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Level 3, Dimension Data House
99-105 Customhouse Quay
Wellington 6011

PO Box 10596, The Terrace
Wellington 6143

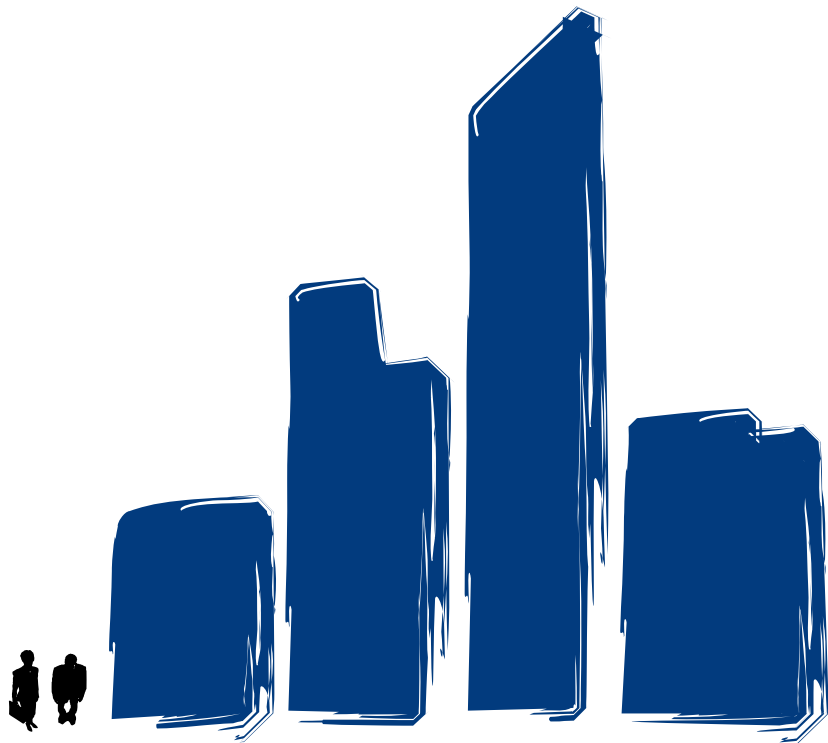
T +64 4 471 5370
F +64 4 499 6538

E info@senateshj.co.nz
www.senateshj.co.nz

corporate
communication

2015 Stakeholder Survey Report

prepared for
NZ On Air



21 December 2015

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Approach

This is NZ On Air's seventh survey since 2002. The approach for the survey was consistent with the approach for previous surveys (2002, 2004, 2007, 2009, 2011, and 2013).

NZ On Air provided SenateSHJ with a long list of about 100 stakeholders to select from, with a target of 25 completed interviews. We conducted 24 interviews in total, from a range of stakeholders.

| Industry | Target | Achieved |
|---|--------|----------|
| TV producers (mix of senior / leaders / other) | 6 | 6 |
| Broadcasters (mix of senior / leaders / others) | 4 | 4 |
| Music industry representatives | 4 | 3 |
| Television industry representatives | 1 | 1 |
| Radio producers and broadcasters | 3 | 3 |
| Public radio management | 1 | 1 |
| Government sector peers | 2 | 2 |
| Digital | 3 | 4 |
| Total | 24 | 24 |

Interviews were conducted by phone and followed an agreed question line (Appendix one). Each took 20-50 minutes to complete, depending on the level of detail in the respondents' answers.

The interview script was changed slightly from previous years, to reflect changes to NZ On Air's operating environment, as well as removing questions that generated little response in previous surveys. This included:

- removing the direct question about special interest funding and Rautaki Māori strategy
- removing the question about the Platinum Fund
- removing the direct question about social media (but listening for spontaneous mention instead)
- listening for mentions of three newsletters
- listening for mentions of Type 3 channels and commentary about pace of change in relation to digital funding
- introducing two new questions to prompt for attitude to funding decisions:

- Do you believe NZ On Air focuses its funds on the right things?
- Are they funding what you think they should fund? If not, what should they be funding?

We found that this explicit focus was unnecessary – stakeholders volunteered their views regarding the use of funds in response to early questions about mandate and success.

Summary – appreciation for NZ On Air – but more concern

This report summarises the main findings from the NZ On Air stakeholder audit in 2015.

