haunui-Thompson, personal communication, October 12, 2020).

High-profile Pākehā reporters and presenters who use te reo Māori in public media are critical for normalising its presence in the public sphere. TVNZ reporter and presenter Jack Tame started learning te reo at about the same time as Espiner, and enthusiastically uses it on air (Tame, 2017). During this year's Māori Language Week in September, *1 News* presenters used more complex phrases on air than they had in the past, and, notably, have continued. Among the bilingual phrases commonly heard on *1 News* are "e whai ake nei – coming up" and "ngā mihi – thank you" to reporters. Phrases like "hoki mai anō" (welcome back) are often not translated at all.

TVNZ is home to English-language and Māori-language news teams, but for many years, the two were housed in separate parts of the company's Auckland headquarters. In 2016, a major renovation saw the two teams brought together in one large newsroom (TVNZ, 2016), and this appears to have promoted greater collaboration and relationship-building. For example, *Te Karere* reporters have started appearing on English-language news. As an example, on Waitangi Day in 2018, reporter Irena Smith did her first live cross in English for TVNZ's *Breakfast*. The same year, *Te Karere* sports reporter Tāmati Rimene-Sproat moved to prime-time TVNZ show *Seven Sharp,* where he presented Māori perspectives and people that generally wouldn't feature on state television in prime time. In November 2019, *Te Karere* presenter and journalist Oriini Kaipara started presenting daytime television news shows, becoming the first woman with a moko kauwae, a traditional chin tattoo, to do so (Brookes, 2019b).

The dominant print and online media companies, stuff.co.nz and NZME, have also stepped up their commitment to te reo and reporting the Māori world. Stuff.co.nz, as of 2020 locally owned, launched a Māori-interest section called Pou Tiaki in June 2020, edited by veteran reporter Carmen Parahi. Among its offerings are bilingual stories translated paragraph by paragraph as well as stories where conversational reo is scattered throughout English text. At NZME, senior staff are preparing a long-term strategy that aims to reflect and embed the company's commitment to fairly and fully representing Aotearoa's bicultural nature and the diversity of its people. Production editor Lois Turei, who is spearheading the initiative, says that staff are keen to understand more about Māori language and tikanga (customs); the company is to provide workshops in both (L. Turei, personal communication, October 12, 2020).

7: TELEVISION BROADCASTING

Author: Sarah Baker

Introduction

In 2020, New Zealand's television broadcasting market saw historic changes as MediaWorks sold its television operations to American Discovery Inc. As a consequence, MediaWorks became a radio broadcasting and outdoor advertising corporation, and Discovery one of the leading commercial broadcasters in the New Zealand media market. During the Covid pandemic, television broadcasters had a tumultuous year. Their advertising revenues shrank despite the large audiences for their news content and election coverage. However, the bulk of the Government's media crisis-support package targeted broadcasters. Streaming services had a strong year, and YouTube overtook TVNZ as the most popular broadcasting channel. Major changes in the broadcasting sector are still pending as the newly-elected Government mulls a merger between TVNZ and RNZ.

Tumultuous year for television broadcasting

In 2019, the JMAD New Zealand media ownership report warned that the television broadcasting sector was in serious trouble as major broadcasters recorded substantial losses (Myllylahti & Baker, 2019). In 2019, Newshub chief Hal Crawford described New Zealand television as "broken" as the influx of global video-streaming services put more pressure on broadcasters and their financial viability (Crawford, 2020). In 2020, things were not looking much brighter. The whole television industry in New Zealand was suffering due to competition from companies such as Facebook, Google and Netflix. In the first quarter of 2020, Netflix picked up 16 million new global subscribers, cementing its place as an essential viewing platform during the Covid-19 pandemic ("Netflix picks up almost 16 million new subscribers", 2020). The broadcasters were also heavily affected by the Covid-19 pandemic, which was eating away their revenue. The first case of Covid hit New Zealand on February 28, 2020 and the pandemic peaked in April 2020. During the pandemic, New Zealand was in some form of lockdown (including a month of full level 4 lockdown). The Covid-19 had an economic impact on all areas of life, and the media was not immune. As discussed earlier, Bauer Media Group closed its New Zealand publishing business. For many television companies the importance of live events grew during the pandemic, such as sporting events, and elections set broadcasters apart from the streaming services that otherwise dominated viewing and the national broadcasting environment. Both national and international elections dominated the news this year. For example, the first leaders' debate on TVNZ between Prime Minister Jacinda Ardern and opposition leader Judith Collins attracted 1.16 million viewers – a turnout not far behind the 1.2 million who tuned in to watch the All Blacks claim the 2015 Rugby World Cup (Venuto, 2020).

However, due to the Covid-19 pandemic, many sporting events were cancelled, and this reduced broadcasters' revenue; both TVNZ and MediaWorks announced substantial job cuts. These cuts occurred at the same time as the journalists were pressured to keep up with the news cycle as they were reporting on coronavirus-related issues globally and locally – including the daily Covid briefings by the New Zealand government. IBIS analysis of the television broadcasting industry in New Zealand suggests that revenue for the industry is expected to decline by 10.3 percent in 2020-21 as the pandemic impacts on advertising spending and household incomes (IBISWorld, 2020). The other major impact is competition from streaming video-on-demand services, which are already affecting traditional broadcasters' profitability (IBISWorld, 2020).

