

Identity, Culture and Media Discussion Document

Purpose

This paper sets out issues NZ On Air thinks our industry needs to focus on, resulting from the research report New Zealand's Identity, Culture and the Media; What's changed in 30 years?

Introduction

NZ On Air aims to 'connect and reflect' Aotearoa – yet with massive change in our demography and society in the past 30 years – how do we reflect Aotearoa? And with the huge challenges our local media companies now face from global players – how do we connect New Zealanders with this content?

These challenges are bigger than NZ On Air – they are challenges for all content creators and local media platforms. Global platforms do not have the same interest in or desire for local stories; and at the same time their offering is further fragmenting audiences, undermining the financial viability of the local industry and putting local story-telling and local platforms at risk.

As an industry, we need to draw the learnings from this research, together with the data from Where Are The Audiences, and look collectively for the solutions that will create great content that New Zealanders want, in the places where they can discover and enjoy it.

Next steps

Further detailed information will be available before the end of 2019 via an e-tool being created by Research NZ. This will be accessed via the NZ On Air website and will allow users to dive into the data and view the responses through a range of different lenses. Watch out for information in the NZ On Air newsletters.

The NZ On Air Board will meet in February to discuss strategy and we will be considering the challenges of the current environment, informed by this research and other sources.

Here are some of the questions this research raises:

- How do we collectively make it easier to find and enjoy local content? What role should NZ On Air play in this?
- How do we engage with people (esp under 40) who don't watch local content and in particular those not connected to local platforms? How will they ever know what great content there is? What content do they want to watch?
- What's the unique selling point of local vs international?
- How do we change the perception that local content is not as good as international?
- How can we do more to promote NZ music so that audiences actively seek it?

The solutions will likely be collaborative. The time for the industry to respond collectively to the threat is now.

Looking at the key results and what they may mean for our industry

Key result 1: Our national identity has evolved, but it's fundamentally the same as it was 30 years ago

Which means: Despite the huge demographic changes in the past 30 years what we believe about ourselves as New Zealanders is largely unchanged.

We need to continue to be aware of differences and changes in key demographic groups so that their needs are catered for in media.

Key results 2 & 3: New Zealanders embrace their cultural diversity, while also acknowledging Māori culture as an important part of their national identity.

Which means: Māori culture is integral, and we also see ourselves as a Pacific nation, and appreciate the many different cultures in NZ today. BUT we can do more to understand each other's differences and challenge racism.

Content can play a part in this. Content that challenges and provokes (like [Land Of The Long White Cloud](#)) can help to reveal the different cultures in Aotearoa and build understanding and cohesion. In Scripted content, we will continue to provide paths for content creators who can authentically tell stories that reflect their community (such as our Asian and Pasifika Newer Storytellers initiative.)

Key result 4: New Zealanders are troubled by some important environmental and social issues

Which means: Climate change, poverty, homelessness, caring for our environment, suicide. There are some changes in the issues most absorbing New Zealanders' minds today.

Content can educate and inform on these issues. They are topics New Zealanders are interested in so therefore will likely engage with. It's important the content is trusted and offers both analysis and hope.

Key result 5: Less than one-half of New Zealanders believe NZ-made content currently shapes and reflects our national identity.

Which means: This one gives us pause for thought. It may be that the question requires more probing. Perhaps presented with examples of content (such as *Country Calendar*, *Westside*, *Wellington Paranormal*, *What Now*, *HEIHEI*) respondents would have a different view. But also if a significant segment of respondents does not currently watch any local content the point may be lost on them.

The response to this point is getting all of the other elements in this discussion right, so that more New Zealanders appreciate and actively support local storytelling, which would raise it up in their consciousness as a contributor to national identity.

Key result 6 & 7: One in four New Zealanders watch NZ content because it reflects and informs their view of our national identity, while others do so because of its entertainment and information value.

Which means: 48% say they hadn't watched a New Zealand-made programme recently. Younger people are more likely to say there's 'nothing for them', and also that they don't know what's available. Free-to-air TV is still the predominant service used overall, but from 16-34 years online media such as Facebook, YouTube & Vimeo have greater penetration, and from 18-34 years a paid streaming service also has greater penetration than free-to-view. That said 73% still have free-to-view access.

