

The Student Radio Network 2024: What Next?



A review for New Zealand On Air

Dr Matt Mollgaard

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Executive Summary

The Student Radio Network (SRN) plays a critical role in our music, media talent and cultural ecosystem.

There is no room in the New Zealand On Air budget to increase funding to the SRN. This situation is unlikely to change in the foreseeable future.

The SRN stations all face rising costs to stay on the FM spectrum, which will impact on their ability to deliver on content goals in their funding agreements with New Zealand On Air.

New Zealand On Air should explore funding a shift from FM to significantly cheaper online platforms for SRN stations that can no longer afford to meet the costs of FM transmission, and eventually all of the sector if they lose the support of their home institutions or choose to move to online delivery to improve their financial positions.

The proposed Soundplant music submission portal, which would allow musicians to submit new music directly to the network, get it critiqued by SRN experts as part of a feedback loop and then playlisted on stations has strong potential to help the group to engage further with emerging music and younger audiences. New Zealand On Air should explore funding Soundplant as part of the strategic shift to online provision for the SRN stations.

Explore funding a sales/coordinator role for the SRN, to maximize opportunities as the group shifts online.

Explore renaming the Student Radio Network, which no longer fully describes the grouping. New nomenclature should support the evolution of the group and resonate with intended audiences as it develops its new digital strategy.

What is the purpose of the Student Radio Network (SRN) today?

New Zealand On Air describes its core strategic objective for funding the five student radio stations as:

Our aim is to ensure "great New Zealand music is valued and enjoyed by many New Zealand audiences." The student radio network allows us to ensure audiences for diverse music, often not featured on mainstream radio.

(New Zealand On Air, 2024)

This is a clear direction to both funding decision makers and to the stations about the purpose of the funding negotiated. This drives the stations to play a significant amount of music made in Aotearoa – between 50 and 80 per cent of total playlisted songs. These songs are usually not played elsewhere on the radio dial and are often new, alternative, experimental, and challenging tracks produced by independent artists in the developmental stages of nascent music careers.

During research conducted in 2022/23 for the book *Other Stations are Shit: Student Radio in Aotearoa* (2023), student radio staff universally reported being inspired by the mission of their stations to discover and platform new local music as a core service to their communities. Student radio audiences reported strong affinity with that mission too. Student radio was seen by both groups as essential to the future of a vibrant music scene in Aotearoa.

Another function of student radio is a broader connective and societal one, as New Zealand On Air notes:

In addition, student radio has a role to play in core public media principles - enriching the New Zealand cultural experience, ensuring content is accessible, strengthening community life and promoting informed debate.

(New Zealand On Air, 2024).

This role is critical as these stations reach audiences that are not typically available to mainstream broadcasters and who seek out alternatives to mainstream music and culture. An informed, critical, and inclusive platform for these audiences is essential to a broader sense of belonging to a peer group and being part of a broader social cohesion that values subcultures along with different lifestyles and tastes. An interviewee for this project pointed to this role student radio plays in providing spaces for “alternative” and “different” young listeners, who can form a sense of community and build connections with others finding their way outside of societal norms through student radio. This respondent pointed to the real risks to health and wellbeing that young people face when developing a sense of self and finding a direction outside of these norms, and the role services that celebrate alternatives like student radio play in

helping to support difference and experimentation in our cultural and societal milieu. Being part of a music scene that their local student radio station is championing can help young people connect and build self-confidence as experts in and supporters of that cultural activity. For this respondent, the communities student radio creates could even be a matter of life and death for some young people who are struggling to find acceptance in more “mainstream” settings.

The SRN is notably a key developer of media talent, with many of the biggest names in the mainstream media of Aotearoa getting a start in student radio, largely because of its willingness to put (almost) anyone in front of the mic. Alumni include Jeremy Wells, Samantha Hayes, Matt Heath, Tova O’Brien, Dai Henwood, Charlotte Ryan, John Cambell, Noelle McCarthy, Wallace Chapman and Jesse Mulligan. Influential political and cultural leaders have also done time in student radio, with Steven Joyce, Grant Robinson, Teresa Patterson, Simon Grigg and Otis Frizzell all developing their talents in the sector.

The SRN also represents substantial value for the spend from New Zealand On Air, when considering the thousands of hours of bespoke audio and video outputs and the multiplatform material the stations produce each year. Platform funding for the five stations in the 2023/24 fiscal year was:

95bFM \$320,000

Radio Active \$280,000

RDU98.5FM \$280,000

Radio One 91FM \$210,000

Radio Control 99.4FM \$180,000

(NZ on Air Funding Decisions 2023/24)

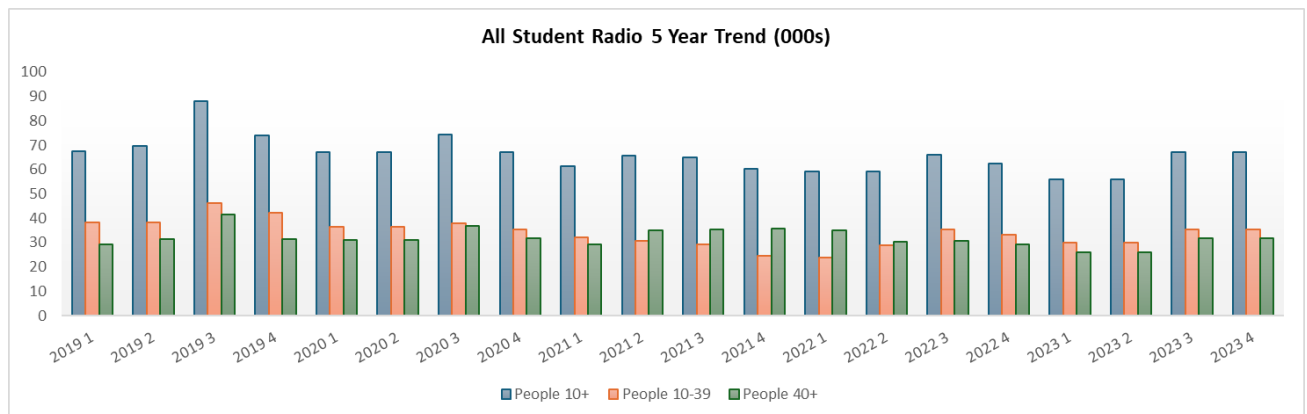
These numbers pale in comparison to the grant for RNZ in 2023/2024, which is \$66,606,000. All things considered; student radio is an extremely cost-effective way to deliver a critical part of the New Zealand On Air music strategy. The key question for the SRN has become “where to now”?

The current state of the SRN, including audience demographics and size, music outcomes and sustainability.

Traditionally, the student radio stations have been champions of “alternative” audiences who are not served by mainstream commercial radio stations, and this remains true today. They offer little threat to the larger commercial youth networks such as The Edge, ZM, Mai FM, George FM, Life FM and The Rock as the content continues to be strongly focused on alternative and experimental music, alternative cultures, news

from different perspectives and the arts, in contradiction to the tightly formatted and risk adverse commercial stations aimed at mass audiences.

Importantly, student radio is not just a “youth” service in 2024 either. While younger audiences under 40 are leaving mainstream radio services for other audio experiences, listener research from GfK Radio Audience Measurement data shows strong audience support from both young audiences and from listeners 40+ over the 5-year trend for student radio:



This audience is likely to be both new younger audiences seeking alternative music and broadcast content that is different from the mainstream radio stations, but there is also a significant group of long-time loyal listeners who have stuck with the services or have come back to them after a period away from them, or away from radio altogether. There could also be newer listeners 40+, who have discovered student radio in later life and are attracted to the non-mainstream listening experience as part of their alternative media choices. The significant comparative size of this 40+ audience is pointing to a slight shift in listening habits for younger audiences and a steady flow of older audiences for the stations. Significantly, the GfK figures do not consider how the radio station is listened to and on what devices, just the act of listening. This means it does not discriminate between broadcast and streaming audiences when reaching final totals of listenership. It is therefore hard to tell through which technology any given group of the audience is listening to the surveyed stations.

Where the SRN network fits in the current media landscape and their continued relevance and ability to reach and engage youth audiences.

There is an argument to be made for student radio stations to further focus their energy on serving the younger audiences at the universities and other education and training institutions around them. Their licenses and heritage are based on creating communities out of local student cultures and they have been successful at doing this for many years. Making strong connections with campuses, being the voice and platform for issues affecting students and giving airtime to student music, culture,

politics and creativity is a large part of their mission. Combining the broadcast and online activities of the stations with the potential of circa 400,000 students currently studying at tertiary level across Aotearoa is a powerful proposition for funders, creatives, audiences and advertisers.