There remains a strong appreciation for NZ On Air, its existence, its people and processes, and what it achieves with its limited resources.

Those interviewed almost unanimously reported strong relationships with the organisation. They commended the accessibility, empathy and industry knowledge of staff.

NZ On Air's engagement and communications continue to rate very highly, and stakeholders appreciate the way NZ On Air navigates a difficult job.

This year, however, concerns – and associated criticism – are more consistent and coherent than in previous years, and they are shared by stakeholders across different sectors. The primary concern is the tight funding environment, and this underlies many of the other issues that are raised.

There's just frankly, in headlines and italics, not enough money.
– Broadcaster

These include perceptions that:

- NZ On Air favours a few big players: the same (Auckland-based) players get all the funding and smaller players have no chance.
- In-house projects by broadcasters are marginalising producers.
- There is no diversity in programming or approach: NZ On Air is 'playing it safe' and content is too mainstream.
- There are too many big-budget projects, reducing funding available for other projects.
- NZ On Air has been captured by the broadcasters / has no power against the broadcasters.

- NZ On Air money is benefiting foreign-owned producers.
- Content being funded for children and young people is missing the mark.
- Despite not being part of NZ On Air's remit, there is a desire among TV producers and broadcasters for NZ On Air to be a stronger advocate for the industry – both for more money and to take on a more active role in nurturing the industry.

In addition to these concerns, there was an emerging sense that stakeholders wonder whether NZ On Air is adapting to change quickly enough, given the rapidly changing audience and funding environments. Some are asking whether the old approaches, models and players are still right.

These concerns led to a number of stakeholders suggesting NZ On Air needs a rethink.

Core topics

This section covers responses to the core questions in the survey, covering NZ On Air's role, how well it fulfils its mandate, perceptions about relationships and communications, and the organisation's strengths and weaknesses. These questions have been part of the survey since 2002.

NZ On Air's role still seen as critically important

As in previous years, all stakeholders showed a strong knowledge of NZ On Air's mandate, often using NZ On Air's own words to describe its purpose.

It was notable that a number of stakeholders used the phrase 'that wouldn't otherwise be made', and this theme flowed through the rest of their commentary.

They are there to facilitate the funding of programmes that would otherwise not be made because they are not inherently commercially viable. – TV producer

To safeguard our culture, so New Zealanders are seeing New Zealanders doing New Zealand things and talking about New Zealand stuff. – Digital industry

They continue to see this role as critically important, using words like 'essential', 'pivotal', and 'vital'.

Without it the industry would be bugged; there would be a collapse of the production sector. – Broadcaster

I think it's a really, really important thing. It helps define what New Zealand identity is. Without it, what are we? – Digital industry

This system works really well and it would be a calamity if NZ On Air didn't exist. – TV producer

NZ On Air fulfils its mandate

Stakeholders almost universally think that within the context of the financial constraints, NZ On Air fulfils its role well.

It's a difficult mandate to fill, especially in the TV landscape. They juggle competing demands incredibly well. – Broadcaster

Can they do better? All of us can do better. NZ On Air for life. – TV producer

I think it's all positive and I commend them – Government sector

Some, however, suggested that given the tight economic market, NZ On Air should change what it sees as successful. This will be discussed in later sections.

Relationships and communications positive

Stakeholders continue to report they have excellent relationships with the staff at NZ On Air, using words like 'extremely healthy', 'mutual respect', 'cracking', and 'collegial'.

As in previous years, the organisation's communication was widely commended. An enduring strength is NZ On Air's openness and consistency. Stakeholders appreciate the ability to pick up the phone any time they need to, and they say staff are clear and fair.

Whenever communication is required, it's timely and appropriate and I get all the information I need. – Radio industry

Stakeholders were asked specifically about the newsletter and NZ On Air's website, and we listened for any mentions about social media. All were reported to be doing the job they should be doing and meeting the needs of stakeholders.

The **website** is generally well used and for the right reasons.

One stakeholder noted that the digital pages were lagging behind other parts of the site (namely television) – that dates were often incorrect and it was unclear.