Support from the Government

In April 2020, the financial fallout of the pandemic was bad enough for the Government to warrant a two-stage media support package worth NZ$50 million to help broadcasters and other media facing decreasing income. However, the package on its own was not seen as sufficient to see the sector through a prolonged period of restrictions and reduced advertising (Cheng, 2020). One key aspect of the package allowed TV broadcasters to avoid paying transmission fees to the state-owned company Kordia (Parker, 2020). Broadcast media received the bulk of the benefits from the decision, which reduced media companies' contributions to NZ On Air screen content by NZ$16.5 million in the 2020-21 financial year. The Government also promised to provide NZ$11.1 million for "specific targeted assistance to companies as and when needed" (Pullar-Strecker, 2020e). The companies to benefit from the relief package were TVNZ, Prime (owned by Sky), Three (owned by MediaWorks) and Māori Television.

Despite the Covid-19 infused crisis, news consumption levels in New Zealand jumped to historic levels. Viewers used linear television news to stay up-to-date with events and coronavirus updates. The Government's daily 1pm briefings about Covid became part of the daily routine of New Zealanders. Additionally, election coverage in New Zealand and the United States gained audience numbers earlier reserved exclusively for sports reporting. NZ On Air's *Where Are the Audiences?* report 2020 suggests that this year, traditional media audiences were overtaken by digital media audiences (NZ On Air, 2020b). The findings make sobering reading, with the global digital giants both fragmenting audiences and overtaking most local platforms with TVNZ 1 and TVNZ OnDemand the only local platforms to shine in the report. In 2020, people still spent more time watching linear television than streaming services. The average time spent watching television was 137 minutes, although the time spent had declined from 156 mins in 2018 (NZ On Air, 2020b). Saying that, the most popular site, station or channel was YouTube, which overtook TVNZ 1 as the most popular channel. While audiences for TVNZ2 and Three declined, viewers for TVNZ OnDemand continued to grow. In 2020, the service reached one in five

New Zealanders daily (NZ On Air, 2020b). The group that has departed from linear television quickest is Asian New Zealanders – just 28 percent of this group consumed linear television; in 2014, the figure was 62 percent. (NZ On Air, 2020). According to the report, TVNZ news updates were the most widely used and trusted source of information during the lockdown. NZ On Air chief executive Cameron Harland said, "it's been a tough year all round, and this research brings home what a fight local content makers and platforms have on their hands. Our challenge is to work harder to find ways of engaging local audiences with the exceptional quality of New Zealand stories and songs" (NZ On Air, 2020b).

TVNZ and RNZ merger still on the table

In 2019, then-Broadcasting Minister Kris Faafoi mooted a merger of TVNZ and RNZ and the formation of one supersize public broadcaster. In January 2020, it was reported that the Government was forging ahead with a plan to create a combined public broadcaster, although not all ministers were convinced about the plan (Patterson, 2020). Many observers noted that the merger would only make sense if the new broadcasting company had a public-interest mandate, and critics said that the company would need a proper charter and transparent funding model. TVNZ chief executive officer Kevin Kenrick, for example, has suggested that if the two state broadcasters were merged, it could be funded by private advertising and Government funding (Smellie, 2020). However, the advocacy group Better Public Media would like to see the de-commercialisation of TVNZ as part of the merger. Its director, Myles Thomas, says "the big question is around advertising; will RNZ remain advertising-free and TVNZ still have adverts, and how is that going to work because if it is all under one roof it seems like a recipe for disaster" (Pullar-Strecker, 2020f). In October, the Labour Party formed a new Government, and it appeared "to press ahead with the merger of TVNZ and RNZ into a new public media entity despite criticisms that it hasn't explained what it would do and why it is being considered" (Pullar-Strecker, 2020f).

TVNZ operates five television channels. including TVNZ 1 and TVNZ 2, and its flagship news program is 1News. The broadcaster also has live-streaming on TVNZ 1, TVNZ 2 and Duke, and a video streaming service TVNZ OnDemand. "Each day, TVNZ reaches more than 2 million New Zealanders through channels TVNZ 1, 2, DUKE and online platform TVNZ OnDemand" (TVNZ, 2020a).

In April 2020, after Covid-19 had entered New Zealand, TVNZ chief executive officer Kevin Kenrick outlined the company's strategy and three priorities based on economic realities (Dillane, 2020). The stated priorities were to deliver essential news; to entertain audiences; and to preserve cash. Kenrick said that the company needed to preserve cash as it faced a downturn in advertising and related revenue. In April 2020, TVNZ announced that its board had agreed to apply for the Government's 12-week wage subsidy as the government was offering a subsidy to large businesses such as TVNZ (Dillane, 2020). According to its strategy to preserve cash, the TVNZ board also decided not to review staff salaries and remuneration because increasing costs would have created further financial stress and made it harder to maintain jobs (Dillane, 2020). Like many other companies, TVNZ saved money on travel and also decreased the costs of building expenses, marketing and content. Other ways that costs were cut were in production cancellations, deferrals of system upgrades and a halt to several innovation projects. Despite its efforts to save money, TVNZ announced in July that it would cut 70 to 90 jobs. The redundancies aimed to save about NZ$10 million (Dillane, 2020).

Kenrick said that TVNZ revenue had dropped 30 percent during the nationwide lockdown and that it would take 18 months for TVNZ to recover (TVNZ, 2020c). The impact of Covid-19 continued through the middle of the year with TVNZ appointing an insolvency specialist, Keiran Horne, to its board. His appointment was to aid TVNZ's cost-cutting programme ("TVNZ appoints insolvency specialist", 2020). Part of the cost-cutting drive was the move to a single-anchor model with Wendy Petrie losing her job while Simon Dallow continued to present the prime-time news ("Pairs future as news co-anchors in doubt", 2020). On August 25, TVNZ announced that it had lost NZ$25 million in the financial year to end of June 2020 (TVNZ, 2020b). Its operating revenue "was stable year-on-year" at NZ$311 million "due to advertising revenue growth pre Covid-19 and $5.9m Government relief partially offsetting revenue declines incurred from April 2020" (TVNZ, 2020b). The broadcaster said that while its advertising revenue fell NZ$7 million from the financial year 2019, to NZ$286 million, its audience share grew and revenue "recovered quickly from -34 percent revenue declines in April to -16 percent in June" (TVNZ, 2020b). Additionally, its digital advertising revenue grew 19 percent year-on-year (TVNZ, 2020b).

