



Māori Content Review and Funding Analysis (2015-2020)

June 2022

Report authored by Heperi Mita

Māori Content Review and Funding Analysis (2015-2020)

Introduction	3
Timeframe of Analysis and Omissions	3
Summary of Analysis (2015-2020)	5
Recommendations	6
History.....	7
Nga Matakirea (2010)	7
Updates to Te Rautaki Māori (2012 and 2018)	8
Current Context.....	8
Audience Demographics and Publicly Funded Māori Media	9
NZ On Air Expenditure (2015-2020).....	11
Te Māngai Pāho Expenditure (2015-2020)	12
NZ Film Commission Expenditure (2015-2020)	14
Feature Film Investment (2015-2020)	15
Total Production Expenditure (2015-2020).....	16
Cross-Agency Comparisons.....	16
NZ On Air Māori Content Applications	17
Scripted Proposals Submitted to NZ On Air	17
Factual Proposals Submitted to NZ On Air	18
Factual Content Analysis - NZ On Air	18
Top 10 Production Companies (2015-2020)	19
Funding Trends – NZ On Air and TMP Comparative Analysis	20
Scripted Content Analysis – NZ On Air and TMP.....	20
Content Approved	21
Funding Totals Per Year.....	22
Top 10 Most Funded Production Companies.....	23
Platform Support (2015 – 2020).....	23
Development Funding.....	24
Development Applications	25
Approved Development	25
Rautaki Categorisation Issues	27
Exponential Growth	28
The TMP/NZ On Air Co-Fund.....	29
Summary and Recommendations.....	31
Annex A - NZ On Air Māori Factual Content Approved (2015-2020).....	33

Introduction

Under the Broadcasting Act 1989 legislation, NZ On Air's primary function regarding Te Tiriti o Waitangi is outlined as follows in item 36(1)(a)(ii):

36. Functions of Commission

- (1) The primary functions of the Commission are—
 - (a) to reflect and develop New Zealand identity and culture by—
 - (i) promoting programmes about New Zealand and New Zealand interests; and
 - (ii) promoting Māori language and Māori culture**

Public funding policy and the distribution of funding can be a challenging topic to analyse. This is particularly the case in the arts and cultural sector where considerations and outputs are more abstract and difficult to measure than other sectors.

Scarcity of resources, a well-documented history of institutional racism within the public and private sector¹²³⁴, and varied political interests bring further scrutiny and complexity to this discussion topic.

The intention of this review is to lay a quantitative foundation upon which public funding of the Māori screen sector can be analysed and observations made. With a better understanding of the Māori sector's position within the public funding sphere at large, NZ On Air can implement more informed funding policies that strengthen outcomes for the Māori screen sector and audiences.

NZ On Air funding policy is just one of many influencing forces within the Māori screen sector. This report will also analyse the funding activities of Te Māngai Pāho (TMP) and Te Tumu Whakaata Taonga / NZ Film Commission (NZFC) for a holistic view of the impacts of public funding on Māori content, production companies and creatives.

The differing and subjective measures for content and performance outcomes across public funding bodies makes it difficult to ascertain a comparative overview of public funding of the Māori screen sector. This process will undoubtedly raise issues of subjectivity regarding the complex cultural and economic pressures on the sector, and while this report and data analysis is not sufficient to answer those questions, it aspires to shed light on the areas of need and identify the right questions to ask.

Timeframe of Analysis and Omissions

This report is based on the classification of Māori content, as per annual reports filed between 2015 and 2020. However, it is important to note that there may be potential omissions in the report due to the narrow definitions used for identifying Māori content and/or inaccuracies in the data tagging and reporting process.

The report includes an analysis of Māori businesses that have accessed public funding. According to the Ministry of Business, Innovation and Employment (MBIE) and Te Puni Kōkiri (TPK), a Māori business is defined as one with at least 50% Māori ownership. However, it is important to note that

¹ <https://www.stuff.co.nz/pou-tiaki/our-truth/123533668/our-truth-t-mtou-pono-stuff-introduces-new-treaty-of-waitangi-based-charter-following-historic-apology>

² MacDonald, L., & Ormond, A. (2021). Racism and silencing in the media in Aotearoa New Zealand. *AlterNative: An International Journal of Indigenous Peoples*, 17(2), 156–164.

³ Walker, R. (1996). Māori and the media. In Walker, R. (Ed.), *Ngā pepa a Ranginui = The Walker papers* (pp. 142–160). Penguin Books.

⁴ Narin, R. (2011) [Mass media in Aotearoa: an obstacle to cultural competence](#). *NZ Journal of Psychology*, 40(3), 168-175

determining Māori ownership can be complex and is sourced from the New Zealand Companies Register, which may not always provide a clear indication of whether a company meets the Māori criteria. Therefore, there may be instances where Māori-owned businesses are either omitted or inaccurately identified in the report.

The funding expenditure analysed by this report takes place between 2015 – 2020. This timeframe comprises two years of pre-NZ Media Fund (NZMF) data from 2015 - 2017, and three years of post-NZMF data from 2017 – 2020 (which encapsulates two years of the 2018 NZ On Air Rautaki from 2018 – 2020). The last time NZ On Air's Māori funding strategy was formally reviewed was in 2018.

The rationale for this timeframe is that it provides some insight into the state of Māori funding prior to the NZMF and therefore a small window into how things have changed.

The omission of the Public Interest Journalism Fund (2021 - 2023) is intentional in that the fund is only temporary and skews factual funding expenditure during this period.

Similarly, this period omits Te Puna Kairangi (Premium Productions for International Audiences Fund), which is a \$50m two-year fund established in 2021 to stimulate the production sector post-COVID-19. This initiative is jointly administered by the three main screen sector public funding bodies (NZ On Air, TMP and NZFC). The fund concludes at the end of the 2021-22 financial year and as noted above, it skews funding expenditure during this period so has been removed.

While this report focuses solely on funding distributed by crown entities there is also Māori content funded outside of these sources. TVNZ and Whakaata Māori both commission and produce content from their own budgets, outside the purview of public funding bodies.

Whakaata Māori has annual content funding of \$16m. A large part of this budget goes toward news gathering services, and current affairs, but specific information regarding expenditure related to content funding is not included in TMP annual reports. Excluding the MTS figure, the average amount of public funding distributed by the three funders to produce Māori content between 2015-2020 is \$28.4m per annum.

The NZFC also distributes short film funds of approximately \$900k annually (across both Māori and non-Māori productions). While these projects result in content outcomes, they're generally regarded as development initiatives, and the distribution of short films is typically limited to film festival exhibition and online streaming and therefore has been omitted from this analysis.

There are also producers creating content without any public funding support. This is either self-funded, crowd funded, or funded by private backing. However, as far as Māori outcomes go this segment of the industry is marginal and unlikely to sway any of the trends reviewed in this report.

Social media content creation is also an enormous element of Māori media creation and consumption that is almost impossible to quantify in any meaningful way.

The 2015-2020 timeframe also takes place in a pre-COVID environment. There were various funding relief initiatives established by Government during this period – including the NZ On Air Platform Contribution Initiative (Platform Initiative) and the Screen Production Recovery Fund. These initiatives are temporary and further complicate the funding landscape, so they too have been omitted from the analysis.

An additional factor in this time frame is that content funded before 2020 is likely to have either been completed, or in post-production and can therefore be determined as realised outcomes.

While many projects funded after 2020 have been realised, COVID-19 has disrupted production pipelines significantly. It has been an exceptionally volatile period for the industry and is not representative of norms.

Summary of Analysis (2015-2020)

- NZ On Air, TMP and the NZFC collectively distribute approximately \$28.4m to Māori film and TV productions annually.
- The amount of Māori content available to audiences is increasing year-on-year.
- 7.1% (\$29.5m) of NZ On Air's total expenditure on Māori content between 2015 and 2020.
- NZ On Air is a major influence within the TV sector, distributing 41.1% (\$8.1m) of all public funding spent on scripted Māori content and 17.1% (\$21.4m) of all public funding spent on factual Māori content between 2015 and 2020.
- Between 2015 – 2020 only 27.4% (\$8m) of all NZ On Air funding for Māori content went towards scripted content.
- Approximately 71% of all cross-agency public funding for Māori film and TV content goes toward factual production.
- Proposals to NZ On Air defined as 'Māori content' have a 78% approval rate compared to 42.8% across all applications. While the approval rate is high, the number of Māori applications received is comparatively very low in the context of all applications submitted.
- There is a widening age gap between the median age of the Māori population and the core audience of linear TV in New Zealand. This is a key factor to consider when analysing the commissioning environment for Māori productions.
- Māori production companies producing scripted content have more success at securing funding in the film industry than in television.
- Trends indicate that the majority of NZ On Air funding for Māori content has gone to non-Māori production companies⁵.
- The Māori production sector has been shaped by how funding bodies define Māori content. These definitions shape policies and policies shape the way funding is distributed.
- Reporting on Māori content outcomes in the film and TV industry more broadly is complex as there are no clear or agreed upon standards or classifications.

⁵ The definition of a Māori business as classified by the Inland Revenue Department is a Māori authority or business with a minimum 50% Māori ownership.

Recommendations

- A pan-sector position on the classification of Māori content will encourage more compatible and comparative data collection practices across the sector and a better framework for measuring sector performance and improvements.
- NZ On Air should instigate a rautaki tagging process at the end of each financial year to ascertain which projects upheld or newly met the definition once production is complete.
- A revised NZ On Air Rautaki Māori should include specific and iterative targets and outcomes for the Māori screen sector over a longer timeframe than one year.
- A revised NZ On Air Rautaki Māori must also expand the criteria of its rautaki to include the following characteristics:
 - Productions led by Māori owned production companies
 - Intellectual property that originates from and is controlled by Māori creatives
 - Content with a significant quantum of te reo
 - Content with Māori key creatives.
- Further collaboration and coordination between the funding agencies will result in more efficient funding distribution, greater talent development pathways, and clearer standards.
- The mitigation of systemic issues that have inhibited Māori production should be an overarching goal of any revised NZ On Air rautaki.
 - This could include coordinating Request for Proposals (RFPs) for Māori content and content development in partnership with platforms and/or other funding agencies.
 - At a minimum an updated NZ On Air rautaki will have to focus on the sustainable development of Māori scripted content and capacity building within the sector to support stronger outcomes.
- It may be appropriate for an updated rautaki to consider an alternative approach to platform support for Māori content.
- Despite the relative success of Māori production companies in the film industry, criticisms relating to story sovereignty and cultural appropriation have been applied to film funding decisions in the same ways they have for TV funding decisions. While these issues are outside of the confines of a quantitative data review, an increase of diverse and authentic Māori stories, characters and content on screen would undoubtedly help progress these conversations and move past these issues.
- The case for NZ On Air serving a wider expatriate Māori audience is worth further investigation as a topic for stakeholder consultation.