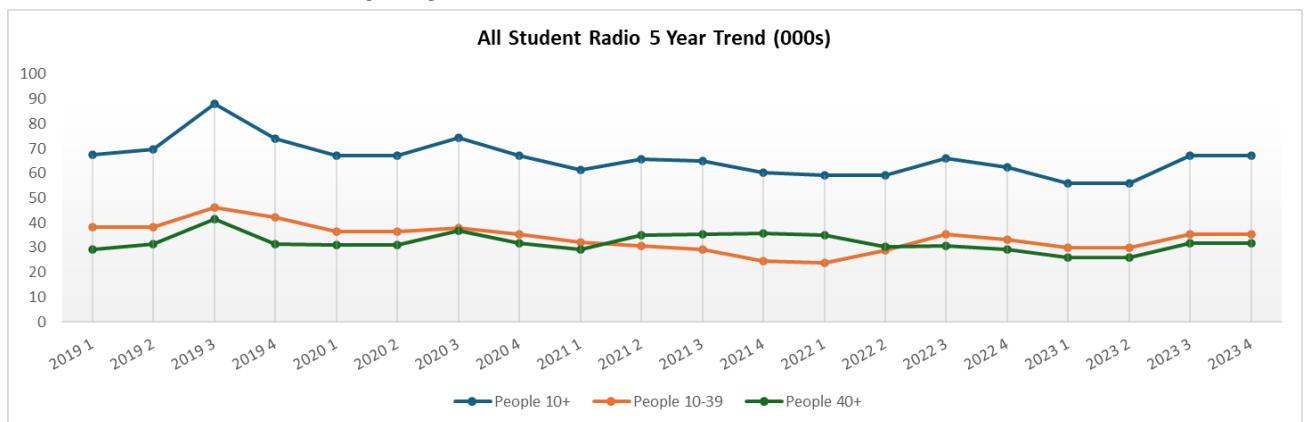
However, this is no longer a critical feature of the SRN stations, with two (Radio Active and RDU98.5FM) no longer on the university campuses they started from and 95bFM largely disconnected from the direct support of the University of Auckland, although it remains on its city campus. Only Radio Control (Massey University) and Radio One (Otago University) remain on campus and closely tied to and directly supported by their original institutions.

The figures below demonstrate the official audience sizes for the SRN as a group and the individual stations between 2019-2023.

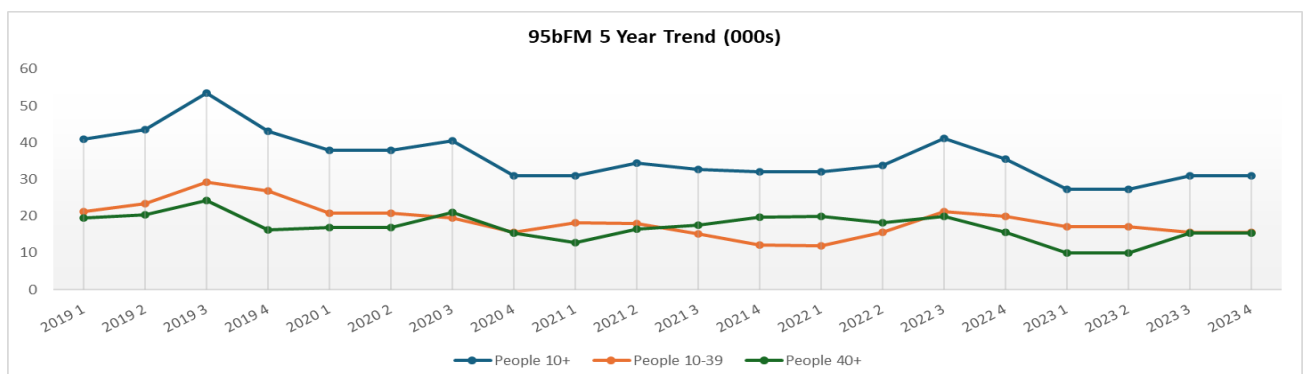
Student radio listening statistics 2019-23 (000s)

(GfK Radio Audience Measurement, 2019-23, Total NZ, Cume, People 10+, Mon-Sun 12mn-12mn)

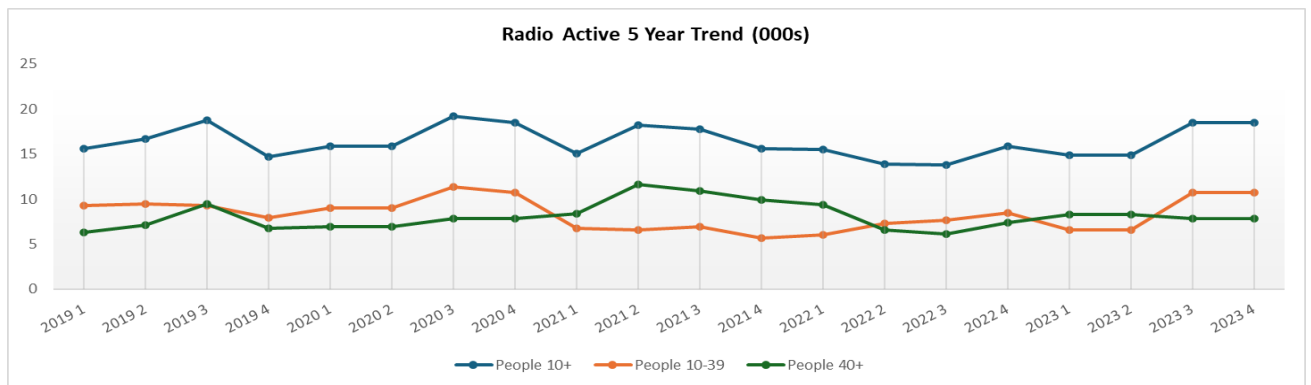
Student radio listenership: 5-year line trend 2019-2023



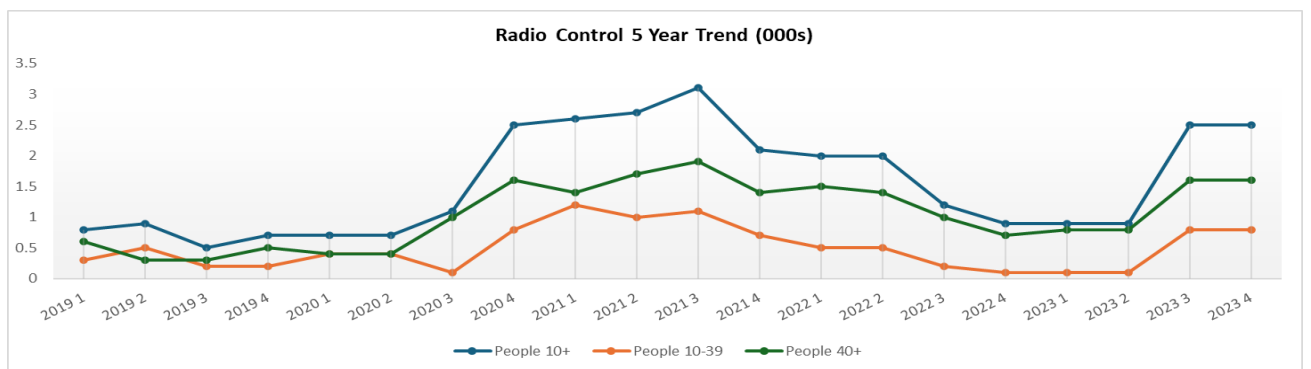
95bFM: 5-year line trend 2019-2023



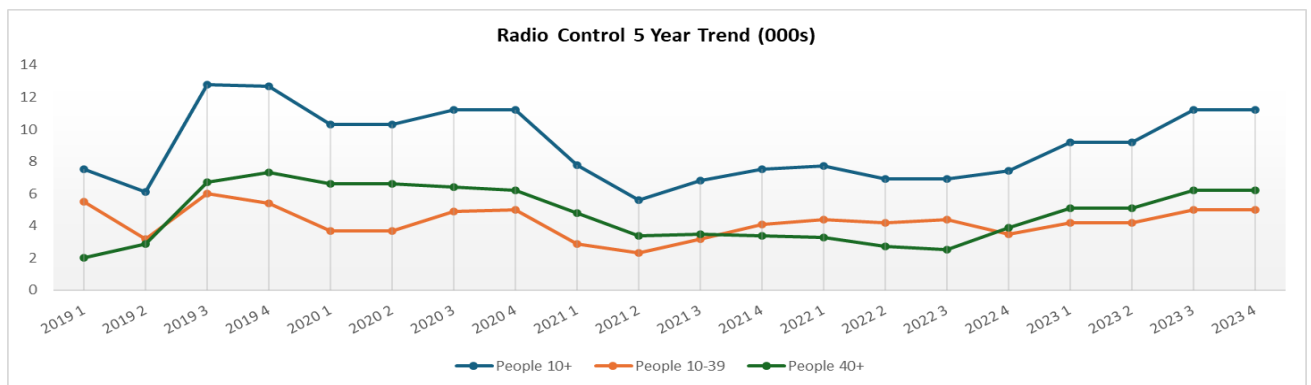
Radio Active: 5-year line trend 2019-2023



