

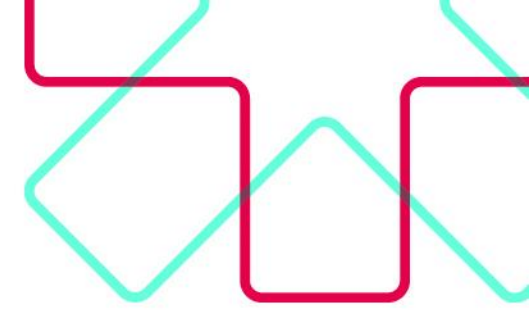
MARTIN
JENKINS

MEDIA SUPPORT PACKAGE - RETROSPECTIVE REVIEW

Final Report

July 2021





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PREFACE

This report has been prepared for Manatū Taonga | Ministry for Culture and Heritage by Matthew Fanselow and Olivia Burrell from MartinJenkins (Martin, Jenkins & Associates Limited).

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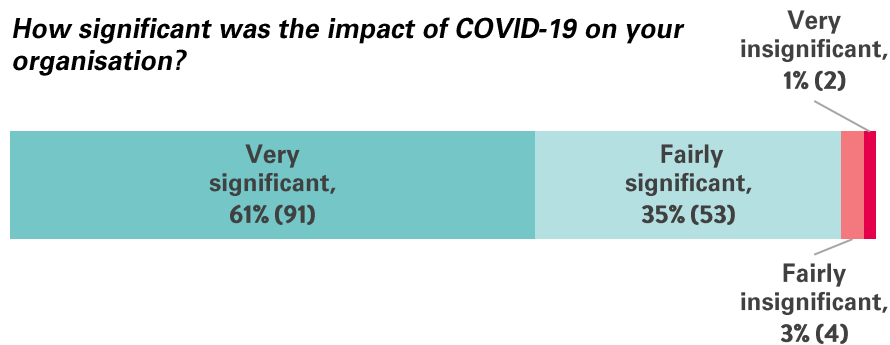
SUMMARY

The 2020 COVID-19 Media Support Package was developed by the Ministry for Culture and Heritage | Manatū Taonga, in consultation with the media sector, to support New Zealand media organisations through the immediate impacts of COVID-19 and lockdown.

The Package was comprised of five initiatives to provide support to the sector through fee waivers, rebates, loans and grants.

COVID-19 had a **significant impact** on the New Zealand media sector. From the outset, media organisations reported a **high level of uncertainty and anxiety** in the sector: the need to **maintain cashflow** and **remain operational** were the most pressing concerns.

How significant was the impact of COVID-19 on your organisation?

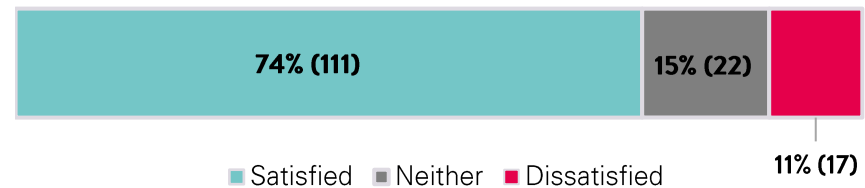


In April-May 2020, the Ministry for Culture and Heritage established the Media Support Package, to provide **short-term relief** to the sector by assisting organisations to **maintain cashflow**. Between June and December 2020 more than **500 applications** were approved.

The Media Support Package extended support to organisations from **all areas** of the media sector: **radio, television, print** and **digital media** were

all beneficiaries of the Package. The review collected **interview** and **survey** feedback from a diverse range of successful beneficiaries of the Package, to determine the extent to which the Media Support Package assisted organisations to **maintain cashflow**; their **satisfaction with the delivery of the Package**; and collect sector views on the **future of the New Zealand media sector**.

In total, **74%** of beneficiaries were satisfied that the Package met their needs.



Cashflow presented the most considerable challenge to the sector: **70%** of beneficiaries reported that **cashflow was a significant challenge to their organisation** during this time. Many beneficiaries expressed that **'staying afloat'** and **'keeping the doors open'** were their key concerns. The Media Support Package provided **significant relief** to beneficiaries, with **78%** reporting that the Package made a **moderate-to-major contribution** to cashflow. In addition to providing direct relief to cashflow, the Media Support Package enabled beneficiaries to **retain staff, pay suppliers, continue to produce content**, and **remain operational**.

Overall, **the Media Support Package made a significant contribution** to sustaining the media sector through the impacts of COVID-19.



INTRODUCTION

About the review

The purpose of the review was to assess the implementation of the 2020 COVID-19 Media Support Package, and to provide the Ministry for Culture and Heritage with an assessment of the contributions made by the Package to supporting and sustaining the media sector during a period of financial strain. The review also captured the challenges still being faced by the New Zealand media sector, and opportunities for the sector to innovate and adapt.

The Media Support Package

The New Zealand media sector was severely impacted by COVID-19. Sharp declines in advertising revenue resulted in pay cuts, redundancies, and disposal of infrastructure across the sector, with further cost-cutting measures seeming likely. This limited the ability for entities to broadcast content of public-interest at a time of intense public need.

As a result, the Ministry for Culture and Heritage worked with the sector to design and deliver the Media Support Package – a \$50m package comprised of five initiatives to provide funding relief in the form of fee waivers, rebates, loans and grants.

The five initiatives of the Media Support Package were:

- **Transmission Fee Waiver**

A fee waiver for six months of transmission fees for DTT, DTH, FM, and AM for eligible organisations, predominantly radio and television. This initiative was delivered iteratively, through four workstreams:

- Radio New Zealand AM transmission services
- Kordia transmission services
- Iwi radio transmission services
- Other private transmission services.

- **NZ On Air Platform Contribution Fee subsidy**

80% of platform contribution fees for broadcasters in 2020/21 were to be funded by Government. This initiative was initially funded for three funding rounds (May through December 2020). It was later expanded to run for the full 2020/21 financial year.

- **Subscriptions Initiative**

Advanced purchase of subscriptions and memberships for 32 government departments and four departmental agencies for 2020/21 to provide immediate cashflow for small-to-medium businesses producing broad, public-interest journalism.

- **Advanced Government Advertising Initiative**

Advanced payments to local media businesses for advertising space that would be placed during 2020/21 by core government organisations.



- **Publications Initiative**

A flat-rated, one-off grant for magazines and community newspapers impacted by the COVID-19 lockdown.

Between June and December 2020, more than 500 applications for the Media Support Package were approved.

Approach of the review

The review was informed by a combination of quantitative and qualitative data sources. An online survey was deployed to all successful Media Support Package applicants (beneficiaries); targeted interviews were conducted with a subset of 10 beneficiaries. The views presented in this report are a **combination** of both **survey data** and **feedback received from beneficiary interviews**. Quantitative data in this report is sourced from the beneficiary survey.

