THE CURRENT STATE OF NEW ZEALAND'S MEDIA SYSTEM

A BASELINE REPORT

NOVEMBER 2023

angus & ASSOCIATES

CONTENTS

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INTRODUCTION

The Strategic Framework for a Sustainable Media System ("the Strategy") sets out Manatū Taonga Ministry for Culture and Heritage ("the Ministry's") vision, objectives, and priorities to support and provide direction to the broadcasting and media work programme over the medium term.

The Strategy identifies three main 'outcome pillars' - Vibrancy (a thriving, vibrant commercial media system), Trust (an independent trusted media system that reflects New Zealand's values and serves the public interest) and Diversity (a diverse media system that contains many different voices) - and includes a set of potential indicators that may be used to monitor the health of New Zealand's media system over time.

Angus & Associates – with the support of Nicholson Consulting, as Māori data advisors - was contracted by the Ministry to develop an Outcomes Monitoring Framework and to produce a Baseline Report. These outputs are intended to enable government to have a better understanding of the current health of New Zealand's media system. This will inform future policy work and better support the sector towards long-term sustainability, and inform and guide future monitoring and reporting on New Zealand's media system outcomes.

The Outcome Monitoring Framework and indicators are below:

1. VIBRANCY	2. TRUST	3. DIVERSITY
▪ Contribution to GDP ▪ Contribution to Employment ▪ Revenue & Profitability ▪ Market Value ▪ Diversity of Revenue Streams ▪ Business Confidence ▪ R&D and Innovation ▪ Sustainability Commitments ▪ Workforce Continuity ▪ Audience Engagement ▪ Audience Willingness to Pay	▪ Audience Trust in Media ▪ Media Literacy ▪ Audience Preference for NZ made Content ▪ Performance of Media Regulatory System ▪ Journalistic Professional Standards & Protection ▪ Capability and Commitment with respect to Te Tiriti o Waitangi ▪ Organisations Receiving Support for Public Interest Journalism	▪ Diversity of Ownership & Leadership ▪ Diversity of Workforce ▪ Source Diversity ▪ Content Diversity ▪ Consumption Diversity ▪ Social Inclusion ▪ Visibility of Te Ao Māori and Use of te reo Māori in Delivery of Content

This Baseline Report provides evidence of the current state of the New Zealand media system and is based on the Outcomes Monitoring Framework outlined above. A separate Technical Report prepared for the Ministry outlines the methodology by which the Outcomes Monitoring Framework was developed and includes recommendations for its future refinement/development.

The main inputs for this Baseline Report include available secondary data, findings from stakeholder interviews, and a media consumption survey of a representative sample of the New Zealand public. The indicators' definition/measure and data sources can be found in the Appendix. Following the summary of baseline measures, the report is presented in three sections – covering the three outcome pillars of the Strategy.

GLOSSARY

Terms	Meaning	Terms	Meaning
$B	billion New Zealand Dollars	NZ	New Zealand
$m	million New Zealand Dollars	NZ On Air	New Zealand On Air
AI	Artificial Intelligence	NZFC	New Zealand Film Commission
AI-generated content	Content such as blogs, marketing materials, articles and product descriptions written by a machine	NZME	New Zealand Media and Entertainment
ASA	Advertising Standards Authority	OD	On Demand
ChatGPT	Chat Generative Pre-trained Transformer	pa	per annum
Disinformation	false information which is intended to mislead	PIJF	Public Interest Journalism Fund
FTA	Free-to-air	R&D	Research & Development
FTE	Full-time Equivalent	RNZ	Radio New Zealand
GDP	Gross Domestic Products	the Ministry's	Manatū Taonga Ministry for Culture and Heritage
Harmful content	content that you consider harmful	the Strategy	The Strategic Framework for a Sustainable Media System
JMAD	AUT research centre for Journalism, Media and Democracy	TMP	Te Māngai Pāho
KPI	Key Performance Indicator	TV	Television
Media algorithms	A set of rules and signals which shapes the content you are exposed to	TVNZ	Television New Zealand
Misinformation	False information, regardless of whether or not it's intended to mislead	US$	United States Dollar

SUMMARY OF BASELINE MEASURES

The tables below and overleaf summarise the baseline measures for each indicator. Note that in the 'Latest Value' column, 'Not available' indicates that a specific/numeric value for the measure is not currently available but other details and/or qualitative commentary are included later in the report for those measures.

OUTCOME PILLAR	INDICATOR	MEASURE	LATEST VALUE
1. VIBRANCY	Contribution to GDP	Value that Media and Broadcasting sector contributes to GDP in NZ	$4,199m
	Contribution to Employment	Number of jobs filled	25,398
	Revenue & Profitabily	Proportion of organisations reporting increasing/static/decreasing revenue & profitability	Not available
		Advertising revenue	$3,389m
	Market Value	Market capitalisation of publicly listed company: Sky	$403m
		Market capitalisation of publicly listed company: NZME	$173m
	Diversity of Revenue Streams	Proportion of organisations having more than one revenue stream	Not available
	Business Confidence	Business confidence = % optimistic and % pessimistic	Not available
	R&D and Innovation	Proportion of media organisations having a stable/increasing expenditure on R&D	Not available
		Proportion of media organisations having adopted at least one new initiative re. product/service development, technology, etc.	Not available
	Sustainability Commitments	Proportion of media organisations having a formal sustainability programme/strategy	Not available
		Proportion of media organisations having made progress on the sustainability programme/strategy stated	Not available
	Workforce Continuity	Proportion of media organisations involved in a (cadetship) training programme/initiative	Not available
		Number of journalism training opportunities/initiatives (course, training programme, funding)	Not available
	Audience Engagement	Proportion of population engaged in any form of media in past 7 days	99%
		Proportion of population having read/watched/listened to any news on TV, in print, online or on the radio	93%
	Audience Willingness to Pay	Proportion of population having paid for news services in the past 12 months	31%
		Proportion of population willing to pay for news content or news service that they value	31%

SUMMARY OF BASELINE MEASURES (CONT.)

OUTCOME PILLAR	INDICATOR	MEASURE	LATEST VALUE
2. TRUST	Audience Trust in Media	Proportion of population agreeing that 'news reporting is trustworthy'	57%
		Number of news/information sources trusted by more than half of the population	8 out of 15
		Proportion of population agreeing that 'news reporting is fair and balanced'	48%
		Proportion of population agreeing that 'media organisations are trustworthy'	43%
	Media Literacy	Proportion of population feeling confident in deciding if the information they see/read online is true or false	80%
		Proportion of population 'extremely/ very concerned' about disinformation – the media issue of greatest concern to the survey sample (of those listed)	54%
		Proportion of population feeling exposed to 'a lot' of media algorithms - the media issue to which the largest number of the survey sample felt exposed (of those listed)	25%
	Audience Preference for NZ made Content	Proportion of population feeling confident in recognising NZ made content	86%
		Proportion of population always choosing NZ made content	19%
	Performance of Media Regulatory System	Proportion of media organisations rating the performance of media regulatory system as average or above	Not available
		Proportion of audience rating the performance of media regulatory system as average or above	Not available
	Journalistic Professional Standards and Protection	Existence of journalism professional standards	Not available
		Proportion of journalists feeling concerned about their safety/wellbeing	46%
	Capability and Commitment with respect to Te Tiriti o Waitangi	Proportion of media organisations making progress in demonstrating capability and commitment with respect to Te Tiriti o Waitangi	Not available
		Proportion of journalists agreeing that Te Tiriti o Waitangi applies to journalism in Aotearoa/New Zealand to some extent	93%
	Organisations Receiving Support for Public Interest Journalism	Number of media and broadcasting organisations receiving support for public interest journalism (funded by various sources i.e., private sector, Government, philanthropy)	Not available

SUMMARY OF BASELINE MEASURES (CONT.)

OUTCOME PILLAR	INDICATOR	MEASURE	LATEST VALUE
3. DIVERSITY	Diversity of Ownership & Leadership	Number of ownership categories currently active	4
		Proportion of female in management role	58%
	Diversity of Workforce	Proportion of female in workforce	46%
		Proportion of Māori/Pasifika/ Asian workforce	11%/5%/12%
	Source Diversity	Proportion of media organisations delivering content via multiple channels and/or platforms	Not available
		Proportion of population agreeing they have sufficient choice of news sources to inform on their local community/ about other ethnic or community groups	68%/58%
	Content Diversity	Proportion of media organisations producing multiple of types content	Not available
		Proportion of population agreeing that 'there's enough NZ content/content representing other ethnic/community group/s available to me'	77%/51%
		Proportion of population agreeing that 'there's high-quality NZ content/content representing other ethnic/community group/s available to me'	66%/46%
	Consumption Diversity	Proportion of population engaged with multiple types of media for news and/or entertainment in the past 7 days	91%
		Proportion of population having used multiple sources to find or access news	80%
	Social Inclusion	Proportion of population seeing their community and people like themselves in NZ media content	54%
		Proportion of population feeling represented in NZ media content	46%
		Proportion of population finding it easy to contribute their story/viewpoint to NZ media content	39%
	Visibility of te ao Māori and Use of te reo Māori in Delivery of Content	Value of Māori content production (NZ On Air, TMP and NZFC funding)	$28.4m
		Proportion of organisations reporting static/increase of visibility of te ao Māori in their delivery of content	Not available
		Proportion of organisations reporting static/increase of use of te reo Māori in their delivery of content	Not available
		Proportion of population agreeing that 'it's easy to find Māori content'	55%
		Proportion of population agreeing that 'there's enough Māori content available'	59%
		Proportion of population agreeing that 'there's high-quality Māori content available'	47%

CONCLUSIONS

This research was designed to provide a baseline measure against which to track the 'health' of New Zealand's media system over time and in relation to the three outcome pillars (Vibrancy, Trust and Diversity) identified in the Ministry's 2022 Strategic Framework for a Sustainable Media System. The results will inform future policy work to better support the system towards long-term sustainability.