History

Kia whakatōmuri te haere whakamua

I walk backwards into the future with my eyes fixed on my past

It is important to place this report in the context of the work that has come before. A formalised NZ On Air Rautaki Māori was created in the early 2000s and has, in effect, been reviewed every three years or so. The reason a rautaki was introduced was to create a framework around which Māori programme funding and strategy could be developed and assessed and to ensure adequate attention was paid to funding Māori programmes.

A 2011 study undertaken by Paul Norris and Brian Pauling ([NZ On Air: An Evaluative Study 1989 – 2011](#)) reviews NZ On Air's mahi over that two decade period. In Chapter 5 (page 32), it outlines NZ On Air's ongoing policy efforts after 2000 to meet the Broadcasting Act's mandate of 'promoting Māori language and Māori culture'.

Throughout the period of the Labour-led Government, NZ On Air continued to refine its policy to ensure that Māori had a presence in mainstream broadcasting, especially in prime time. This was principally achieved through the use of programme targets involving Māori, commonly known as the Māori quota. By 2004 this concept had evolved as follows: Upwards of 15% of hours funded within a television "umbrella" funding arrangement will involve substantial Māori creative participation on a topic of relevance to Māori language and culture. Substantial Māori creative participation meant in practice that two of the three key roles of producer, director and writer/researcher must be Māori.

In 2007 NZ On Air introduced a new definition for the Māori programmes it was funding: "We define a Māori programme as one that makes a conscious decision to reveal something of the past, present or future Māori world. Its creative core will be Māori. Its cultural control will be Māori, its management may be Māori or Pakeha."

Tainui Stephens explains the implications of this revised definition: "This definition helped to address the matter of how to assess the 'Māoriness' of a project. In other words, did it have cultural authority or authenticity, without interfering in an editorial way with the storytelling process. Just because a key creative is Māori does not automatically mean he/she has cultural credibility. This definition enabled us to assess the mana of the projects we funded: with regard to Māori creativity and Māori control."

In 2010 NZ On Air commissioned a major report into the environment around Māori programming on mainstream TV channels. Mainstream Māori Programming, [a comprehensive review by Nga Matakiirea](#), revealed a number of issues ranging from definitions to genre gaps and misunderstandings among both industry practitioners and broadcasters. It recommended a hui and a further review of Te Rautaki Māori.

Nga Matakiirea (2010)

Ngā Matakiirea was engaged by NZ On Air to "examine the state of Māori mainstream television today: how it has arrived to this point; how it services its audiences; and how it may best develop, now and in the future". Key findings and recommendations included:

The current version of NZ On Air's Māori Content Strategy was written in 2008. Industry respondents generally considered NZ On Air's policies and requirements to be clear, although some called Te Rautaki Māori "vague". Ngā Matakiirea's analysis is that this perception is in fact reference to the document's broad approach. This is understandable, as it is required to be an overarching document; however Te Rautaki Māori appears to be a definition of NZ On Air's aims for mainstream Māori programmes, more than a strategy. (Page 5)

On Page 12 of the report, it raised pātai that it recommended NZ On Air consider in a review of Te Rautaki Māori – including:

- *Does Te Rautaki Māori reflect NZ On Air's current priorities for mainstream Māori programmes?*
- *Does Te Rautaki Māori meet the current needs of the mainstream Māori broadcasting industry? Is it as clear as it can be?*
- *Does the definition of a "Mainstream Māori Programme" require amendment?*
- *Should NZ On Air consider the strategic plans of Te Māngai Pāho, to futureproof Te Rautaki Māori: ie, will NZ On Air need to consider more low-level Māori language programming?*
- *Is it feasible and desirable to publish a set of "focus points" for Te Rautaki Māori every year, outlining particular genre and other directives for Māori producers to aim for?*

Updates to Te Rautaki Māori (2012 and 2018)

In response to Nga Matakiirea, and in partnership with Ngā Aho Whakaari, there was an update to te rautaki in 2012. A [further update was undertaken in 2018](#), which was the last time it was formally reviewed. The current overarching purpose and objectives are outlined below. The full policy is [here](#).

- Support the production of quality **Māori content made for a general audience**
- A minimum target from our total contestable funds across the Scripted, Factual and Music streams of **6% expenditure on Māori content** (about \$5m per annum)
- Contribute to a visible Māori presence in media
- Prioritisation of proposals led by or with the significant involvement of Māori key creatives: for screen production this means **at least two of the three key roles of producer, director and writer/researcher should be Māori**
- **content mainly in the English language**, to complement the work of Te Māngai Pāho.

Current Context

In 2017 the NZ Media Fund (NZMF) was launched and changed the way NZ On Air funds content. The NZMF came about in response to changes in New Zealand audience behaviours and demography. Many of these changes have been driven by digital technologies, others by migration and still others by cultural shifts. The 2018 rautaki sat alongside the NZMF in terms of policy.

In 2020 NZ On Air commissioned Hal Crawford to [review the NZMF](#) after three years of operation. Regarding the role of the rautaki within the funding landscape the review found that:

One issue several observers have is the definition of what is and is not a Rautaki Māori project. The official NZ On Air policy includes a "priority" that "two of three key roles of

producer, director and writer/researcher” be Māori in order for a production to be considered Rautaki Māori”

The wording is not the issue for those who object. Instead, they say that production houses are opportunistically placing Māori creatives in roles in order to clear the Rautaki Māori bar, often in the process appropriating Māori stories.

In 2018 Te Puni Kōkiri began a review of Māori Media that will likely change the ministry’s interactions with the sector. The review aims to modernise the Māori media and broadcasting sector – to explore the most effective and efficient way of funding and producing te reo and tikanga Māori content and repositioning the Māori media sector to achieve the best outcomes. This work is still ongoing, but it is expected to have major impacts on the landscape of Māori media.

In 2021 NZ On Air began its own organisational change project, commissioning cultural design agency, Oho, to review the organisation and undertake stakeholder engagement. One of Oho’s key recommendations was a refresh of te rautaki Māori to ensure it is integrated across policies and into key accountability and governance documents. The review also found that:

Story sovereignty in media and storytelling as a whole has become a very important but polarising topic within Māoridom. There was strong reference to ensuring the cultural integrity of content which is consistent with the importance placed on tikanga Māori and appropriate approaches to storytelling.

Oho’s observations of rautaki Māori across the wider public sector (not just screen) included:

- 1. Rautaki Māori are stranded, zero - minimal reference in SOI or mainstream strategies - perception of tokenism*
- 2. Internal capability building often light or not considered at all*
- 3. Māori outcomes are commercially motivated with low targets*
- 4. Lack of accountability to rautaki Māori*
- 5. Not often speaking to or aligned with other rautaki Māori within the sector.*

The immense change currently taking place in the sector, as well as the ongoing issues pointed out in past reviews of NZ On Air’s rautaki necessitate a new look at the organisation’s funding policy for Māori content.

Audience Demographics and Publicly Funded Māori Media

The demographics of Māori audiences and content makers have a significant influence on the current state of the Māori sector and audience media consumption.

[Stats NZ estimates](#)⁶ that the Māori population in 2021 is 875,300, making up 17.1% of the national population. The majority of Māori live in the North Island, with one quarter of Māori located in the Auckland region alone.

There are now more Māori living in Australia (140,000 in 2016) than in the South Island (110,000 in 2018). The 2020 NZMF Review points out that ‘*Although there is no real mandate to serve expatriates, this big group forms part of the national experience and culture.*’ The cultural impacts of

⁶ 30 June 2021

this dynamic amongst Māori is perhaps best exemplified by the inclusion of Australian based kapa haka groups in Te Matatini.

The median ages for Māori males and females are 25.3 and 27.3 years respectively, compared with the national population's median ages of 36.7 and 38.8 years respectively, reflecting a much younger Māori population.

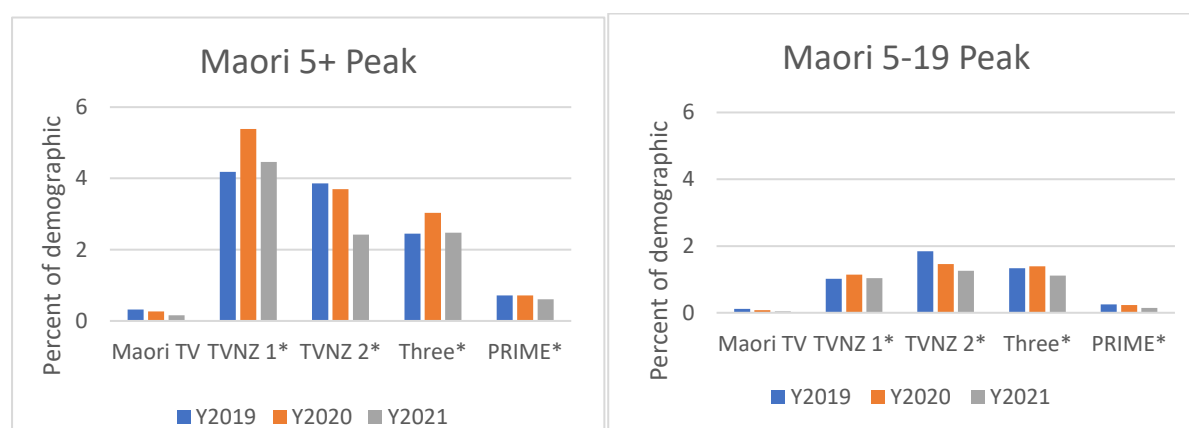
This is particularly important to note as the majority of all NZ On Air funding applications must have the support of a local free-to-air (FTA) platform and this has traditionally been the domain of a small number of TV broadcasters.

NZ On Air's [2021 Where Are the Audiences](#) (WATA) research found that the 15-39 age demographic spends the least time watching linear TV. Furthermore, the research noted that:

The most popular media providers among Māori audiences are now the international digital providers YouTube, Netflix, and Facebook, with Spotify attracting the same audience size as the most popular traditional media provider TVNZ 1.

The 2020 NZMF Review revealed that 84.1% of all NZMF funding has gone to either TVNZ, Mediaworks (now Discovery) or Sky TV, all three of which are primarily linear TV platforms. The WATA research also found that the linear television audience is more likely to be over the age of 40. According to Nielsen's TAM data (2019 – 2021) Māori audiences for NZ's FTA platforms are shrinking.