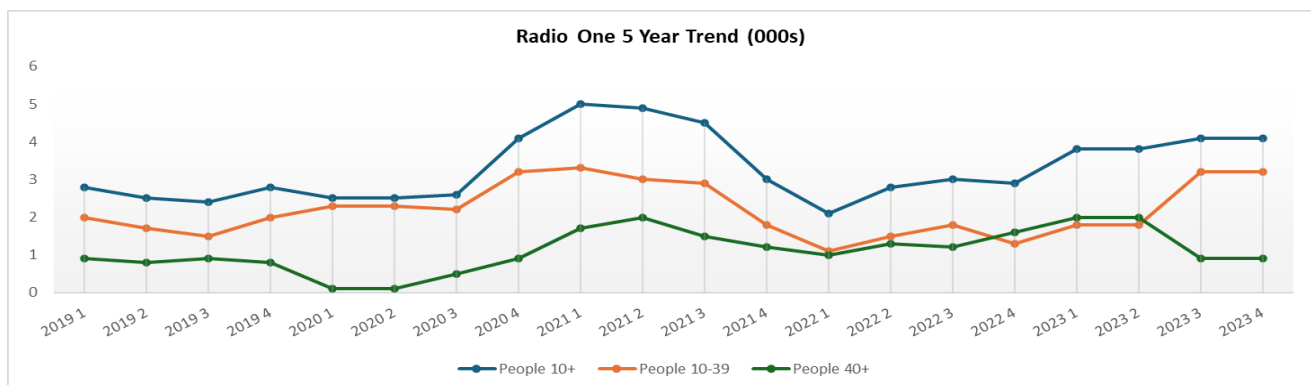
Radio Control: 5-year line trend 2019-2023



RDU: 5-year line trend 2019-2023

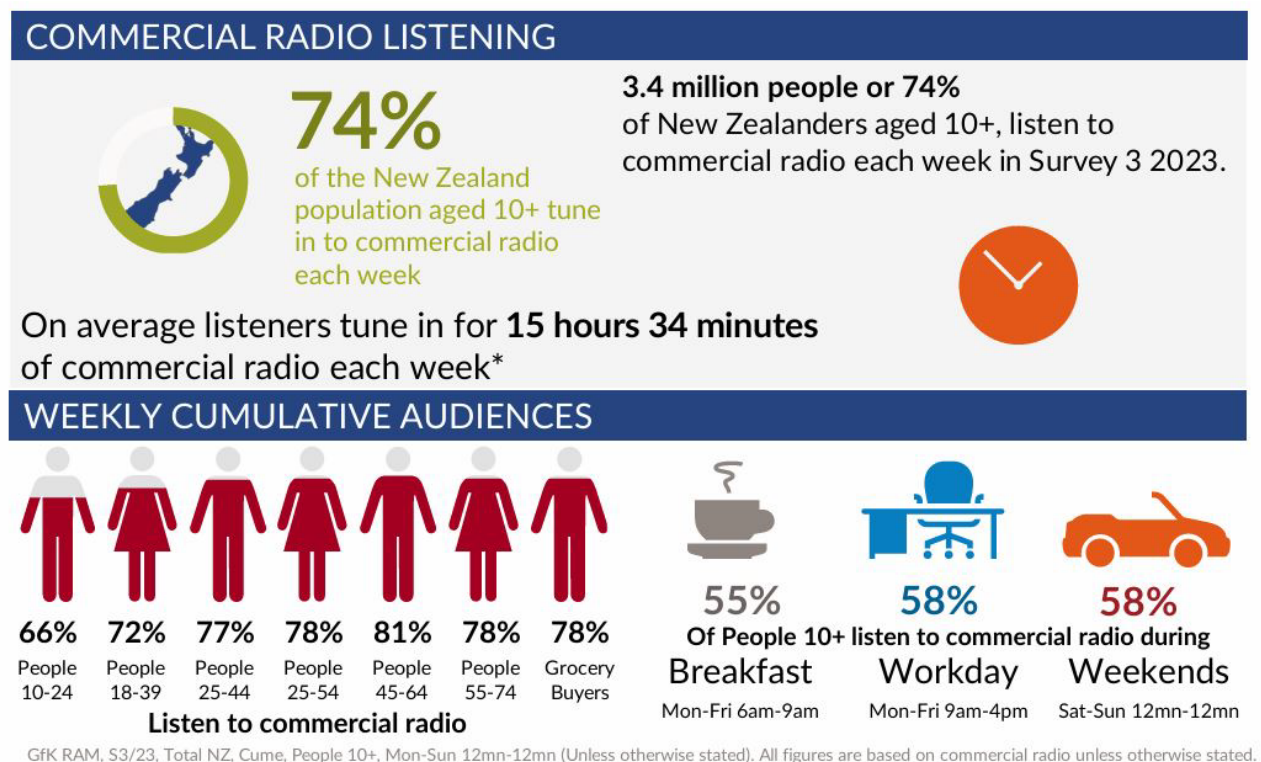


Radio One: 5-year line trend 2019-2023



The SRN in the context of similar services both broadcast and online

The largest regular survey of radio listening audiences in New Zealand is run by GfK for the commercial radio industry and Radio New Zealand (circa 10,000 respondents 10+ nationwide, across 40 weeks per annum) and has respondents note all listening across a week. This survey shows that radio audiences are still strong, although there is less listening at the younger end of those surveyed, it is not at crisis point as of May 2024 for commercial radio, who most actively target young people.



This is confirmed by Edison Research in its local version of the ongoing multi-market study of listening habits *The Infinite Dial*, across the US, Canada, Australia, and New Zealand. This survey uses a sample group of around 1,100 respondents 16+ who are asked about their audio usage habits across the last week. Its most recent iteration of this research (2023) shows that radio still has strong uptake in New Zealand, even amongst younger audiences.