The baseline data captures a 'moment in time' in a dynamic system, where change is the norm and where members of the sector and their platforms/channels are constantly evolving to keep pace with new technology and audience needs and expectations. While results on some measures may cause concern – for example, audience trust in media, or social inclusion – it is not possible to conclude solely from the baseline data whether the system is in 'good', 'poor' or 'indifferent' health overall, nor what the future holds; for example, whether AI will be an enabler or an inhibitor of the media system; or whether audience trust will decline in response to ever more sophisticated disinformation, misinformation and algorithms that dictate what the audience sees and consumes.

Future measures will confirm the direction of travel on key indicators of system health; enabling the Ministry to identify issues that threaten the long-term sustainability of the system and to work with the media sector on solutions.

OUTCOME PILLAR 1

VIBRANCY

CONTRIBUTION TO GDP

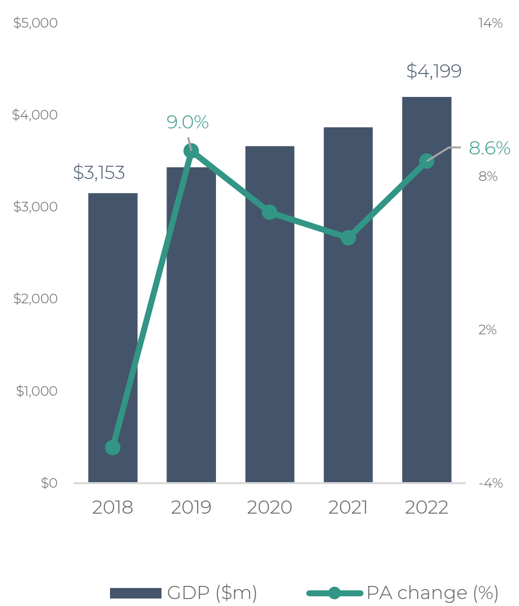
Measure: Value that Media and Broadcasting sector contributes to GDP in NZ
Latest value: $4,199m

In 2022, the Media and Broadcasting sector contributed more than $4,199m to New Zealand's GDP. This equated to 1.2% of New Zealand's total GDP.

Auckland led other regions by a significant margin in terms of contribution to GDP from the sector, at 58% of the total. Wellington (21% of the total) and Canterbury (6% of the total) followed.

In terms of the annual growth rate, contribution to GDP in 2022 was up 8.6% from 2021 – this is higher than the overall New Zealand growth rate of 5.3% pa.

MEDIA & BROADCASTING SECTOR CONTRIBUTION TO GDP



$4.2B
1.2% of total NZ GDP
Contribution to GDP

7,886
1.3% of all businesses in NZ
Number of Businesses

NUMBER & SIZE OF BUSINESSES IN THE SECTOR

There were 7,886 businesses in the Media and Broadcasting sector in 2022, equating to 1.3% of all businesses in New Zealand.

The number of media and broadcasting businesses grew at a higher rate than the number of all businesses in New Zealand (8.1% and 4.8% respectively).

Almost all businesses (98.6%) in the Media and Broadcasting sector are SMEs.

Source: Infometrics Media and Broadcasting Sector Profile 2022

CONTRIBUTION TO EMPLOYMENT

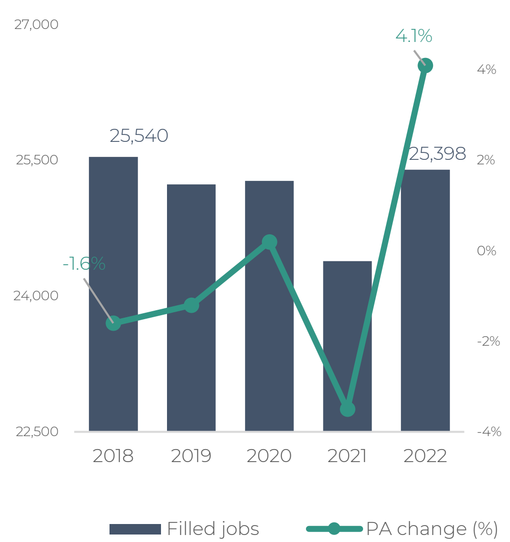
Measure: Number of jobs filled
Latest value: 25,398

In 2022, the Media and Broadcasting sector filled 25,398 jobs, or 0.9% of total jobs in New Zealand. Workers in the Media and Broadcasting sector are more likely to be self-employed than workers in New Zealand as a whole, with a self employment rate of 45% (compared with 16% for all New Zealand workers).

The number of FTEs in the Media and Broadcasting sector in 2022 was 22,668, equating to 0.9% of total FTEs in New Zealand. The year-on-year FTE growth rate was 4.6%. This is higher than the total NZ FTE growth rate of 3.4%.

As an estimate of labour productivity, in 2022 GDP per FTE in the Media and Broadcasting sector was $185,219 GDP/FTE, higher than total New Zealand labour productivity of $148,629 GDP/FTE.

MEDIA & BROADCASTING SECTOR EMPLOYMENT



25,398

0.9% of total jobs in NZ

Filled jobs

$185,219

> $148,629 Total NZ

GDP/FTE

SKILLS & QUALIFICATIONS

Approximately 63% of Media and Broadcasting sector workers are employed in Highly Skilled Occupations, significantly higher than the proportion for all workers in New Zealand (38%).

The largest broad occupational group is 'Professionals', accounting for 14,033 jobs (55%) of all employment in the sector. This is a higher proportion than for the New Zealand workforce as whole, where Professionals make up 25% of the total.

Employers in the Media and Broadcasting sector ideally require people with a degree level qualification (63%), compared with 38% of the total New Zealand workforce.

Source: Infometrics Media and Broadcasting Sector Profile 2022
Note: Employment figure is comprised of primary employment only

REVENUE & PROFITABILITY

Measure: Proportion of organisations reporting increasing/static/decreasing revenue & profitability - Latest value: Not available
Measure: Advertising revenue - Latest value: $3,389m

Findings from both secondary research and stakeholder interviews indicate that many media organisations are experiencing declining or static revenue and saw profits decline in 2022. While there is revenue growth in some areas (including niche and specialist content providers or those with a strong business focus), even profitable businesses are experiencing difficult times, with unpredictable revenue and a pessimistic marketplace. A fall in advertising revenue (COVID and non-COVID related) has had a direct impact on profitability and is felt especially keenly by businesses with high and fixed overheads. Non-profits and businesses which are wholly or partially dependent on donations are finding it increasingly difficult to reach the critical mass needed to remain viable.

> Profitability has declined; we have high overheads and a high break-even point. A drop in revenue has a disproportionate impact on our bottom line. If revenue is $1 or $5 million, we still have to pay journalists the same.
> *(Commercial Media Business)*

> Newspaper business is essentially a break-even operation. We have had to diversify to make a profit.
> *(Local Media)*

> 10 years ago, our revenue was triple. Profits were 3 to 4 times what they are now.
> *(Commercial Media Business)*

Organisation	REVENUE		PROFIT/(LOSS)	
	2022	2021	2022	2021
RNZ	$50.7m	$50.0m	$(1.1m) ↓	$0.3m
TVNZ	$341.7m	$340.0m	$7.9m ↓	$59.2m
Māori TV	$42.1m	$38.5m	$(0.2m)	$(1.1m)
NZME	$365.9m	$365.6m	$22.7m ↓	$34.4m
Sky TV	$736.1m	$711.2m	$62.2m ↑	$44.1m

Source: Annual Reports 2022

$3.4B
Advertising revenue

The ASA Advertising Turnover 2022 Report states that advertising revenue across main media was $3,389m for the 12 months ended 31 December 2022, an increase of 6% compared with the previous year ($3,195m).

Source: ASA Advertising Turnover Report 2022

MARKET VALUE

Measure: Market capitalisation of publicly listed company: Sky – Latest value: $403m
Measure: Market capitalisation of publicly listed company: NZME – Latest value: $173m

As of October 11th, 2023, the market values of publicly listed media companies on the New Zealand market are:

- Sky - $402.787m (Last updated: 16/10/2023, 4:14 pm)
- NZME - $172.879m (Last updated: 16/10/2023, 3:46 pm)
- Warner Bros. Discovery - US$25,276m (Data retrieved: 16/10/2023, 4:33pm)

Note: There is no data available for the NZ share of Warner Bros. Discovery's market value.

sky	NZME.
NZ$403m	NZ$173m

Source: https://www.nzx.com/
https://www.nasdaq.com/

DIVERSITY OF REVENUE STREAMS

Measure: Proportion of organisations having more than one revenue stream

Latest value: Not available

Findings from both secondary research and stakeholder interviews indicate that many media organisations have more than one revenue stream.