Sky TV has operated in New Zealand since the late 1980s; it broadcasts live sports and offers pay-television services via its own platform. Its brands include Igloo and NEON. In 2020, Sky TV acquired streaming service Lightbox from Spark. FanPass offers its users passes to view premium sports content, and SKYGo enables satellite customers to stream a selection of Sky's linear channels and view content on-demand. Additionally, Sky owns free-to-air TV channel Prime. In September 2020, Sky TV reported a net loss of NZ$156.8 million, including a non-cash impairment of goodwill of $177.5 million, for the financial year ending on June 30 (Keall, 2020a). The company said that it was expecting to return to profit in 2021 due to the "faster-than-expected return of sport" (Keall, 2020a). In the financial year 2020, the total number of its subscribers increased 27 percent to 990,000 (partly due to Sky's purchases of the Lightbox and RugbyPass streaming services), but average revenue per user dropped (Keall, 2020a). By November, things were looking more positive for Sky TV and it increased its revenue and profit estimates for the financial year 2021. In a media release, the company said that it was lifting its guidance "as a result of a positive start to the financial year, higher than expected growth in its direct satellite customer base and tight cost control" (Sky TV, 2020b). The company noted that it had seen "six consecutive months of growth in direct satellite customers" and that it had "achieved greater-than-expected growth in streaming revenue, particularly from the newly merged NEON entertainment platform" (Sky TV, 2020b). Martin Stewart, Sky's chief executive, said that "while external economic factors remain challenging and uncertain", the company's internal performance was aiding it to turn things around (Sky TV, 2020b). Stewart noted that "the last few months have reinforced the "power of our bundle and our ability to offer a one-stop-shop for all of our customers' entertainment and sport needs" (Sky TV, 2020b). In 2021, Sky TV is entering into the broadband market and it will offer ultrafast fibre (UFB) broadband in partnership with Chorus, which makes Sky TV a one-stop-shop for internet and content (Keall, 2020b). This may also enable its customers to buy bundles of content through apps and services including Netflix, Disney+ and Spark Sport (Keall, 2020b).

Spark Sport is a premium live and on-demand sport streaming service that allows viewers to watch programmes on their television or devices. In October, Spark and Sky TV signed a deal that allows Spark to offer Sky Sport Now streaming services bundled with Spark Sport content, and this started on November 16, 2020 (Sky TV, 2020b). The bundle costs NZ$49.99 per month. Chaz Savage, chief customer officer at Sky, said "our ambition at Sky is to have our superb content in the hands of every New Zealander. Spark customers who choose to buy our streaming service Sky Sport Now in this bundle will have access to our great range of sport content across 12 Sky Sport channels" (Sky TV, 2020b). Currently, Spark Sport costs NZ$24.99 per month (with some Spark mobile and broadband customers able to claim a NZ$5 rebate), while Sky Sport costs NZ$39.99 per month, so the bundled price gives the customers a discount of up to NZ$15 per month (see table 5 for pricing).

MediaWorks sold its television operations in 2020, and prior to that, it was one of the major television broadcasters in New Zealand. Now, the radio and interactive media company is owned by the US company Oaktree Capital Management. In September, MediaWorks sold its television operations to Discovery Inc., and acquired assets included entertainment channels Three and Bravo, streaming service ThreeNow, news and current affairs service Newshub as well as Three+1, Bravo+1, The Edge TV and The Breeze TV. Before the company's sale to Discovery, the company's CEO Michael Anderson stepped down. MediaWorks's financial stability has been in question for years (Myllylahti & Baker, 2019), and in 2020 it was stated that the company was not financially viable. In the financial year 2019, the company made a NZ$25 million loss "which cast doubt on the company's ability to continue" (Bridgeman, 2020). In the financial year 2019, the company's liabilities had doubled from NZ$138 million in 2018 to NZ$296 million in 2019, and it had NZ$131 million of debt (Bridgeman, 2020). During 2020, MediaWorks announced that 130 of its staff would be made redundant, despite the fact that it received NZ$8.6 million in wage subsidies from the Government (Bridgeman, 2020).

Freeview, founded in 2007, is New Zealand's digital terrestrial television platform. It is operated by a joint venture between the country's major free-to-air broadcasters – Government-owned TVNZ and RNZ, state-subsidised Māori Television, and MediaWorks New Zealand.