The charts below illustrate the percentage of the Māori audience watching each of the major FTA platforms during their peak audience timeslots in the 5+ age group and the 5-19 age group year on year (YOY).



Amongst Māori aged 5+ the audience of FTA TV peaks at less than 6% of the demographic and amongst Māori aged 5-19 the audience peaks at less than 2% of the demographic.

Taking these statistics into consideration, it is evident that Māori currently represent a relatively small market for both platforms and advertisers. This has been the case historically. However, with Māori audiences increasingly turning away from linear television, there is a growing disparity between the interests and behaviours of the Māori population and the content being commissioned by local free-to-air (FTA) platforms in New Zealand to be shown during commercially viable timeslots. While local video-on-demand (VOD) platforms have made progress, research indicates that social media platforms present the most promising opportunity for reaching Māori audiences with locally produced content.

NZ On Air faces a challenging dilemma, as its current policy settings rely on local platforms to bring in applications for content that can reach both Māori and non-Māori audiences. A revised rautaki will therefore need to explore alternative approaches to platform support for Māori content.

NZ On Air Expenditure (2015 - 2020)

All figures are derived from NZ On Air annual reports. Pre-NZMF scripted/factual designations are sourced from an internal database ('ORAC'). Music expenditure is not featured in these figures.

2015/16

Strand	Māori Funding	NZOA Total Funding	Percent Māori
Scripted	\$273,960	\$37,568,455	0.7%
Factual	\$3,960,423	\$44,755,285	8.8%
Total	\$4,234,383	\$82,323,740	5.1%

2016/17

Strand	Māori Funding	NZOA Total Funding	Percent Māori
Scripted	\$280,278	\$35,535,449	0.7%
Factual	\$4,253,446	\$46,477,373	9.1%
Total	\$4,533,724	\$82,012,822	5.5%

2017/18

Strand	Māori funding	NZOA Total Funding	Percent Māori
Scripted	\$3,879,075	\$39,813,335	9.7%
Factual	\$4,096,135	\$41,327,456	9.9%
Total	\$7,975,210	\$81,286,591	9.8%

2018/19

Strand	Māori funding	NZOA Total Funding	Percent Māori
Scripted	\$2,089,130	\$44,185,013.00	4.7%
Factual	\$4,884,960	\$40,707,468.00	12%
Total	\$6,974,090	\$84,892,481.00	8.2%

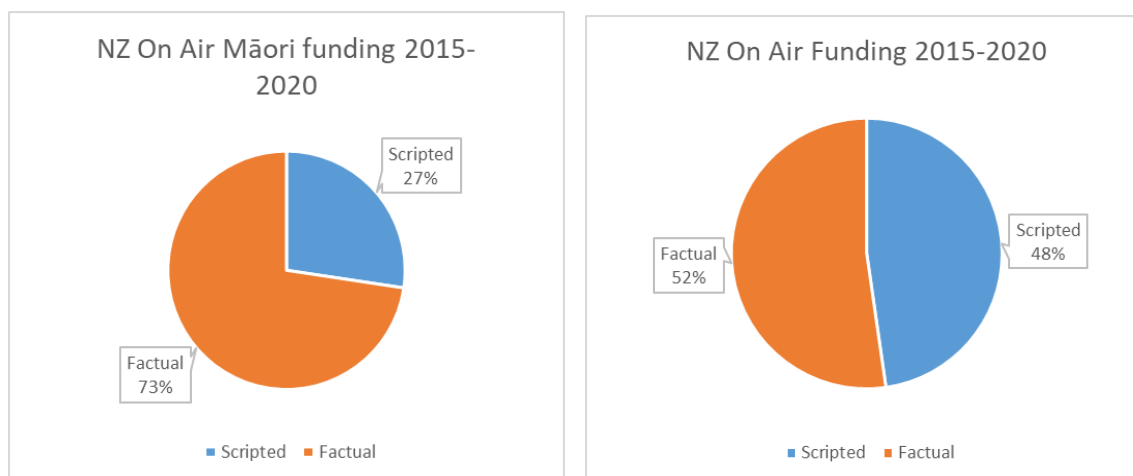
2019/20

Strand	Māori funding	NZOA Total Funding	Percent Māori
Scripted	\$1,560,291	\$40,622,757	3.8%
Factual	\$4,250,982	\$43,204,521	9.8%
Total	\$5,811,273	\$83,827,278	6.9%

According to these figures, NZ On Air consistently met the current rautaki minimum threshold of 6% expenditure from total contestable funds available even prior to the creation of the 2018 rautaki (expenditure on music funding pushes overall spend above 6% in 2015/16 and 2016/17).

As noted in the 2020 NZMF Review, the classification of some titles as 'Māori' during this period has historically been the topic of some public and industry debate. However, looking purely at the reported expenditure, NZ On Air is achieving its goals under these definitions.

The charts below illustrate the differences in how funding has been distributed between general funding strands versus funding for Māori projects across the two genres of scripted and factual.



Despite the significant imbalance in funding going towards factual content versus scripted content, it should be noted that there is an increase in funding going towards scripted Māori content over that five-year period. This could be attributed to several factors such as the implementation of the NZMF, the establishment of the 2018 rautaki, key staffing and Board personnel changes at both NZ On Air and at commissioning platforms, and more production companies within the Māori sector choosing to create scripted content.

Te Māngai Pāho Expenditure (2015 - 2020)

Te Māngai Pāho (TMP) does not differentiate between scripted and factual content. Their remit is the revitalisation of te reo Māori and KPIs are measured by te reo quotas within content. These are Receptive Audiences (30% - 70% of content in te reo) and Fluent Audiences (70% - 100%).

It is worth noting that the vast majority of NZ On Air funded Māori content would sit below the 30% Receptive Audiences threshold. This delineation is captured in the current rautaki as follows: *"Priorities for funded content will focus on ... content mainly in the English language, to complement the work of Te Māngai Pāho."*

TMP uses subcategories of genre to classify the content it funds and a look into their genre list reveals several areas of overlap relevant to multiple NZ On Air funding policies. For the sake of comparison, this report categorises TMP genres into four areas of alignment with NZ On Air:

- 1) Scripted (includes TMP genres of Drama and Comedy)
- 2) Factual (includes Documentary, Reality, Whanau, Entertainment, Sports, Kapa Haka)
- 3) Tamariki / Rangatahi
- 4) News and Current Affairs.

Tamariki/Rangatahi content may contain both scripted and factual content. A lesser portion of the Entertainment genre may also include scripted comedy, so there is a small margin of error. News and Current Affairs content is purely factual.

2015/16		
Factual	\$13,635,612	55.0%
Scripted	\$1,010,236	4.0%
Tamariki/Rangatahi	\$4,439,530	17.9%
News/Current Affairs	\$4,479,463	18.0%
Innovation Initiatives	\$1,232,000	5.0%
	\$24,796,841	TOTAL

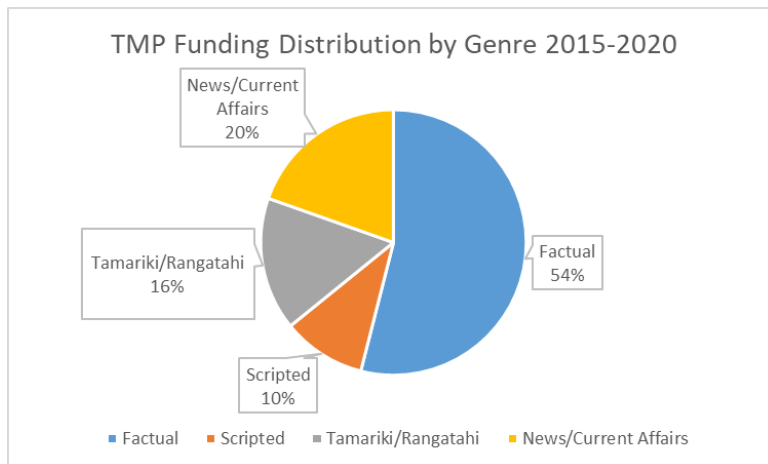
2016/17		
Factual	\$11,748,956	50.7%
Scripted	\$2,479,880	10.7%
Tamariki/Rangatahi	\$4,250,087	18.4%
News/Current Affairs	\$4,688,499	20.2%
	\$23,167,422	TOTAL

2017/18		
Factual	\$14,718,025	62.2%
Scripted	\$1,231,709	5.2%
Tamariki/Rangatahi	\$2,997,568	12.7%
News/Current Affairs	\$4,719,326	19.9%
	\$23,666,62	TOTAL

2018/19		
Factual	\$8,209,492	40.5%
Scripted	\$3,659,330	18.0%
Tamariki/Rangatahi	\$4,704,025	23.2%
News/Current Affairs	\$3,695,622	18.2%
	\$20,268,469	TOTAL

2019/20		
Factual	\$13,013,775	56.7%
Scripted	\$3,200,000	13.9%
Tamariki/Rangatahi	\$2,056,521	9.0%
News/Current Affairs	\$4,690,988	20.4%
	\$22,961,284	TOTAL

The chart below illustrates the total distribution over this five-year period:

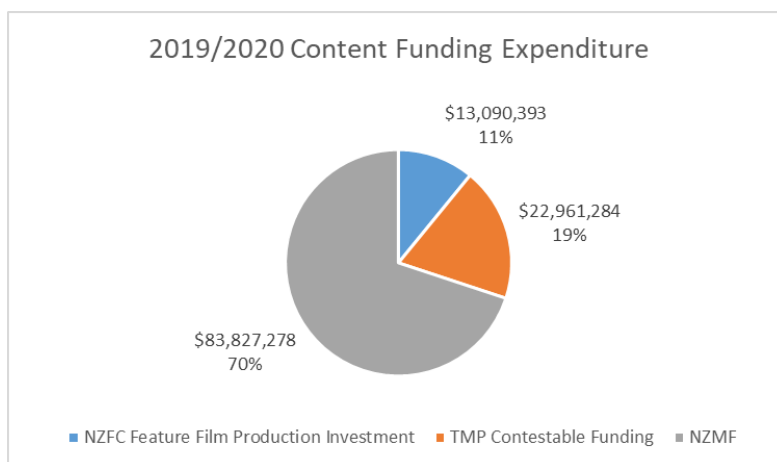


NZ Film Commission Expenditure (2015 - 2020)

The NZ Film Commission (NZFC) is distinct from NZ On Air and TMP in that its outcomes are primarily theatrical releases and not TV broadcast outcomes. Furthermore, where NZ On Air and TMP rely on platforms for commissioning oversight of production, the NZFC broadly takes on this role itself as a theatrical release does not require a local FTA platform.