Revenue streams and models vary by organisation and can include a single source of revenue or a mix of two or more. Revenue streams, in addition to the main ones listed below, include donations, advertising levies, sponsorships, commercial partnerships and contracts, philanthropists, Meta funding for podcasts and paid written content.

Diversification has included branching out across platforms and investing in non-media related businesses.

Organisation	REVENUE STREAMS
RNZ	Crown funding, others
TVNZ	Advertising (94%), programme funding, production facilities, programme sales, and multi-feed services
Māori Television Service	Crown funding, Te Mangai Paho Production funding, other production funding, and advertising
MediaWorks	Advertising
Warner Bros. Discovery	Advertising, distribution, and content
NZME	Advertising, circulation & subscription, external printing, and distribution
Sky TV	Subscriptions (90%), advertising, and installation
Scoop	Subscriptions, commercial-use licensing revenue, and member donations
Radio Samoa	Advertising
Kaniva Tonga	Grants (from i.e., MPP, Government) and advertising

Source: Annual reports 2022 and JMAD NZ Media Ownership Report 2022

BUSINESS CONFIDENCE

Measure: Business confidence = % optimistic and % pessimistic

Latest value: Not available

Feedback from stakeholders indicates that pockets of business optimism exist, including confidence and a belief in the resilience and steadfastness of the media sector. This is offset by pessimism at a micro (viability of the sector) and macro (economy, government, funding) level.

Many stakeholders interviewed for the baseline research expect that business will get worse and hope the Government will support the sector during this period of transition and disruption, to prevent widespread unemployment and to maintain a robust, diverse and democratic media sector.

Commercial media organisations with a niche or specialist focus (content or audience), who embrace technology and AI, and who pride themselves on the strength of their content, reporting and a loyal customer base, have most confidence in their business. Others have confidence in the strength and resilience of the media sector, which has proven itself to be nimble and creative in challenging and changing environments in the past. The immediate and long-term impacts of AI (such as Chat GPT) are still unknown, though there is optimism that if harnessed, used, and controlled well, AI has the potential to (help) sustain the media industry.

This optimism is offset by low business confidence among those who have grave concerns for the long-term viability of commercial media in New Zealand. Business pessimism is driven by concerns about equity in the media system, including loss of digital advertising expenditure to international platforms, journalists not being recognised or compensated for shared content they produce, and competition with 'citizen journalists' for revenue.

R&D AND INNOVATION

Measure: Proportion of media organisations having a stable/increasing expenditure on R&D – Latest value: Not available

Measure: Proportion of media organisations having adopted at least one new initiative re. product/service development, technology, etc. – Latest value: Not available

Stakeholders confirm that the media sector is (mostly) receptive to and quick to embrace new ideas and technology. Being nimble and keeping pace with change are critical to the sustainability and vibrancy of the sector. Most organisations acknowledge that R&D and innovation are necessary for businesses to remain relevant and viable.

However, low business confidence means some businesses are reluctant to over-commit or invest; at the same time, acknowledging that businesses who do not innovate and diversify are at risk.

Examples of R&D and Innovation are prevalent across the media sector, including using and developing new technology (and AI), business models and revenue streams, taking shared responsibility for workforce continuity, support, and training and inter-sector collaboration, partnerships and sharing resources.

Innovation is also seen in:

- Diversity of delivery and access to content through global, digital platforms.
- A move from linear consumption models to digital, streaming, podcasts, and social media.
- Using technology to track and improve engagement. Time and money have been invested in Websites and Apps to bring businesses into the digital age and to set them up for opportunities later.
- Use of AI to support content production. Also, input from 'citizen journalists' to generate and supplement content.
- Use of technology for search engine optimisation, data integration and content management systems.
- Improved visual presentation and appeal and marketing promotions.

SUSTAINABILITY COMMITMENTS

Measure: Proportion of media organisations having a formal sustainability programme/strategy - Latest value: Not available
Measure: Proportion of media organisations having made progress on the sustainability programme/strategy stated – Latest value: Not available

Stakeholders describe how Sustainability - in the broadest sense - is important and practiced across the media sector, though community and environmental sustainability commitments can be undermined by business and workforce sustainability in hard economic times (like now).

All organisations interviewed had developed formal (mandated KPIs and annual reporting) or informal strategies (initiatives and practices) to support business sustainability and financial responsibility (protecting 'assets' for future generations). Being sustainable also meant supporting the journalism profession, maintaining professional standards, supporting staff (and people) and wellbeing in the workplace, as well as community and environmental responsibilities.

Māori media organisations express concern about the sustainability of maintaining and increasing Te Tiriti o Waitangi capability, the use of te reo Māori and balanced Māori content, by Māori for Māori, if funding is withdrawn.

Organisation	Sustainability commitments	Key themes/pillars	Progress made
RNZ	✓	People, Planet, Profit	✓
TVNZ	✓	Green, Representative and Responsible Broadcasting	✓
NZME	✓	Communities, People and Environment	✓
Sky TV	✓	Sustainability and Sky for Good	✓

Source: Annual reports 2022

Note: Sustainability Commitments meaning 'commitment to and participation in sustainable practices for the wellbeing of the organization's people, the wider community and/or the environment'.

WORKFORCE CONTINUITY

Measure: Proportion of media organisations involved in a (cadetship) training programme/initiative – Latest value: Not available

Measure: Number of journalism training opportunities/initiatives (course, training programme, funding) – Latest value: Not available

Stakeholders confirm that the media sector is facing workforce challenges.

Many businesses are finding it difficult to attract and retain staff and have implemented improved working conditions, with flexible and reduced hours, to help to address this.

The size and diversity of the pipeline are both of major concern and are seen as a shared responsibility at a sector level (for conditions, protections, support, on the job experience), with government (for funding) and Career Associations (for education and learning) to attract and retain talent.

A more optimistic perspective is that there is still a good pool of talent available and the capacity to recruit people offshore.

WORKFORCE CONTINUITY CHALLENGES

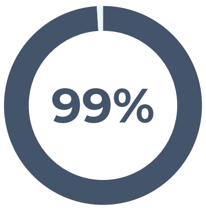
- The pipeline of young people choosing journalism as a profession is decreasing
- Many journalism graduates choose other professions
- There are fewer local journalists
- Journalism is seen as harsh and new staff need support to hone their skills and to thrive in a fast paced and stressful environment
- Long term funding is considered unsure, detailed planning is lacking and there is little, if any, targeted funding for wider ethnic groups (Pan Asian/Chinese), disabled people or rainbow communities
- The range of journalism training opportunities has reduced
- If current attrition rates continue, it is thought that this will have negative long-term implications for the professionalism of the sector and the quality of work published

AUDIENCE ENGAGEMENT

Measure: Proportion of population engaged in any form of media in past 7 days - Latest value: 99%
Measure: Proportion of population having read/watched/listened to any news on TV, in print, online or on the radio – Latest value: 93%

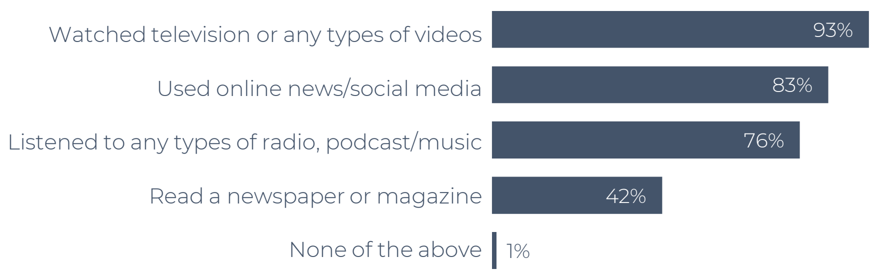
Almost all New Zealanders have engaged with (at least one form of) media for news and/or entertainment in the past 7 days.

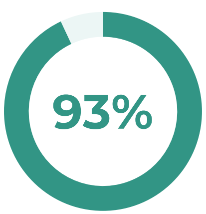
More than 9 in 10 have engaged with news at least once in the last week and almost 70% do so at least once a day.



of New Zealanders surveyed have engaged with (at least one form of) media for news and/or entertainment in the past 7 days

Media engagement activities





of New Zealanders surveyed read/watch/listen to news at least once a week

MEDIA & NEWS ENGAGEMENT BY DEMOGRAPHICS

- Those aged 18-39 years are less likely to watch TV/videos (88%) or to read newspapers or magazines (31%), while those aged 60+ years are more likely to do so (97% and 57% respectively).
- Those aged 30-49 years are more likely to use online news/social media compared with other age groups.
- Those aged 70+ years are less likely to use online news/social media (69%) or to listen to radio/podcasts (69%)
- European New Zealanders are more likely to watch TV/video (95%), while Māori, Pacific and Asian New Zealanders are less likely to do so (90%, 87% and 89% respectively)
- Asian New Zealanders are more likely to use online news/social media compared with other ethnic groups.
- Pacific Peoples are less likely to read newspapers/magazines (33%).
- Those aged 50+ years are more avid news consumers when compared with other age groups, with 59% reading/watching/listening to news more than once a day.
- Young people aged 18-29 years are more likely to 'never' access any news (5%) or access news less often than once a week (9%).
- European New Zealanders are more avid news consumers than people in other ethnic groups, with 46% reading/watching/listening to news more than once a day, compared with 40% of all New Zealanders.

HOW OFTEN DO YOU READ, WATCH, OR LISTEN TO ANY NEWS?