Stakeholders appreciate the **newsletter** – many skim it, or only read the sections relevant to them, but they appreciated its existence as a news delivery system. There was also praise for Jane’s introduction

I often like to see what Jane has to say in her column... Sometimes I share it with staff when it’s appropriate. – Radio industry

Some stakeholders suggested its whole format should be shorter and more casual

Sometimes information that would be good to know is received in such a broad package that you miss things. Often there might be one or two points of specific interest to us in the monthly newsletter, but it gets lost in the volume of information. – Music industry

There was no confusion about the three separate newsletters, and some stakeholders said they are not receiving the newsletter at all. Across the board, the comments show that while stakeholders appreciate receiving newsletters they don’t pay attention to how many they receive or frequency.

We did not ask a direct question about **social media** this year, as stakeholders in previous years had indicated it was not a key communication channel for them. A small number of stakeholders spontaneously mentioned the channels, and said NZ On Air was doing what they would expect, but they did not rely on social media as a form of communication.

I follow them on social media, but I don’t engage this way. Facebook is a peculiar beast. – Radio industry

I go on their Facebook page very regularly. – Digital industry

Other communications issues that were raised included:

1. One broadcaster mentioned issues with NZ On Air releasing press releases too quickly after a board meeting, before the industry has time to inform the right people.
2. A number of TV producers praised Te Māngai Pāho’s digital submission system. They were keen to see NZ On Air adopt a similar approach.
3. Both broadcasters and producers said they believed NZ On Air provided more information to broadcasters than it does to producers, and small producers felt they received the least access of everyone.

They may be prepared to give us slightly more of an insight. – Broadcaster

Sometimes they tell a broadcaster something and assume the broadcaster will tell us. But they don't. – TV producer

It sometimes feels like the big guys have all the access; the producers and broadcasters have access that other people don't. – Digital industry

Sometimes with big spats, you'll hear that the bigger producers who have global owners have gone to present to the board. That's fine, but you'd think that would be equitable to all parties. If they have people present their show to the board, then why can't I? It would be good if board lobbying had rules or a policy – TV Producer

When asked about whether NZ On Air could be doing more to communicate with them, some stakeholders said they would like more roadshows and seminars. This is covered further under the 'more to assist the industry' question.

Many strengths, but consolidating list of weaknesses

Stakeholders continue to appreciate NZ On Air's many organisational strengths, and the themes were similar to previous years. This year, however, the perception of the organisation's weaknesses have become more consistent and coherent than they have been in the past.

1. Strengths

Stakeholders readily identified a range of NZ On Air's strengths, which were broadly similar to previous years. These included:

Quality, well-led team and great staff: dedicated, knowledgeable, open, and courteous. Well respected.

I find them a fantastic group of professionals; I couldn't praise them enough for their smarts, their strategic ability. I think they do a bloody good job; they understand the sector, which is important. – Radio industry

Brendan Smyth deserves a knighthood for his career, for 30 years he's managed this and it's incredible... Jane in the same way is tireless in her efforts to maintain the funding and ensure it's protected and looked after.
– Music industry

There's a real strength with Glenn; he has a real talent for understanding and resolving things. – TV producer

I really value [them] – they do a good mix of being very professional and very honest.– Digital industry

They have a lot of empathy. – TV producer

The people are great to work with. My dealings with Keith have always been fantastic. – Radio industry

On the whole, the board is balanced – a good bunch of people and it seems to be working well. – TV producer

Good processes: rigorous, consistent and fair

The funding process is generally good, transparent and accountability is good. – Radio industry

We've always felt they've been very fair and clear about their criteria. – TV producer

They're very scrupulous and thorough but very fair. – TV producer

Efficient

It's a very small amount that goes on operations costs – that's admirable. – Government sector

They're financially efficient. I think they achieve a lot with not too many staff. – TV producer

They're strong and smart

It's an unenviable job. Everyone wants more, and there isn't more. They do a great job with limited resources. – Broadcaster

It's a difficult role and a lot of people overlook that. – Broadcaster

They're strong when they need to be, they're resolute, they don't get into a defensive crouch. – Radio industry

They handle the balance between governance and dealing with an industry which is highly commercial. – TV producer

Relationships and collaboration

They give me the impression that they're in it with me. – TV producer

I think there's mutual respect, mutual appreciation of each other's roles, budgets, pressures. There's understanding. – Broadcaster

They're open: they'll have a punch up with you and you'll leave the ring and have a beer. – Broadcaster

Deliver high-quality content

Keeping a high standard of content being produced every year is their strength. I don't think it would be made if they didn't take that stance.
– Broadcaster

2. Weaknesses

Over the years, stakeholders' concerns have shifted to reflect the environment at the time. Most years, it has been difficult to determine any particular theme from the weaknesses that stakeholders articulated. This year, however, we are seeing some of the weaknesses identified in 2013 continuing and solidifying, with a clear coherence about them among the stakeholders we interviewed.