The NZFC funds numerous activities in the film sector including professional and script development funding, short film funding, and industry development funding. These funding streams do not directly result in content outcomes that are of relevance to this report, but they are mentioned as an acknowledgement to the broad and important role that the NZFC plays in the sector.

On average, film projects are generally more expensive at a cost per minute basis than TV productions. Excluding the NZ Screen Production Grant (NZSPG), the total amount of funding that NZFC spends on domestic feature film production per year is less than either of the annual funding allocations administered by TMP and NZ On Air.



These factors result in structural and proportional differences that make comparison between the NZFC and the other funding agencies difficult and in many cases inappropriate. However, it is important to include the NZFC's outputs when considering the Māori screen sector as a whole. Further complicating the issue is the NZFC has its own definition for a Māori production which it describes as '*projects with at least one Māori key creative and/or recognisably Māori content.*'

This report will focus on the NZFC's Feature Film Production Investment, which is the most relevant fund for the purposes of this report. The table below includes NZFC Māori Feature Film Investment (2015 - 2020) and is sourced from the NZFC past funding decisions' database on its website.

Feature Film Investment (2015 - 2020)

Titles highlighted in green denote content that would align with NZ On Air's rautaki definition. Titles marked with an asterisk note factual productions.

Year	Title	Production Company	Key Māori Creatives	Budget
15/16	The Breaker Upperers	Piki Films	Ainsley Gardiner	\$1,595,000
	Maui's Hook	Kura	Karen Waaka, Paora Joseph	\$205,000
	TOTAL:			\$1,800,000
16/17	Bellbird	Herringbone	Hamish Bennett	\$1,572,064
	Reunion	Miss Conception	Ainsley Gardiner	\$1,000,000
	The Breaker Upperers	Piki Films / Miss Conception	Ainsley Gardiner	\$100,000
	6 Days	GFC	Glenn Standring	\$62,000
	Herbs: Songs of Freedom*	Jawbone	Te Arepa Kahi, Reikura Kahi	\$824,897
	Waru	BSAG	Ainsley Gardiner, Brir Grace, et al	\$105,000
	TOTAL:			\$3,663,961
17/18	Baby, Done	Piki Films	Morgan Waru	\$1,335,652
	She Shears*	Miss Conception	Ainsley Gardiner	\$220,302
	The Breaker Upperers	Piki Films	Ainsley Gardiner	\$45,600
	Vai	BSAG	Kiel McNaughton	\$1,600,000
	Taki Rua: Breaking Barriers*	Fala Media	Whetu Fala	\$368,000
	Maui's Hook	Kura	Karen Waaka, Paora Joseph	\$100,000
	Coming Home in the Dark	Light In The Dark	Desray Armstrong, James Ashcroft	\$1,400,413
	TOTAL:			\$5,069,967
18/19	The Legend of Baron T'oa	BSAG	Kiel McNaughton	\$1,858,402
	Whetū Mārama - Bright Star*		Toby Mills	\$499,931.00
	Cousins	Miss Conception	Ainsley Gardiner, Briar Grace	\$1,715,000
	Ngā Pouwhenua	Te Kotukutuku	Mia Tierney-Henry, Tim Worrall et al	\$680,000
	TOTAL:			\$4,753,333
19/20	Baby, Done	Piki Films	Morgan Waru	\$100,000
	Juniper	Sandy Lane	Desray Armstrong	\$1,700,000
	Millie Lies Low	Sandy Lane	Desray Armstrong	\$910,633
	The Legend of Baron T'oa	BSAG	Kiel McNaughton	\$29,797
	Taki Rua: Breaking Barriers*	Fala Media	Whetu Fala	\$7,000
	Muru	Jawbone	Te Arepa Kahi, Reikura Kahi	\$2,400,000
	Whina	GFC	Tainui Stephens, Paula Jones	\$2,500,000
	Night Raiders	Alcina / Miss Conception	Ainsley Gardiner, Chelsea Winstanley	\$450,000
	TOTAL:			\$8,097,430
	TOTAL ACROSS 5 YEARS:			\$23,384,691

Of the 22 unique titles in the table above only three are factual productions. This is in stark contrast to NZ On Air and TMP funding activity, but is not surprising when you consider that news, current affairs, and magazine-style content are outside of the NZFC's remit.

It should be reiterated that the NZFC's definition of Māori content is much broader than NZ On Air's so the number of titles that qualify as Māori content under the NZFC are more numerous. Many of the titles listed above that are not highlighted in green would not be categorised as Māori content under NZ On Air's definition.

To analyse this distinction further, the following tables break down the annual NZFC expenditure split out by funding for Māori content that would fit the NZ On Air Rautaki definition ('Rautaki'), funding that sits outside NZ On Air's definition but meets NZFC's Rautaki definition ('NZFC Māori'), and the total expenditure invested on all feature film production.

Total Production Expenditure (2015 - 2020)

2015/16	Expenditure	% of Spend
Rautaki	\$205,000	2.83%
NZFC Māori	\$1,800,000	24.87%
NZFC total spend:	\$7,237,394	

2016/17	Expenditure	% of Spend
Rautaki	\$929,897	9.79%
NZFC Māori	\$3,663,961	38.59%
NZFC total spend:	\$9,494,516	

2017/18	Expenditure	% of Spend
Rautaki	\$1,868,413	15.82%
NZFC Māori	\$5,069,967	42.92%
NZFC total spend:	11,812,602	

2018/19	Expenditure	% of Spend
Rautaki	\$2,395,000	18.30%
NZFC Māori	\$4,753,333	36.31%
NZFC total spend:	13,090,393	

2019/20	Expenditure	% of Spend
Rautaki	\$5,357,000	37.31%
NZFC Māori	\$8,097,430	56.40%
NZFC total spend:	14,356,197	

Cross-Agency Comparisons

Similar to TV funding, finance of Māori content has considerably increased over this period of time. It should be noted that the [NZFC launched its rautaki](#) in 2018 and the timing of these policy changes across both NZFC and NZ On Air could be attributable to this growth.

While the dominance of scripted content is evident in NZFC funding, when looking at the sector as a whole, the funding going toward factual is still proportionally much larger and constitutes approximately 71% of all public funding expenditure on Māori projects.

Several Māori-owned production companies have handled multiple scripted feature film productions with budgets in excess of \$1m (e.g. Sandy Lane Productions, Miss Conception Films, Brown Sugar Apple Grunt). This is a rarity in TV, with the exception of Kura Productions. It is clear that there is a disconnect between scripted film and TV outcomes when it comes to Māori-owned companies.

There could be a few key factors contributing to this disconnect, including that the commissioning structure of the TV industry is largely driven by commercial imperatives versus the film industry is more strongly directed by public funding outcomes and cultural value performance indicators. Another argument might be that the higher overall production cost of scripted projects lends itself

to larger production companies that can more easily invest in project and script development. Or it could simply be that Māori producers of scripted content are more interested in film than TV. The cause of this disconnect is worth further investigation as a topic for stakeholder consultation.

NZ On Air Māori Content Applications

According to NZ On Air data⁷ (2015 - 2020) applications tagged as Māori break down as follows:

Proposals	111	
Approved	83	74.8%
Declined	24	21.6%
Cancelled	3	2.7%
Withdrawn	1	0.9%

The following tables look at the split between scripted and factual:

Scripted		
Proposals	31	
Approved	22	71%
Declined	6	19.4%
Cancelled	2	6.5%
Withdrawn	1	3.2%

Factual		
Proposals	80	
Approved	60	75%
Declined	19	23.8%
Cancelled	1	1.3%
Withdrawn	0	

What is striking is the comparatively low number of Māori content applications – particularly scripted projects, which also includes some development applications. For further context, here are the approval and decline rates according to NZ On Air Funding Data for each stream of funding.

Scripted Proposals Submitted to NZ On Air

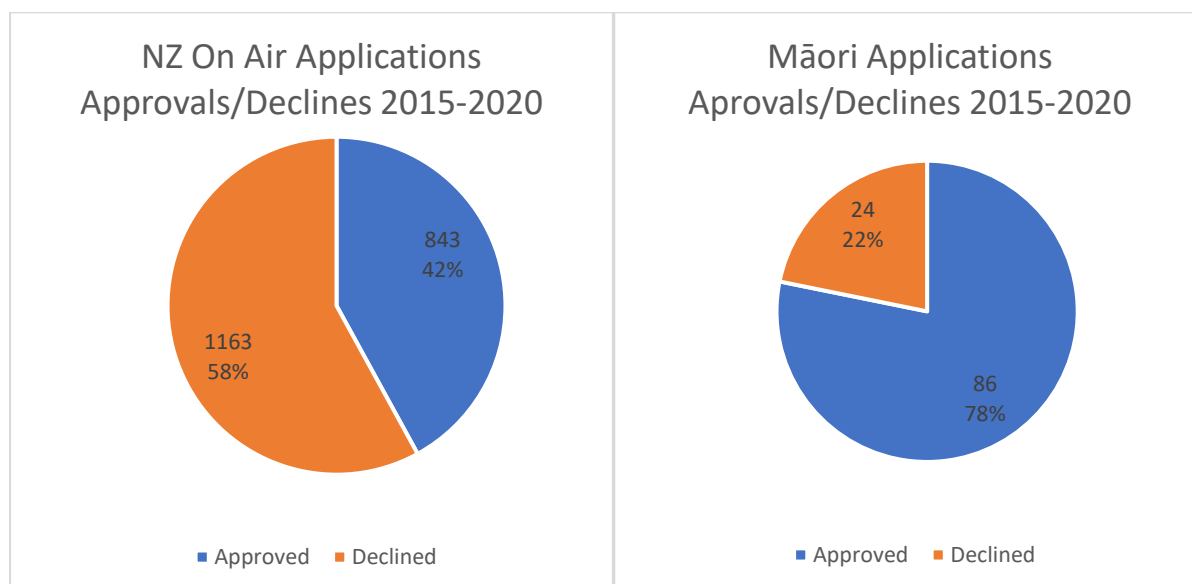
YEAR	Proposals	Approved	Declined	% Successful
15/16	62	51	11	73%
16/17	63	50	13	79.4%
17/18	136	76	60	55.9%
18/19	260	91	169	35%
19/20	241	58	183	24.1%
TOTAL	762	326	436	39%

⁷ The margin for error of the above data is unclear. It rests on manual tagging and is dependent upon how the content fits the prevailing definition of Māori content. Furthermore, staff time is usually more dedicated to the oversight and categorisation of data for approved applications - as this has flow on effects for contracting, reporting, etc. Data tagging regarding declines is likely to be less accurate, resulting in a possible greater margin of error for declines of Māori content.