Listening to AM/FM Radio in the Last Week

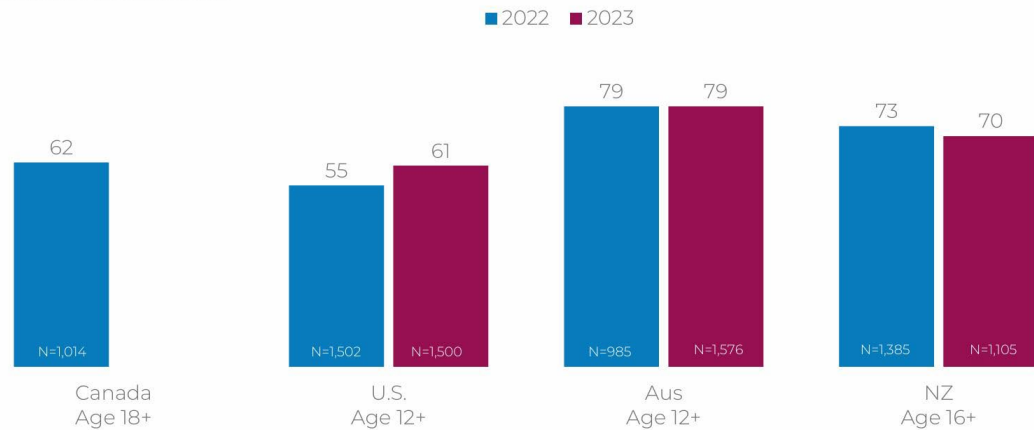


NZ radio remains strong in context of global measures

TOTAL POPULATIONS

% LISTENED TO RADIO IN LAST WEEK

RADIO INCLUDES AM/FM RADIO, BOTH OVER-THE-AIR AND ONLINE



Infinite Dial NZ 2023 Edison Research

Listening to AM/FM Radio in the Last Week

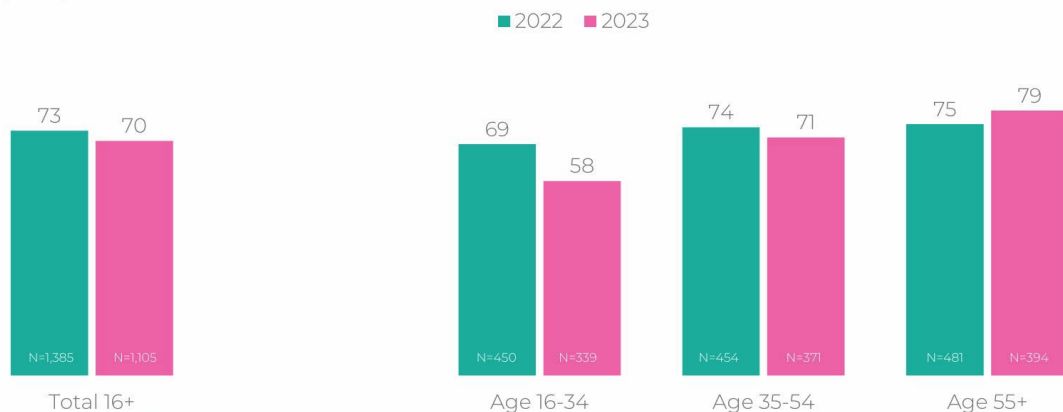


NZ core listening remains older with slight decline registered with lower age range

TOTAL NEW ZEALAND POPULATION 16+

% LISTENED TO RADIO IN LAST WEEK

RADIO INCLUDES AM/FM RADIO, BOTH OVER-THE-AIR AND ONLINE



Infinite Dial NZ 2023 Edison Research

These results differ from those in the 2023 Where Are the Audiences? research conducted for New Zealand On Air by Glasshouse, which samples circa 1400 people 15+ and uses a daily usage model, with 39 per cent of all respondents 15+ using radio on the day surveyed and 23 per cent of people 15-24 reporting usage on that day, a steady decline year-on-year since 2016.

Daily reach of media over time – Youth (15-24s)

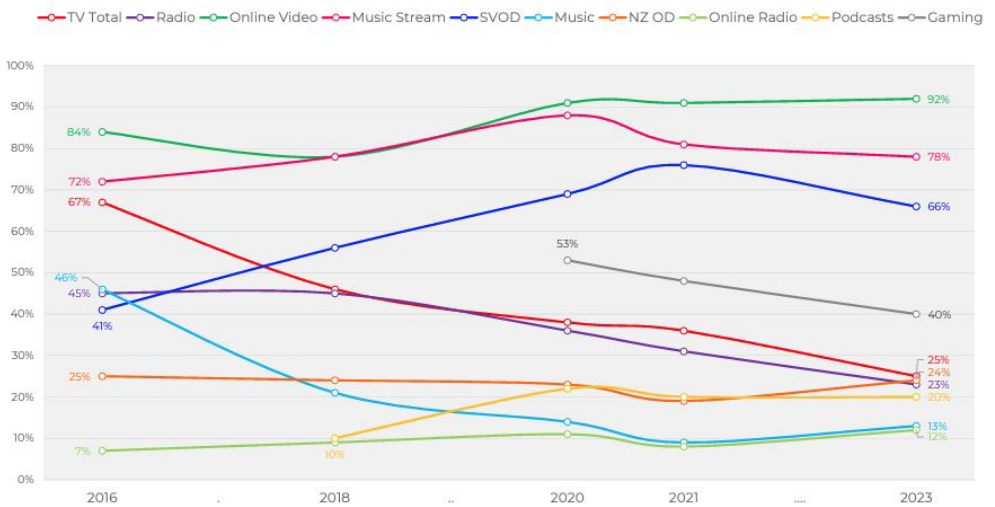
- All Youth 15-24

Base: All Youth 15-24; (2016 n=249; 2018 n=264; 2020 n=262; 2021 n=251; 2023 n=245).

Note: TV viewing includes live and time shifted viewing, in and out of home.



Online video now dominates 15-24 year old's media use following slight declines in the audiences listening to streamed music or watching SVOD since 2021. Online gaming has also continued the decline evident in 2021. On demand shows the most audience growth among youth since 2021.



Q: I'd like to ask you about the different types of entertainment or media you used yesterday. For each of the following, I'd like you to tell me if you did that activity for 5 minutes or more during the time period I read out. It doesn't matter if you were also doing something else at the time.

However, there is an argument to be made for the strength of the GfK and Edison Research results combined, as they constitute a larger sample size, across a longer sample window. That said, the Glasshouse research is a useful snapshot of the entire media market on a given day that is informative in allowing comparisons between different platforms, and in showing how new media platforms impact older ones. Also, repeated iterations of Where Are the Audiences? have shown a steady slide in listening to the radio across the board over several years, while online music and streaming services have shown notable growth, reflecting a transition in usage to online audio, especially for younger audiences.

How the Student Radio Network serves the goals of NZ On Air's investment strategy, specifically in terms of local music discoverability and/or serving youth audiences.

It is clear the student radio stations offer New Zealand On Air a platform to support new, alternative, and experimental music made in Aotearoa and the (generally younger) people that make it. The emergent scenes and developing artists that are part of the student radio ecology are therefore both directly served when they win grants from New Zealand On Air and indirectly served by being featured on the funded radio stations. For many artists, their first encounter with the "big" media is through the SRN platforms. This takes the form of playlisting of songs, but also interviews, live-to-airs and being featured on station websites and at station events, or having their live gigs promoted on air. While this report shows student radio stations having audiences across age groups,

they are predominately staffed by younger people who are actively seeking out music from their peers to champion on air, meaning much of what is played is newer, local and usually not played elsewhere in our media.

For many artists in Aotearoa, the only broadcast outlet they have is student radio, which can elevate them out of the relatively closed ecosystem of catering to fans on social media aligned to a Spotify release, and into a broader public sphere, with the opportunities afforded by FM broadcast exposure and attendant extra exposure through student radio websites. All the stations can point to relevant examples of this, like the Live Sessions out of Radio Control filmed at Stomach Studios and turned into highly crafted live music video content or the similarly sophisticated live recordings captured in the bespoke RDU SALTBOX music studios and pushed out on air and online.

The student radio stations are also significant champions of local live music, supporting hundreds of live gigs, big and small, every year. The stations feature comprehensive “Gig Guides” both on air and online and offer more direct promotion of live music venues, touring bands, and local events as part of their daily programming. A cursory glance at any of the individual station's websites will show just how much live music each station is promoting or directly supporting and the wide variety of venues for live music that are promoted, further enhancing local live music scenes. The mainstream commercial radio stations, based in Auckland and not interested in doing free promotion of venues, cannot provide the service to the smaller, local live music scenes that student radio does as part of their daily outputs.

The importance of the SRN to the wider Aotearoa music ecosystem

The experts interviewed for this project were keen to point to the critical role that student radio plays in our music ecosystem, acknowledging the fact that many of the artists championed by student radio would never get initial support, airplay or recording opportunities through attempting to get airplay on the mainstream media. Respondents from the record industry were also acutely aware of the power of radio to build an audience for an act, both before and after they sign to major labels or their minor counterparts. The record industry respondents noted how valuable the radio frequencies the stations used were and wanted to see the stations expand their playlists to incorporate more artists from across the spectrum of popular culture, while also acknowledging the challenges of being independent taste makers as opposed to a being another part of the mainstream popular music industries.

There is some variation in emphasis to unpack here – the major labels see the potential of student radio to both foster new and emergent artists and scenes that can then be picked up by the mainstream media, while also playing the newest popular music in more strictly organized playlists and formats, which would allow them to get more of their artists on student radio. That the “big” record industry sees value in what student

radio does is instructive – the cultural cache of student radio as being the place “new” happens and genre experts craft music experiences that are at the edge of musical development offer a low-cost promotional avenue to imbue major label music with “cool”, which can lead to broader market uptake for those artists.

Conversely, the smaller independent labels saw the SRN stations as being valuable in staying focused on privileging the non-mainstream, the very new and experimental music as their core kaupapa, while rejecting mainstream music, even if it was originally platformed on student radio. They also saw value in broad, loosely organized playlists and specialist music shows that created room for a wide variety of artists to get airplay, reflecting the profile of their acts. Interestingly, this reflects about 90 per cent of what audiences said was valuable about the music services of the stations when responding to a survey on student radio for *Other Stations Are Shit* – the non-mainstream nature of playlist picks and the relative lack of structured playlists compared to the commercial radio industry was seen as a critical positive for the listening experience.