More than once a day	40%
Once a day	29%
4-6 times a week	12%
2-3 times a week	8%
Once a week	4%
Less than once week	5%
Never	3%

Source: Media Consumption Survey

AUDIENCE WILLINGNESS TO PAY FOR NEWS

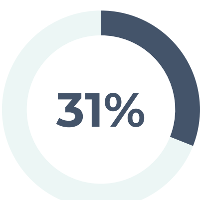
Measure: Proportion of population having paid for news services in the past 12 months - Latest value: 31%
Measure: Proportion of population willing to pay for news content or news service that they value – Latest value: 31%

3 in 10 New Zealanders have paid for one or more news services in the last 12 months.

A similar proportion (31%) are willing to pay for news they value, while a larger proportion say they are not at all willing (36%) to pay for news services.

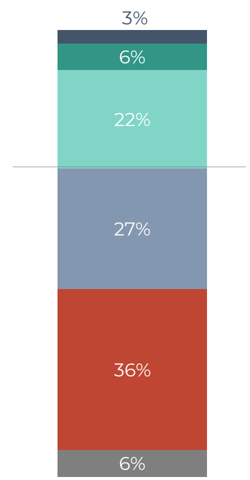
WHICH OF THE FOLLOWING HAVE YOU DONE IN THE LAST 12 MONTHS?

Paid for print-only newspaper/magazine subscription	15%
Paid for digital and print newspaper/magazine subscription	9%
Paid for digital-only newspaper/magazine subscription	9%
Made one-off payment for an article or app or e-edition	5%
Made one-off donation to a media organisation	4%
None of these	69%



of New Zealanders surveyed have engaged with paid news services in the 12 months

HOW WILLING ARE YOU TO PAY FOR NEWS CONTENT OR A NEWS SERVICE THAT YOU VALUE?



31%

of New Zealanders surveyed are willing to pay for news services they value

Extremely willing
Very willing
Somewhat willing
Not very willing
Not at all willing
Don't know

PAID NEWS ACTIVITIES & WILLINGNESS TO PAY FOR NEWS BY DEMOGRAPHICS

- European New Zealanders and Pacific Peoples are *more likely* to have not made any form of payment for news services and they are also *less likely* to be extremely willing to pay for news services.
- Māori are *more likely* to have paid for digital-only newspaper/magazine subscriptions on news websites and apps; they are also *more likely* to be extremely willing to pay for news services.
- Asian New Zealanders are *more likely* to have paid for digital and print, or digital-only newspaper/magazine subscriptions on news websites and apps; they are also *less likely* to be not at all willing to pay for news services
- Young people aged 18-29 years are *more likely* to be willing to pay for news services compared with other age groups.

Source: Media Consumption Survey

OUTCOME PILLAR 2

TRUST

AUDIENCE TRUST IN MEDIA

Measure: Proportion of population agreeing that 'news reporting is trustworthy' - Latest value: 57%
Measure: Number of news/information sources trusted by more than half of the population – Latest value: 8 out of 15
Measure: Proportion of population agreeing that 'news reporting is fair and balanced' - Latest value: 48%
Measure: Proportion of population agreeing that 'media organisations are trustworthy' – Latest value: 43%

Just over half of New Zealanders agree that 'news reporting is trustworthy' (57%). The level of agreement drops for 'news reporting is fair and balanced' with 48% agreeing. A smaller proportion again agree that 'media organisations are trustworthy' (43% agree).

A significant minority of New Zealanders (21-26%) disagree that news reporting is trustworthy, that it is fair and balanced, and/or that media organisations are trustworthy.

News source	% of population considering news source trustworthy
Radio	59%
Commercial FTA TV	55%
NZ news websites/apps	55%
Publicly-owned FTA OD TV	54%
Community/local print newspapers	53%
Publicly-owned FTA TV	52%
Daily print newspapers	51%
Commercial FTA OD TV	51%

TRUST BY DEMOGRAPHICS

- Those aged 18-29 years are less likely to trust the fairness and balance of news reporting (38%) and media organisations (37%), compared with other age groups.
- Asian New Zealanders are more likely to trust news reporting (67%), its fairness and balance (59%) and media organisations (57%), compared with other ethnic groups.
- While radio is the most trusted news source for most age groups, TV (publicly-owned FTA OD and commercial FTA) is the most trusted source for those aged 18-29 years.
- The most trusted source of news varies by ethnicity. While for European and Pacific Peoples, it is more likely to be radio, it is more likely to be publicly-owned FTA TV for Māori and NZ news websites/apps for Asian New Zealanders.
- Social media is the least trusted news source for all age and ethnicity groups.
- Accuracy ('It gets the facts right') and balance ('It presents a balanced view') are the most important elements which make a news source trustworthy - this view is shared among all age and ethnicity groups.
- Compared with other ethnic groups, Māori and Pacific Peoples are more likely to say that seeing their community and people like them in the reporting and the use of visuals (photos, video, etc.) make a news source trustworthy.

8 out of 15
of the main news sources are trusted by more than half of the population

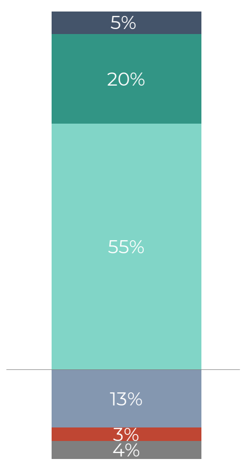
MEDIA LITERACY

Measure: Proportion of population feeling confident in deciding if the information they see/read online is true or false - Latest value: 80%
Measure: Proportion of population 'extremely/very concerned' about disinformation – the media issue most concerned about amongst those listed – Latest value: 54%
Measure: Proportion of population feeling exposed to 'a lot' of media algorithms - the media issue most exposed to amongst those listed - Latest value: 25%

4 in 5 New Zealanders say they are confident deciding if the information they see or read is true or false.

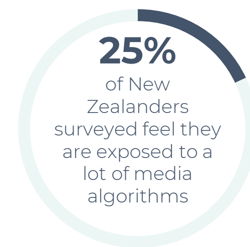
Around half are extremely/very concerned about media-related issues i.e., disinformation, misinformation, harmful content, media algorithms and AI-generated content, but smaller proportions feel they have been exposed to these a lot (between 12 and 25%, depending on the issue).

HOW CONFIDENT DO YOU FEEL IN DECIDING IF THE INFORMATION YOU SEE/READ ONLINE IS TRUE OF FALSE?



80%

of New Zealanders surveyed feel confident in deciding if the information is true or false



ISSUE	CONCERN		PERCEIVED EXPOSURE		
	Extremely/Very concerned	Not at all/Not very concerned	A lot	A little	Not at all
Disinformation	54%	10%	19%	50%	14%
Misinformation	53%	11%	19%	50%	16%
Harmful content	53%	15%	12%	40%	34%
AI-generated content	50%	12%	14%	39%	18%
Media algorithms	48%	13%	25%	38%	16%

MEDIA LITERACY BY DEMOGRAPHICS

- Younger audiences are more likely to be confident than older audiences when deciding if information is true or false. Those aged 30-39 are more likely to be 'extremely confident', while those aged 60+ years are less likely to be 'very confident'.
- Māori are more likely to be 'extremely confident' compared with other ethnic groups.
- While 'disinformation' is the issue of most concern for most age groups, 'harmful content' is also among the top 2 for those aged 30-39 and 50-59. For those aged 60+, the issue of most concern is AI generated content.
- While Māori are most concerned about 'misinformation', the top concern for Pacific and Asian New Zealanders is 'harmful content'.

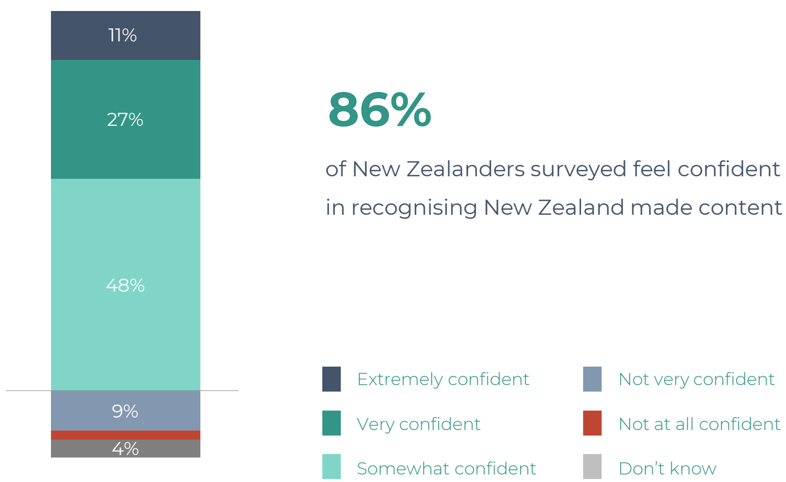
AUDIENCE PREFERENCE FOR NEW ZEALAND MADE CONTENT

Measure: Proportion of population feeling confident in recognising NZ made content - Latest value: 86%
Measure: Proportion of population always choosing NZ made content – Latest value: 19%

The majority of New Zealanders are confident they can recognise New Zealand made content.

2 in 5 prefer New Zealand made content over internationally made content (they always or sometimes choose it), and of this group, around half always choose New Zealand made content (19% of the population in total).