Factual Proposals Submitted to NZ On Air

YEAR	Proposals	Approved	Declined	% Successful
15/16	138	85	53	61.6%
16/17	116	81	35	69.8%
17/18	205	112	93	54.6%
18/19	448	112	336	27.2%
19/20	337	117	220	34.7%
TOTAL	1244	507	737	49.6%

The charts below illustrate the comparative success rates between Māori content applications and all applications submitted to NZ On Air during this period:



The major difference between Māori applications in comparison to the general trend for applications is the success rate. Projects tagged as Māori content have a 78% approval rate compared to 42.8% for all applications within this timeframe.

Of the 2,006 applications received in this period only 111 were tagged as Māori. The significantly lower number of proposals could be due to two factors:

1. NZ On Air is not recognised as a source of funding for Māori content.
2. A lack of platform support for Māori applications to NZ On Air.

Factual Content Analysis - NZ On Air

It is difficult to analyse all public funding expenditure across factual Māori production given the relatively high level of investment, low cost of production, and large quantity of titles funded.

However, analysis of NZ On Air's factual funding does provide insights into the entities that commission and produce these programmes and how NZ On Air distributes funding.

Whakaata Māori is the platform that commissioned the most factual Māori content from 2015 to 2020, supporting 28 of 69 factual Māori productions funded in that period. TVNZ supported the second most titles with 10.

A full list of funded Māori factual productions (2015 - 2020) is included in [Annex A](#).

Top 10 Production Companies (2015 - 2020)

Production Company	NZ On Air Funding Received
Great Southern Television	\$3,710,433
Greenstone TV	\$3,707,802
Imagination TV	\$1,957,930
Rogue Productions	\$1,619,190
Awa Films	\$1,383,616
Pango Productions	\$1,331,119
TVNZ	\$1,272,481
Scottie Productions	\$993,484
Tawera Productions	\$987,986
Tikilounge Productions	\$906,784

According to the Ministry of Business, Innovation and Employment (MBIE) and Te Puni Kōkiri (TPK), a Māori business is defined as one with at least 50% Māori ownership. Although NZ On Air does not require applicants to disclose whether their company is Māori-owned, Awa Films, Pango Productions, Scottie Productions, and Tawera Productions are known to meet this criterion. It is possible that shareholders of other companies may also have Māori whakapapa, but the status of these companies as Māori organisations is not clearly stated.

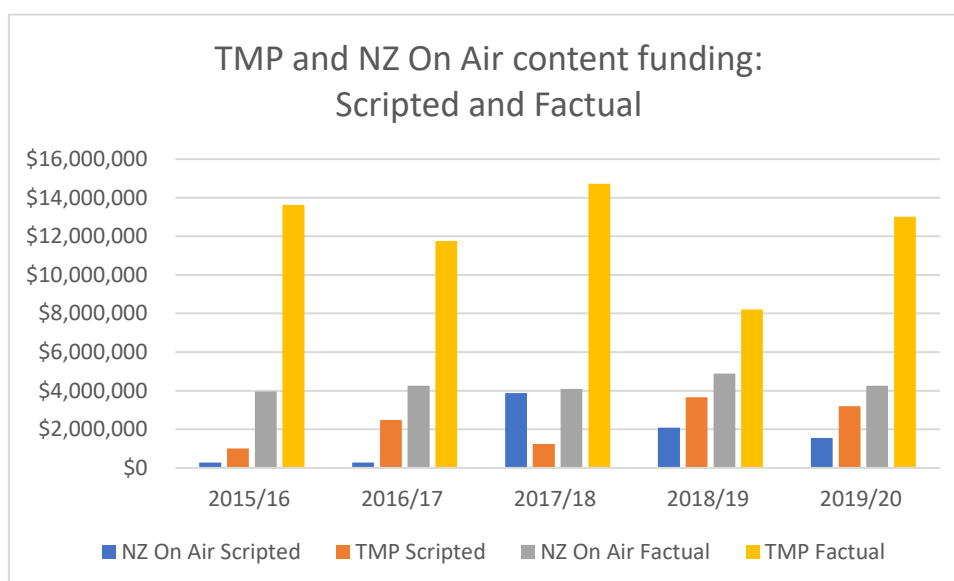
There may also be production companies funded by NZ On Air during this period that met the MBIE and TPK criteria for Māori owned businesses that made content that was not tagged as Māori.

Despite the margin of error, the reporting trend suggests that a majority of NZ On Air funding for factual Māori content is directed towards non-Māori-owned companies, especially for higher budget and recurring factual series. However, it should be noted that many of these organisations have Māori-led teams driving productions internally or at least hire specialised Māori contractors and advisors for specific productions.

The inequitable distribution of funding for large-scale factual Māori content production restricts Māori-owned companies to creating only one-off, low-budget content. This has a detrimental impact on the sustainability and growth potential of Māori-owned companies.

Funding Trends – NZ On Air and TMP Comparative Analysis

The graph below illustrates the distribution of funding between both agencies across scripted and factual funding streams.



The dominance of factual funding in the Māori sector is evident. Note that news and current affairs (NCA) is omitted from the TMP factual figures. Those figures constitute just under 20% of all TMP funding and if included would further inflate the proportion of factual funding significantly.

NZ On Air's funding contribution, while lesser than TMP's is still a significant proportion of the Māori TV sector – particularly for scripted content. According to these figures, NZ On Air funded 41.1% of all scripted Māori production and 17.1% of all factual Māori production (including TMP funded NCA) between 2015 - 2020.

TMP and NZ On Air spend a comparable amount of funding on scripted Māori content but in both cases these figures are dwarfed compared to the quantum spent on factual content. These funding trends across both agencies would suggest that more proportional funding in terms of NZ On Air's approach to Māori content could be explored to balance this split and help ensure a diversity of Māori content for audiences.

The analysis below of NZ On Air's Māori content applications provides further context for the demand and disparity between scripted and factual funding outcomes.

Scripted Content Analysis – NZ On Air and TMP

Since scripted productions are a smaller sample size than factual production, it is feasible to do comparative scripted analysis across TMP and NZ On Air activities to establish an overarching view of the Māori sector of scripted TV production.

These titles were sourced from the respective agency's annual reports, and a broad definition of Māori content was applied. This included NZ On Air's current definition of having two Māori key creatives. It also included productions made by companies that clearly fit the TPK and MBIE definition of a Māori business (noting that the classification of Māori business status may not be known for all companies funded in this period). For the sake of being as broad as possible it also

included content that was at one point considered a 'Rautaki' production but may not have been reported as such in a final report.

Please note that these definitions of Māori content are not the recommendation of this paper – it's simply a broad measurement to capture an overall picture of the sector.

Content Approved

- NZ On Air funded titles that appear on the annual report as Māori are highlighted in green.
- NZ On Air funded titles that fit any of the descriptions above but were not tagged as Māori in the annual report are highlighted in yellow.
- TMP funded titles are highlighted in grey.
- Productions funded by both TMP and NZ On Air are highlighted in blue.

2015/16

TITLE	COMPANY	BROADCASTER	AMOUNT
Waru	BSAG	Whakaata Māori	\$215,000
Born To Dance	Sector 7	Whakaata Māori	\$110,000
Hunt For the Wilder People	Majestical	TVNZ 2	\$199,999
Find Me a Māori Bride 2	BSAG	Whakaata Māori	\$590,000
Aroha Bridge	Piki Films	Whakaata Māori	\$100,000
Only in Aotearoa	Kura Productions	Whakaata Māori	\$100,000
Nia's Extraordinary Life	BSAG	Webseries	\$100,000
Kairākau 1*	Velvet Stone Media	Whakaata Māori	\$19,000*
Haka City	Enter the Dragon	Whakaata Māori	\$461,236
Tūtūrū	Tūturu Pictures	Whakaata Māori	\$530,000
Colonial Combat	Awa Films	TVNZ+	\$110,000
Māori Sidesteps	Potent Youth	Webseries	\$80,000

**This is an additional funding amount. Kairākau received its primary funding (\$468k) the year prior.*

2016/17

TITLE	PRODUCTION COMPANY	BROADCASTER	AMOUNT
Only In Aotearoa	Kura Productions	Whakaata Māori	\$241,866
Baby Mamas Club	BMC Productions	TVNZ+	\$100,000
Ahikāroa	Kura Productions	Whakaata Māori	\$1,350,000
Jimi's World	Scottie Douglas Productions	Whakaata Māori	\$300,000
Tākaro Tribe	Cinco Cine	Whakaata Māori	\$394,656
Tongue Tied	Greenstone TV	Whakaata Māori	\$490,000

2017/18

TITLE	PRODUCTION COMPANY	BROADCASTER	AMOUNT
Only in Aotearoa 2	Kura Productions	Whakaata Māori	\$599,441
Aroha Bridge 3	Piki Films	Whakaata Māori	\$534,900
In Dark Places	South Pacific Pictures	TVNZ 1	\$2,994,175
The Ring Inz 2	Enter the Dragon	Whakaata Māori	\$785,209
Tākaro Tribe 2	Cinco Cine	Whakaata Māori	\$367,234

2018/19

TITLE	PRODUCTION COMPANY	BROADCASTER	AMOUNT
Ahikāroa 2	Kura Productions	Whakaata Māori	\$3,824,069
Cousins*	Miss Conception Films	Whakaata Māori	\$200,000
The Exceptional Squad *	Pango	HEIHEI	\$499,885
Undertow	Te Rakau Hua o te wao tapu	Whakaata Māori	\$83,850
Colonial Combat 2	Awa Films	TVNZ+	\$382,500
Baby Mama's Club 2	Culture Factory	TVNZ+	\$342,972
I DATE Rejects	Whitiora Productions	TVNZ+	\$416,500
The Feijoa Club	BSAG	HEIHEI	\$500,000
Ring Inz 3	Enter the Dragon	Whakaata Māori	\$785,261
Colonial Combat	Awa Films Ltd	TVNZ+	\$382,500
AIO: The Last Paradise of Kiwa	The Māori Sidesteps Collective	Pilot	\$49,908
Rere Te Whiu	Punarau Media	Whakaata Māori	\$510,000
Takaro Tribe 3	Cinco Cine	Whakaata Māori	\$295,576

*These titles were co-funded over two separate financial years.