Devices, ease of access, and promoting content seem key to ensuring greater opportunity to see local content. 73% have access to free-to-view but it's competing with other services, and the growing trend to watching when we want. On Demand is the vehicle that can best compete as long as it can easily be accessed. The recent Horizon research that put TVNZ On Demand ahead of Netflix is encouraging. There is a reasonably strong call for an easier user-experience for finding and consuming local content. One consistent brand with multiple end-points could be one way to go, recognising the multiplicity of devices used today.

With regard to the younger audiences – the refrain that 'there's nothing for them' is consistent with international research. NZ On Air has been experimenting with online content for younger audiences. One question about this is whether the best approach is to continue to make a range of 'niche' offerings, with the increasing risk of it not being discovered, or more ambitiously - and with much more risk - find one or two big investment pieces for this audience .

Key result 8: Regardless of whether they watch New Zealand-made content, in principle it's considered important.

Which means: 50% agree there's something special about seeing familiar places in NZ and hearing NZ voices. A view stronger held in the older age range and weakest in 16-24yrs. 54% of people who do not regularly watch local content think it's important that local content is available. Support for the idea that cultural content is available is consistent with most cultural surveys internationally.

The challenge remains to both increase the support for the concept of local, and to turn this support into actual viewing and listening.

Key result 9: With changes more New Zealanders would watch New Zealand-made content

Which means: Both non-local watchers and local-watchers responded positively – only 15% of 'overseas-made content watchers' categorically said nothing would encourage them to start watching local content. We will do more analysis here. But the suggestions from viewers of what would encourage them to watch more local content are solid pointers for the industry.

Ad free – around 40% want ad-free viewing. What we don't know is whether they are prepared to pay for it. We can't assume from the Netflix figures that viewers would also pay a subscription to view local content ad free (partly because we don't know how many people actually pay for their Netflix subscription). And in the case of NZ On Air-funded content the current policy requires a free-to-view outcome somewhere in the distribution mix.

The alternative of an ad-free platform would require significant government investment, but fragmented audiences won't suddenly converge on one platform. Creating the content viewers want, and ensuring ease of access via the technology audiences are using, is vital.

Quality – the perception of many overseas content watchers that local content is not as good. A refrain that’s been heard ever since local content began being made, and disappointing given the continual and ongoing improvement in local production standards, scripts and talents. The fact that the best of NZ content is also internationally successful (both in sales and awards) disputes this observation by viewers. However it is a perception that needs to be overturned and is an important point for industry discussion.

Availability - a strong call for local content to be available on the services they use. See the above discussion also re ad free. In particular, viewers want more content On Demand, and younger viewers want more content for their age group. Looking at one good example, *NZ Today*, was moderately successful on linear broadcast, but short-form clips of Guy Williams’ interviews had viewing figures on YouTube of up to 250,000 each. Proof that short-form wins for these audiences in the online environment. NZ On Air’s mandate is to go where the audiences are, and the pull to these platforms (esp for young viewers) is strong. But it’s important that local platforms can compete for eyeballs against these major global platforms that are not seriously investing in local content.

Promotion- If they don’t know about it they won’t watch it. Promoting within linear channels is not useful in reaching the audiences who are on other platforms. A growing lack of local media reviews is also a problem – global content creates a buzz in news media and on social media and it’s hard for local content to get that same hype. A collective approach to championing local is required, and the existence of one brand could help this.

Key result 10: New Zealanders want news media that is independent and informative

Which means: This is an area of interest for NZ On Air due to the fragile news media environment and the need for further funding intervention.

To be fair, journalists always get a bad rap – right down there with car salesmen and politicians. But there may be a message here for the commercial news media that are struggling to survive – New Zealanders want less click-bait and more serious reporting. It’s also vital to a functioning democracy.

Due to the failing market, NZ On Air is taking an active interest in further investment in journalism – in particular in investigative journalism and serious current affairs as these are the higher cost outputs that the industry is struggling to fund. In addition, the shrinking presence of media in regions is an area of focus.

Summary

30 years after NZ On Air was created, the environment we operate in has substantially changed. Television isn’t dead but it is evolving, and fast. The pace of change, investment in new ways of reaching audiences, and creation of content that meets their diverse needs to keep up with the growing momentum.

New Zealand media will only survive the onslaught of global media giants by acting collectively to create the content audiences want, and make it easier for them to find and enjoy it. NZ On Air funded content is a fraction of the local media content consumed today – we can lead but we can’t make an impact without a collective industry response.