Media Support Package survey

A survey of Media Support Package beneficiaries was co-designed by the Ministry for Culture and Heritage and MartinJenkins. The survey covered:

- the significance of the impact of COVID-19 on the organisation
- the challenge of short-term cashflow to the organisation
- the impact of each specific initiative on addressing the challenge of short-term cashflow
- other means by which the Media Support Package relief assisted the organisation
- satisfaction with the Media Support Package in terms of:
 - communication from the Ministry for Culture and Heritage
 - the timeliness of the support

- the level of support received
- the overall extent to which the support met the needs of the organisation.

In addition to the Media Support Package, beneficiaries were asked to provide their views on:

- the challenges facing the New Zealand media sector
- the opportunities for the sector to innovate
- ways in which their organisation promotes and supports good journalism.

272 beneficiaries of the Media Support Package were sent a survey. In some cases, multiple publications are produced by a single outlet – therefore, the number of surveys distributed was less than the total number of successful applications. A total of **150** survey responses were received – an overall response rate of **55%**.

Table 1 provides a breakdown of responses by initiative. Organisations may have received support from multiple initiatives.



Table 1: Survey responses by initiative

	Proportion of sample	Proportion of responses	Number of responses	Total sample	Response rate
Transmission Fee Waiver	29%	21%	33	123	27%
NZ On Air Platform Contribution Fee subsidy	1%	1%	2	6	33%
Subscriptions Initiative	3%	5%	9	9	100%
Advanced Government Advertising Initiative	7%	8%	19	31	61%
Publications Initiative	60%	64%	100	179	56%

Beneficiary interviews

In addition to the survey, interviews were conducted with a range of Support Package beneficiaries. Interviewees were selected to provide insight from a range of different types of media providers. The interviews covered:

- the participants' experience and engagement with the Media Support Package
- the anticipated, and actual, impacts of COVID-19 on their organisation
- their satisfaction with the Media Support Package, and what could have been done differently in delivering the support
- what the Media Support Package enabled for their organisation
- the diversity of the New Zealand media sector
- the challenges and opportunities facing the sector
- what their organisation is doing to promote and foster good journalism.

A total of 10 interviews were conducted with beneficiaries:

- 1 large national media outlet
- 1 iwi radio station
- 1 Pacific radio station
- 2 small-to-medium digital news publications
- 1 regional print and digital media provider
- 1 local radio station
- 1 multi-region radio station
- 1 small online news publisher
- 1 small print publication

Sector views

The review has collated a selection of views from different types of media providers – including their views of the Media Support Package, the impact of COVID-19 on the sector, and the ongoing challenges being faced. These



insights are presented in pull-boxes throughout the report, drawing on a combination of survey and interview feedback from:

- Māori and Pacific organisations
- Regional and community organisations
- Niche providers
- Small- to medium-sized organisations
- Large media organisations

Limitations

The analysis informing the review is limited to the Media Support Package beneficiaries who engaged with the review team.

- A single survey link was sent to each organisation that benefitted from the Package. An organisation may have received support from multiple initiatives. Respondents were asked to submit only one survey, and to collect input from others in their organisation if required. The review team cannot verify whether or not a survey was completed by the most appropriate subject-matter expert within each organisation.
- A total of 19 beneficiaries were contacted with a request to participate in an interview as part of the review. 10 beneficiaries accepted, from a range of different media types. While the review attempted to collect feedback from a range of media types, those who chose not to engage may have given different perspectives than those beneficiaries that were interviewed.
- Unsuccessful beneficiaries were not invited to participate in this review: therefore, the review does not capture feedback or views on the design of the Package or the application process from this group.



COVID-19 AND THE MEDIA SECTOR

The media sector was immediately aware of the potential impacts of COVID-19 on the sector, and on individual organisations. Uncertainty was widespread across the sector, and revenue from advertising rapidly declined.

“I definitely anticipated that it was highly likely we would have to close our doors.” [Interview; Publications Initiative]

The impact of COVID-19 on the sector

COVID-19 had a significant impact on the New Zealand media sector. Beneficiaries reported that, from the outset, there were extreme levels of anxiety and uncertainty across the sector. Media organisations were “thrown into the unknown” and had to work out how best they could continue to operate, while retaining and supporting staff and continuing to produce content.

“I have been involved in the media for over 30 years, and I have never seen such volatility. Everyone in media went into overdrive – 12-hour days – to keep things going and work out how we would survive the uncertainty.” [Interview; multiple initiatives]

The most evident impact of COVID-19 on the media sector was the rapid drop in advertising revenue. Within 48 hours of Level 4 lockdown being announced, beneficiaries reported a significant decrease in advertising. This was a common theme across all types and sizes of media outlets.

“We lost two of our four biggest clients within the first 48 hours.” [Interview; Subscriptions Initiative]

“Our advertising revenue dropped 80% from the previous year.” [Interview; multiple initiatives]

The question of ‘staying afloat’ was the most pressing concern across the sector – for large entities as well as smaller organisations. Although many beneficiaries felt that larger organisations with greater capital were better-placed to withstand the impacts of COVID-19, the question of survivability was also voiced by large organisations.

“To be honest, we thought we wouldn’t survive for longer than 6 months.” [Interview; Subscriptions Initiative]

Given the heavy reliance on advertising revenue, many within the media sector feared they would not be able to continue to operate and would have to lay off staff. Many beneficiaries shared the view that it was especially important for small and local stations and outlets to continue to operate during COVID-19, as they are close to their communities and are trusted sources of news and information. The governments’ COVID-19 Wage Subsidy was singled out as another lifeline that enabled the media sector to retain staff.

96% (n=144) of survey respondents rated the impact of COVID-19 on their organisation as 'very' or 'fairly' significant



THE MEDIA SUPPORT PACKAGE

Delivery of the Package

In April 2020, Cabinet agreed to establish a \$50m package of initiatives to support the media sector in response to the financial impacts of COVID-19. From June to December 2020, media organisations were invited to apply for support from the five initiatives established under the Media Support Package.

As part of the review, beneficiaries were asked to share their views on the delivery of the Package itself – its timeliness, the communication received from the Ministry, and the overall extent to which the support met the needs of their organisation¹.

Overall, the sector was grateful for the support it received

The majority of beneficiaries were not anticipating any support for the media sector, and were extremely grateful when the Media Support Package was announced. Many beneficiaries expressed that the sector would not be in as good shape as it is without the help of the Media Support Package.

“The Support Package was pivotal in keeping us in business in such a difficult time. I doubt whether we would have been able to continue without it.” [Survey; Publications Initiative]

¹ Figures in brackets represent the number of respondents.

Overall, **74%** of survey respondents were satisfied that the support offered met their needs. **11%** were dissatisfied; **15%** were neither satisfied nor dissatisfied.