For New Zealand On Air, the student radio stations offer a radio and online platform dedicated to championing music made in Aotearoa that is often in its developmental stage. Many of the artists funded by New Zealand On Air who are mainstream success stories were originally student radio discoveries, and this has been the case for decades. The record industry knows this and sees both the power and potential of student radio to support their efforts to sign great acts and promote them. In many ways, student radio is both a gift to audiences who seek the latest music and the record industry who seek to exploit it. It is part of the wider ecosystem of music in Aotearoa as it plays a pivotal role in getting artists from the bedroom to the boardroom.

RNZ TAHI: An alternative model to the SRN?

TAHI is an internet-based media platform aimed at younger audiences produced by Radio New Zealand as part of its strategic objectives to engage rangatahi in its outputs and to be the public media service for all the people of Aotearoa. It is based on a bespoke website (tahi.fm), which contains multimedia content with a focus on music and culture and an audio feed of local and international popular music as its core offering. TAHI also links to social media platforms, YouTube and the digital audio services offered by Apple and Spotify.

The key differences between TAHI and the services offered by the SRN are that TAHI is a streamed music experience with bespoke multimedia content on demand, while the SRN stations have FM broadcast footprints with local reach, a focus on New Zealand music, regular programming, announcers, advertisements, and a wide variety of specialists shows across multiple genres, as well as websites to listen online, retrieve previously broadcast content and engage with bespoke audio and video content beyond the broadcast outputs.

According to research conducted by Kantar in 2023, only 13 per cent of New Zealanders “are aware of TAHI”. It is hard to estimate the total audience for this service, as there is no definitive measures available and the targeted metric of “1000 live stream users a day for rangatahi” was dropped during the last reporting window of 2022-23 in favor of measuring all platforms that TAHI is on, including Facebook, Instagram, YouTube and TikTok, with a new figure of “total views across all platforms of 956,495 in a year” (RNZ Strategic Objectives, 2022-23). This figure cannot give insights into who used the content, how much was used or how long it was used.

TAHI is seen as more of a digital beachhead by RNZ management in that it is both a “sandbox” for trying out new things in the face of digital change and a place to begin migrating content online for audiences that are digital natives, while not impacting the mass audiences already enjoyed by the public broadcaster through its radio broadcasts. This is an acknowledgement that broadcast radio still has some time left to serve large swathes of New Zealand audiences. Because of its content and lack of market penetration, it is unlikely that TAHI and the SRN stations directly compete for audiences.

Although in its infancy, there is no indication that TAHI is having a notable impact on other youth media platforms in Aotearoa either. TAHI would be better seen as competing more with the commercial radio sector in terms of content, rather than challenging the more alternative and local music-focused output of the SRN stations. It also does not have an incumbent broadcast audience to grow from, like the commercial radio stations, the SRN and other RNZ offerings have. This is a significant handbrake on audience development for the service in the short to medium term. However, TAHI does provide one local example of how a music service might evolve organically online, as it builds a talent roster and develops podcasts and other audio experiences for a new generation of listeners. The relatively large resources of RNZ compared to other local media organizations are part of this, but audiences looking for less mainstream media might also help the platform to grow in coming years, if it can continue to offer unique experiences that resonate with younger, more connected audiences. This does signal one way that the SRN could futureproof its own offerings – by doing online content that works for this emerging audience, who expect a quality online media experience that speaks to their world views, tastes and cultures.

What capabilities are needed to deliver a modern and well-targeted youth/music public media service?

There is an emerging discussion across media businesses and policy makers about the shift from broadcast to internet-based platforms to deliver content that has traditionally been seen as part of the “mass” media. Radio is seen as an outlier by many, remaining firmly fixed to broadcasting signals from large, expensive towers to local areas and

resisting the kind of shifts television and cinema have made to online streaming platforms. The cost base of radio is therefore seen as unsustainable as audiences move to online platforms such as iHeartRadio, YouTube and Spotify to find audio content that was once the exclusive domain of radio.

There is a looming decision point about broadcasting in Aotearoa on the near horizon – 2031 is when many radio broadcasting licenses are up for renewal, setting the scene for broader discussions amongst stakeholders (broadcasters, government, civil society, audiences) about the future of radio broadcasting. There is a sense of urgency developing too, as natural justice would dictate the decision being made well before 2031, to give incumbent broadcasters time to change their business plans and rework their offerings if the radio spectrum is to be abandoned or is priced too high for incumbents to lease again.

While there is notable uptake of services such as iHeartRadio (NZME), Rova (MediaWorks NZ) and RNZ's online platforms, the broadcast audiences these services complement are still significant and crucial to the success of the "big three" radio broadcasters. The smaller players, such as the Iwi, Pacific, ethnic, independent, Rhema and SRN operators have not had the resources to build "full service" internet platforms that could conceivably replace broadcast audiences and have joined iHeartRadio and Rova to provide another cost-effective internet presence, beyond their own websites.

The exception to this partnership with commercial operators is the Access Media sector, who have built a relatively low cost and easy to use online platform in the accessmedia.nz system. Even then, the Access Media sector is still very much in the business of broadcasting on FM to local and diverse audiences in their geographic regions as they are heavily focused on who is behind the mic and accessibility for significantly diverse audiences, including those who can't easily be reached through online platforms.

The crux of the 2031 "line in the sand" is whether the incumbent broadcasters still want to operate the infrastructure behind broadcast radio in the face of declining audiences, and if they see value in remaining on the spectrum while transitioning to new technology. There are already indications from the Radio Broadcasters Association that they would like to remain on the AM and FM spectrum beyond 2031 and RNZ has not indicated it will be abandoning the broadcast spectrum either.

This does not mean AM and FM will still be with us for the foreseeable future. To paraphrase RNZ CEO Paul Thompson on the future of radio in Aotearoa, it faces "a glorious sunset, but a sunset nonetheless." When asked when that sunset is to be expected, Thompson plucked 2044 out of the air – for no particular reason, beyond the date being far enough into the future to be relatively uncontroversial. The key point here is that there is no strong movement or regulatory impulse to stop broadcasting on the AM and FM spectrums in Aotearoa, but there is a strong technological and cultural

“pull” towards internet-based content provision which is also impacting traditional radio broadcasting systems.

To date there is not a firm directive from government and a workable plan to move incumbents off the radio spectrum that doesn't leave millions without those services and broadcast businesses in ruins, and the current government has not indicated that there is significant work to be done in this area, at least in this term. It would be reasonable to assume that the FM spectrum the SRN is on now will still be available to them post 2031, but that is in no way guaranteed. It is now prudent that all broadcasters in Aotearoa begin planning for a media environment without AM and FM broadcasting.

The FM spectrum and what RDU's James Meharry calls the “steel in the sky” required to use it is a considerable strain on the budgets of the SRN stations, especially those that are no longer directly supported by the universities they evolved from - 95bFM, Radio Active and RDU98.5FM. The increasingly prohibitive costs of keeping a reliable FM signal operating for these stations is constraining what they can achieve for the New Zealand On Air funding they receive, and this is unlikely to get any more manageable, with the need to replace aging transmission equipment, Kordia fee increases and other fees and costs the stations pay to broadcast on FM impacting their bottom lines.

FM transmission is still attracting audiences to the SRN and there is good coverage achieved across their local broadcast areas. The SRN is also a local alternative for less tech-savvy audiences on the radio dial and has maintained solid listenership over in 40+ listenership. To date, producing traditional radio output has been a focus for the group as it has grown from a broadcast tradition and produces content with linear broadcast structures at its core.

That said, there is solid evidence that the SRN can and does produce excellent online experiences for their audiences through their individual websites, which are rich with multimedia music, entertainment and information content that is not available anywhere else. All five stations have responded to the challenges and opportunities of the digital age with websites that deliver bespoke content at a level of quality and feel that is beyond the relatively tiny budgets they are built on. What is different from the other broadcasters, and typical of the sector, is that they are all extremely individual to their parent broadcast operations, hyper-local and have little in common with each other in terms of design and aesthetics.

One strength of this approach is that the websites have served to further reinforce what are incredibly strong brands that resonate beyond the broadcast space. All five stations have built these brands over decades, and they are replete with layers of meaning around the mission of these media outlets – being different, being at the forefront of culture, being challengers, being open, and developing talent. This gives them all significant opportunities to leverage these brand values into the new spaces

afforded by the internet, at dramatically reduced costs when compared to FM transmission.