On the whole, these points were raised as concerns, rather than strong criticisms. Apart from two stakeholders, these points were raised by people who were otherwise largely supportive of NZ On Air.

This year, concerns can be grouped into the following themes:

Lack of money

The vast majority of stakeholders commented on the static funding for the sector and associated competition and tight funding environment. This is placing stakeholders under pressure, and feeds into the other concerns noted below.

Money is the main issue. We feel the pinch because they feel the pinch.
– Radio industry

Our members need this money and NZ On Air's budget hasn't increased for years. – TV industry

You can hear the rivets popping. – Radio industry

While stakeholders appreciated NZ On Air's lean operating budget and efficiency, the tight funding environment prompts scrutiny and had some of them questioning

the cost of creating and sending out hard copies of a glossy Annual Report and the Statement of Intent.

It must cost a fortune to send to everyone. I don't need no book. Put it online and send a link around. – TV producer

Lack of diversity in funded projects and funding recipients

Several stakeholders noted concerns about a lack of diversity of funded projects, in particular that:

- they are 'too safe'
- too few projects are getting too much money
- a small number of recipients are receiving the bulk of the funding.

The concern that funded content is 'too safe' is an echo of a concern aired in previous years about the balance between commercial and public interest funding. However, there was stronger concern this year that 'mainstream' choices were winning out, to the detriment of audiences and the industry

The same kind of ideas get perpetuated over and over again. – Digital industry

I think the public were better served a few years back when there wasn't such a focus on commercial outcomes. The broadcasters play a big part in this too, but what we are seeing is the same old thing: no variety, no focus on good content, it's just rubbish. – Radio industry

Its results focused and that political need to back winners. It's easy to fund what they know or hope will be successful. – Music industry

I sometimes question why we're funding commercial TV on a commercial network. – TV producer

I'd like to see other genres getting support. New Zealand music is made up of a broad range of music, not just commercial music. There could be a spread sideways, e.g. singer-songwriters etc. – Radio industry

Many felt NZ On Air was giving too much money to too few projects.

I think the budgets are unrealistic for this country – \$6.6m for a show. You could probably make six really good things for \$1 million a show. Sometimes I think they put a lot of eggs in certain baskets and some of those baskets are doomed to fail. – Digital industry

I know that in the last 10-15 years, more and more of the funding pot is going to fewer and fewer production companies. The remainder fight over the remaining 10 per cent. – TV producer

Many also commented that they perceived the same, small number of people receiving funding in every round, and some were concerned there was a 'closed shop'.

I know people who are bitterly angry with NZ On Air because they think it's a closed shop. There are a limited number of chosen ones who are always funded. I know that in the last 10-15 years, more and more of the funding pot is going to fewer and fewer production companies. – TV producer

I think that a couple of the broadcasters and producers have the monopoly on it and they use that monopoly or threat of lots of people losing their jobs as an argument as to why their stuff needs to be funded... I think one of the biggest ones isn't even New Zealand owned. I'm wary of that – two or three offshore companies can take the lion's share of what is essentially New Zealand funding. Sure they might be making programmes for New Zealand, but I think breaking that up and spreading it around for more voices will be a better use of funding versus the same voices controlling 60 per cent of the content. – TV producer

The broadcasters are choosing the same old people to do the same old shows, and NZ On Air aren't saying 'this is a problem'. – TV producer

The production companies that are getting funded are getting narrower and narrower – four key companies. It feels like favouritism. – Digital industry

A strong concern around the funding going to overseas companies emerged in this year's survey.

NZ On Air is being pressured by overseas owners. That's one of the realities for NZ On Air. Seventy per cent of their funding goes overseas: Greenstone, Warners, SPP, all foreign owned and take a lot of the money. If they are seen to be flying around New Zealand meeting overseas companies and being forced politically, then that's a bad sign. That's taxpayer money going overseas. – TV producer

Many stakeholders, however, continued to support a focus on commercial outcomes, and others offered a reluctant acceptance of commercialism due to limited funds.