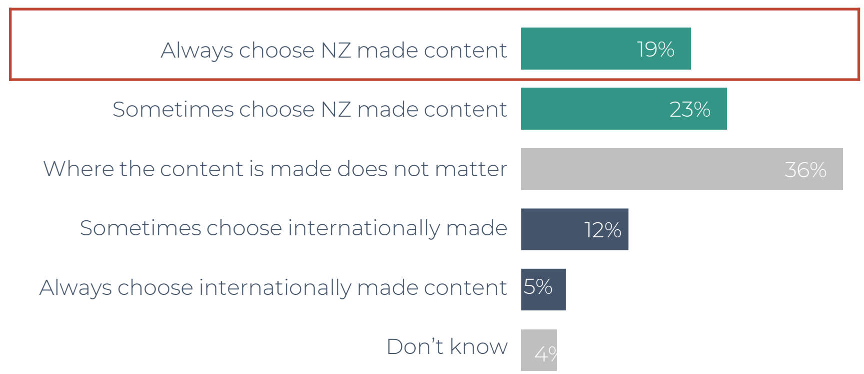
HOW CONFIDENT ARE YOU IN RECOGNISING NEW ZEALAND MADE CONTENT?



86%

of New Zealanders surveyed feel confident in recognising New Zealand made content

PREFERENCE FOR NEW ZEALAND MADE CONTENT



MEDIA PREFERENCE BY DEMOGRAPHICS

- Those aged 70+ are less likely to be extremely confident in recognising NZ made content.
- While Māori are more likely to feel 'extremely confident' that they recognise NZ made content (19%), Asian New Zealanders are less likely to be so (6%).
- While Māori are more likely to 'always choose NZ made content', Asian New Zealanders are less likely to do so.
- Those aged 30-39 are more likely to 'sometimes choose NZ made content', while those aged 60-69 are less likely to do so.

angus & ASSOCIATES

Source: Media Consumption Survey

PERFORMANCE OF MEDIA REGULATORY SYSTEM

Measure: Proportion of media organisations rating the performance of media regulatory system as average or above – Latest value: Not available
Measure: Proportion of audience rating the performance of media regulatory system as average or above – Latest value: Not available

There are multiple bodies regulating broadcast content in New Zealand, underpinned by media organisations' own ethics, professional standards and codes of conduct. Of concern to professional media organisations are content producers and sharers who operate outside of the 'mainstream', as they are not governed by regulatory regimes and their unprofessional 'practices' can mislead and impact on trust.

Impending reforms in the regulatory space - a centralised regime, to protect New Zealanders from harm, and uphold New Zealanders' rights to freedom of expression, that preserves the freedom of the press, and is consistent with Te Tiriti o Waitangi principles - are welcomed by media organisations, as the current system and Broadcasting Act is seen as outdated.

Reforms are especially welcomed by Māori Media organisations who feel there is little to support and recognise Māori in the current legislation or regulatory frameworks, which have been developed to reflect a traditional Pakeha legal and societal context.

JOURNALISTIC PROFESSIONAL STANDARDS & PROTECTION

Measure: Existence of journalism professional standards - Latest value: Not available

Measure: Proportion of journalists feeling concerned about their safety/wellbeing – Latest value: 46%

There is no sector specific or professional body representing (or protecting) journalists and nothing to distinguish 'qualified' from 'citizen' journalists. There is no code of ethics, standards or code of conduct at a sector level and audiences have no way of distinguishing journalism from opinion.

Journalists can join the E-Tu Union, which represents commercial printers, journalists, and broadcasters, where all members must observe the Journalist Code of Ethics in their professional activities.

Professional journalists abide by their own (and/or their employers') ethics and professional standards to provide high quality, accurate and balanced content. While full time employees are protected by their employers, freelancers have fewer protections and must rely even more on their personal ethics, professional standards, and partnership relationships with media organisations.

Some in the sector are advocating for the establishment of 'professional standards', to verify content from professional and authentic sources. Others counter by claiming this may undermine the independence of the sector and freedom of speech.

46%

of journalists surveyed felt concerned about their physical and emotional wellbeing*

*Source: Worlds of Journalism Study 2.0. Journalists in Aotearoa/ New Zealand

CAPABILITY & COMMITMENT WITH RESPECT TO TE TIRITI O WAITANGI

Measure: Proportion of media organisations making progress in demonstrating capability and commitment with respect to Te Tiriti o Waitangi – Latest value: Not available

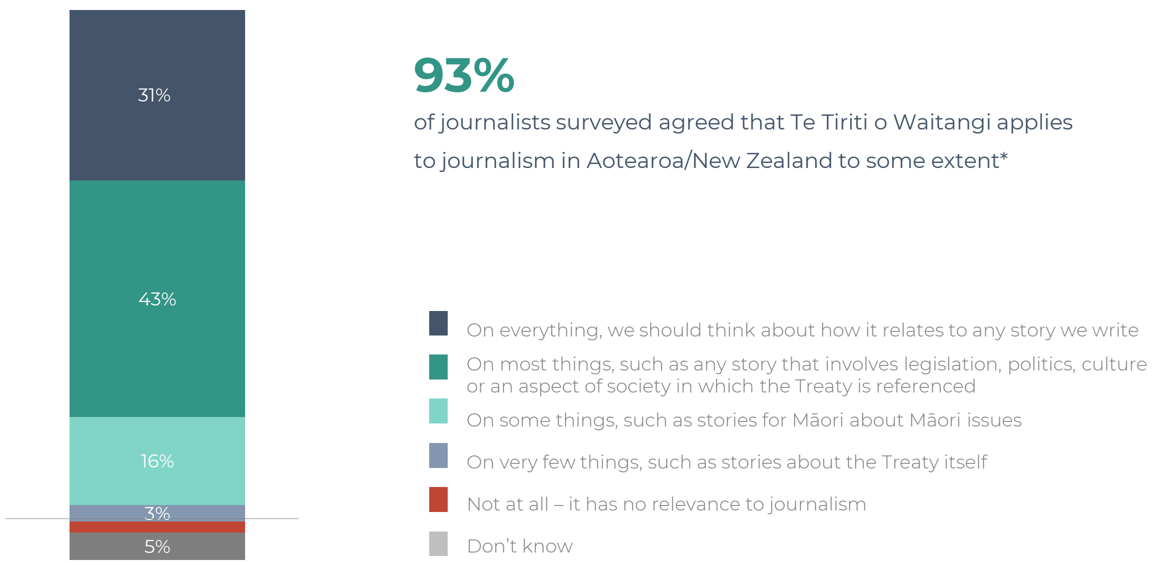
Measure: Proportion of journalists agreeing that Te Tiriti o Waitangi applies to journalism in Aotearoa/New Zealand to some extent – Latest value: 93%

Stakeholders believe that progress is apparent, but that there is still work to do for the sector to consistently (and respectfully) demonstrate capability and commitment with respect to Te Tiriti o Waitangi.

There is widespread recognition and belief that capability with respect to Te Tiriti is essential, and that this will, over time, become embedded and enshrined in how all New Zealand media businesses operate. Some businesses claim Te Tiriti principles are mandated and embedded into how they work. Public Media and Regulatory and Funding organisations are governed by legislation and have clear mandates relating to the articles of Te Tiriti and incorporate them into their organisation's practices and operations.

Secondary research identifies that, while the majority of journalists agree that Te Tiriti o Waitangi applies to journalism in Aotearoa/New Zealand, only 31% agree that "we should think about how it relates to any story we write."

TO WHAT EXTENT DOES TE TIRITI O WAITANGI APPLY TO JOURNALISM IN AOTEAROA/NEW ZEALAND?



*Source: Worlds of Journalism Study 2.0. Journalists in Aotearoa/ New Zealand

ORGANISATIONS RECEIVING SUPPORT FOR PUBLIC INTEREST JOURNALISM

Measure: Number of media and broadcasting organisations receiving support for public interest journalism (funded by various sources i.e., private sector, Government, philanthropy)
Latest value: Not available

Serving the public interest is key to a trusted media system. There are many initiatives worldwide that focus on facilitating media and broadcasting for public interest, i.e., the International Fund for Public Interest Media[1] (partnership between government, philanthropic, and corporate actors collectively), Australia's Public Interest Journalism Initiative[2] (philanthropically funded), the UK's Public Interest News Foundation[3] (a registered Charity) and the BBC UK's Local Democracy Reporting Service [4]. In the New Zealand context, Crown Entities like NZ On Air and Radio New Zealand have historically provided contestable funding. Most recently in response to the economic impact of the Covid pandemic, there were two temporary schemes to support public interest reporting, the Public Interest Journalism Fund and the Local Democracy Reporting Scheme (the LDRS was modelled on the BBC example).

The Media stakeholders interviewed mentioned the importance of government agency initiatives as well as other (contestable) investment / funding available from non-government organisations or the private sector.

Stakeholders are largely welcoming and supportive of funding and investment for media and broadcasting representing the public interest. Many regard it as essential to support democracy and equitable access to news across New Zealand. Media stakeholders say the most recent schemes provided vital income, off-set costs, allowed for the expansion and retention of reporting teams, and supported local democracy coverage. Funding is also thought to have increased cultural competency in the sector, by raising awareness and funding staffing appointments and training. There is optimism for initiatives such as the Te Rito Cadetships which have reflected community needs and diversity.

