Radio New Zealand Project - Research Paper
By Ollie Wards
22 November, 2017

What is the best opportunity for a new FM music brand?

Millennials – they should be the target group for a new music brand.

‘18-34 year old millennial New Zealand music fans’, with a primary target of 18-29.

The Case

New Zealand’s current music FM market is serviced almost entirely by a duopoly, mirroring each other’s offering. Formats are essentially head to head based on CHR, Top 40, Adult Contemporary or limited scope Hip Hop and RnB offerings.

The commercial imperative drives these stations, resulting in conservative music programming based on research and a narrow format, making advertising pitches easy, based on particular demographics.

New Zealand music does not compete with the major label, heavily marketed artists that these formats are based on – so local music is seen as a hindrance, rather than an opportunity to connect with audiences.

Radio’s penetration as a medium is extremely high in New Zealand, reaching over 86.7% of 10+ year olds on a weekly basis. A challenge for radio programmers worldwide in the cluttered media landscape is to retain Time Spent Listening to the radio.

However according to the GFK figures New Zealand’s TSL is in a very healthy position, with 20-29 year olds listening 15 hours 26 minutes per week, a figure perhaps unrivaled worldwide.

To put this in context, Australia’s national youth network triple j has a 10+ TSL of around 7 hours 31 minutes per week. New Zealanders are very much a radio listening nation, with young people still highly engaged with the medium.

Over time since the creation of most of New Zealand’s current FM formats, the music industry and consumer habits have changed.

Notably, streaming and online means all music is accessible and young consumer’s tastes are more eclectic than ever.

RNZ’s music research shows that ‘enthusiasts’ like to listen to an average of seven different genres, from reggae to alternative to rap. This reflects an audience of music lovers don’t expect to be delivered music in a narrow format like a ‘rock station’ or ‘hip hop and R’n’B station’.
An opportunity exists here to bring a collection of music fans from all other formats together in a combined audience community. Together, music enthusiasts, lovers and appreciators will make up this audience and represent 56% of the 25-60yo population.

a) Audience: engaging a broader and younger population than RNZ National does.

RNZ National over indexes on older, European heritage demographics.

The Music Research report shows younger millennials are less likely to use radio for the sorts of news and information that RNZ provides. There is a strong perception amongst millennials that RNZ National is aimed at older people and is not relevant for them.

In terms of talk type content that would be relevant for a younger group, RNZ’s ‘The Wireless’ research shows topics that matter to young people are those that affect their own lives more closely, such as finding a job, the housing market or money.

The issues that affect the 16-30yo millennial demographics are distinct from those that older groups are interested in, thus RNZ’s over indexing in older groups indicates a drastic change in programming would be required to bring in a younger audience.

Music is almost a ubiquitous influence for younger people, with 95% of 25-60yo listening each week. 54% of people said that listening was very often to music on the radio.

With substantial listening taking place across multiple genres, but still in a large part on FM radio, there is an opportunity apparent for younger audiences to be brought together by music.

As accessibility to music has never been higher (with nearly ⅔ of 25-60yo listening to music online) there is an emphasis on trust and credibility in music recommenders.

To decipher access to the entire world’s back catalogue, young people are relying on brands and personal connections to find music they like (44% of music listeners seek out new music with some regularity).

With RNZ’s non-commercial, independent remit and existing credibility amongst millennials (The Wireless qualitative research) there is a strong opportunity to become a music recommender as well as a platform for youth issues in New Zealand.

From RNZ music research report

- 25 – 39s, 64% says “music is part of who I am”

- 10% Music Enthusiasts, 20% Music Lovers, 26% Music Appreciators = 56% potential audience (not including music mainstream)

- Music enthusiasts and lovers want to connect more deeply with music than offered on commercial radio (indexing 80+ for enthusiasts)

3.603m total radio listeners in NZ per week
1.193m potential 18 - 34s (GFK S2)
b) Societal: reflecting the changing makeup of the NZ population, giving voice to more NZers, incorporating Te ao Maori, NZ Asian and Pasifika experiences.

RNZ’s music research shows that young people are likely to be fans of several genres of music, that seeking out new music is a regular activity and that young audiences are on many platforms simultaneously.

A crucial consideration to attracting a young audience is to offer content on a peer to peer level, with credible and authentic presentation techniques that are inclusive - not alienating of a young audience.

These include things like having a young, diverse presenting team, but also to consider types of content that matter to a younger audience.

Millennials’ outlooks are essentially optimistic while keeping a view on their own future as part of that. RNZ’s The Wireless qualitative research identifies the type of content that is most likely to connect with young audiences, like travel and careers and money or future housing.

When creating content on these topics, if it's not done in the right tone - an intended young audience will feel ‘spoken to’ rather than with and quickly turn off.

Millennials have grown up in New Zealand’s multi-cultural population, the ‘changing’ state of the nation isn’t a change to them - it’s the only reality that they’ve known.

So a guiding principle for creating content for younger New Zealanders is that diversity is ever present, it is inclusive - not approached in a token or quota based way. Diversity in perspectives aren’t necessarily called out for where they come from, but are approached as equals in content delivery.

A presenter may happen to have a Maori name or a Tongan accent, but their role isn’t connected to that - it’s incorporated seamlessly into a broader content strategy that will match this with the following piece of content from a Pakeha New Zealander without signposting a change.

If ideas or issues affecting young people are the focus of particular content, then a further guiding principle should be that the target demographic are a filter all content is run through. This means content generation from a community’s perspective rather than about that community.