2019/2020

TITLE	PRODUCTION COMPANY	BROADCASTER	AMOUNT
Cousins*	Whenua Films	Māori Television	\$200,000
The Exceptional Squad*	Pango	HEIHEI	\$250,000
Muru	Jawbone Films	THREE	\$200,000
Island of Mystery	Adrenalin	HEIHEI	\$360,291
The Legend of the Bone Tiki	Arama	TVNZ 2	\$1,000,000
Good Grief	BSAG	TVNZ OnDemand	\$500,000
Toke	Screentime	THREE	\$2,193,993
One Lane Bridge	Great Southern	TVNZ 1	\$5,470,000
Head High	South Pacific Pictures	THREE	\$3,883,000
Ahikāroa 3	Kura Productions	Whakaata Māori	\$3,000,000
Willie Styles	Awa Films Ltd	Whakaata Māori	\$418,824

* These titles were co-funded over two separate financial years.

Funding Totals Per Year

Year	Titles	Total Funding
2015/16	12	\$2,615,235
2016/17	5	\$2,876,522
2017/18	5	\$5,280,959
2018/19	12	\$8,273,021
2019/20	9	\$17,770,815
TOTAL:	43*	\$36,816,552

*Cousins, the Exceptional Squad, Colonial Combat, and Only in Aotearoa are listed twice due to being funded across multiple years and figures in the titles column are adjusted to reflect individual titles.

The amount of funding skyrockets in 2018 which coincides with the launch of NZ On Air's rautaki and the second year of the NZMF. It also marks the year that *Ahikāroa* becomes a regular production.

Top 10 Most Funded Production Companies

Production Company	Applications	Total Awarded	Percentage
Kura	6	\$9,115,376	29%
South Pacific Pictures	2	\$6,877,175	22%
Great Southern	1	\$5,470,000	17%
Screentime	1	\$2,193,993	7%
Enter The Dragon	3	\$2,031,706	6%
BSAG	5	\$1,905,000	6%
Awa Films	4	\$1,293,824	4%
Cino Cine Films	3	\$1,057,466	3%
Pango	2	\$699,885	2%
Piki Films	2	\$634,900	2%
TOTAL	29	\$31,279,325	

It should be noted that none of the top four most funded companies meet the MBIE and TPK definition of Māori owned business – this includes Kura which South Pacific Pictures is a 51% majority shareholder.

South Pacific Pictures (SPP), Great Southern and Screentime made up three of the top four highest funded production companies making Māori content with only 4 of 43 applications – three of which were approved in the 2019/20 financial year alone.

SPP is the second highest funded production company making Māori scripted content with only two successful applications over a five-year period. This is not surprising given the fact that they are the company who have received the most NZ On Air funding of all time, and possess the capacity to produce large scale, big budget drama productions.

Similarly, Great Southern received the third most funding for Māori content in this period with one application. They are the second highest funded production company overall across NZ On Air's NZMF era (2017 onwards).

Of the Māori companies represented on this list, Pango, Cinco Cine and Piki Films content output are almost entirely represented by children's animated series. Animation typically has a higher cost-per-minute than live action scripted content.

With the data above we can also analyse the distribution across each broadcaster:

Platform Support (2015 – 2020)

Platform	Titles funded	Amount	Percentage
Whakaata Māori	23	\$16,800,829	46%
TVNZ	11	\$11,898,646	32%
THREE	3	\$6,276,993	17%
HEIHEI	3	\$1,610,176	4%
Other	3	\$229,908	1%
	43	\$36,816,552	

While Whakaata Māori commissioned 23 of the 43 Māori scripted productions funded during this period (more than all the other platforms combined) the share of funding distributed to Whakaata

Māori productions is 45%. This reflects a higher number of low budget productions being put forward by the broadcaster. In contrast, THREE commissioned three projects and received 17% of the funding.

The differing peak audience size of the broadcasters and capacity of the production companies involved are undoubtedly causes for the distribution of funding in this manner.

This makes sense from a market perspective; however, an unintended effect of this dynamic is a Māori production sector that is restricted to low budget production. A potential long-term effect of this may result in outcomes where the capacity of professionals involved in the Māori production sector are inhibited by a lack of experience working on bigger budget projects – particularly around complex elements such as VFX, stunts, or projects with major production design challenges, such as period piece series. In this context, drama production is largely an unrealistic venture unless the project is backed by one of the major production companies with a major broadcaster attachment.

These funding trends contribute to a growing concern around story sovereignty which surfaced during the stakeholder consultation of the 2020 NZMF Review. As noted in that review, the current funding environment advantages large production companies who subsequently own the rights of Māori intellectual property.

This is further exacerbated if production companies making Māori content are lacking in the cultural competency to create healthy and safe working environments for Māori cast and crew.

These observations are not intended to advocate the prohibition of Māori stories being adapted to the screen by well-established and experienced production companies, or partnerships between these companies and Māori. These types of partnerships have undoubtedly offered important opportunities to Māori actors and technicians and is potentially a vital pipeline for talent development and capacity building.

The issue is that the current environment so overwhelmingly favours the well-established production companies that it has functioned as a veritable chokehold whereby the funding model for Māori scripted content could be comparable to trickle-down economics.

Targeting opportunities and adjusting existing funding mechanisms to both retain some of these outcomes, while also creating space to support more Māori owned companies, could see more equitable growth in the Māori sector and stronger cultural capacity for the screen sector at large.

Consultancy with producers and technicians who have worked through this transition on both sides of Māori and non-Māori content production is recommended for greater insight on these issues.

Development Funding

In addition to the production funding expenditure, the public sector funding bodies also fund script development. Analysis of development funding does provide some insight into how content is defined as Māori over the course of its creation.

A challenge in analysing NZ On Air's funding efforts in this part of the sector is the fact that development proposals are not categorised under te rautaki Māori in the annual report. However, internal data does offer some insights albeit that these have not been systematically collated⁸.

Development Applications

Year	Title	Producer	Platform	Amount
17/18	My New Zealand War	Tūmanako	Whakaata Māori	15,000
17/18	Home Soil	Jawbone	TVNZ 1	20,000
17/18	Rapunga	Cinco Cine	Whakaata Māori	11,500
17/18	I AM MĀUI	Awa Films	TVNZ 2	7,500
18/19	Toke	Duncan Media	Diverse Dev*	25,000
18/19	Home Soil	Jawbone Pictures	TVNZ 1	40,000
18/19	Better The Blood	10,000 Company	Diverse Dev*	25,000
18/19	Vegas	Greenstone TV	TVNZ 2	8,000
			TOTAL	\$152,000

*Diverse Development is a type of development funding that NZ On Air provides when there is no supporting platform attached.

A further 2 development proposals were submitted during this period, one of which was declined and the other resulted in a cancelled contract.

It is worth noting that of these 10 projects only 2 have come through development to completion (*Toke*, *Vegas*). A further three projects received ongoing support from Te Puna Kairangi, but thus far have not progressed further into production.

As the previous analysis has shown there are a number of issues with how the Māori designation has been applied to projects. For the purposes of assessing Māori content and creatives within the development arena, we will use the same criteria applied to scripted titles.

Approved Development

Rows in green denote projects that went through the development pipeline and into production.

2015/16

Title	Production Company	Platform	Amount
One Lane Bridge	Great Southern	TVNZ 1	\$10,000
Māori total:			\$10,000
Total Dev spend:			\$439,600
Percent Māori			2.30%

2016/17

Title	Production Company	Platform	Amount
In Dark Places	10,000 Company	TVNZ 1	\$10,000

⁸ This data was a manual input into NZ On Air's internal financing system, NAV. It is worth noting that according to NAV none of the development projects in the FY 2015/16 & 2016/17 were tagged as Māori. This could simply be a case of categorisation as it could be that this function of NAV was not applied prior to these dates. However, it has been in place for other scripted and factual content within this period and it could be that development titles simply weren't categorised as "Māori" prior to FY 2017/18.

In Dark Places	10,000 Company	TVNZ 1	\$10,000
Head High	SPP	THREE	\$44,700
Home Soil	Jawbone Pictures	TVNZ 1	\$10,000
Ms Wolfe	BSAG	Diverse Dev	\$25,000
Final Resting Place	Tauihu	Diverse Dev	\$25,000
Māori total:			\$124,700
Total Dev spend:			\$424,700
Percent Māori			29.4%

TMP also funded development in this financial year – although this was limited to one project.

Title	Production Company	Platform	Amount
The Ring Inz 3	Enter The Dragon	Whakaata Māori	\$75,140

2017/18

Title	Production Company	Platform	Amount
Baby Mama's Club 2	Culture Club	TVNZ+	\$5,000
Home Soil	Jawbone Pictures	TVNZ 1	\$20,000
Home Soil (advanced)	Jawbone Pictures	TVNZ 1	\$12,500
Mangu Town	Adrenalin	Diverse Dev	\$10,000
Naki Blues	BSAG	TVNZ+	\$10,000
One Lane Bridge	Great Southern	TVNZ 1	\$10,000
Rapunga	Cinco Cine	Whakaata Māori	\$11,500
The Feijoa Club	BSAG	HEIHEI	\$25,000
The Last Bastion	Cinco Cine	Whakaata Māori	\$7,500
The New Adventures of Maui	Awa Films	TVNZ 2	\$7,500
Māori total:			\$119,000
Total Dev spend:			\$508,562
Percent Māori			23.4%

TMP funded multiple development projects in this financial year. This and the preceding year are the only years TMP have funded any development applications during this time period.