An example of an initiative funded by the private sector and accessed by New Zealand media stakeholders is Google's News Equity Fund, a global commitment to provide financial support and opportunities to news organisations that primarily serve underrepresented communities. Their aim is to strengthen inclusion, further empower a diverse news ecosystem, and specifically support small and medium sized publishers creating original journalism for underrepresented audiences around the world.

[1] https://ifpim.org/
[2] https://piji.com.au/
[3] https://www.publicinterestnews.org.uk/
[4] https://www.bbc.com/lnp/ldrs

OUTCOME PILLAR 3

DIVERSITY

DIVERSITY OF OWNERSHIP & LEADERSHIP

Measure: Number of ownership categories currently active - Latest value: 4
Measure: Proportion of females in management roles – Latest value: 58%

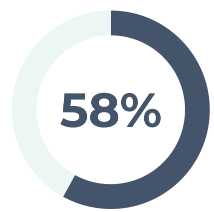
Findings from the JMAD NZ Media Ownership Report 2022 show that 'the general makeup of media ownership in Aotearoa New Zealand remains unchanged' with four types of active ownership categories - crown-owned, independently owned, private equity owned, and shareholder owned.

4
categories of ownership

CATEGORY	EXAMPLE
Crown-owned	RNZ, TVNZ, Māori Television Service
Independently owned	Allied Press, Asia Pacific Report, Crux, National Business Review, Newsroom, Scoop, Stuff, The Spinoff
Private equity owned	MediaWorks
Shareholder owned	Warners Bros. Discovery, NZME, Sky TV, Spark Sport

Source: JMAD NZ Media Ownership Report 2022

The Worlds of Journalism Study 2.0. Journalists in Aotearoa/New Zealand report shows that females are well represented at all levels in journalism, including management roles. Females account for more than half of the middle and top management roles.



of management roles in journalism are occupied by females

Source: Worlds of Journalism Study 2.0. Journalists in Aotearoa/ New Zealand (based on 'middle' and 'top' management roles)

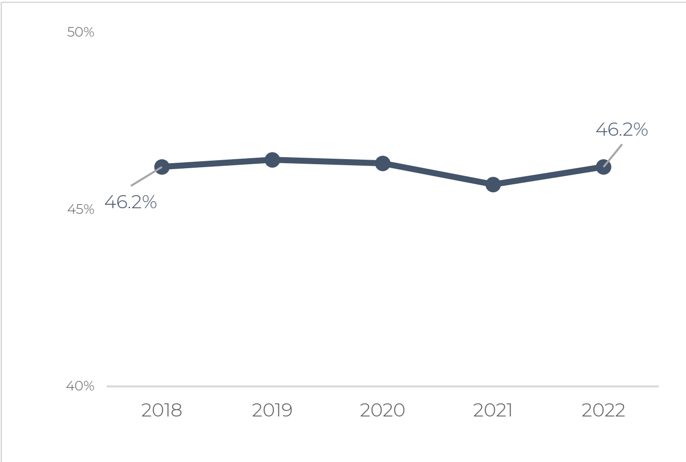
DIVERSITY OF WORKFORCE

Measure: Proportion of females in workforce – Latest value: 46%
Measure: Proportion of Māori/Pasifika/Asian workforce – Latest value: 11%/5%/12%

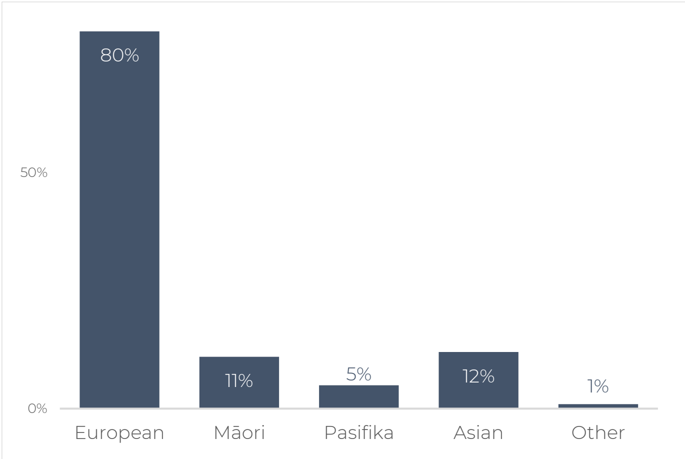
The proportion of females in employment in the Media and Broadcasting sector was 46% in 2022.

The latest data on ethnicity of workers in the Media and Broadcasting sector (dated 2018) shows that the majority are of European ethnicity while Māori, Asian and Pacific Peoples make up 11%, 12% and 5% of workers, respectively.

MEDIA & BROADCASTING SECTOR - PROPORTION OF FEMALES IN EMPLOYMENT (2022)



MEDIA & BROADCASTING SECTOR – EMPLOYMENT BY ETHNICITY (2018)



Source: Infometrics Media and Broadcasting Sector Profile 2022

SOURCE DIVERSITY

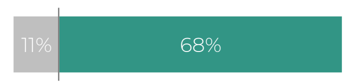
Measure: Proportion of media organisations delivering content via multiple channels and/or platforms - Latest value: Not available

Measure: Proportion of population agreeing they have sufficient choice of news sources to inform them about their local community/about other ethnic or community groups – Latest value: 68%/58%

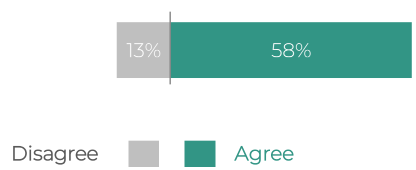
Most media organisations interviewed reported that they deliver content via multiple channels and/or platforms, to keep pace with audience demand and to survive in a fast-changing and increasingly competitive environment.

From an audience perspective, two thirds of New Zealanders agree that 'they have sufficient choice of news sources to inform themselves about their local community'.

I have sufficient choice of news sources to inform myself about my local community



I have sufficient choice of news sources to inform myself about other ethnic or community groups



Older audiences (those aged 60+) are more likely to agree that they have sufficient news sources to inform themselves about their local community.

There is no statistically significant difference by ethnicity.

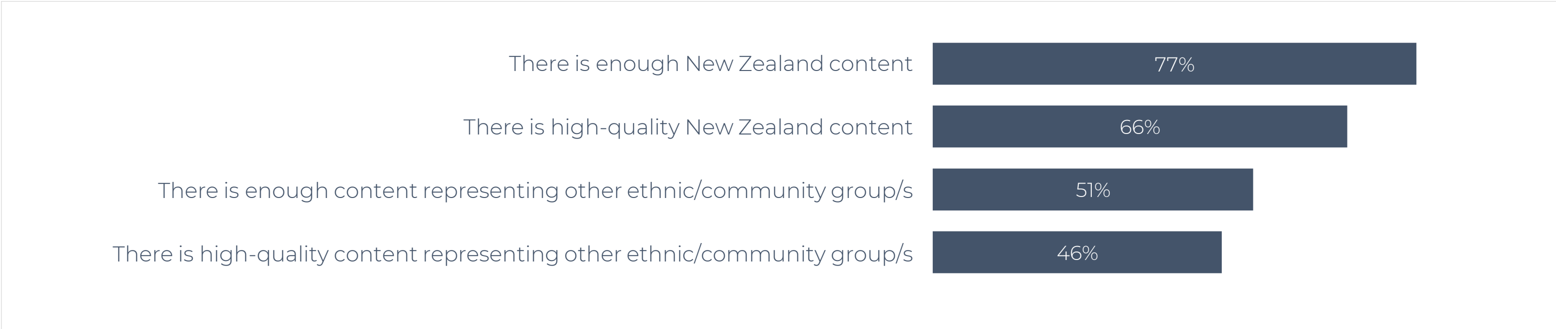
Source: Media Consumption Survey

CONTENT DIVERSITY

Measure: Proportion of media organisations producing multiple of types content – Latest value: Not available
Measure: Proportion of population agreeing that 'there's enough NZ content/content representing other ethnic/community group/s available to me' – Latest value: 77%/51%
Measure: Proportion of population agreeing that 'there's high-quality NZ content/content representing other ethnic/community group/s available to me' – Latest value: 66%/46%

Findings from secondary research show that many media organisations produce multiple types of content.

From an audience perspective, over three quarters of New Zealanders agree that 'there is enough New Zealand content available'. A smaller proportion (66%) agree that there is enough high-quality New Zealand content available.



Younger audiences (those aged 18-29) are less likely to agree that there is enough NZ content, and that there is enough high-quality NZ content.
There is no statistically significant difference by ethnicity.

Source: Media Consumption Survey

CONSUMPTION DIVERSITY

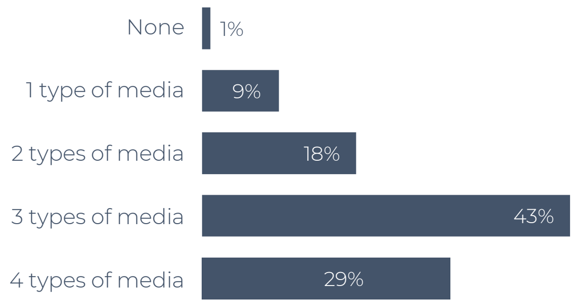
Measure: Proportion of population engaged with multiple types of media for news and/or entertainment in the past 7 days - Latest value: 91%

Measure: Proportion of population having used multiple sources to find or access news– Latest value: 80%

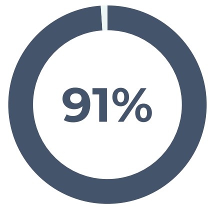
91% of New Zealanders have engaged with multiple types of media in the past seven days.