Streaming video-on-demand services

In 2020 there were a plethora of streaming choices available in New Zealand. During the Covid-19 pandemic, streaming services saw substantial increases in their audiences, but even before the lockdown Netflix, Lightbox and Amazon Prime Video experienced double-digit growth (Roy Morgan, 2020b). According to Roy Morgan, "viewership and new entrant Apple TV captured a large audience over the past twelve months" and Netflix "is the most watched service, with well over two million New Zealand viewers" (Roy Morgan, 2020b). According to Roy Morgan survey, "a total of 2.42 million New Zealanders have access to Netflix in their household, an increase of 291,000 compared with a year ago" (2020b). The same figure for Sky TV's NEON was 1.70 million (+66,000), Lightbox 875,000 (+113,000), Apple TV 377,000, Amazon Prime Video 322,000 (+191,000) and YouTube Premium on 234,000 (-7,000) (Roy Morgan, 2020b). Roy Morgan CEO Michele Levine said that while Netflix remained the most popular streaming service, a number of its competitors were also experiencing considerable growth. She observed that "Netflix entered the New Zealand market in 2015, and has since transformed the television-watching landscape. Viewers are no longer constrained by inconvenient program times, commercial breaks or slow-drip series releases. Streaming services place the viewer in control of what to watch and when they watch it" (Roy Morgan, 2020b). After Sky TV purchased Lightbox, the new service, dubbed NEON, was launched in July 2020. The merger gave

NEON customers access to some of the most popular content on streaming platforms, including *The Handmaid's Tale*, *Homeland*, *Outlander* and *Breaking Bad*. NEON's top programmes remained, such as *Game of Thrones*, *Watchmen* and *Westworld* as well as *Love Island*. NEON also added the capacity to rent movies for a set fee (Downes, 2020).

Play Stuff is a free online video-on-demand service that was launched by Stuff in August 2019. Stuff has partnered with BBC, Reuters, VICE, Red Bull, Bravo New Zealand, Madman and NZ on Screen as well as others to deliver thousands of titles. In the initial launch catalogue, there were 10,000 titles across a wide range of genres including news, sports, entertainment as well as lifestyle programmes ("Stuff launches Play Stuff, an online video destination free to all", 2019).

Table 5: Pricing of streaming & on-demand services in New Zealand, 2020

Company	Pricing per month
Acorn	$7.99
Apple +	$8.99
Amazon Prime Video	$9.00
Disney +	$9.99 ($99.99) annual
Netflix	$ 11.99 (Basic) $ 16.99 (Standard) $21.99 (Premium)
Neon	$13.95
Play Stuff	Free
Sky Sport Now	$19.99 (one-week pass) $49.99 (month) $39.99 (if signed for 12 months)
Spark Sport	$24.99
3 Now	Free
TVNZ OnDemand	Free
YouTube Premium	$15.99
Sky Go	Cost included in Sky Subscription (cost varies depending upon plan).
Freeview on Demand	Free as long as own decoder
AnimeLab	Free with ads or upgrade to ad-free premium ($7.95 per month).

Sources: TVNZ, NZ Herald, Spark

Acorn TV was launched shortly after Stuff Play in September 2019. It streams world-class mysteries, dramas, and comedies from Britain and beyond. Acorn has around one million paying subscribers for its mix of British, Canadian and

Australian “quality dramas” (Keall, 2019). It is one of the cheaper streaming services in New Zealand, although some of the programmes are already available on other services (see table 5).

8: RADIO BROADCASTING

Authors: Peter Hoar & Rufus McEwan

Introduction

In 2020, radio broadcasting in Aotearoa New Zealand held its position as the resilient medium. During the Covid-19 pandemic, both commercial radio stations and RNZ saw increases in their listenership. In fact, the high listenership of RNZ reflected growing interest in public broadcasting in a time of crisis. However, as with other sectors of the media, Covid-19 had an immediate impact on the commercial radio duopoly as they adjusted to a global downturn in advertising revenue, the challenges of cross-media ownership, and the dramatic interruption of a major content source: live sport. Conversely, in the public sector, discussion of a new public media entity and a youth radio offering have signalled future investment in RNZ and a longstanding review of New Zealand on Air funding has promised extra support for community access, Pacific and student radio.

Strong growth in radio listenership

In 2020, there were small but notable increases in radio listenership in New Zealand. This report utilises GfK's radio research surveys, which collect data over a 40-week period each year, drawing from a sample of approximately 15,000 New Zealanders. The third survey of 2020 (released in mid-October) indicated that the total weekly radio listenership had increased from the same period in the previous year by 78,200 listeners to a national total of 3,688,200 (GfK, 2019a; 2020a). These overall gains in listeners were shared by both commercial and non-commercial radio organisations. Commercial listenership increased by 29,100 listeners to a national total of 3,383,300 (GfK, 2019b; 2020b), and the public-service broadcaster RNZ saw a greater increase from 669,600 listeners in 2019 to 826,500 listeners in 2020 (GfK, 2019a; 2019b). Although the vast majority of radio audience share was still dominated by the commercial duopoly of NZME and MediaWorks, the proportionally higher increase in listeners for RNZ reflects sustained, and even growing, audience interest in the public service broadcaster.

Table 6: **Total NZ Commercial Radio Survey Report 3, 2020**

Rank	Station	Audience share %	Weekly reach (000s)
1	*Newstalk ZB* (NZME)	12.7	610.3
2	*Breeze* (MediaWorks)	9.5	622
3	*Magic* (MediaWorks)	8.3	427.9
4	*More FM* (MediaWorks)	7.7	567.4
5	*The Sound* (MediaWorks)	7.1	401.1
6	*The Rock* (MediaWorks)	6.1	402.4
7=	*Coast* (NZME)	5.8	372.5
7=	*The Edge* (MediaWorks)	5.8	576
9	*ZM* (NZME)	5.7	523.6
10	*Mai FM* (MediaWorks)	5.4	429.5

Source: GfK

Within the commercial sector, Newstalk ZB was again the highest-rating radio station in the latest survey with more than three percentage points separating it from *Breeze*, the second-highest rating station (GfK, 2020b). MediaWorks, however, commanded a much larger share of the audience overall, with 52 percent of the total audience share[3], compared to NZME's 35.6 percent (GfK, 2020b). MediaWorks also had seven stations featuring in the top ten. One can argue that the increases in national radio listenership, the specific context of Covid-19 and the desire for national audiences to stay informed and connected during a period of uncertainty present a viable cause. Commenting earlier on the role of radio during the Christchurch earthquakes, Joyce (2016) summarises previous scholarship that suggests that "radio is valued for its informative communication, but also the sense of companionship and emotional support it can facilitate for the imagined audience of people who are directly experiencing disaster" (p.88). Furthermore, in election-year audience interest in news and commentary was high and RNZ National became the first New Zealand station to reach 700,000+ listeners (RNZ, 2020). Yet, RNZ Concert also recorded 260,900 listeners in 2020, an increase of 57.5 percent on the same survey in the previous year, supporting the widely-accepted companionship role as cited by Joyce (2016).