It's a commercial world, let's face it. Creeping commercialism is part of the world, really. – Radio industry

Captured by broadcasters

In conjunction with the previous weakness, a number of stakeholders expressed concern that the relationship between NZ On Air and broadcasters had shifted, and they felt that broadcasters hold NZ On Air to ransom and use their monopoly to demand funding.

I think they can be held to ransom by the bigger players, I mean big production companies like SPP and Greenstone ... NZ On Air has difficulty standing up to those kinds of powers, and I think the same with the larger broadcasters. It can be difficult for NZ On Air to take on disagreements with [big players]. – Broadcaster

TV3 are making lots of their programming in-house with NZ On Air funds. NZ On Air doesn't seem to care. It's a side-lining of the industry. – TV producer

It feels like they're up against the wall with networks who must be saying 'if you fund that channel for that, you have to fund us for this proposition' – even if the proposition doesn't sit right with NZ On Air's remit about telling quality New Zealand stories. – Digital industry

Many stakeholders expressed concern about the proposed funding of the TV3 soap opera, and used this as evidence of their concerns. We note that these interviews were conducted before NZ On Air's announcement that the proposal had been rejected.

Need to look ahead more

Although most stakeholders reported they felt NZ On Air had moved at a good pace in adapting its online policy, many nonetheless expressed concern about the organisation's readiness for the future. This was not just in relation to adapting to a digital environment, but more broadly questioning how it will adapt to the ongoing and fast-moving changes in the industry and audience behaviour, combined with the new pressures created by the funding limitations.

They wanted a better understanding of NZ On Air's strategy and thinking.

The majority of money is still being spent in similar ways to historically. They need to examine this more closely. Their weakness will be the ability to embrace the future in a creative and interesting way. – Government sector

I think the idea should be that they're future proofing. People are abandoning TV... They should be moving faster to further understand the audience. I think the lines between digital and broadcasting should disappear. What's defined as a broadcaster should be if you can prove you can find an audience. – Digital industry

There's no coherent strategy. – Music industry

Specific question areas

This section covers responses to this year's specific questions addressing NZ On Air's approach to online funding, its decision making and use of public funds, and what more NZ On Air could do to help the industry.

Knowledge of NZ On Air's online funding?

Most stakeholders knew about NZ On Air's online funding approach, and generally agreed with its direction.

Most felt the pace of change was about right. Some felt the organisation has been moving too slowly, but even those appreciated it's 'there now'.

I think they're changing appropriately; you don't want to change too fast.

Their role is not to be market leaders. – TV producer

I think they've adapted at the right pace. The proof is where they go from here. – Broadcast

I think they're cautious, appropriately so. I think they understand the world we're living in now. People are not stopping watching the telly, people are consuming more content in new ways, rather than replacing their habits.

– Radio industry

They need to go a bit quicker in the next five years than the last, but I think they've been doing a good job. – Radio industry

There is a strong desire for better clarity about NZ On Air's strategy in this field and its rationale. It's still not widely understood and some stakeholders feel that NZ On Air itself doesn't understand it.

Quite hard to fathom their rationale behind it sometimes. – TV producer

I know that the policy needs to be printed out and sit in a room for a day together to simplify it completely. – TV producer

Its digital funding approach still needs a bit of smoothing out and simplification. – Digital industry

They should support it but they need a clear charter and series of goals – it is hideously confusing and also not a lot of money available, though I don't think they should increase that. We're not at a point yet where they should be putting huge amounts of money into digital enterprises. – TV producer

There's no coherent ongoing strategy, they lurch about then re-evaluate what they're doing. – Music industry

This is especially strong among television producers and broadcasters, who are worried about money moving to digital rather than traditional broadcast channels.

I have some concerns about the movement of money towards online, and would like to see a continuing emphasis on TV and online together, rather than online at the expense of TV. – Broadcaster

What we're starting to see is TV being threatened, and shifting into digital and shifting to companies that we don't know. – Broadcaster

I would not like to see money going into digital at the expense of TV funds.
– TV producer

Some noted that the online space allowed 'riskier' / more innovative projects to be supported, and others were concerned that NZ On Air was 'playing it safe' by funding people who had already proven themselves by completing web series before.