4 in 5 have used multiple sources (channels/platforms) to find and access news and the majority have followed multiple types of news content.

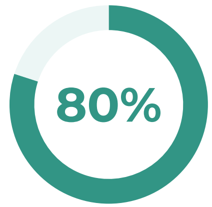
PAST 7 DAYS
PROPORTION OF NEW ZEALANDERS WHO CONSUMED...



Number of channels/ platforms used (past 7 days)	Visual content	Audio content	Print content	Social media/ Search engine
0	8%	24%	58%	19%
1	7%	28%	10%	24%
2	14%	19%	11%	22%
3	19%	13%	12%	16%
4	17%	7%	5%	9%
5+	35%	8%	4%	9%
Multiple (>1)	85%	48%	32%	57%



of New Zealanders surveyed have engaged with multiple types of media for news and/or entertainment in the past 7 days



of New Zealanders surveyed have used multiple sources to find or access news

Number of news sources used	%
0	3%
1	17%
2	19%
3	18%
4	15%
5+	27%
Multiple (>1)	80%

Number of types of news content followed	%
0	3%
1	11%
2	11%
3	14%
4	13%
5+	48%
Multiple (>1)	86%

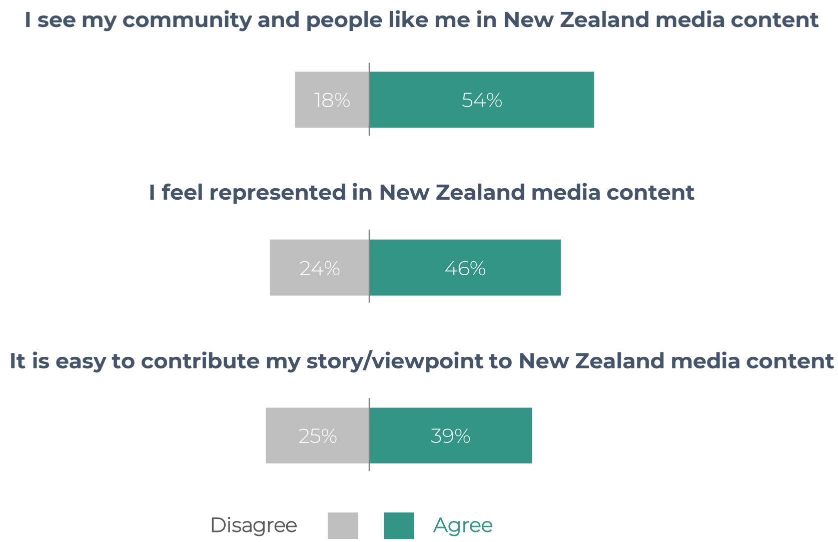
Source: Media Consumption Survey

SOCIAL INCLUSION

Measure: Proportion of population seeing their community and people like themselves in NZ media content - Latest value: 54%
Measure: Proportion of population feeling represented in NZ media content – Latest value: 46%
Measure: Proportion of population finding it easy to contribute their story/viewpoint to NZ media content – Latest value: 39%

More than half of New Zealanders (54%) agree that 'they see their community and people like them in New Zealand media content'.

The level of agreement is slightly lower (46%) when it comes to feeling represented in New Zealand media content, and only 39% agree that it is easy to contribute their story/viewpoint to New Zealand media content.



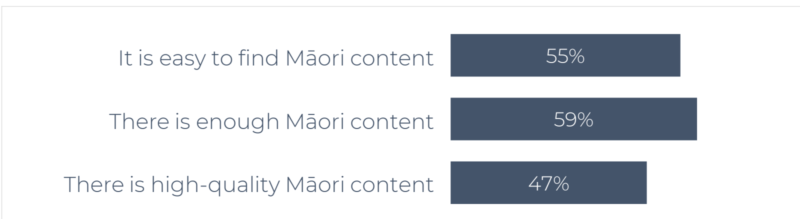
Asian New Zealanders are more likely to find it easy to contribute their story/viewpoint to New Zealand media content.

Source: Media Consumption Survey

VISIBILITY OF TE AO MĀORI AND USE OF TE REO MĀORI IN DELIVERY OF CONTENT

Measure: Value of Māori content production (NZ On Air, TMP and NZFC funding) – Latest value: $28.4m
Measure: Proportion of organisations reporting static/increase of visibility of te ao Māori in their delivery of content – Latest value: Not available
Measure: Proportion of organisations reporting static/increase of use of te reo Māori in their delivery of content – Latest value: Not available
Measure: Proportion of population agreeing that 'it's easy to find Māori content' – Latest value: 55%
Measure: Proportion of population agreeing that 'there's enough Māori content available' – Latest value: 59%
Measure: Proportion of population agreeing that 'there's high-quality Māori content available' – Latest value: 47%

More than half of New Zealanders agree that it is easy to find Māori content and that there is enough Māori content available. A slightly lower proportion (47%) agree that there is high-quality Māori content available.



Māori are more likely to agree that 'it's easy to find Māori content'

Source: Media Consumption Survey

NZ On Air, TMP and the NZFC collectively distribute approximately $28.4m to Māori film and TV productions annually.

$28.4m
was distributed to Māori film and TV productions annually*

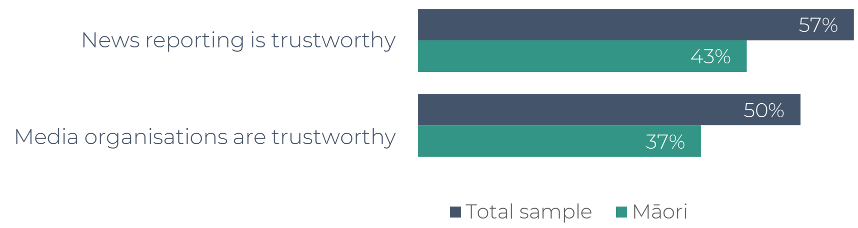
*Source: NZ On Air Māori Content Review and Funding Analysis (2015-2020)

MĀORI AUDIENCE SNAPSHOT

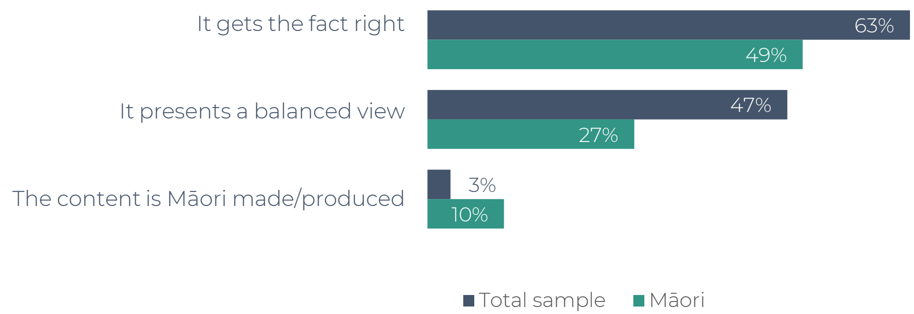
MĀORI AUDIENCE SNAPSHOT – TRUST IN MEDIA

Relative to the overall sample, Māori are less likely to trust international news sources.

Overall sentiment towards news reporting is somewhat more negative for Māori than for the overall sample. Māori are less likely to consider news reporting to be trustworthy, and less likely to view media organisations as a whole as trustworthy.

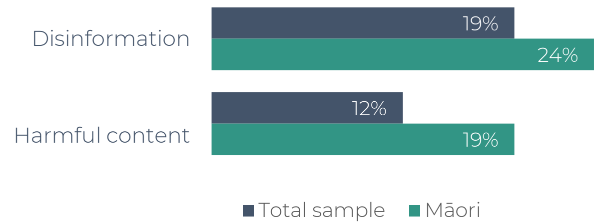


When considering the factors that contribute to trust in media, Māori are less likely to prioritise whether or not the source gets the facts right, or presents a balanced view, and more likely than the overall sample to prioritise whether the content is Māori made.

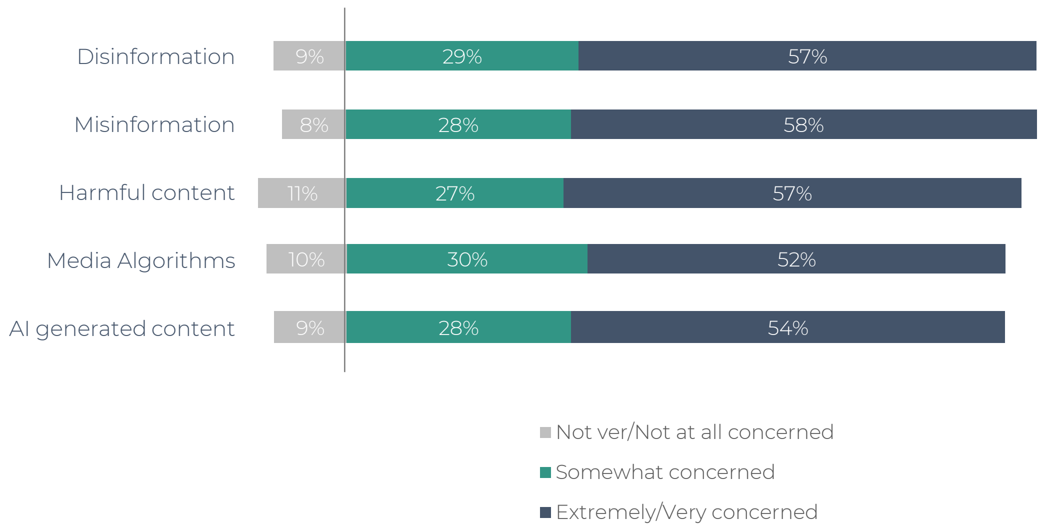


MĀORI AUDIENCE SNAPSHOT – MEDIA LITERACY

Relative to the overall sample, Māori are more likely to consider that they have been exposed to 'a lot' of disinformation and harmful content.