Strong listener data from industry-commissioned reports continue to portray radio as a resilient medium that has so far staved off any marked decline in the wake of mass audience migration towards digital platforms. Interestingly, this was in stark contrast to the fourth *Where are the Audiences?* report commissioned by NZ On Air (2020b). This report (as discussed earlier) suggests that "traditional" media *are* seeing significant decline in daily audiences at the expense of on-demand platforms; daily radio listenership declined from 67 percent (2018) to 50 percent (2020b). This may be evidence of an overall fracturing of audience attention – strong weekly listening coupled with declining daily listening – but the difference in methodology between the near full-year, large-sample GfK surveys and the much shorter, small-sample *Where are the Audiences?* report might also raise questions about the latter study's rigour. For example, the report suggests that nine of the 11 most-listened-to radio stations

[3] The station share result, presented as a percentage, combines the cumulative audience of the station (weekly reach) and the average time spent listening to establish an overall result.

can each claim 3 or 4 percent of the daily New Zealand audience; this appears be an anomaly when compared with previous report data.

Job losses and the end of Radio Sport

Despite the general sense of resilience that can be ascertained from the radio industry's own measurements, the impact of Covid-19 on advertising revenue quickly resulted in significant job losses at both major commercial networks. As Duncan Greive (2020d) of *The Spinoff* explained: "There's a huge paradox in [the Covid-19 pandemic's] relationship to the media, in that all of us are seeing record ratings, which in normal times would lead to big revenue spikes – but because almost no client is advertising, the opposite is happening." The consequences of a pandemic lockdown that keeps consumers at home sits in direct opposition to the radio advertising model, which, among other things, promotes its ability to reach listeners in their cars, close to retailers. The full extent of industry-wide losses is likely to emerge next year, but Tim Murphy (2020b) reported that NZME's radio business "saw revenues drop by 18 percent in the June half-year, from NZ$53m to NZ$43m."

In April, the Government announced several measures to support media businesses, including radio broadcasters which have been affected by the decline in advertising revenue attributed to Covid. In addition to access to the wage subsidy scheme, this relief included a six-month waiver of transmission costs, a reduction in the platform contribution fee to fund NZ on Air content and advance purchasing of Government advertising (Faafoi, 2020; Murphy, 2020c). However, the support package was not enough to prevent job losses at both NZME and MediaWorks. NZME announced its intention to cut 200 jobs, approximately 15 percent of its workforce, and MediaWorks similarly announced that it would lose130 jobs (Jennings, 2020b). As Jennings (2020b) explains, the job cuts at MediaWorks were to be targeted at the relatively successful radio business as the company proceeded with preparations to sell its television operation: "The focus on cutting cost at radio is bound to produce some bitterness towards the television business. Without radio's cashflow, *Three* would have disappeared 10 years ago" (Jennings, 2020b).

The swift closure of NZME's *Radio Sport* in late March was likely the first sign of the challenges that would follow for those in the radio industry. In its announcement, NZME cited the severe disruption of spectator sports at local, national and global level as a direct consideration in reviewing the organisation's sports coverage (Pullar-Strecker, 2020g). However, as Egan (2020) suggests, there were already indications of financial difficulty for the broadcaster when *Radio Sport* chose not to renew its rights to live commentary with New Zealand Cricket. Sudden format or brand changes within the large multiplexes of commercial radio are not uncommon. However, the closure of *Radio Sport* signalled an end to full-time, free-to-air sports broadcasting in New Zealand (Braae, 2020).

Unlike most niche formats, MediaWorks had not sustained a direct competitor to *Radio Sport*, largely because exclusive broadcast rights for live coverage were the major drawcard for audiences. *Radio Sport* broadcasters and staff were reportedly stunned by the immediacy of the cancellation and former sports broadcasters bemoaned the loss of the station. Keith Quinn, for example, was concerned at the loss of opportunity for future sports broadcasters: "It's another example of the fact that even maybe into the 1990s and new millennium there was an opportunity for young blokes to make a career and last a long time [in sports broadcasting] ... That's now going to be very difficult for anyone to consider if they want to make a career out of it" (as cited by Egan, 2020). But as Dana Johannsen suggests amidst wider commentary, a legacy of issues with misogynistic culture, high-profile scandals and outdated approaches to audiences and content had potentially contributed to the station's general inability to build a sustainable audience share (Johannsen, 2020). As sports competitions adapted to the challenges of Covid and began to resume after the initial surge in global cases, both NZME and MediaWorks revealed revised plans for the coverage of live sport – albeit integrated part-time into music and talk formats. In June it was announced that the former *Radio Sport* AM frequencies would carry a new music station, *Gold*, that would also replace NZME station *The Mix* on the latter's FM frequencies. *Gold AM* would also broadcast *The Country Sports Breakfast*, a rural-targeted show that would include "a good dose of sports content" ("NZME eyes powerful demographic", 2020). Likewise, in August, MediaWorks reported that it had signed a three-year deal to provide live, free-to-air commentary for New Zealand Cricket (MediaWorks, 2020c).