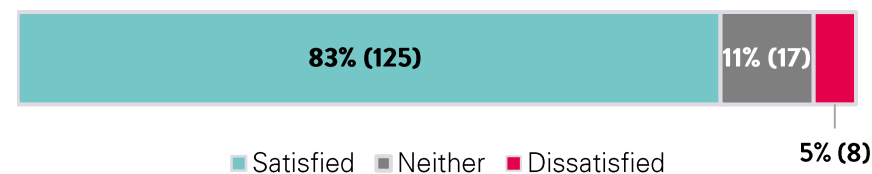


The Package was announced in a timely manner

Many beneficiaries were not expecting any form of support, and so “any support was timely support”. However, the general view of beneficiaries is that the Media Support Package was developed and delivered with speed and timeliness.

83% of survey respondents were satisfied with the timeliness of the Package. **5%** were dissatisfied; **11%** were neither satisfied nor dissatisfied.

“The timing was right. When the support was announced we could see that we were going to come out of this.” [Survey; Publications Initiative]

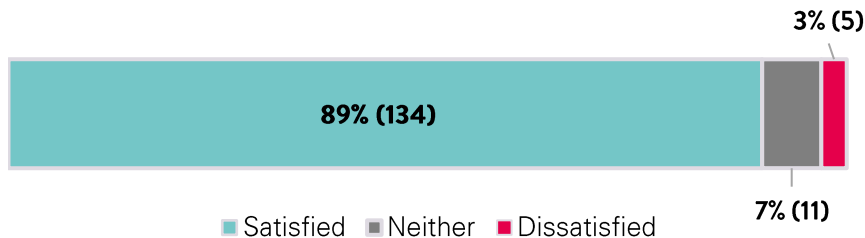


Communication from the Ministry was clear and frequent

Beneficiaries were appreciative of the clear and timely communication they received from the Ministry. Clear communication and straightforward requests for information from beneficiaries was important to media organisations during such a turbulent and confusing time for the sector.

89% of survey respondents were satisfied with the communication they received from the Ministry. **3%** were dissatisfied; **7%** were neither satisfied nor dissatisfied.

“The communication was good. The expectancy and information requested was clear and precise and the communication was professional.” [Survey; Publications Initiative]



Beneficiaries of the Subscriptions Initiative and Advanced Government Advertising Initiative expressed concern that there was poor communication between the Ministry, government departments and advertising agencies. There is a view that these initiatives did not perform as well as they could have, in part because government departments and advertising agencies were unaware of the Support Package and did not take full advantage of it.

“Operating through ad agencies is fraught with issues of poor communication and getting the right information is difficult.” [Survey; Advanced Government Advertising Initiative]

MĀORI AND PACIFIC MEDIA PROVIDERS

Māori and Pacific outlets play an important role in New Zealand media. They are trusted providers of news and information to their communities, who are often marginalised or isolated. They also serve to promote culturally and linguistically-diverse content.

The advent of COVID-19 had a significant impact on providers, many of which are smaller, community-focused organisations. The decrease in advertising revenue was considerable, leaving providers to question whether they would be able to remain operational.

“Our communities look to us for information and content – they want to hear from people who look and sound like them.”

The Media Support Package enabled these organisations to retain staff, and continue to produce and distribute content. For Pacific media providers, namely radio stations, this meant they were able to continue to broadcast and keep their communities up-to-date about developments with the COVID-19 pandemic, including rebroadcasting national health updates in different Pacific languages.

Iwi media were further supported by Te Māngai Pāho, which, in addition to providing direct funding, promoted the Media Support Package to iwi media outlets. Providers were able to utilise the funding to establish dedicated news broadcasts, sending reporters into communities to get stories ‘on the ground’, so they could continue to update their whānau. However, there were concerns that iwi radio was an ‘afterthought’ and not considered a part of core media delivery, in developing the Media Support Package.

The key challenges to the sector identified by Māori and Pacific media providers were: changing technology and digital capability, the reduced role of journalism in holding the powerful to account, and the spread of misinformation.

The level of financial support was well-received; however, it could have been better targeted

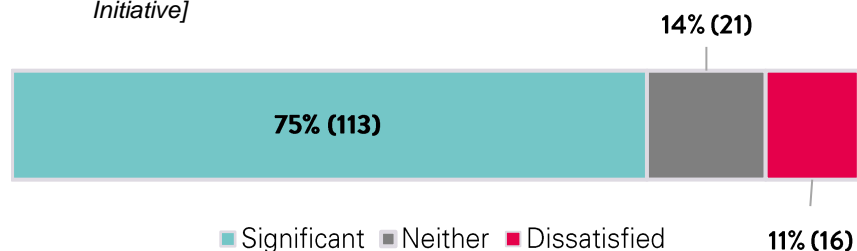
Overall, beneficiaries were satisfied with the level of financial support their organisation received. The Package was generally viewed as being well-



thought-out, and there was an appreciation within the sector for the support that was received. The Media Support Package gave organisations the confidence to continue to invest in their operations, supporting staff retention and maintaining content production.

75% of survey respondents were satisfied with the level of financial support they received. **11%** were dissatisfied; **14%** were neither satisfied nor dissatisfied.

“The Minister is very interested in media, and this government is very engaged with the media sector. The Minister and the Ministry [for Culture and Heritage] acted quickly and engaged early.” [Interview; Subscriptions Initiative]



However, beneficiaries also raised concerns with specific areas of the Support Package:

- The consultation and design phases were seen to be **heavily focused on large media organisations** – particularly broadcast media – with little focus on or inclusion of other operators.

“We became quite vocal early on – if the small, independent operators didn’t speak up, we weren’t going to get anything.” [Interview; Transmission Fee Waiver]

- Beneficiaries felt the development of the Media Support Package was **weighted towards journalism** and took too long to expand focus to the rest of the media sector.

“It certainly felt like it was too heavily focused on journalism, especially with the big players.” [Survey; Publications Initiative]

- The **Transmission Fee Waiver** was aimed primarily at Kordia. Delays in expanding the Waiver left smaller and independent operators struggling to cover their ongoing transmission costs. Beneficiaries acknowledged that this was a key policy lever for the government and understood why this was done first; however, the sector would like to have seen the expansion to other, smaller providers happen earlier.

“I think the government looked at this two-fold. They looked at the easy, convenient path – ‘everyone uses Kordia, let’s cover the Kordia fees’ – and then the more complicated path, realising that small and independent providers can’t afford to, and have their own transmission arrangements.” [Interview; Transmission Fee Waiver]

- Beneficiaries of the Subscriptions Initiative felt the initiative was **poorly targeted**, with many beneficiaries disappointed at the lack of uptake from government agencies. Beneficiaries felt that the government did not do enough to promote the initiative to agencies, and that the delivery mechanism was flawed (e.g. beneficiaries should have been put in direct contact with agencies, rather than waiting for the agencies to make contact).