Title	Production Company	Platform	Amount
Ahikaroa 2	Kura Productions Ltd	Whakaata Māori	\$320,000
The New Adventures of Maui	Awa Films Ltd	Whakaata Māori	\$7,500
The Last Bastion	Cinco Cine	Whakaata Māori	\$7,500
Kairākau 2	Velvet Stone Media	Whakaata Māori	\$100,000
TMP Dev funding:			\$435,000

2018/19

Title	Production Company	Platform	Amount
Toke	Duncan Media	Diverse Dev	\$25,000
Better the Blood	10,000 Company	Diverse Dev	\$25,000
Broken Backs & Mountains	Whitiara Productions	TVNZ+	\$5,000
I Date Rejects	Whitiara Productions	TVNZ+	\$5,000

Home Soil	Jawbone Pictures	TVNZ 1	\$40,000
One Lane Bridge	Great Southern	TVNZ 1	\$10,000
The Bone Tiki	Arama Pictures	TVNZ 2	\$10,000
Vegas	Greenstone TV	TVNZ 2	\$20,000
		Māori total:	\$140,000
		Total on Dev	\$904,383
		Percent Māori	15.5%

2019/2020

Title	Production Company	Platform	Amount
The Exceptional Squad 2	Pango	HEIHEI	\$20,000
Feijoa Club 2	BSAG	HEIHEI	\$20,000
Vegas	Greenstone TV	TVNZ 2	\$15,000
Vegas	Greenstone TV	TVNZ 2	\$8,000
		Māori total:	\$63,000
		Total on Dev	\$329,940
		Percent Māori	19.1%

Of the 21 NZ On Air projects listed 10 have gone into production: *One Lane Bridge*, *In Dark Places*, *Head High*, *Baby Mama's Club 2*, *The Feijoa Club 1 & 2*, *Toke*, *I Date Rejects*, *Vegas*. Of these, only *Toke* and *In Dark Places* have been reported as rautaki projects.

TMP development funding, although a rarity, tends to award development funding at much higher amounts. The \$320k awarded to *Ahikāroa 2* is almost equal to the total development funding distributed by NZ On Air in the entire 2019/20 financial year.

Rautaki Categorisation Issues

All of the data used in this report are based on determinations of 'Māori content' and genre for the purposes of accountability reporting by Government funding agencies (annual reports). Given the subjective nature of these determinations, some titles categorised as 'Māori' for the purposes of these reports may be debateable and could arguably lead to inconsistencies in data gathering and comparative analysis.

This is not so much of an issue with TMP funded content, as the te reo requirements of their funding guarantees a strong presence of Māoritanga in everything they fund. It could be argued that content that contains a certain quantum of te reo Māori is irrefutably Māori. However, this should not be the sole factor, as there are numerous examples of content that express a Māori worldview using language other than te reo.

The main identifier for projects classified as being part of NZ On Air's rautaki has been the two out of three key creatives policy. In regard to the development analysis above, given that only 2 of 21 projects going through to production qualified as rautaki, it could be concluded that the projects and/or production companies were not in a position to support projects that fit this designation.

The two projects that maintained their categorisation as rautaki from development to production funding are programmes that originated from Māori productions companies. *In Dark Places* and *Toke* were initially brought in for development by Māori production companies, the rights were

subsequently assigned to larger companies at the production funding stage, but ultimately, they maintained their initial rautaki categorisation.

I Date Rejects was submitted by a Māori owned production company and helmed by a Māori writer/director. There were no other Māori key creatives listed in either the development or production funding applications. After the funding decision, the production brought in a Māori producer and other Māori writers and the end result is a series that would qualify as rautaki but was not classified as such by NZ On Air given it did not meet the categorisation at the time of funding.

These examples illustrate the changeable nature of the two-of-three key creatives policy being the defining factor of the designation of projects as rautaki during the application assessment stage. Staffing changes occur frequently and due to the ever-evolving nature of content production, content outcomes do not always reflect the ideas or intentions submitted at the application stage of the process when the categorisation/tagging takes place. A recommendation from this review is that NZ On Air revises its rautaki tagging process at the end of each financial year to ascertain which projects uphold the definition once production has completed. This would provide a better suited system for the fluid nature of production, and a more complete data set to measure outcomes.

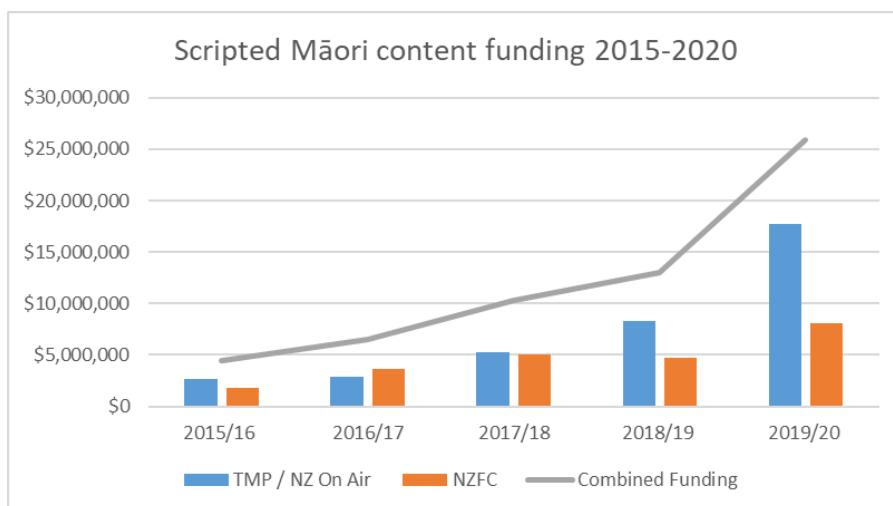
Scripted series developed by TMP such as *Ahikāroa*, *The Ring Inz*, and *Kairākau 2* would all qualify as rautaki productions in terms of key creatives and originated from Māori production companies. These projects also come with te reo Māori quotas as per their TMP funding obligations.

- 1) Although the sample size is small, it is the author's position that three factors present at the earliest stages of a production typically correlate with clear Māori content outcomes:
- 2) Intellectual property originating from Māori creatives and/or production companies
- 3) Proposals made by Māori production companies
- 4) Proposals with te reo obligations.

Projects that do not meet all three criteria may still result in Māori content, but a more nuanced measurement of Māori public funding outcomes could be achieved through a scaled, non-binary classification of a production's characteristics.

Exponential Growth

The boost in funding for scripted Māori productions between 2015 and 2020 could be described as exponential. While these outcomes are long overdue and overwhelmingly positive, it must be noted that such rapid growth in a short amount of time has led to cast and crew shortages as well as cost pressures across the screen sector – with a particular impact on the Māori production sector.



It should be noted that the data points represented in the graph above conform to the broadest definitions of Māori content, but this does correspond to a demand for Māori actors, technicians and key creatives in the industry. One showrunner in discussion with NZ On Air staff remarked:

Our round funded four Māori drama productions and one Māori film production that all went into production over the same period in late 2019. This meant it was a scramble for any Māori crew members and a shortage of suitably qualified H.O.D's.

Despite this being expected with Māori funding multiplying six-fold over a 5-year period, this once again raises questions about sustainability and capacity within the Māori screen sector.

The TMP/NZ On Air Co-Fund

The TMP/NZ On Air co-fund is a collaboration between the agencies that has distributed \$17.6m of funding over four rounds since 2020. Costs are shared by both funders which enables larger scale productions with a reduced impact to the respective agencies overall annual budgets (in comparison to a single funder carrying these costs alone).

These rounds typically ask for receptive audiences reo content (30% minimum) although there has been some flexibility in this regard compared to TMP's general fund. The majority of funding to date has gone to factual production with only 16% of co-fund expenditure allocated to scripted content - totalling \$2.8m.

Unlike other NZ On Air content funding streams, Māori owned production companies make up a greater proportion of companies funded. This result could be attributed to the TMP te reo Māori requirements of the fund.

Top 5 Most Funded Production Companies

Production Company	Funding Received	Percentage
Pango Productions	\$5,014,224	48%
Scottie Douglas Productions	\$1,759,052	17%
Great Southern Television	\$1,736,194	16%
Faultline Films	\$1,230,926	12%
Sweetshop and Green	\$795,512	8%
TOTAL	\$10,535,908	

Under the co-fund, TVNZ has commissioned the majority of successfully funded applications with 18 projects, followed by Whakaata Māori with nine projects. This could be a result of the scale of productions sought by the two agencies as part of the co-fund objectives.

One interesting outcome of the co-fund has been the *Beyond the Veil* Anthology series. These programmes received funding from all three public funding bodies with the NZFC contributing development funding and theatrical release support for some episodes, while production funding for the anthology's Māori content episodes were covered by the co-fund, and episodes containing non-Māori content were funded from NZ On Air's baseline scripted funding.

The co-fund has been critical for NZ On Air regarding the integrity and fulfilment of Māori content requirements in recent years. However, there are some settings that with further consideration could result in greater potential outcomes for the co-fund.

The co-fund has taken place over the past three years by annual agreement between the funders and there is no formal long-term arrangement regarding the continuation of the co-fund. The amount of funding available has varied from round to round as has the assessment process, with two of the four rounds conducted via a two-stage submission, and the other two rounds as a single submission.

An ongoing agreement could bring greater stability and allow platforms and production companies more opportunity to strategise longer-term submissions for the co-fund.

NZ On Air has received feedback that the 30% minimum is an obstacle for some platforms and producers. Greater flexibility regarding minimum reo requirements could help encourage increased competition and stronger plurality of Māori content for audiences across a broader spectrum.

However, funding analysis has shown that there is a positive correlation between reo requirements and the success of Māori production companies so there is merit in the continuation of a minimum reo requirement – not only in regard to equitable outcomes, but also in regard to NZ On Air's commitment to promote Māori language.

An additional issue is the two funders have differing policies around platform contributions and exclusivity. NZ On Air allows a platform a defined period of exclusive playout of publicly funded content if the platform provides a license fee of more than 5% of a project's overall budget.

TMP contracts limit the potential exclusivity period and prescribe that TMP funded content is made available to Whakaata Māori for a Second Play Broadcast after three months. The Second Play clause has been the subject of dispute by some broadcasters who argue that it undermines their financial contributions to premium content which they wish to support.

NZ On Air has supported the inclusion of this clause, but it has impacted the amount platforms are willing to contribute in support of their applications. The more funding a platform is willing to contribute in support of an application, the less the application will cost to the pool of available public funding. If the retention of broadcast rights is a priority for a platform, the clause may also limit the platforms that are willing to submit to the co-fund.

These issues are not significant deterrents for future co-funding between NZ On Air and TMP, but they are factors that should be discussed by the agencies in regard to the future of the co-fund.

Summary and Recommendations

One of the most striking findings of this report is the extent of the historic imbalance between public funding allocated toward factual Māori content and public funding allocated toward scripted Māori content.

Drama and comedy are high-risk genres because of their production complexity, cost, and heavy international competition. These factors, alongside the market conditions of the television industry, has resulted in a scarcity of Māori scripted production.

NZ On Air functions within an intersection between commercial and cultural imperatives, and while these driving forces may have mutual interests, market outcomes ultimately dictate the priorities of the industry and therefore dictate the applications that are submitted for funding.

NZ On Air must therefore ensure that the cultural objectives of the Broadcasting Act, its obligations under section 36(c) of the Act, and its commitment to Te Tiriti O Waitangi are not superseded by the economic imperatives of the sector.