Te Reo Irirangi o Aotearoa Radio New Zealand (RNZ)

If not the best or the worst, the last 12 months have certainly been among the most interesting times for Te Reo Irirangi o Aotearoa Radio New Zealand (RNZ). In 2020, there was a proposal to demolish RNZ Concert and to construct a youth radio network on its ruins. The prospect of a merger with TVNZ hovered miasma-like in the political atmosphere and assumed a more palpable form after the October 17 General Election. Less than a week after Labour's resounding victory, Chris Faafoi, Minister of Broadcasting and Media, stated that "my view remains that we will need to move beyond the current public media structures" (Pullar-Strecker, 2020f). Along with these developments, RNZ, along with every other local media and broadcasting entity, faced considerable pandemic related challenges. These challenges were perhaps even more acute for RNZ, given its social responsibilities as a public broadcaster rather than a commercial or specialist media organisation. With the General Election, RNZ experienced a tumultuous year but emerged from it with both increased audience numbers and public trust in its role as a broadcaster.

The year began somewhat inauspiciously for RNZ when management announced that it intended to transfer the Concert network to AM frequencies as an automated 'jukebox'-style platform and fire all its presenters. It was to be replaced by a network modelled on Australia's Triple-J and aimed at capturing a younger audience (Donnell, 2020). This diktat from Paul Thompson, RNZ CEO & Editor-in-Chief, generated a heated controversy. RNZ management had expected some backlash but had somewhat naively underestimated its scale and vehemence (Peacock, 2020b). Opponents of the proposal organised petitions and involved celebrities such as opera singer Dame Kiri Te Kanawa and former

Prime Minister Helen Clark (Chumko, 2020). Concert supporters used social media to publicise their cause and organised concerts and meetings to protest the move (savernzconcert, 2020). Within a week of the announcement, Concert supporters had presented RNZ with a petition signed by more than 26,000 people that Thompson declined to accept in person when told that media wanted to attend the meeting (Te, 2020). Public and political opposition to the decision increased and amid a welter of recrimination, RNZ management backtracked, coming up with a proposal to use the former Kiwi FM 102 frequencies for the proposed network. These frequencies had been earmarked for just this purpose (Walls, 2020). Having been drawn into the fray in her role as Minister for Arts, Culture and Heritage, Prime Minster Jacinda Ardern pointed out: “This is not cutting one generation after another or one audience after another. We don't have to lose one for the other” (RNZ Politics, 2020). As the time of writing, RNZ Concert broadcasts on FM while plans for the broadcasting youth network have been shelved due to Covid-19, according to Faafoi (Pullar-Strecker, 2020h).

This episode could be seen in the wider context of the planned merger of RNZ and TVNZ. A proposal was presented to Cabinet in January 2020 and a business plan began to be drafted with assistance from PwC (McCullough, 2020). A redacted version of this plan was released in September after delays caused by Covid but “… did not spell out the benefits of combining the broadcasters into a single entity or state how TVNZ or RNZ’s services would change if the proposal was approved” (Pullar-Strecker, 2020c). The implications of this merger are unclear in an age of falling profits and projected audience declines for non-digital broadcast media such as TVNZ. Some feel that the merger would create unfair conditions for smaller, commercial outlets (Grieve, 2020e). Another perceived risk is the dilution of RNZ’s cultural values and strengths as a public broadcaster by the profit-driven, commercial ideology that drives TVNZ. The proposed organisation in some ways suggests a shuffling, lumbering, zombie-type resurrection of the unlamented NZBC (1962-75). Such corporate undead are not noted for the agility and nimbleness that Faafoi spoke of when launching the idea of the merger (Peacock, 2020a).

Speculation about the drawbacks and benefits of this putative merger are hampered by the vagueness of the business plan as it stands. But such a move would be the most profound change for RNZ (and TVNZ) since the breakup of the New Zealand Broadcasting Corporation in 1975. It may well have been a fait accompli by now except for the effects of the Covid pandemic.

All media have vital roles during this ongoing crisis. Reliable information is important for public health and RNZ used all its resources to provide "reliable, independent, and freely accessible news and information" as per its Charter (RNZ, 2016). For many listeners, RNZ seems to have lived up this expectation with its coverage and reporting of the pandemic. In a survey on media trustworthiness conducted by JMAD, RNZ was rated as the most trusted news source by New Zealanders (Myllylahti & Treadwell, 2020). Its audience size broke industry records when it gained over 700,000 listeners in one week and Concert drew 4 percent of the population aged 10 and over (Jennings, 2020c). In the blizzard of half-truths, misinformation, conspiracy theories, and outright lies generated by the Covid crisis, New Zealanders turned to RNZ in large numbers for reliable information and news, whether as broadcast radio, digital streams, podcasts, or web pages. Concert explicitly set out to provide musical "calm and respite" and this may have appealed to many stressed and frightened people (RNZ Upbeat, 2020). These successes were not recognised in the 2020 budget. It allocated NZ$153.3 million for the public broadcasting services in 2021 compared to NZ$148 million in 2020 (Peacock, 2020c). This paltry boost is no doubt connected with the planned merger mentioned above.