There's a big demand and they're playing it safe. The point of doing digital is to come up with really ground-breaking ideas. If someone's already done two series before, they could probably get independent funding. NZ On Air should be supporting people with really fresh new ideas. – TV producer

Some stakeholders were concerned about the tight budgets in digital funding, and say this will mean people are working for no money.

I struggle to see how to make that kind of content, unless you have dedicated teams of enthusiastic people who will work for almost nothing. – TV producer

One music industry stakeholder expressed concern for the All Tracks project.

With Brendan leaving, this is a great opportunity to reset and start again. Every person in the industry will tell you [the digital strategy] is a joke and no one will say anything to Jane or Brendan. They have this thing called [All] Tracks – Spotify related – and it's embarrassing and everyone laughs about it. This is their attempt to help streaming, but the amount of followers is only 289 on one section. They shouldn't be doing YouTube and trying to be a broadcaster. I don't know why it's there or how much money they're wasting; it's not their role. – Music industry

We were asked to listen for mention of Type Three channels. Only one person mentioned them explicitly (and incorrectly) but several others showed through their comments that they understood this funding direction.

There's something called Level 3 – it's either digital or television, and TV is free-to-air. That money can't start drifting over into digital initiatives. They should support it but they need a clear charter and series of goals – it is hideously confusing. – TV producer

Does NZ On Air make the right decisions with funds?

Despite all of the concerns raised through the interviews, overwhelmingly stakeholders agreed that NZ On Air generally makes the right decisions with funds.

Yes, I think they do. It's important for them to keep thinking about new platforms and the future of the sector, but they have the balance right at the moment. – Government sector

This question elicited the usual requests for funding related to the stakeholders' area (more comedy, more documentaries, more music), as well as some of the themes already discussed (too much money to too few, not enough innovation etc).

As previously mentioned, a number of stakeholders also expressed a concern about the perceived increasing focus on commercial projects at the expense of diversity, or projects that wouldn't otherwise be made.

You can't just keep giving \$1.5 million to shows that are making a lot of money for a network. Like Jono and Ben – I know how much money they make from sponsorships and deals, why are they propping that up?
– Digital industry

Given our lack of commercial viability (not to be confused with value to society), our sector lends itself to more government support over and above other mediums. I'd like to see a shift in thinking where less commercially viable content is recognised. – Radio industry

One relative newcomer to the industry suggested NZ On Air should be 'more adventurous' and their comments points to some benefits in putting more care into building understanding with new entrants.

They shouldn't be so strict on the New Zealand content aspect. It's important to have that, but there are ways to express a Kiwi sentiment

without it being set in New Zealand or having a tuatara in it. – Digital industry

Indeed, it was notable that for most comments in this area, there was generally another stakeholder who made the opposite plea.

Does NZ On Air make good use of public funds?

Twenty-three out of twenty-four stakeholders we interviewed agreed NZ On Air makes good use of public funds, and they used their response to this question to reiterate the importance of the model.

I think they do. They have lived on fixed rations for a number of years – they examine every cent. They need to take some risks, they need to innovate, but I think they get that balance right. – Radio industry

However, a greater number than in previous years qualified this approval with phrases like ‘most of the time’, or ‘apart from as stated’, referring back to their concerns (worrying about lack of diversity, wanting more / different types of projects funded).

I think they could do better. Some areas are very good and some are appalling; it’s not consistent. – Music industry

One interviewee said no.

They’re heading towards more funding of commercialised content. I’m not sure they’re reaching their mandate. – Radio industry

Do you understand NZ On Air’s decisions?

The vast majority of stakeholders are very comfortable with their level of understanding of NZ On Air’s decisions, and add that they can call NZ On Air to clarify if they are unclear.

Some stakeholders did comment that the decision letters lack detail, and applicants needed to put in a phone call to truly understand the reasons. Some understand the need to keep these simple, but others want more detail.

We often have to deconstruct the words in the funding letter – they’re like a letter from your bank. – Broadcaster

There was a desire for more information about what missed out on funding. Although one producer was adamant NZ On Air should not publicly release information about all applications, some stakeholders suggested it would be

helpful to know what else was being pitched. (One stakeholder suggested providing the list to MPs so they could know all the great ideas they were missing out on.)