There is also strong evidence of the market potential for Māori stories when you consider that in the history of New Zealand cinema, six of the 10 highest grossing films are stories of te ao Māori.

In summary – the overall observations and recommendations are as follows:

- A pan-sector position on the classification of Māori content will encourage more compatible and comparative data collection practices across the sector and a better framework for measuring sector performance and improvements.
- NZ On Air should instigate a rautaki tagging process at the end of each financial year to ascertain which projects upheld or newly met the definition once production is complete.
- A revised NZ On Air Rautaki Māori should include specific and iterative targets and outcomes for the Māori screen sector over a longer timeframe than one year.
- A revised NZ On Air Rautaki Māori must also expand the criteria of a rautaki Māori to include the following characteristics:
 - Productions led by Māori owned production companies
 - Intellectual property that originates from and is controlled by Māori creatives
 - Content with a significant quantum of te reo
 - Content with two or more Māori key creatives.
- Further collaboration and coordination between the funding agencies will result in more efficient funding distribution, greater talent development pathways, and clearer standards.
 - This could include an ongoing co-fund agreement between NZ On Air and TMP – potentially with revised settings – to allow platforms and production companies more opportunity to strategise longer-term submissions for the co-fund.
- The mitigation of systemic issues that have inhibited Māori production should be an overarching goal of any revised NZ On Air rautaki.
 - This could include coordinating Request for Proposals (RFPs) for Māori content and content development in partnership with platforms and/or other funding agencies.

- At a minimum an updated NZ On Air rautaki will have to focus on the sustainable development of Māori scripted content and capacity building within the sector to support stronger outcomes.
- It may be appropriate for an updated rautaki to consider an alternative approach to platform support for Māori content.
- Despite the relative success of Māori production companies in the film industry, criticisms relating to story sovereignty and cultural appropriation have been applied to film funding decisions in the same ways they have for TV funding decisions. While these issues are outside of the confines of a quantitative data review, an increase of diverse and authentic Māori stories, characters and content on screen would undoubtedly help progress these conversations and move past these issues.
- There are now more Māori living in Australia (140,000 in 2016) than in the South Island (110,000 in 2018). The 2020 NZMF Review points out that *'Although there is no real mandate to serve expatriates, this big group forms part of the national experience and culture.'* This is perhaps best exemplified amongst Māori by the inclusion of Australian based kapa haka groups in Te Matatini. The case for NZ On Air serving a wider expatriate Māori audience is worth further investigation as a topic for stakeholder consultation.

A final note of this review is one of hope. At the time of writing this paper, NZ On Air embarks on its third year of the co-fund partnership with TMP that has seen a total investment of almost \$18m invested across 39 projects. Furthermore, the two agencies – alongside the NZFC – are working more closely than ever before on shared sector objectives and aspirations. The Māori Media Shift review is likely to herald a new era of even greater cross-sector collaboration. This review both endorses these advances but also aims to shine a light on the places where imbalances in public media funding still exist. Our hope is to provide an evidence base for what needs to change in the knowledge that what is good for Māori is good for all of Aotearoa.

Annex A - NZ On Air Māori Factual Content Approved (2015-2020)

2015/16			
TITLE	PRODUCTION COMPANY	BROADCASTER	AMOUNT
Game Of Bros	Tikilounge Productions	Whakaata Māori	\$210,000
Karena and Kasey's Kitchen Diplomacy	Imagination TV	TVNZ 1	\$991,333
Maui's Hook	Kura Productions	Whakaata Māori	\$78,800
Sacrifice On The Somme	Scottie Douglas Production	Whakaata Māori	\$225,000
Sisters	Rogue Production	Whakaata Māori	\$341,710
Te Araroa: Tales from the Trails 2	Scottie Douglas Production	Whakaata Māori	\$295,000
The Loggers	Great Southern Television	Prime	\$463,877
Toa Hunter Gatherer	Awa Films	Whakaata Māori	\$240,000
The Hui	Great Southern Television	THREE	\$400,000
The Palace	Rogue Production	Whakaata Māori	\$15,022
Fresh	TVNZ	TVNZ 2	\$699,681
Total			\$3,960,423

2016/17			
TITLE	PRODUCTION COMPANY	BROADCASTER	AMOUNT
Artefact	Greenstone TV	Whakaata Māori	\$1,140,277
Ngarara	Tellyvise	Whakaata Māori	\$92,636
Herbs: Songs Of Freedom	Boot Hill Films	Whakaata Māori	\$199,000
Kaupapa On the Couch	Hex Work	The Spinoff	\$25,800
Game Of Bros	Tikilounge Productions	Whakaata Māori	\$348,392
Kasey And Karena's Kitchen Diplomacy	Imagination TV	Whakaata Māori	\$966,597
Toa Hunter Gatherer	Awa Films	Whakaata Māori	\$273,616
The Hui	Great Southern Television	THREE	\$634,308
Fresh	TVNZ	TVNZ 2	\$572,800
All Talk With Anika Moa	Rogue Production	Whakaata Māori	\$932,673
Total			\$5,186,099*

*This figure conflicts with the total quoted in the annual report, however the budgets listed total to the amount used in this table.

2017/18			
TITLE	PRODUCTION COMPANY	BROADCASTER	AMOUNT
Tamariki Take Over	Blackout Media	HEIHEI	\$99,000
Anika Moa Unleashed	Rogue Productions	TVNZ+	\$329,785
Conversations	Tawera Productions	e-Tangata	\$139,640
Intake	Diva Productions	Whakaata Māori	\$310,475
NZ Wars: The Stories Of Ruapekapeka	Great Southern TV	RNZ	\$468,000
Stan	Ruckus Media	THREE	\$200,000
The Forgotten Wahine	Villainesse	Whakaata Māori	\$250,558
The Negotiators	Tawera Productions	Whakaata Māori	\$328,366
Sharing The Love	Cabrikan Productions	NZME WatchMe	\$66,882
Class Act	Pango Productions	TVNZ 1	\$716,037

Paakiwaha 2017	UMA Broadcasting	Radio Waatea 603AM	\$40,000
Paakiwaha 2018	UMA Broadcasting	Radio Waatea 603AM	\$75,000
The Hui 2018	Great Southern Television	THREE	\$544,000
Game Of Bros 3	Tikilounge Productions	Whakaata Māori	\$348,392
Haukainga	Te Hiku Media	Te Reo Irirangi O Te Hiku	\$180,000
Total			\$4,096,135

2018/19			
TITLE	PRODUCTION COMPANY	BROADCASTER	AMOUNT
Speak Māori For Kids	Adrenalin	HEIHEI	\$292,463
Paakiwaha 2019	UMA Broadcasting	Radio Waatea 603AM	\$75,000
The Hui 2019	Great Southern Television	THREE	\$543,988
A Taata Kōrero: Stories of Tairaawhiti	The Gisborne Herald Co	NZ Herald	\$50,000
Artefact 2	Greenstone TV	Whakaata Māori	\$831,267
Blue Smoke	Awa Films	Whakaata Māori	\$115,000
He Kōrero Taumaha Tonu	Storybox	The Spinoff	\$100,000
Honey Wars	Greenstone TV	Prime	\$399,991
Kaupapa On the Couch	Hex Work	The Spinoff	\$38,400
Legend – Te Tautohito I Te Moana	Tawera Productions	Whakaata Māori	\$190,000
Origins	Greenstone TV	TVNZ 1	\$1,336,267
The Cannabis Coast	Te Amokura Productions	Prime	\$194,935
Vapnierka	Te Amokura Productions	Whakaata Māori	\$209,861
Victor 4 Company	ILA Film Productions	Whakaata Māori	\$11,500
Toa Hunter Gatherer 3	Hi Mama	Whakaata Māori	\$316,288
Haukainga 2018/19	Te Hiku Media	Te Reo Irirangi O Te Hiku O Te Ika	\$180,000
Total			\$4,884,960

2019/2020			
TITLE	PRODUCTION COMPANY	BROADCASTER	AMOUNT
Putā Mōhio	Kokko Media	HEIHEI	\$340,766
Paakiwaha 2020	UMA Broadcasting	Radio Waatea 603AM	\$75,000
The Hui 2020	Great Southern Television	THREE	\$623,375
The Lost Children Of Aotearoa	Awa Films	Whakaata Māori	\$295,000
The Māori Economy	Hinge Productions	Newsroom NZ	\$211,566
Whitiki	Scottie Douglas Productions	Whakaata Māori	\$124,703
Ake, Ake, Ake	Scottie Douglas Productions	Whakaata Māori	\$348,781
The Negotiators 2	Tawera Productions	Whakaata Māori	\$329,980
Kī Mai Āe	Great Southern Television	TVNZ 1	\$262,454
The Māori In Me	Cabrikan Productions	Prime	\$105,356

The Walkers	Hi Mama	TVNZ 2	\$311,805
Hikoī Long Shadow Of The March	Hinge Productions	Newsroom NZ	\$199,863
National Treasures	Pango Productions	TVNZ 1	\$615,082
Hongi To Hāngi	Great Southern Television	TVNZ 1	\$190,251
Haukāinga 2019/20	Te Hiku Media	Te Reo Irirangi O Te Hiku O Te Ika	\$200,000
He Kakano Ahau	Ursula Grace Films	RNZ	\$2,000
NZ Wars Stories Of Waikato	Great Southern Television	RNZ	\$15,000
Total			\$4,250,982

Considerations

This data is sourced from NZ On Air annual reports. There may be productions during this period that fit a definition of Māori content not included in these tables due to narrow definitions of Māori content in the years of reporting and/or errors in classification.

TVNZ's *Fresh* was reported as both a Māori and Pacific title with a proportion of funding attributed to each of those designations based on proposed content outputs. This practice ceased with the 2018 season when the show shifted from TVNZ to Tikilounge Productions and *Fresh* has since been solely reported as a Pacific title. This is a unique method of the quantitative categorisation of content that was not applied to any other programmes made during this period.

There does seem to be some inconsistency in this practice when you consider the pan-Pacific reality show *Game of Bros*, was solely reported as a Māori title. Both series feature Māori creatives and Māori talent, but the designation of either of these series as Māori could be considered evidence of too broad a categorisation of Māori content.

The intent of this observation is not to deny the Māori elements of these productions, but to demonstrate the challenging subjectivity of these categorisations, and how designations may change over time. These examples are also significant in that they push the companies that make them into the top 10 highest funded production companies making Māori factual content.