RNZ was cursed with an interesting 2020. The year began on a sour note with a public backlash at the arbitrary decision to destroy Concert. As the Prime Minster pointed out, there was no reason why a youth network could not exist alongside Concert; this need not be a zero-sum game. This episode possibly stemmed from RNZ management applying commercial ideologies to a public media and this has left a legacy of mistrust within the organisation (Mitchell, 2020). Such divisions may not be helped by the proposed merger with TVNZ. Faafoi seems to be intent on this shotgun marriage, although its business case and the details remain vague and uncertain. It may well undermine the strengths of both organisations for very little gain. Despite these uncertainties and dramas, RNZ emerged from 2020 with record-breaking audiences and as New Zealand Aotearoa's most trusted media organisation. This is due to the dedication and expertise of its staff but also to the importance of the values at the heart of public media as stated in RNZ's Charter: Nā runga i tana tū hei kaipāpāho ratonga tūmatanui motuhake, ko te pūtake o te kamupene reo irirangi tūmatanui he ū ki ngā take whai tikanga ki a ngāi tūmatanui. (As an independent public service broadcaster, the public radio company's purpose is to serve the public interest).

Community and student radio

Community and student radio play important roles in Aotearoa New Zealand's media ecology. Along with iwi and Pacific radio, these networks provide crucial alternatives to the commercial and public media and make important contribution to the country's culture. The 12 community stations and five student stations are funded by New Zealand on Air Irirangi te Motu. The community radio network was reviewed in 2018 and found to be "valuable, unique and delivering the required bespoke … programming to its targeted audiences on multiple platforms" (Mollgaard, 2018). Community radio is accessed by many people across a number of platforms. Auckland's Planet FM alone claims 100,000 listeners a week in at least 32 languages (Planet FM, 2020). Increased funding has led to innovative developments such as the internet-based Access Internet Radio (AIR) project which allows stations (and the public) to share and obtain content (CAMA, 2020). Community radio continues to expand and fulfil its varied roles in reflecting and contributing to Aotearoa New Zealand's cultural diversity and richness.

Student radio continues to play a vital role in the country's musical life and general culture. Over its 60-odd years, the student network has explored areas outside mainstream culture and the format makes these stations rich sources for varied discussions about art and politics (Casserly & Saw, 2015). As well as providing informal training schools for broadcasters, the student stations have been vital for local music, particularly the alternative varieties. Many musicians began their careers through the opportunities to record, perform and be heard though student radio platforms. According to 95bFM manager Caitlin McIlhagga: "Student radio is here to be a platform for new talent" (Walton, 2020). This alone makes them a vital force in the country's cultural life. Student radio is currently under review by NZ on Air, with a view to focusing the network's strengths and further developing its potential.

The important roles played by community and student radio for New Zealand's people and cultures were recognised in the *Wellbeing Budget 2020*, which granted NZ on Air an extra NZ$6.25 million every year for the next four years. This extra funding will help "deliver content to under-served audiences" as well as ensuring "access to vital media content" (Peacock, 2020c). Such a funding boost indicates the current Government's understanding that media have important functions beyond generating profit.

9: PLATFORMS

Author: Merja Myllylahti

Introduction

In January 2020, social media was actively used by 3.6 million Kiwis, and the number of social media users grew during the Covid-19 pandemic. Alphabet/Google and Facebook dominated the digital advertising market with 72 percent of digital advertising money going to search engines and social media. During the pandemic, rumours and misinformation spread widely on social media platforms. This triggered Health Minister Chris Hipkins to warn people about spreading misleading information. Despite the popularity of social media platforms, many Kiwis did not trust news coming via search engines or social media. In 2020, only 16 percent of New Zealanders trusted news on social media platforms. In 2020, Stuff withdrew from Facebook as misinformation kept spreading on the platform. However, during the Covid pandemic, multiple New Zealand media outlets received some relief funding from Google's Journalism Emergency Relief Fund. In 2020, it became evident that Google had become more active in the New Zealand media scene, and had, for example, "trained" hundreds of journalists in the country.

Platforms dominate in visits and usage

In January 2020, 3.6 million New Zealanders used social media, and the number of social media users in New Zealand increased by 35 percent between April 2019 and January 2020 (Kemp, 2020). Amidst the Covid-19 pandemic, social media usage in New Zealand increased further. Hootsuite data shows that in April

2020, “social media use increased with nearly half (47 percent) of New Zealanders using social media more” than previously (Hootsuite, 2020). According to Hootsuite data, 3 million Kiwis used Facebook, 2.1 million LinkedIn, 1.7 million Instagram, 1.4 million Snapchat and 730,000 Twitter (Kemp, 2020). In January 2020, Google was the most visited website in New Zealand followed by YouTube, Facebook, Stuff and the *NZ Herald* (table 7). The most used social media platforms included YouTube, Facebook, Facebook Messenger, Instagram and Pinterest (table 7).

Google and Facebook were not just among the most popular websites, they also dominated in digital advertising in New Zealand. In the first half of 2020, the total digital advertising market was $586 million (IAB, 2020). Of that, $361 million went to search engines and $61.6 million to social media, and together search and social gobbled up 72 percent of digital advertising revenue in New Zealand (as seen in table 8). Advertising on social media grew considerably from the same period in 2019, experiencing year-on-year growth of 14.2 percent (IAB, 2020).