“The Package was disappointing in the sense that the uptake was very patchy – some entities were very good and took up the opportunity, others didn’t seem to know or want to know about it.” [Survey; Subscriptions Initiative]

- Similarly, many beneficiaries of the **Advanced Government Advertising Initiative** felt the initiative had minimal impact on their businesses. Beneficiaries felt that governments’ tendency to advertise with major publications, rather than with small or local providers, meant that very few publications benefited from the initiative. There was also concern that too much advertising was given to internationally-owned



and social media platforms, rather than being targeted to local providers with closer connections to their communities.

“With such a diversity of publishers in New Zealand, and being a niche publisher, this wasn’t the most ideal initiative because we didn’t have many government agencies advertising with us.” [Survey; Advanced Government Advertising Initiative]

Contribution of the Package to supporting the media sector

The key objective of the Media Support Package was to provide the media sector with short-term cashflow relief during a period of high uncertainty, via the policy levers available to government.

This section summarises the contribution made by the Media Support Package to the sector in terms of cashflow relief, but also covers the additional benefits the support has generated for the sector.

Summaries of the individual initiatives comprising the Package are listed in Appendix 1.

“The concept of the Media Support Package was excellent. Having the foresight to look after media, at a time when cashflow was decimated, and needing to keep the public informed, was great.” [Survey; Transmission Fee Waiver]

Cashflow presented a considerable challenge to the sector

The decrease in advertising revenue presented a significant challenge to the media sector, most notably in terms of cashflow. The media sector is heavily dependent upon advertising revenue, and with the advent of Level 4 lockdown, advertisers pulled considerable funding from the sector.

“The Package truly did support our cashflow. This also helped us to keep staff on and keep them paid.” [Survey; Publications Initiative]

Survey respondents were asked to rate the significance of the challenge of short-term cashflow to their organisation, at the time of the COVID-19 lockdown. **70%** of respondents rated cashflow as a ‘very’ or ‘fairly’ significant challenge to their organisation; **30%** rated cashflow as ‘fairly’ or ‘very’ insignificant. The challenge of cashflow was a key theme to emerge from the beneficiary interviews: in particular, organisations incurring additional costs (e.g. new equipment and software) to enable them to operate remotely and support working-from-home arrangements during lockdown.

“Our equipment was nearing end-of-life, and wasn’t able to support everyone working from home. The Support Package freed up cash that we could use to invest in new broadcasting equipment.” [Interview; Transmission Fee Waiver]



■ Significant ■ Insignificant

The Media Support Package made a significant contribution to organisations’ cashflow

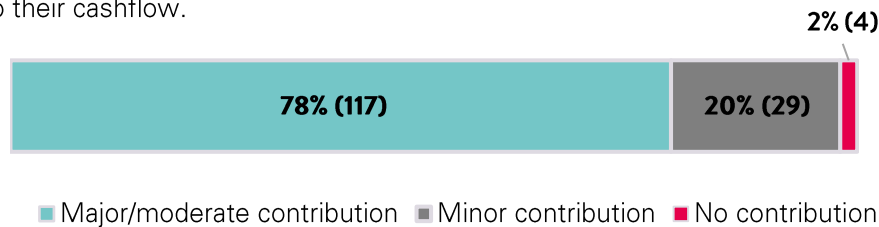
Beneficiaries of the Media Support Package repeatedly emphasised the extreme uncertainty they faced during the COVID-19 lockdown. The challenge of short-term cashflow was severe, and even with the Wage Subsidy to support staff retention, organisations were unsure how they would continue their operations and produce the content needed by the public.



“The Support Package gave us peace of mind that some of our financial pressure would be relieved.” [Survey; Transmission Fee Waiver]

“Without this support we would not have been able to provide our community with direct information on what was open, what was closed, what the different COVID levels meant.” [Survey; Publications Initiative]

The relief provided by the Media Support Package made a considerable contribution to the sector. **78%** of survey respondents rated the Media Support Package as having made a ‘major’ or ‘moderate’ contribution to their cashflow position. **2%** of respondents said the Package made no contribution; **20%** rated the Package as having made a ‘minor’ contribution to their cashflow.



The support provided by the Package was used by beneficiaries in line with the goal of the fund

The goal of the Media Support Package was to provide and support cashflow during lockdown: the fundamental purpose was to prevent media organisations from going out of business, and thereby maintain diverse media provision through and beyond lockdown.

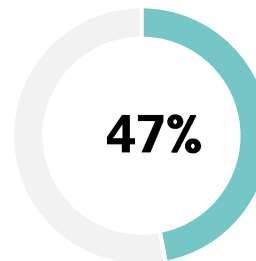
The main challenges facing the sector during this time were: ensuring staff wages were paid; continuing to produce content and keep the public informed; paying suppliers (to support the local economy and promote business continuity); and ultimately continue to operate as a viable business. These challenges were identified in the development of the

Media Support Package, which, in addition to maintaining cashflow in general, formed the objectives of the Package: through the provision of direct relief to organisational cashflow, the Media Support Package contributed significantly to the sector’s ability to sustain its operations.

“It came at a great time, was processed efficiently, was frankly unexpected but very welcome - at a time when we faced a great deal of uncertainty.” [Survey; Publications Initiative]

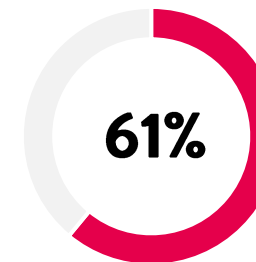
“The payment was timely, enabling a confident move forwards into next year without the worry of losing significant numbers of major subscribers.” [Survey; Subscriptions Initiative]

The figures below illustrate the various ways in which the Media Support Package provided relief in line with the stated goals of the Package. These figures represent feedback from survey respondents and are consistent with the views given by interview participants. Beneficiaries were able to select multiple options of how they benefitted from the Package.



of respondents reported that the Media Support Package enabled them to retain their staff (n=70)

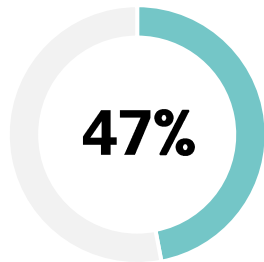
53% of Advanced Government Advertising Initiative beneficiaries stated that the Package allowed them to retain their staff.



of respondents reported that the Media Support Package enabled them to maintain content production and/or distribution (n=92).

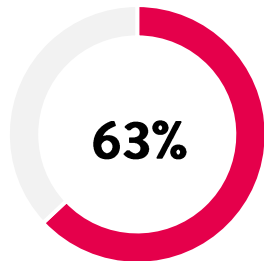
89% of Subscriptions Initiative beneficiaries reported that the Package enabled them to maintain content production.





of respondents reported that the Media Support Package enabled them to pay their suppliers (n=70)

56% of Subscriptions Initiative beneficiaries reported that the Package enabled them to continue to pay their suppliers.



of respondents reported that the Media Support Package enabled them to stay operational (n=94)

62% of Publications Initiative beneficiaries stated that the Package enabled them to keep operating.