There is an opportunity here to reimagine what a more connected and connective online SRN experience could be, as a significant player in a national independent and alternative music and information culture, using a web-based approach to distributing the significant amount of unique content the sector generates each day. This would be a deliberate strategy to expand what the SRN offers to national and international audiences, while retaining local connections to the music scenes, cultures, and audiences in the regions they operate in.

The SRN Soundplant Proposal

The 2020 Student Radio Review conducted by the author of this report identified a lack of coordination between the individual SRN online portals as inhibiting their potential to promote local music and connect up the stations as a network to enhance their reach and impact, and the discoverability of new music made in Aotearoa. Now four years old at the time of writing, no physical unified platform exists to do these things, despite some early enthusiasm and meetings between the SRN and the Access Community Media broadcasters, who have successfully created an online system to network their outputs nationwide – accessmedia.nz.

The SRN has proposed a submission portal attached to a bespoke website that would allow musicians to submit new music directly to the network, have it reviewed and critiqued as part of a feedback loop to the submitter and played out on SRN produced shows and playlisted on stations. The Soundplant proposal is one potential step towards a more integrated online presence for the SRN, which may prove critical in terms of helping the stations shift their efforts closer to their younger audiences, who are significant users of online platforms to discover new content.

The SRN has engaged a digital and customer experience consultant to cost an initial discovery project to create a new SRN digital strategy, with a very reasonable initial cost of circa \$10,000. This could be a helpful initial stage in planning for a more digital future for the SRN and could help quantify what it will take to do this going forward.

One concern is that these projects, once started, are notoriously hard to fully cost and could take significant time to achieve full and reliable implementation. The alternative is “re-skin” what the Access Media sector has done already, as it is fully costed, functioning now, able (with a bit of back-end tweaking) to do all of the things the Soundplant proposal asks for, flexible enough to customize for the SRN and is demonstrably working to spread content to audiences easily and with reliable accountability systems to see audience uptake of content.

At their core, both Sounplant/SRN.NZ and accessmedia.nz offer opportunities to leverage the powerful brands the SRN has built into impactful online presences that build and retain audiences as content growth and audience attention moves increasingly online.

The shift from broadcast to online for radio in Aotearoa

The digital strategies of the commercial and public radio operators of Aotearoa are informative here. Both sectors employ varying degrees of “digital first” frameworks to their content production and distribution – this requires a shift in thinking from making content for a radio audience to making content for digital audiences that works online and on-air and is truly platform-agnostic, anticipating a media environment that will move away from “steel in the sky” and into online and on-demand distribution. Both sectors have built significant online platforms that deliver not just broadcast content, but bespoke programming that is online only. Both sectors have focused on apps that index content to make it easily discoverable and both sectors have focused on national and local audiences with their online offerings.

The most concrete examples of this in the commercial sector are iHeartRadio and Rova. While iHeartRadio is licensed to NZME and Rova is a bespoke build for MediaWorks NZ, they both function to catalogue and transmit the outputs of the traditional radio companies that manage them to the audiences of the internet, through the shift from radio sets to mobile communication devices such as mobile phones, tablets, smart TVs and increasingly, new cars, which now largely ship without radio receivers, relying on Wi-Fi and app-based audio services instead of traditional radio sets for their entertainment systems. In addition, both platforms have embraced giving space to other media outlets to join their stable of streams and experiences, expanding their digital “real estate” to sell to advertisers by offering their audiences more and more content, beyond what they generate alone.

Both platforms also open up new channels for content that was never meant for radio, adding new audiences for programming that would not otherwise be made. One notable example of this is iHeartRadio’s Alternative Commentary Collective (The ACC), which grew from a single online cricket commentary to a suite of podcasts, commentaries across major sporting codes and now into screen productions for SKY TV. The ACC demonstrates the utility of online-only formats that mimic traditional broadcast forms but sidestep the need for expensive infrastructure to distribute it and attract audiences.

Rova has also morphed from an online transmission platform for MediaWorks NZ radio outputs to a catalogue of hundreds of channels of content, the vast majority of which are never broadcast on the radio. The strategy of building audiences online through content aimed at very specific slices of the overall available audience is designed to keep engagement with these media companies through the various audio experiences

that are tightly focused on these smaller segments but add to broader audience numbers for the company. Again, even the media that Rova platforms from other organizations adds to MediaWorks NZ overall digital footprint, increasing its reach and audience size to sell to advertisers at minimal extra cost.

It is this “digital first” ethos that offers the SRN the opportunity to extend its impact and broaden its audience base in the long term. This strategy also offers New Zealand On Air more “bang for its buck” in terms of funding the SRN, with the growth of national audiences complimenting local audiences in the five regions, which includes four of our biggest cities, that the SRN broadcasts in. As New Zealand On Air funding is focused on content, rather than physical plant, there is a risk that the increasing and ongoing costs of maintaining FM transmission will eventually make the sector unattractive to the agency as a platform for music discovery, in comparison to the myriad online platforms many people in Aotearoa can now choose from. A move to a stronger online presence and a deliberate strategy to attract the growing online audiences to SRN content will give the sector the other options it needs for a future-focused strategy now.

RNZ’s and Access Media’s broader content strategies also offer a further direction for an SRN with a significant online presence – the option of “radical sharing” of its unique content. While RNZ and Access Media have built a strategy of sharing whatever they can with whoever wants it, including through an RNZ presence on iHeartRadio and Rova, the commercial industry is more concerned with maximizing commercial returns from its content, which drives it to use its own platforms as part of its content and audience ecosystem. An SRN online platform, largely unbound by profit maximization concerns, could radically share much of its music and information content with both the public and commercial sectors and even internationally, further cementing its suite of brands as the critical link between emerging music and new audiences.

This could include not only sharing their linear transmissions on iHeartRadio and Rova but also creating new bespoke content for these platforms, as well as their own. A strategy of making everything the SRN stations do available through every platform possible is in line with what RNZ has managed to do over the last few years, and points to a more influential role for the stations, especially in the discovery and dissemination of new music made in their local markets and across Aotearoa.

This strategy has also been successful for Tik Tok, which launched the Tik Tok Trending channel in Australia on iHeartRadio in 2021, and now has hundreds of thousands of listeners and multiple channels on the platform, including podcasts, artist playlists and other bespoke content. Significantly, the Manager for Tik Tok Music in Australasia, Ollie Wards, was previously the Content Director of Triple J and Triple J Unearthed, and created Tik Tok Trending to replicate a radio experience, with DJs, playlists and specialist features, alongside the additional content space afforded by the iHeartRadio platform. This points to one way the SRN could easily translate what it now does on the

FM spectrum to an online environment, building new digital content outputs as it develops its online activities through streaming on iHeartRadio and/or other platforms.

There are also potential revenue opportunities with iHeartRadio, who have created commercial partnerships across all of the major social media, music and search engine platforms. There might be scope to negotiate revenue sharing deals with iHeartRadio, Rova and other platforms too, as the audiences SRN stations could bring to these companies would be attractive to advertisers. Tapping into these opportunities would be another advantage of a considered strategy to move the SRN online.

Funding transformation

This depends on how the SRN is funded going forward. To resource a complimentary web platform is expensive, especially as the stations are all struggling to meet costs at present, which is exacerbated by the inflation problem Aotearoa faces in 2024. There are decisions to be made both by the individual SRN organizations and by New Zealand On Air about how the platform funding can be maximized going forward. Unavoidable costs of doing business such as transmission costs and minimum staffing requirements are a challenge for the sector, as will building a stronger revenue base beyond the New Zealand On Air funding. That said, due to having advertising and promotional inventory to sell, the SRN is in the unique position of being a public broadcaster with the commercial potential to grow its output through the right commercial strategies.

The stations lend themselves to partnering with game changers, underdog and evolutionary brands that share similar ethos with them. This has traditionally been a strength of the sector and should be a focus now too. In discussions with the Chief Executive of the Radio Broadcasters Association, there was a willingness to help develop this potential and to grow the sector's ability to attract advertising revenue. This has a benefit across the industry, as no one wants to see this high-profile part of the radio sector "fall over", as it will hurt the viability of radio as an advertising platform in the perception of marketing decision makers. To date, there is no enthusiasm from the broader commercial radio industry to support the SRN's revenue goals, but the idea is out there. Building commercial capacity and inventory will take time but is part of the solution, especially if it complements the offerings of the SRN and is not in direct competition with commercial radio. It may even help the sector bring new advertisers to radio if the SRN can attract companies that haven't traditionally used audio to market their products. The SRN has unique audiences and approaches to creative advertising solutions.