Table 7: Most-visited websites and platforms in January 2020

Most-visited websites	Most-used social media
Google	YouTube
YouTube	Facebook
Facebook	Facebook Messenger
Stuff	Instagram
NZ Herald	Pinterest
Netflix	WhatsApp
Google NZ	Snapchat
TradeMe	LinkedIn
Wikipedia	Twitter
Metservice	Skype

Source: Hootsuite, 2020

Table 8: Market share of digital advertising, first half of 2020

Platform	% of the market digital ad market	$/million
Search engines	61.5%	361
Classified/directories	16.1%	94.2
Total display	11.9%	69.8
Social media	10.5%	61.6

Source: IAB

As indicated earlier, in July, Stuff withdrew from Facebook as a trial. Approximately 953,000 people follow the Stuff news Facebook page and 134,000 follow its Instagram account (Anthony, 2020). Stuff editor-in-chief Patrick Crewdson said that the media company made its decision "in the context of the various unhealthy things seen on Facebook such as fake news, hate speech and fraudulent advertising" (Anthony, 2020). In October, Stuff owner Sinead Boucher indicated that the outlet was not in a rush to return to Facebook. Despite the popularity of search engines and social media, New Zealanders' trust in these platforms as a news source was weak. The *Trust in News in New Zealand* report found that only 16 percent of New Zealanders trusted news in social media, and 27 percent trusted news they found via search engines (Myllylahti & Treadwell, 2020, p.6). The report states that "these trust levels in news found through search and social media are internationally low" (Myllylahti & Treadwell, 2020, p.6). During the Covid-19 pandemic "nasty rumours, inaccurate advice and bullying" circulated on social media platforms about the second wave of Covid infections (Cook, 2020). Health Minister Chris Hipkins warned that the rumour mill was not only "harmful and dangerous, it was totally and utterly wrong" (Cook, 2020).

During 2020, multiple media outlets in New Zealand received relief funding from Google's Journalism Emergency Relief Fund. For example, Crux received US$5,000 from the fund (P. Newport, personal communication, October 28, 2020). According to Google, "publications across Fiji, Samoa, New Zealand and other Pacific Islands, have received funding to support local reporting throughout the crisis. We were able to provide financial support to a total of 76 news organisations across the Pacific" (Hopkins, 2020). Google says that it intends "to work more closely with local news publishers in New Zealand next year. The focus of our efforts will be on helping publishers innovate to build and optimise their digital advertising revenue streams" (Hopkins, 2020).

In its New Zealand blog, Google says that through its News Lab Teaching Fellows initiative, the company has provided training workshops in New Zealand "to make sure that journalists and media organisations have the digital skills to succeed at their craft. Since then, we've trained almost 600 journalists in dozens of newsrooms across the country" (Hopkins, 2020). The company also says that in the General Election, it provided New Zealand news organisations with fact-checking tools, and launched specific sites and tools for journalists to "help Kiwi journalists in their election reporting" (Hopkins, 2020). One of these sites was the Policy.nz site. Additionally, it worked with BusinessDesk to implement its digital subscription service Subscribe with Google "to make it easier for readers to subscribe to premium content online" (Hopkins, 2020). According to BusinessDesk CEO Pattrick Smellie, adapting the subscription service has had an "immediate" impact on the media outlet's revenue (Hopkins, 2020). Google has also worked with NZME in data optimisation. Additionally, TVNZ editor of newsgathering, Phillip O'Sullivan, was chosen to attend the Google News Initiative (GNI) newsroom leadership programme "to develop the business and product expertise of emerging newsroom leaders from the Asia Pacific region" (Hopkins, 2020). Google has also funded PressPatron, which is the media monetisation platform used by New Zealand media outlets to turn readers into paying customers.

10: Conclusions

In 2020, Covid-19 seriously dented media companies' advertising revenue, and the Government support package and wage subsidies aided them through the crisis.

The pandemic also boosted news sites' traffic, readership and audience reach, and many media outlets saw increases in their subscriptions, memberships and donations. In some cases, increases in reader revenue helped media outlets to expand their operations.

As the number of independently-owned media outlets has grown, there is some optimism for the media's future, particularly if New Zealanders keep paying for their content and keep supporting journalism. However, the Government needs to safeguard the future of national media whatever the funding mechanisms may be.

In 2020, big decisions concerning New Zealand media and its market structures were put on hold because of the General Election. Important decisions are pending in the public broadcasting sector. The newly-elected Government is expected to make a decision about the future of RNZ and TVNZ, and decisions on the restructure of the Māori media sector lie ahead.

As the ownership structures of mainstream New Zealand media keep evolving, new initiatives will emerge. Stuff, for example, has promised to develop an ownership structure that allows its workers to partake in ownership, and it will be interesting to see how this will be organised.

Factsheets

Table 9: NZME substantial shareholders 2020

Substantial shareholders *(as of October 2020)*	***Ownership***
Auscap Asset Management	15.3%
Osmium Partners	13.2%
Forager Funds Management	7.7%
Telstra Super	5.2%
Morgan Stanley	5.1%
Total	**46.5%**

Source: NZME

Table 10: NZME board members 2020

Board member	***Other director roles***
David Gibson	None declared
Carol Campbell	NZ Post, Kingfish, Marlin Global, Kiwibank, NPT Limited
Sussan Turner	Aspire2 Group, Pro Chancellor at AUT
Barbara Chapman	None declared

Source: NZME

Table 11: Sky TV substantial shareholders 2020

Substantial shareholders *(as of October 2019)*	Ownership
Kiltearn Partners	9.2%
Jupiter Asset Management	9.0%
Accident Compensation Corporation	8.4%
UBS Group	5.4%
Black Crane Asia Opportunities Fund	5.1%
Total	**38.6%**

Sources: NZX, Sky TV

Table 12: Sky TV board members 2020

Board member	***Other director roles***
Philip Bowman Chair	Kathmandu, Ferrovial SA and Better Capital PCC.
Martin Stewart CEO	Non declared
Joan Withers	Chair of The Warehouse Group, director of ANZ NZ
Keith Smith	Chair of Goodman Ltd, Deputy Chair of The Warehouse Group, Director of Mercury NZ + several private companies
Geraldine McBride	Director of National Australia Bank and Fisher & Paykel Healthcare.
Derek Handley	
Mike Darcy	Chair of M247; director of Arqiva

Sources: NZX, Sky TV

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