Lessons for the future

The Media Support Package was novel and developed within a relatively condensed timeframe. As a new initiative, the review asked beneficiaries to provide feedback on the delivery of the Media Support Package, what worked well and what could be done to improve the Package should it be needed again. Most beneficiaries did not have suggestions for changing the Media Support Package: this section summarises the feedback that was received into key themes.

Overall, beneficiaries were happy with the delivery of the Package

The majority of beneficiaries were satisfied with the design and delivery of the Package. Beneficiaries acknowledged that the Package was designed and delivered with haste and, given the operating context of COVID-19 at the time, beneficiaries were content with the Media Support Package and appreciative of the support received.

Beneficiaries felt the support was administered in a timely and efficient way

Most beneficiaries found the process of applying for support to be efficient and straightforward. The lack of administrative burden during what was a highly stressful time was appreciated by beneficiaries. Beneficiaries also acknowledged that payments were made promptly.



Support should have been expanded to the wider sector in a timelier manner

Many beneficiaries expressed the need to extend support wider, and in a faster timeframe. Although beneficiaries understood the rationale for the Transmission Fee Waiver and Platform Contributions being the initial response from government, their feedback expressed concern at the delay in extending the fee waiver to other providers, and in broadening support to other areas of the media sector. Feedback suggested a need for the government to put all media providers “in the same basket,” rather than prioritising the delivery of support.

The duration and level of support should have been extended

Beneficiaries of the Media Support Package expressed a need for the support to have been extended for a longer period of time. The 6-12 months of relief provided by the initiatives, while well-received by the sector, was viewed as being too short by many beneficiaries, who are continuing to struggle to cover operating costs due to the ongoing challenges facing the sector (primarily, lower-than-expected advertising revenue). Beneficiaries, particularly those in print and subscription media, and smaller radio broadcasters, would like the Media Support Package to have been in place for a two-year period. Many beneficiaries commented that they would have preferred a higher level of cash support: in particular, smaller media outlets, primarily in the publications sector. This was largely due to the high costs of physical printing.

NICHE MEDIA PROVIDERS

Niche media providers cater to very specific audiences. They are predominantly small radio stations and print publications, which provide topic-specific content to their readers and listeners.

These providers are heavily dependent on advertising revenue, generally not having sufficient reach or circulation to be highly-profitable: as a result, COVID-19 and the decrease in advertising revenue had a very significant impact on cashflow for these organisations. The majority of these organisations noted that the impact of COVID-19 on their business was greater than they had expected.

The Media Support Package was critical to the survival of these organisations, with many expressing gratitude for the cashflow support which meant they were able to continue to produce content, and, most importantly, retain staff. These organisations did not express strong views on the development and delivery of the package – they see themselves as different from the rest of the media sector and not necessarily in competition with them.

“We didn’t see any distinction between how the small and the big players were treated – niche and mainstream are different operators.”

There was a view expressed that the Support Package could have delivered more, and sooner, to these organisations – particularly in affording them a greater share of the support package.

The key challenges to the sector identified by providers were: decreasing advertising revenue, changing technology and digital capability, and a reduced amount of local/community news.



THE FUTURE OF THE NEW ZEALAND MEDIA SECTOR

In addition to providing feedback on the Media Support Package, beneficiaries were asked to share their views on the media sector more broadly. Beneficiaries were asked to provide insight into:

- **the diversity of the New Zealand media sector**
- **challenges being faced by the sector**
- **opportunities for the sector to innovate**
- **how the sector is promoting good journalism**

The sector needs a greater level of diversity

Beneficiaries of the Media Support Package did not hold strong views as to whether the support provided helped to maintain a “diverse” media sector during lockdown, or beyond. The key focus of the Media Support Package – supporting cashflow – has been emphasised repeatedly by beneficiaries as a success, and pivotal to the survival of many organisations. The provision of this relief enabled beneficiaries to continue to operate, and assisted with staff retention and building business confidence. To that end, it is reasonable to conclude that the Media Support Package made a notable contribution to maintaining sector diversity, by preventing media outlets (many of them smaller providers) from going out of business as a result of COVID-19 and the lockdown.

However, feedback from Support Package beneficiaries highlighted a lack of diversity within the New Zealand media sector more broadly.

A lack of diversity of ownership

Feedback from the sector emphasised a lack of diversity in terms of the ownership of media in New Zealand: a concern that there is a concentration of ownership in a small number of large entities who dominate the sector and restrict the ability of small- and medium-sized organisations to establish themselves.

“I think we have kidded ourselves for years that we have diverse media, and diverse media ownership – we only have two or three major players.”
[Interview; Transmission Fee Waiver]

A lack of diversity in leadership across the sector

Concerns were expressed from the sector that there is a lack of diversity in leadership and senior management positions across media organisations in New Zealand. This was highlighted with particular regard to a lack of Māori and Pacific representation at these levels.

“At the executive and governance levels, the diversity of Māori and Pacific is very lacking.” [Interview; Transmission Fee Waiver]

Feedback from beneficiaries also emphasised a lack of diversity in terms of reporters and broadcast presenters – that there is a lack of Māori, Pacific, and Asian correspondents visible in the media.



There are a number of key challenges facing the sector...

The media sector is continually changing, and the sector faces specific challenges as a result.

Survey respondents were asked to rank a series of challenges to the media, based on their perceived importance to the sector. Respondents could rank up to five key challenges.

1. Decreasing advertising revenue was the most-pressing concern for the sector, with **84%** of respondents ranking it in the top-five most important challenges. **53%** of respondents ranked decreasing advertising revenue as *the* most important challenge to the sector.

2. Changing technologies and digital capability was ranked as a challenge by **57%** of respondents.

3. Reduced amount of local/community news is the third most-important challenge facing the sector, and was ranked by **41%** of respondents.

4. Reduced amount of investigative and public-interest journalism was ranked as a challenge by **39%** of respondents.

5. Risk of closure was ranked as a challenge by **39%** of respondents.

Table 2 shows the full list of challenge rankings and their importance to the sector.

SMALL- AND MEDIUM-SIZED MEDIA PROVIDERS

Small- and medium-sized providers cover a range of media, from radio stations through to newspapers and magazine publications. They reach a wide range of listeners and viewers nationwide, and form a key part of the New Zealand media sector.

The majority of these providers reported that the impacts of COVID-19 on their organisation were greater than they had anticipated. The diversity of providers in this area meant that many benefited from multiple initiatives within the Media Support Package; all five support initiatives were accessed by small and medium providers.

The challenge of short-term cashflow was significant to the majority of providers, many of which are small, local outlets with limited sources of revenue. The Media Support Package made a significant contribution to these organisations, with staff retention cited as one of the most important impacts of the initiatives.