The stations also have a distinct advantage in being local media platforms, which can draw advertising from their local business with better client service, closer connections between audiences and businesses and by trading off the cultural cache they have developed as local, independent brands. This can be done without compromising on

content but needs to be deliberate and targeted at the right potential clients who will see a return on their investment when using the SRN stations. Building capacity in doing this could be a key task of the management group of the SRN, as could rolling out a national strategy for attracting clients to their platforms, possibly coming together as a single åbuyö for The Radio Bureau. There is room for a sales/coordinator role to be established to support this activity, alongside other SRN transitional projects, driven by the management team. Doing more commercial content well will be a challenge, but it is not an insurmountable barrier to revenue growth, and there is untapped potential evident across the five stations.

Bringing costs under control is another key element. There is no increase in funding for New Zealand On Air in the 2024 budget, so there is little to no room for New Zealand On Air to increase its platform funding to the SRN. This looks to be the case for the foreseeable future, with budget forecasts trending core Crown spending down over coming years. The SRN will have to operate with what it has now, and whatever it can generate commercially and in donations etc. There is a pressing need to trim costs and adjust margins across the sector. Each station should make those decisions, and they will be tough, but necessary in the current economic environment. All stations should be looking at how they balance the total costs of doing business with the audience size and impact they generate for the New Zealand On Air Funding they receive - while also asking the question åwhere to nowö?

Partnerships

There may be other ways to get on top of costs by partnering with other industry organizations, both commercial and public. The two stations that are financially backed by their universities have benefitted from this over many years, although the current financial strain the university sector is under may lead to changes in these arrangements. The best-case scenario is that the host institutions continue to support the stations with free or very low-cost spaces and some direct financial support as part of their student services. The worst-case scenario is that the stations are forced to leave their studios and financial support ends as universities cut back on costs. The campus-based stations are all somewhere on this spectrum and vulnerable to rapid and dramatic shifts in fortunes.

The two non-campus-based stations are at more financial risk, as having to cover all of their costs, including rent and utilities, makes them vulnerable to the impact of inflation, tightened advertising spends and cost blowouts related to aging infrastructure.

Going forward, partnering with other platforms such as Radio New Zealand, Access Media, iHeartRadio, Rova and others might be the best solution to the core issue of

costs becoming unmanageable. Partnerships with other organizations might also lead to revenue-generating agreements and other opportunities to grow incomes across the sector. The unique and often hard to reach audiences of the SRN might be attractive to commercial partners through platforms the SRN uses.

This would have to be carefully constructed to ensure the independent essence, brand qualities and unique programming philosophies of the SRN's five individual local stations were not "watered down" to serve the interests of a bigger partner or that the ease of access new talent have to these media outlets to be volunteer DJs and other contributors isn't overly curtailed. It would be counterproductive to lose the ability for the next Jeremy Wells, Dai Henwood, John Campbell, Charlotte Ryan or Noelle McCarthy to walk through the front door and sign up to make some content on a whim.

There are also potential trust issues for audiences, who like the fact the SRN stations maintain independence from the "big" broadcasting industry, according to research conducted for *Other Stations Are Shit*. Public funding for the stations would also need to be carefully ringfenced to ensure it goes to the stations in transparent ways that fulfill the requirements of their New Zealand On Air agreements. Any partnerships should be built on clear contracts that center New Zealand On Air's objectives while protecting the independence of the stations and their programming and editorial decisions.

Are there international examples that can provide some guidance for a future-focused strategy for SRN?

The BBC

The BBC's recently published strategy "A BBC for the Future: An Essential Part of The UK's Democracy, Creative Economy and Society" (March 2024) paints a picture of a slimmer BBC that does more with less and embeds a "digital first" culture throughout the organization. The plan includes retaining all of their current broadcast platforms while significantly ramping up content on their online iPlayer platform and working towards creative and cost-effective solutions for content production. While the BBC is necessarily reflecting on its future under "austerity" politics in the UK, the outputs of the organization are set to grow and diversify, despite restrictions on funding from public sources and revenue generating content agreements.

The BBC is facing many of the same dilemmas as our broadcasters, albeit on a grander scale. Key to the future of the BBC is its ability to "flex" in to the digital age, to pick the right content for diverse platforms and audiences and to operate with efficiency in a multiplatform world where the main competition is increasingly from global platforms such as Spotify, Netflix and YouTube. The key concern for the BBC is producing content with its mandated UK audience love, no matter how they find and consume it, while

continuing to develop revenue streams from offshore content deals that support production back home in an age of austerity.

Another key takeaway from the BBC strategy is the drive to think digitally while remaining a broadcaster and working to elevate all content platforms in financially tough times. The focus on where audiences are migrating to and how they find content is instructive here, as is the ongoing need to find and fund cutting edge creative projects that audiences keep coming back to, no matter what platform they are on. The SRN produces thousands of hours of bespoke content that works across multiple platforms every year and should be capable of expanding the audience for them with a stronger online presence that works to make its content readily available to audiences everywhere.

Triple J Unearthed

Triple J Unearthed is the online and DAB+ new music discovery platform of the Australian Broadcasting Corporation (ABC) and also offers insights into what the SRN could do with stronger and more unified online presence. The platform has a national focus and a clear remit to be the champion of new music made in Australia. It differs from the SRN in that it is fully funded by taxpayers and has no commercial content. Its sister station, Triple J, has the same financial arrangements, which does give the two networks significantly more stability and ability to plan for future innovations. The broader Triple J strategy is to be the most important broadcast and online music platforms for young people and independent music lovers across Australia, while supporting the local music industry in the regions as well as the urban centers.

The Triple J Unearthed strategy takes this a step further with a critical focus on new independent Australian music as it develops, promoting very new music with events such as the high school battle of the bands type competition *Unearthed High*. The SRN and Triple J strategies already share common ground around championing new music, but Triple J does it better online as a joined up experience. While the live and local elements of the five independent student stations is important, there is an opportunity to bring the best of what they do individually together in a unified platform such as the Triple J websites, without necessarily losing local flavor or audiences in their home markets.

Is there a more future-focused digital-first opportunity for the SRN network that would sustain their purpose while still meeting the kaupapa of the individual stations - an alternative model for the delivery of local music and audience outcomes.

Exchanging broadcast for an online platform

Perhaps the most radical solution, but worth exploring, is leaving the FM spectrum and becoming online platforms that stream through SRN.NZ, iHeartRadio, Rova and any other platform that works for the group, or any mixture of these services. This would have the instant benefit of taking all of the FM transmission costs out of the cost base of the struggling stations and would also open up myriad opportunities to think about how to create content and experiences for a virtually limitless media landscape. This will not be a completely new situation for Aotearoa - AUT has been running the online-only classic New Zealand sounz.kiwi.nz "radio" stream with a lineup of students of the Bachelor of Communication Studies since 2012. More recently, both The Platform and Reality Check Radio have launched online-only streaming "radio" services that have attracted audiences large enough to keep them producing content for several years.

Towards an online strategy for the SRN stations

Leveraging the strength of the SRN brands would be critical to this (does it really matter how I get my bFM, as long as I get it?), and some transition funding for streaming equipment and marketing of the change would be critical. A shift online, done well, would also have the added benefit of these outlets getting ahead of the curve with the ongoing slide in FM audiences and eventual reallocation of that spectrum as it becomes used less and less by broadcasters.

The SRN is uniquely placed to do this extremely well, as it employs and targets the most tech-savvy and online audiences in the media market and has the distinct market advantage of being the place new culture is found by these audiences. This might be a shift for older audiences, who would invariably cope as internet access is virtually ubiquitous and relatively cheap in Aotearoa, but it would be of little impact on younger audiences if done well as they are already spending much of their media lives online.

Launching Soundplant as part of this shift should provide excellent publicity, both for the stations and the new platform(s) they move to. It would also help engender the new system to musicians, who would see the benefits of the new online spaces and potentially unlimited reach of the online SRN as well as the more intimate connections between creating music and getting it played and promoted by the individual brands, who could retain significant local presences as well as national and global audiences.

Weighing up the costs of moving online through what mechanism (bespoke build, partnerships etc.) and having Soundplant ready to go as part of the transition will be critical to the success of any move online. It will also be essential to prioritize the goals of the New Zealand On Air Platform Funding in any shift in the transmission mode of the SRN's outputs and its attendant music discovery work.