I like to know anything that NZ On Air want to divulge about their decision-making processes. – Broadcaster

Could they do more to assist industry?

As in previous years, stakeholders understand it is not NZ On Air's mandate to assist the industry. But this year, there was a stronger desire that they do more anyway to help grow the industry and provide opportunities to develop talent.

I'd like some sort of responsibility for a healthy industry in NZ On Air's camp. – TV producer

NZ On Air has traditionally had a mandate that it doesn't support the industry and its only output focused. The answer would be yes potentially, but they've never accepted that. Unofficially, they do have an interest and concern, but they've used the official line to get better returns.

– Government sector

Stakeholders had many ideas for what NZ On Air could do, including:

- **Be braver in asking for more money**

I think they should [ask for more money] a bit more. Because they don't stand to gain from it, they're just passing the money on. – Broadcaster

Lobbying the government for more money. That's what we'd like them to be doing better. – TV producer

Champion their own cause to secure additional funding for the industry. Communicating what effort they are undertaking to secure increased funding and where the funding might go would go... To know they're trying would be useful. – Radio industry

- **More roadshows and seminars, provide a better sense of strategy**

They could go out to us as a collective and say, 'we would like to see more projects in these particular areas' and we would work to that ... Their whole system would benefit from them being more engaged with both producers and broadcasters. – Broadcaster

It would be good to put faces to names, learn more about NZ On Air, learn more about expectations. – TV industry

More interaction from them, as opposed to me going to them. They don't necessarily initiate it. – Digital industry

- More collaboration – with research, other organisations, and other initiatives

I wonder if we could do better to join up NZ On Air funding with some other organisations – Ballet, Opera, NZSO, could we do more to get more value out of the Crown funding? – Government sector

They could invest in more partnerships, working with organisations and businesses who have established presence or foothold in international markets. Don't recreate the wheel. It seems a lost opportunity to be focused only on the domestic market. – Music industry

Is there some research that we could be getting that helps us all? If we're all investing in the same research, it could be better research and we could join together on the findings. It might make for more joined-up thinking in the sector. – Radio industry

In the TV funding area, they've done a lot of productions funded by the network and NZ On Air. Over time they could have done more to encourage third party funding or investment and try to think about how they could make the money go further. – Government sector

- Do more to nurture new talent and build capability

I think they should be putting more funding into professional development. – TV industry

There could be some sort of incentive to help up-and-coming talent, people who've got great ideas. Maybe even seek out talent a little more – attend the 48 hours film festival and find the people who are making amazing stuff and give them money. – Digital industry

They don't do anything in terms of industry development on a professional level, given that's where we all go for funding. – Digital industry

It would be great if developing future talent who will create content for them was a wider part of their mandate. – Music industry

- Help create a public broadcast channel so NZ On Air is not beholden to broadcasters

I think NZ On Air has to find a broadcast avenue. There needs to be a dedicated public broadcast channel. – TV industry

I'm unsure about whether we have the best system available. In some ways, the old broadcasting service did by making content and programming because they believed they were capturing NZ history with no financial gain, no ratings reference or incentives. – TV producer

- Help lobby the government to make sure all radio stations are on FM
In 2016, all stations should be on FM. The government has invested for so long in access radio, it shows we're here for the long haul. NZ On Air should advise us on how to lobby the Minister of Commerce, MBIE, Ministry of Culture and Heritage and to come onside and give us a hand to get that sorted. – Radio industry

Emerging themes

This section outlines some further themes that emerged this year, which are either new, or more prominent than in previous years.

1. Be stronger advocates and defenders

With the growing concern about the health of the industry and worries about the paucity of funding, there is a strong desire for NZ On Air to take a stronger position within the industry as advocates and defenders – for more money or industry advancements, or for more diverse, less commercial projects to be funded and aired.

Broadcasters are getting broader and more risk-averse. At least NZ On Air can be another voice in that mix. – Digital industry

I think they should be firmer with the networks, stronger advocates for quality TV, not network TV. – TV producer

2. More engagement to explain strategy

Alongside some confusion about NZ On Air's direction, a number of stakeholders suggested roadshows or other engagement plans to help them better understand NZ On Air's thinking.