"I really thought that if we had to be out for several months, and having to pay staff, that would be it – we'd close."

Although expressing gratitude for the support, many providers shared the view that the development of the Package was too heavily focused on larger media organisations, who benefitted more immediately from transmission fee waivers and who secured greater proportions of the Advanced Government Advertising Initiative, due to a tendency by government departments to advertise with larger or national media outlets. Providers also felt the support took too long to be extended to their organisations.

The key challenges to the sector identified by providers were: decreasing advertising revenue, the reduced amount of local/community news, and changing technology and digital capability.



Table 2: Key challenges facing the New Zealand media sector ²

	Most-important	2nd-most	3rd-most	4th-most	5th-most	TOTAL	
Decreasing advertising revenue	53% (79)	17% (25)	7% (10)	5% (7)	3% (5)	84%	126
Changing technology and digital capability	11% (17)	19% (28)	14% (21)	8% (12)	5% (7)	57%	85
Reduced amount of local/community news	3% (4)	7% (10)	13% (20)	11% (16)	7% (11)	41%	61
Reduced amount of investigative and public-interest journalism	3% (4)	9% (13)	10% (15)	11% (16)	7% (10)	39%	58
Risk of closure	9% (14)	9% (13)	5% (7)	7% (11)	9% (13)	39%	58
Decreasing subscriptions/memberships	4% (6)	16% (24)	8% (12)	5% (7)	4% (6)	37%	55
Misinformation	3% (5)	3% (5)	5% (8)	8% (12)	13% (19)	33%	49
Reduced role of journalism in holding the powerful to account	5% (7)	2% (3)	6% (9)	9% (13)	6% (9)	27%	41
Falling journalistic quality	5% (7)	3% (4)	7% (11)	6% (9)	7% (10)	27%	41
Fewer journalists	1% (2)	7% (10)	5% (7)	7% (11)	3% (5)	23%	35
Decreasing diversity of content	1% (1)	5% (7)	6% (9)	5% (7)	5% (8)	21%	32
High barriers to participation and engagement for underserved groups	2% (3)	2% (3)	7% (10)	3% (4)	3% (5)	17%	25
Lack of Māori media content and production	1% (1)	2% (3)	1% (2)	4% (6)	3% (5)	11%	17
None	0% (0)	0% (0)	0% (0)	0% (0)	1% (1)	1%	1

² Figures in brackets represent the number of respondents



In addition to the challenges ranked in the survey, beneficiaries identified a number of additional challenges facing the media sector.

- **Too much focus placed on large media entities**

The feedback received from small- and medium-sized entities highlighted concern that the government places too much emphasis on a small number of major media outlets – both in terms of their influence in shaping policy in the sector, and the share of advertising revenue they receive. There was a strong view that the dominance of these major organisations is making the successful operation of smaller providers increasingly difficult.

“The biggest and most profitable entities get the most focus – but there is a lot more to New Zealand media than just those big 3-4 companies.” [Interview; Subscriptions Initiative]

- **Increased competition with social media providers** impacting local and regional media’s reach, and ability to generate revenue through advertising was a key concern of beneficiaries.

“Social media controls a significant amount of distribution channels...this heavily impacts local media’s ability to generate revenue.” [Survey; Advanced Government Advertising Initiative]

- **Difficulty in recruiting and retaining journalists**, due to journalism not being seen as an attractive career. There is an increased perception of journalism as a low-status career, and undervalued in terms of salary levels. Beneficiaries also commented on the lack of quality journalism graduates emerging from training institutions.

“There is a lack of diversity in journalists, and a declining interest in the profession – it is underpaid and undervalued.” [Survey; Transmission Fee Waiver]

- **Advertising revenue** taking longer-than-expected to return to pre-COVID levels.

“I am heavily dependent on advertising. Advertisers are still very reluctant to reinvest, in case things turn pear-shaped again.” [Interview; Subscriptions Initiative]

- **A lack of diversity in the content being produced** – a perceived reluctance of providers to pay for high-quality content, and content being repeated on multiple platforms.

“Content production processes are becoming more automated, and more content is being repurposed – it takes away the opportunity for individual creativity.” [Survey; Publications Initiative]



REGIONAL AND COMMUNITY MEDIA PROVIDERS

Regional and community media outlets play a key role in keeping their communities informed and engaged. They are trusted sources of information for their communities, and are often the go-to source for news.

COVID-19 hit these providers hard, with most reporting a 'significant' impact on their organisation as a result. With many of these providers being smaller organisations, they were vulnerable to sudden losses of revenue while still having to maintain their operational and staffing costs. The high levels of uncertainty were challenging for these providers, many of which felt they would have to close their doors as a result.

The initial development of the Media Support Package was criticised by many of these providers, who felt the larger, national media outlets were having considerably more say in the shaping and content of the Package. In particular, the emphasis on Transmission Fee Waiver was seen as unfair, both to local radio stations that use private transmission services, and to print media, which felt the Package took too long to consider their needs.

"They [the Ministry] did a fund much later in the year for smaller publications like us – that worked really well."

However, overall, these providers were highly satisfied with the Media Support Package, and were grateful for any support that was offered to help cover costs and enable them to continue to operate. The key challenges to the sector identified by providers were: decreasing advertising revenue, changing technology and digital capability, and the reduced amount of local/community news.

...but there are also opportunities for the sector to innovate

The rapidly changing nature of the media sector also presents opportunities for providers to innovate and adapt. Beneficiaries of the Media Support Package gave several examples of ways in which the sector can change to keep the sector relevant and increase the diversity of media provision.

- **An increased focus on smaller providers.** There was strong encouragement from beneficiaries for the government to do more to support a diverse range of providers, with a focus on small and regional media outlets, rather than focusing on the large providers – particularly with regard to advertising revenue.

"We need to give more attention to more bespoke and localised news services." [Survey; Transmission Fee Waiver]

- **Increased funding and support for smaller media organisations** is seen as a key means by which the government can promote a diverse media sector, and support local and regional news and media delivery.

"State-owned and large corporations get top-level funding from government, they can innovate and change because they have the cash – it is much harder for smaller players." [Interview; Publications Initiative]

- **Develop an integrated online platform** that can facilitate a range of public-interest journalism from small through to large providers. Feedback from beneficiaries highlighted an interest in the government supporting the development of a public and accessible news platform, showcasing reporting from all parts of New Zealand (not focused on the main centres) and promoting diversity of reporting (in terms of content, and ethnically-diverse journalists).



“We need a reincarnation of the NZ Press Association – covering a whole range of news, not just the high-profile stories in the centres.” [Interview; Subscriptions Initiative]

- **Greater acceptance and usage of digital platforms.** Beneficiaries noted the need for the New Zealand media sector, particularly news media, to keep pace globally and increase the use of digital platforms for sharing news.