If there is a perceived critical need to maintain a presence on the FM band, but not the resources to do a full-power offering, a Low Power FM (LPFM) option could be relatively cheaply constructed, with broadcast equipment sited in the station premises, cutting out most of the cost of current FM set ups. This could either be a transitional move, or more permanent, but would not provide the coverage of the current FM spectrum used by the stations but could serve a distinct locality for a fraction of the cost.¹

Using the Access Media digital platform

"Re-skinning" the already built Access Media internet platform could be the way to get more of the SRN online quickly and at minimal cost. It has been paid for to date, and has relatively low ongoing costs, has proven itself up to the task of handling and distributing large volumes of audio and other digital content, allows stations to maintain an individual web presence, is flexible, adaptable, scalable and easy to use for station staff and audiences and importantly, is available now. Without a large design and implementation budget for a bespoke online platform, this is the next best thing and should be easy to roll out quickly. It could be easily rebranded and set up as a standalone digital experience as a starting point for digital expansion of the SRN sector. Discussions between the SRN and Access Media have already taken place, albeit some time ago, but they could easily resume and focus on implementation of the system. The SRN stations could either maintain a bespoke website alongside having input into the universal SRN one or opt to be more fully integrated with it to save money. Ultimately, this could be an easier step in the next evolution of the SRN and will open up new opportunities to grow audiences locally, nationally and internationally for the outputs of the sector relatively cheaply.

Maximizing the use of social media channels

Social media is channel-rich and audiences are spending more time in these spaces year on year. Doing social media well all the time is a challenge, and some music content is restricted due to copyright issues between the platforms and the rights owners. However, there are opportunities throughout the social media ecology to

¹ AUT has this in place for its student FM station, Static 88.1FM, which broadcasts on LPFM to the Auckland CBD. Static 88.1FM has been on LPFM for 22 years as of 2024 <https://www.static.co.nz/>

expand the SRN's reach and impact. Most successful media organizations are using these channels in the way they work best for their audiences, by creating bespoke content moments that flow with other content on the platforms. The Wall Street Journal's Tik Tok is an example of this done well, with bite size news done differently for new audiences. The WSJ Tik Tok shows that even the most traditional and conservative media outlets can develop social media channels to bring in new audiences and remain relevant to current ones. The low cost of entry and creation for social media is an opportunity for the SRN, with its target audiences increasingly engaged in the key platforms. A strategy to maximize social media "hits" for SRN content is needed, based on designing the right content for the platforms the target market uses most and imbedding the use of social media whenever the opportunity to push out content that works in these environments arises. The five stations are already doing some of this well, and it will become increasingly important going forward. A more deliberate strategy with clear goals and workflows will be of benefit to the stations and any activity the network does together.

Producing a network-wide multimedia show

There is an opportunity to take what each SRN station does well and network it, to produce an audio, video and online experience that solidifies the sector's reputation for championing independent music and culture and tackling national issues from student perspectives. This "blockbuster" show (or shows) could be the flagships of the SRN online, on whatever platforms it is on, and with a talent roster that resonates with an independently minded, music loving younger audience across the five markets and everywhere else by creating a strong online presence with video and other elements that are "digital first" and includes clever and sharable social media elements. The independent and emergent music scene in Aotearoa would be better catered for across both the large urban and the smaller regional scenes with a platform like this, which would also be a key bridge between emergent musicians and new audiences. Finding a commercial partner to fund a show like this as a daily or weekly platform to promote local music that would not get commercial airplay would produce a unique and valuable collaboration for the sector.

Summary: How public funding can best support a financially viable SRN

The SRN is a unique and essential part of the music and cultural ecology of Aotearoa. It is also a celebrated incubator of media talent and a cost-effective way to produce many hours of audio, video and other channels of new music, culture, and current affairs for younger audiences. The future of the SRN will be significantly enhanced by adopting "digital first" methods of content creation and distribution. The SRN has huge potential as the voice and platform for the nearly 400,000 students in tertiary study in Aotearoa

and has kept audiences beyond the campus too. Platform funding has remained relatively static in recent years and current economic policies under the Coalition Government do not bode well for increased funding for the media and content sectors New Zealand On Air is focused on.

Public funding is still essential to the survival of the SRN and what it may become into the future. If the SRN stations want to remain on the FM spectrum, they will have to cope with the increasing costs inherent in the transmission and other infrastructure for this channel, without an increase in New Zealand On Air Funding, which will restrict their ability to produce results for the funding they do receive, leading to a vicious circle of declining returns for both parties. This would be the worst outcome for new music and media talent development in Aotearoa.

If the SRN stations which are financially struggling do not change their cost bases, they will need to continue to generate more and more revenue from other sources, including advertising, sponsorship, donations and memberships, while audiences decline in a stagnant advertising environment, with marketing spend moving increasingly online. Added to these costs is the need to do more using online channels, which increases costs overall. This is where there is a decision point; as FM audiences decline, public spending is static and would be most useful if targeted towards growing audiences through digital platforms to meet the new audiences where they are now.

As suggested, there are already opportunities to do this, and they must be considered if there is to be a shift in the fortunes of the SRN stations, as they face declining resources in real terms. As the cost of traditional broadcasting has become more and more prohibitive, the relatively low costs and rapidly growing audiences of digital platforms are becoming more attractive to most broadcasters today, including RNZ, TVNZ, TV3, NZME and MediaWorks NZ in Aotearoa, who are all investing heavily in moving their offerings online. The SRN now faces a crucial moment when the availability of funding through New Zealand On Air matches a need to innovate away from costly traditional broadcasting structures that restrict the amount and quality of content they can produce.

New Zealand On Air should seriously explore funding a shift from FM to online for SRN stations that can no longer afford to meet the costs of FM transmission, and eventually all of the sector if they lose the support of their home institutions or choose to move to online only. This could include funding the development of a bespoke SRN website and the Soundplant platform, repurposing the Access Media platform, or helping SRN brands establish channels on iHeartRadio, Rova and other existing platforms, this shift should include funding new streaming equipment and other changeover technology.

Aligned to this would be making funding available for a marketing budget to promote the shift to online, and the new online platforms the brands are on. This has been done

before, with the 'Big Listen' campaign for the Access Radio stations in 2016, and an SRN version might be financed along similar lines.

It is clear that the SRN stations have done well on the radio spectrum for over 50 years, but the time for change has arrived. These organizations are among the most suited to a shift to online platforms, as the audiences and content creators they are funded to serve are already largely available to them there. A deliberate and strategic move online, backed by the right marketing and a new energy around what is possible in the digital age is vital to the ongoing success of these critical cultural taonga.

A further consideration is funding a sales/coordinator role for the SRN. This will be particularly useful for managing the shift from FM to online. This role could include supporting the management team in the transition to online, managing marketing and promotion, including creative and media spend, liaising with platform partners and working with advertisers, including The Radio Bureau on revenue maximization and working with the music industry, including New Zealand On Air in connecting with the change and getting the most out of it. The success in raising the visibility, cooperation and impact of the Access Media sector occasioned by the hiring of a coordinator for that group is instructive here. This was also recommended, but not implemented, in the 2000 SRN Review.

The final note is on nomenclature. The 'Student Radio Network' has become somewhat divorced from the reality of what the five stations represent individually, and as a group in 2024. With only three on university campuses (95bFM, Radio Control and Radio One) and two now sited in commercial premises with no significant connection to or support from the universities they grew from (Radio Active and RDU98.5FM), it is time to imagine a new moniker for the grouping. This will be even more important if some or all of the group decouple from the FM spectrum, and it could be critical for marketing any changes if done well. This report offers no potential names, but recommends it is considered in full light of the current and future directions of the five organizations and the grouping as a whole.

Thank you for the opportunity to contribute to the future of this important and vibrant media sector, I wish everyone involved the best and look forward to seeing what this group of motivated, creative and capable people can do.

Matt Mollgaard

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Contributors

Kim Boshier, Managing Director, Sony Music NZ

Andrew Dubber, Director, Music Tech Fest Labs, Sweden.

Andrew Fraser, Chief Executive, Rhema Media

Mike Hall, Director Member Services, APRA AMCOS

Al Jamison, CEO, Radio Broadcasters Association

Andrew Jefferies, Director, Brian FM

Joost Langeveld, Managing Director, Big Pop Records

Jeff Newton, Music Promoter, New Zealand On Air

Paul Thompson, Chief Executive, RNZ

Student Radio Network Managers Group

Ollie Wards, Director of Music, TikTok Australia & New Zealand

Leon Wratt, Director of Content, MediaWorks NZ

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