I feel it's very one-way traffic; they sit in reception of the concepts rather than driving back out to the industry ... I think that they could go out to us

as a collective and say we would like to see more projects in these particular areas. – Broadcaster

I find it difficult sometimes to get a handle on what their aspirations are for our sector. I'm not sure there's a long-term plan. – Radio industry

More engagement. I don't know if they want to do that in group sessions or more one on one (and I'm in control of that too – if I asked it would be forthcoming). The idea would be that you'd come out of that session with more of an understanding about where and how to apply your energy in terms of NZ On Air. – TV producer

3. Emerging concern about the viability of the model (desire to return to public broadcaster model / create own broadcast channel)

With the tight funding environment and fragmenting audiences, there was greater concern about the ongoing viability and relevance of the model, and whether it still meets audiences' needs. This included suggestions of a return to a public broadcast model. Interestingly, this line of thought came strongly from government sector stakeholders.

What do the changes in media consumption mean for a funding agency set up in 1980/90? What are the radical options that need to be considered and discussed? They may need a more radical holistic view at some stage. – Government sector

I'd like to see them get more money, and as a true public broadcaster, so they didn't have to worry about the *ménage à trois* between broadcasters, producers and themselves. – TV industry

I think they're cautiously edging their way forward with changes in media consumption, they may need to be bolder in that area. It would be an interesting exercise (zero budget) to see if they would spend money the same way tomorrow that they did yesterday. You can always make small adjustments, but at some point you will need to stop and reassess and see if you're still spending money the right way. – Government sector

Other models with fully funded public broadcast that do TV and radio ... you get vigour and innovation, you stimulate small business. But we get an anaemic [industry that isn't] nourished as much as they should be. And you now see an audience problem. It's hard to get prime-time content to a big audience. Where does the content that NZ On Air exists to fund get air play? – Radio industry

4. Concern about children's content

The perceived challenges of creating relevant children's content and delivering it to them was a much stronger theme than previous years – generally comments were coupled with mentions of NZ On Air's Children's Content strategy.

Some stakeholders lamented the drop in children's drama funding, and several felt children's magazine style shows are outmoded and need a shake up and change.

The magazine style shows and cartoons need a good shake up. Everything is so rushed, there's no engaging, inspiring, just showing. We need to look clearly at what we're doing with children's content, and a conduit, whether it's digital / freeview so children can find programmes made for them. – Radio industry

Everyone's concerned about the amount of overseas product that kids get exposed to. The only way to counteract that is to create good local children's content. – Digital industry

I know NZ On Air is considering children's content at the moment. As an access station, we're trying to engage with schools all the time. I'd like to think that we could be part of that discussion or conversation as a sector. We want to do more. – Radio industry

It's a difficult place, especially with children. Where are people going when they go to digital platforms? How do you find them? – Broadcaster

Appendix one: Interview script

1. What do you understand NZ On Air's mandate to be? (i.e. what does it exist to achieve?)
2. Do you think that the role that NZ On Air plays in New Zealand's public broadcasting system is an important one?
3. How well do you think NZ On Air fulfils its mandate? Why do you say that?
4. Do you interact with NZ On Air? If so, how often?
5. How would you describe your relationship with NZ On Air (positive, negative or neutral, etc)? Why do you say that?
6. How does NZ On Air currently communicate with you?
(listen for social media)
7. How would you rate the effectiveness of how NZ On Air communicates with you?
8. Is there anything you'd like to see them do differently, in terms of how they communicate with you?
9. Do you receive NZ On Air's newsletter?
(if yes, probe for attitude; listen for comments on three different newsletters)
10. Do you use NZ On Air's website? How easy is it to find what you want?
(probe for attitude)
11. When NZ On Air make funding decisions do you generally understand its reasons?
(prompt for understanding of criteria, how staff communicate their decisions)

12. Do you believe NZ On Air focuses its funds on the right things/makes the right choices?
13. Are they funding what you think they should fund? If not what should they be funding?
14. What do you know about NZ On Air's approach to funding online-only content?
(what do you think about pace of change? If mention of Type 3 channels, note and probe)
15. Do you think NZ On Air makes good use of public funds?
16. (If not already covered) What would you say NZ On Air's strengths are?
17. (If not already covered) What would you say NZ On Air's weaknesses are?
18. Is there anything more that NZ On Air could be doing to assist the industry?
19. Finally, is there anything else you'd like to add about NZ On Air, the job it does or your relationship with the organisation?