“We have to become more digitally-savvy, and be aware of the public’s changing reading habits.” [Survey; Publications Initiative]

- **Consideration of alternative business models.** The challenge of competing with digital platforms and reliance on advertising revenue was exacerbated in 2020. Beneficiaries indicated a growing need to “change with the times” but tend not to have the time, money, or resource to do so – particularly when their focus is primarily on ‘staying afloat’.

“Serious debate around alternative business models for news outside of advertising remains elusive.” [Survey; Advanced Government Advertising Initiative]

- **A need for more collaboration and cooperation across the sector,** rather than focusing on competition. Beneficiaries commented that, with New Zealand being a relatively small market, there is more to be gained by providers collaborating and sharing resources than competing.

“We need more collaboration within the media sector – commercial and non-commercial. Content sharing, internships, secondments, infrastructure sharing.” [Survey; Transmission Fee Waiver]

Media organisations are undertaking a range of activities to promote good journalism

Journalism has an important role to play in keeping the public well-informed: this is especially important during times of crisis. A lack of quality journalism will result in an ill-informed public who are not receiving the updates and information they need to make decisions. Poor journalism will also fail to hold leaders and decision-makers to account.

Beneficiaries of the Media Support Package that employ journalists were asked what their organisations were doing to foster and promote ‘good’ journalism in New Zealand. A range of activities were identified, and are summarised below:

- **Promoting ‘journalism as a public good’** – empowering writers to produce content that inspires their audience
- **Focusing on quality of content** over quantity of output
- **Giving journalists opportunities** to explore areas of personal interest to them
- **Paying competitive salaries**
- **Intentionally focusing on supporting Māori and Pacific journalism graduates** through internships and focused stories, to increase diversity within the sector
- **Using skilled researchers and freelance journalists** to conduct research and write stories
- **Distributing targeted and focused content** to rural and local communities – creating local content for community benefit
- **Supporting education providers and students** through internship opportunities, mentoring, and training programmes



- **Endeavouring to employ a diverse range of journalists** – with different experiences, backgrounds, and ethnicities
 - **Producing high-quality and fact-checked content.**
-

LARGE MEDIA PROVIDERS

Large media organisations have a national reach. They represent the 'mainstream' media and provide the majority of the public with access to news and entertainment content.

Like all media providers, the advent of COVID-19 had a considerable impact on large entities. The larger size of these organisations means they have higher costs than smaller providers, including considerable staffing costs. The Media Support Package helped these organisations considerably in being able to retain staff and continue to produce content to inform the New Zealand public, particularly during a national emergency.

"Everything about the pandemic was continually evolving. Looking back it is important to remember the uncertainty – I think the staggered support of the initiatives and subsidies worked well. It would have been hard to do everything at once."

Due to their larger size, many of these organisations are involved in the delivery of multiple media channels, and as a result were able to access several different initiatives from with the Media Support Package. Their size and diversity of delivery positioned them well to be able to adapt and continue to operate in a changing environment. The level of support received from the Media Support Package made a 'very significant' contribution to these organisations, in particular the Transmission Fee Waiver.

The key challenges to the sector identified by providers were: changing technology and digital capability, decreasing advertising revenue, and the spread of misinformation.



CONCLUSIONS

The Media Support Package

- COVID-19 presented a **significant challenge** to the New Zealand media sector. **Uncertainty** caused considerable distress across the sector: **96%** of Media Support Package beneficiaries reported that COVID-19 had a **significant impact** on their organisation.
- Beneficiaries of the Media Support Package were extremely **grateful** for the support that was provided by government: the majority of beneficiaries were **not anticipating** any specific support to be provided to the media sector. There was appreciation from **across the sector** for the support that was provided, with beneficiaries expressing that the sector **would not be in as good shape as it is** without the contribution of the Media Support Package.
- Overall, beneficiaries were **supportive** of the development and design of the Media Support Package. The majority of beneficiaries felt that the Package was announced to the sector in a **timely** manner. The **communication** between the Ministry for Culture and Heritage and the wider sector was generally praised for being **clear, timely, and effective**.
 - There was criticism expressed by beneficiaries of the Advanced Government Advertising Initiative and the Subscriptions Initiative that communication between the Ministry and other government departments, and with advertising agencies, was **unclear** and did not adequately explain these initiatives to those organisations.
- The level of financial support was generally **well-received** by the sector, with many beneficiaries expressing that the support gave them the confidence to **continue to invest in their operations, to retain their employees** during a time of uncertainty, and to continue to **produce and distribute content**.
- However, there were concerns raised about specific elements of the Package:
 - A considerable number of beneficiaries felt that the consultation and design of the Package was too heavily focused on large media outlets and should have been extended earlier to be more inclusive of the wider sector.
 - The development of the Package was seen as being too heavily weighted towards journalism, and took too long to shift focus to the wider sector.
 - Delays in extending the Transmission Fee Waiver to smaller and independent operators resulted in increased cost and stress for those organisations.
 - Beneficiaries of the Subscriptions Initiative felt it was poorly targeted, with many feeling the government did not do enough to promote the initiative to departments: as a result, uptake of the initiative was seen to be low.
- The Media Support Package made a **considerable contribution** to the media sector overall. Beneficiaries were grateful of the support they received, and saw the Package as an indication by government of the



importance of the media sector, particularly during a time of crisis. **70%** of beneficiaries reported cashflow as being a **significant challenge** to their organisation as a result of the COVID-19 lockdown. The Package had a significant impact on **maintaining cashflow** within the sector, and achieved outcomes in line with its intended goals. The Package enabled the sector to **retain its employees**, continue to **produce and distribute content**, and continue to **pay suppliers** – thereby supporting the wider economy.

- Overall, **the Media Support Package made a significant contribution** to sustaining the media sector through the impacts of COVID-19.

The wider media sector

- In supporting cashflow, the Media Support Package played a key part in **maintaining the diversity** of media provision in New Zealand. Cashflow being maintained ensured that businesses could **continue to operate** rather than risking going out of business. The applicability of the Media Support Package to a **diverse range of media** – small, large, television, radio, digital, print – ensured that diverse media provision **was maintained** throughout and following lockdown. However:
 - A significant number of beneficiaries expressed concern at the lack of diversity in media ownership in the sector, with a concentration of ownership in a small number of organisations.
 - Beneficiaries were also concerned at the lack of ethnic diversity at the leadership and senior management levels of media organisations: in particular, a lack of Māori and Pacific representation.
- Beneficiaries identified a number of **key challenges** that continue to face the media sector in New Zealand. The risk of **falling advertising**

revenue was the primary concern raised by beneficiaries, with **53%** identifying this as their most-pressing challenge – and the majority of respondents ranking it in the top-five issues facing the sector. Other key challenges facing the sector include a **reduced amount of local and community news**, a reduced level of **investigative and public-interest journalism**, and the continued **risk of closure**.