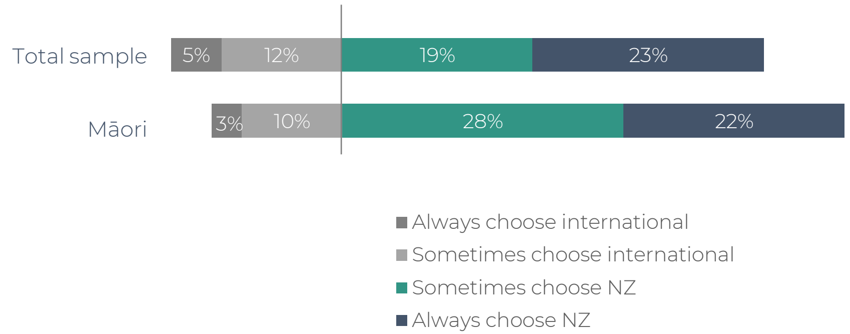


Māori report high levels of concern about harmful content, dis/misinformation, algorithms and AI content.



MĀORI AUDIENCE SNAPSHOT
– PREFERENCE FOR NEW ZEALAND MADE CONTENT

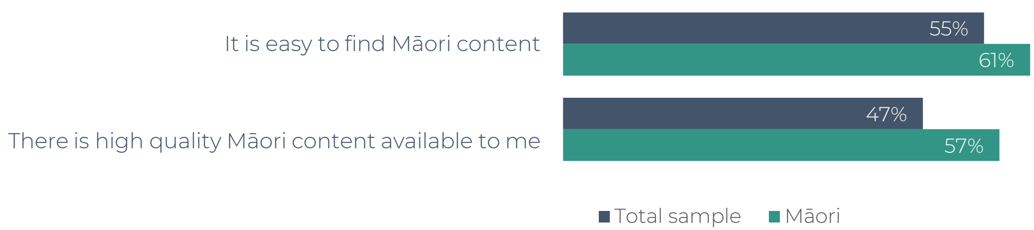
Māori are more likely to express a preference for New Zealand-made content over internationally-produced content.



2. TRUST

– VISIBILITY OF TE AO MĀORI AND USE OF TE REO MĀORI IN DELIVERY OF CONTENT

Māori are more likely to agree that it is easy to find Māori content, and that this is of sufficient quality compared with the total sample.



3. DIVERSITY

APPENDIX

APPENDIX – INDICATORS' DEFINITION/MEASURE & DATA SOURCES

Indicator	Definition/Measure	Data Source
Contribution to GDP	Value that Media and Broadcasting sector contributes to GDP in NZ	Infometrics Media & Broadcasting Sector Profile
Contribution to Employment	Number of jobs filled	Infometrics Media & Broadcasting Sector Profile
Revenue & Profitability	% of organisations reporting increasing/static/decreasing revenue & profitability	Media organisations' annual reports where available
	Advertising revenue	ASA Advertising Turnover Report
Market Value	Market capitalisation of NZ publicly listed media companies	nzx.com
Diversity of Revenue Streams	% of organisations having more than one revenue stream	Media organisations' annual reports where available
Business Confidence	Business confidence = % optimistic - % pessimistic	Stakeholder Interviews
R&D and Innovation	% of media organisations with stable/increasing expenditure on R&D	Stakeholder Interviews
	% of media organisations having adopted at least one new initiative re. product/service development, technology, etc.	
Sustainability Commitments[1]	% of media organisations which have a formal sustainability program/strategy[2]	Media organisations' annual reports where available
	% of media organisations that have made progress on the sustainability program/strategy stated	
Workforce Continuity	% of media organisations involved in a (cadetship) training program/initiative	Stakeholder Interviews
	Number of journalism training opportunities/initiatives (course, training program, funding)	
Audience Engagement	% of population engaged in any form of media in past 7 days	Media Consumption Survey
	% of population having access to news[3]	
Audience Willingness to Pay for News	% of population having paid for news in past 12 months	Media Consumption Survey
	% of population willing to pay for news content/service they value	

[1] Sustainability Commitments meaning 'commitment to and participation in sustainable practices for the wellbeing of the organization's people, the wider community and/or the environment'.
[2] Examples of sustainability program/strategy can be found in some media organisations' annual reports such as TVNZ, NZME, RNZ and Sky.
[3] Having access to news meaning 'having read/watched/listened to any news on TV, in print, online or on the radio'.

APPENDIX – INDICATORS' DEFINITION/MEASURE & DATA SOURCES (CONT.)

Indicator	Definition/Measure	Data Source
Audience Trust in Media	% of population agreeing that 'news reporting is trustworthy'	Media Consumption Survey
	Number of news/information sources trusted by more than half of the population	
	% of population agreeing that 'news reporting is fair and balanced'	
	% of population agreeing that 'media organisations are trustworthy'	
Media Literacy[1]	% of population confident in deciding if the information they see/read online is true or false	Media Consumption Survey
	% of population 'extremely/very concerned' about disinformation[2]	
	% of population feeling exposed to 'a lot' of media algorithms[3]	
Audience Preference for New Zealand made content	% of population feeling confident in recognising NZ made content	Media Consumption Survey
	% of population 'always' choosing NZ made content	
Performance of Media Regulatory System	% of media organisations rating the performance of media regulatory system as average or above	Stakeholder Interviews
	% of audience rating the performance of media regulatory system as average or above	
Journalistic Professional Standards and Protection	Existence of journalism professional standards	Stakeholder Interviews
	% of journalists feeling concerned about their safety/wellbeing	Worlds of Journalism Study 2.0. Journalists in Aotearoa/ NZ
Capability and Commitment with respect to Te Tiriti o Waitangi	% of media organisations making progress in demonstrating capability and commitment with respect to Te Tiriti o Waitangi	Stakeholder Interviews
	% of journalists agreeing that Te Tiriti o Waitangi applies to journalism in Aotearoa/New Zealand to some extent	Worlds of Journalism Study 2.0. Journalists in Aotearoa/ NZ
Organisations Receiving Support for Public Interest Journalism	Number of media and broadcasting organisations receiving support for public interest journalism (funded by various sources i.e., private sector, Government, philanthropy)	Stakeholder Interviews

[1] Media Literacy meaning 'the ability to critically analyse stories presented in the mass media and to determine their accuracy or credibility'.

[2] As part of the Media Consumption Survey, the media issues listed included disinformation, misinformation, media algorithms and AI generated content and the question asked about how concerned the audience is about each issue; the issue most concerning is the subject of this measure ('disinformation' for the baseline measure).

[3] As part of the Media Consumption Survey, the media issues listed included disinformation, misinformation, media algorithms and AI generated content and the question asked about how much the audience feels exposed to each issue; the issue to which the audience feels most exposed is the subject of this measure ('media algorithms' for the baseline measure).

APPENDIX – INDICATORS' DEFINITION/MEASURE & DATA SOURCES (CONT.)

Indicator	Definition/Measure	Data Source
Diversity of Ownership & Leadership	Number of ownership categories	JMAD Aotearoa New Zealand Media Ownership 2022 Report
	% of female in management role	Worlds of Journalism Study 2.0. Journalists in Aotearoa/ NZ
Diversity of Workforce	% of female in workforce	Infometrics Media & Broadcasting Sector Profile
	% of Māori/Pasifika/Asian workforce	
Source Diversity	% of media organisations delivering content via multiple channels and/or platforms	Stakeholder Interviews
	% of population agreeing they have sufficient choice of news sources to inform on their local community/about other ethnic/community groups	Media Consumption Survey
Content Diversity	% of media organisations producing multiple of types content	Stakeholder Interviews
	% of population agreeing that 'there's enough NZ content/content representing other ethnic/community groups available'	Media Consumption Survey
	% of population agreeing that 'there's high-quality NZ content/content representing other ethnic/community groups available'	
Consumption Diversity	% of population engaged with multiple types of media for news and/or entertainment in the past 7 days	Media Consumption Survey
	% of population having used multiple sources to find or access news	
Social Inclusion	% of population seeing their community and people like themselves in NZ media content	Media Consumption Survey
	% of population feeling represented in NZ media content	
	% of population finding it easy to contribute their story/viewpoint to NZ media content	
Visibility of te ao Māori and use of te reo Māori in delivery of content	Value of Māori content production (Public funding)	NZ On Air Māori Content Review and Funding Analysis (2015-2020)
	% of organisations reporting static/increase of visibility of te ao Māori in their delivery of content	Stakeholder Interviews
	% of organisations reporting static/increase of use of te reo Māori in their delivery of content	
	% of population agreeing that 'there's enough Māori content available'	Media Consumption Survey
	% of population agreeing that 'there's high-quality Māori content available'	

angus
& ASSOCIATES