- Despite the challenges being faced by the sector, beneficiaries identified areas of opportunity for the sector to **adapt** and **innovate**. An increased focus on **smaller media providers**, and increased **government support and funding** for those organisations, were identified as a key opportunity for the government to **support and foster** an increasingly **diverse media sector**. Beneficiaries also expressed a need for the New Zealand media sector to be more accepting of **digital platforms**, to keep the public informed in real-time, and to keep pace with increased global uptake and competition in digital platforms as a means of delivering news and other media.



APPENDIX 1: SUMMARY OF FEEDBACK BY INITIATIVE

Note: figures represented in tables are total responses.

Transmission Fee Waiver

33 beneficiaries of the Transmission Fee Waiver completed the survey.

How significant was the challenge of short-term cashflow to your organisation?

	n
Very insignificant / Not significant at all	9
Fairly insignificant	6
Fairly significant	8
Very significant	10

What contribution did the Transmission Fee Waiver make to addressing this challenge?

	n
No contribution	1
Minor contribution	4
Moderate contribution	8
Significant contribution	20

In what ways did the Transmission Fee Waiver contribute to your organisation?

Respondents could select multiple options

	n
Retain staff	8
Pay suppliers	8
Maintain content production and/or distribution	15
Stay operational	19
Other	13

'Other' ways in which the Transmission Fee Waiver supported organisations include:

- Providing general financial relief/stability
- Supporting infrastructure investment
- Supporting new content development
- Providing peace of mind
- Supporting staff to work remotely
- Helping to "bridge the gap" until advertisers returned



Additional feedback on the Transmission Fee Waiver

- “Huge relief” for the sector, as transmission fees are a key cost for broadcasters
- A general appreciation from the sector for the support received
- The Waiver prevented stations having to shut down completely
- It freed-up cash that could be used to purchase new equipment and facilitate out-of-station broadcasting
- The application process was straightforward
- The delays in extending the Waiver beyond Kordia impacted smaller and independent stations (those with their own transmitters on private land)
- Iwi radio felt overlooked, due to the emphasis on Kordia



NZ On Air Platform Contribution Fee Subsidy

2 beneficiaries of the NZ On Air Platform Contribution Fee Subsidy completed the survey.

How significant was the challenge of short-term cashflow to your organisation?

	n
Very insignificant / Not significant at all	0
Fairly insignificant	0
Fairly significant	0
Very significant	2

What contribution did the NZ On Air Platform Contribution Fee Subsidy make to addressing this challenge?

	n
No contribution	0
Minor contribution	1
Moderate contribution	0
Significant contribution	1

In what ways did the NZ On Air Platform Contribution Fee Subsidy contribute to your organisation?

Respondents could select multiple options

	n
Retain staff	1
Pay suppliers	1
Maintain content production and/or distribution	2
Stay operational	1
Other	0

Additional feedback on the NZ On Air Platform Contribution Fee Subsidy

- The Contribution Fee subsidy saved one respondents' production company from going out of business.



Subscriptions Initiative

9 beneficiaries of the Subscriptions Initiative completed the survey.

How significant was the challenge of short-term cashflow to your organisation?

	n
Very insignificant / Not significant at all	0
Fairly insignificant	3
Fairly significant	2
Very significant	4

What contribution did the Subscriptions Initiative make to addressing this challenge?

	n
No contribution	0
Minor contribution	0
Moderate contribution	1
Significant contribution	8

In what ways did the Subscriptions Initiative contribute to your organisation?

Respondents could select multiple options

	n
Retain staff	6
Pay suppliers	5
Maintain content production and/or distribution	8
Stay operational	4
Other	0

Additional feedback on the Subscriptions Initiative

- Poor execution/coordination within agencies – recommendation that the Subscriptions Initiative should have been coordinated by agency Communications departments, rather than information centre managers
- High apathy/lack of engagement from agencies – recommendation to allow providers to follow up directly with agency contacts
- “A great initiative, and well-intentioned” - but poorly supported, and a lack of clarity as to how subscriptions were allocated
- Poorly targeted – a view that those least-impacted by drops in advertising revenue (paywall subscription services) received the most benefit



Advanced Government Advertising Initiative

19 beneficiaries of the Advanced Government Advertising Initiative completed the survey.

How significant was the challenge of short-term cashflow to your organisation?

	n
Very insignificant / Not significant at all	5
Fairly insignificant	2
Fairly significant	4
Very significant	8

What contribution did the Advanced Government Advertising Initiative make to addressing this challenge?

	n
No contribution	2
Minor contribution	8
Moderate contribution	7
Significant contribution	2

In what ways did the Advanced Government Advertising Initiative contribute to your organisation?

Respondents could select multiple options

	n
Retain staff	10
Pay suppliers	5
Maintain content production and/or distribution	6
Stay operational	8
Other	1

The 'Other' way in which the Advanced Government Advertising Initiative supported organisations was to "give more certainty" to organisations.

Additional feedback on the Advanced Government Advertising Initiative

- Providers were, in general, "grateful for any and all support"
- The Initiative provided considerable help to cashflow for some beneficiaries
- However, few publications benefitted, as government tends to advertise in major publications (rather than with local/regional outlets) so smaller communities were underserved
- Too much advertising was given to internationally-owned providers and large social media platforms, rather than spent with local media that has a closer connection to their communities
- The application process was unclear/inefficient
- There needed to be greater emphasis on spreading the advertising funding to a broader range of providers



Publications Initiative

How significant was the challenge of short-term cashflow to your organisation?

100 beneficiaries of the Publications Initiative completed the survey.

	n
Very insignificant / Not significant at all	15
Fairly insignificant	9
Fairly significant	32
Very significant	44

What contribution did the Publications Initiative make to addressing this challenge?

	n
No contribution	1
Minor contribution	19
Moderate contribution	30
Significant contribution	50

In what ways did the Publications Initiative contribute to your organisation?

Respondents could select multiple options

	n
Retain staff	45
Pay suppliers	51

Maintain content production and/or distribution	61
Stay operational	62
Other	7

'Other' ways in which the Publications Initiative supported organisations include:

- Helping to cover new digital costs
- Meeting general office expenses
- Meeting tax obligations
- Contributing to general production operating costs

Additional feedback on the Publications Initiative

- The Initiative helped some beneficiaries immensely with cashflow (enabled organisations to purchase new equipment, to pay staff, to pay suppliers)
- It gave organisations confidence and helped to maintain business continuity
- It enabled organisations to keep producing content
- The support meant that small/local providers could continue to keep their communities informed
- Some beneficiaries view the initiative as "too little funding, administered too late"
- Information about the initiative was slow to be released, and was not clear
- Some providers felt disadvantaged by the definition of 'publication' – digital publishers felt "forgotten"