This inclusive principle of presentation is also appropriate for a music policy that’ll appeal to a broad range of young New Zealanders.

While pop and rock are the two most popular genres by nearly double, there is still significant interest in other genres and the younger the demographic - the higher the proportions the interest in hip hop or EDM.
A young group of music lovers are likely to have their tastes transcend particular genres, so a limited format based on genre won’t take advantage of wider tastes.

A music policy that can incorporate music across rock, hip hop, alternative, EDM, soul and funk and more will be a new prospect for New Zealand's radio market - but listening across these genres is a normal habit for young music lovers of all backgrounds.

Maori and Pasifika median ages are in the early 20s, compared to other communities which are more mid-aged. This represents an opportunity with these young people likely to listen to stations that concentrate on new music, but often have limited scope for mainstream artists such as The Edge and Mai FM.

The current media market in New Zealand is very Auckland centric. While Auckland is the biggest market and emerging audience for a potential new youth targeting station, there is also an opportunity for a new station to have a broad geographic audience.

Building an audience into a community that brings together a national demographic should be a focus for attracting a diverse group of listeners. With RNZ’s resources and current brand recognition throughout the country,

   c) Cultural: supporting/promoting NZ music and music makers across genres.

New Zealand music hasn’t had a real backer in the media for decades.

NZ On Air is spread thin across the current outlets, with sporadic unearthed of new talent at best.

Radio is still reaching massive audiences in New Zealand and makes up a majority of music listening, representing both an opportunity for discovery as well as building ongoing support of local acts.

New Zealanders are in many ways parochial, wanting to support local products and culture - why wouldn't this apply to music?

Recent homegrown heroes (or Pure Heroines - not the album reference) have shown the quality of New Zealand music can join the world’s main stages (Lorde, Broods, Conan Mokasin, Kimbra, Unknown Mortal Orchestra) while there are more acts closing ranks (Big City, Leisure, Mathew Young, Cut Off Your Hands) and they’re finding platforms to reach audiences despite the unwillingness of commercial radio to back local acts.

Audiences are there, but not serviced by the current outlets.

The ability to find audiences without mainstream media support is a reflection of the changed music industry. Social Media means a direct relationship between artists and fans - cutting out the need for early distribution deals as do free hosting sites like Soundcloud and BandCamp.

At the same time, technology means the barriers to making high quality music are ever decreasing. ‘Bedroom Producers’ are making music that can fill stadiums with the push of a spacebar.
For example, triple j in Australia have a platform called Unearthed - a website where local, independent artists can upload music direct - with a team on the other end moderating the uploads to discover the best, while a community of music fans can then do the same.

This is how literally hundreds of Australian acts are discovered and added to national airplay, like Flume - who as a 20 year old from the Northern Beaches of Sydney making music on his laptop.

He now has a US #1 under his belt and is a sort after headliner around the world.

This grassroots emergence of music should represent an efficiency and opportunity for a new radio brand, to capitalise on an emerging local music scene that gazumps the current model.

This in turn leads to a backing and loyalty of local artists made good, encouraging the next group of artists along.

Music fans love the idea of being able to access and follow their favourite artists. This happens through social media but also on the live scene.

Supporting and elevating local acts means fans have a deeper connection, seeing them go from local pubs to festival headline sets comes with a sense of ownership and community.

This is where early adopters and supporters of local music emerge as a cohesive group and the artists themselves develop ever bigger fan bases.

The reputation of New Zealand's leading touring acts precede them; Fat Freddy's Drop, Salmonella Dub, Shihad, Katchafire, The Black Seeds, Ladyhawk….. But who is the new wave? Where are the venues they play?

A thriving local music scene becomes self-fulfilling and self-generating. This can be seen in the Australian example, where despite massive costs for touring, because of national airplay on triple j, even emerging acts can find audiences around the country - making viable careers a possibility.

Music fans want to know what live opportunities are coming up in their area (88 enthusiasts, 70 lovers)

Median age for Maori is 24 and PI is 22, a big opportunity for younger people in these ethnic groups.

Maori currently like Top40 and RnB with 24.8% listening to Mai FM and 21.2% to The Edge each week

Pacific peoples have similar tastes with 30.3% listening to Mai FM each week
‘Other Asians’ also listen to The Edge with 23.8% tuning in per week, representing a diverse group that listen to new music on that station.

With 12% of NZ’s population identifying as Asian, this is a large potential audience for a new format.

d) Entertainment: Having some fun among the seriousness of RNZ and the world.

As well as having diverse staff and music, content should be representative from youth issues and affairs to comedy and pop culture.

Young people have a range of interests and comical content from satire to slapstick is an important part of the spectrum.

Throughout a breakfast program for example, listeners should be able to learn, laugh, dance and cry in varying measures.

But as this recent article outlines, for a show like breakfast - the most important thing to do is be funny: https://tjohnsonmediagroup.com/insiders-radio-network/personalities/performance/humor/be-funny/

Comedy and entertainment content is a great entry point to then gain an audience’s attention, from which you can deliver more challenging content like current affairs.

Young people lead complex lives, with influences coming from a range of sources.

The Wireless research shows a range of platforms are trusted for sources of news and information, so across multiple platforms it’s important for a new station to address various needs on each platform.

On Facebook for example, a comedy sketch video may be followed by an informative ‘explainer’ video, if it’s created with the same brand values and voice - then it will still make sense to a young audience member to consume content across this spectrum from the same brand.

A specialist approach to the diverse group of young content makers behind a new station is a good approach to creating light and shade in content.

A comedy breakfast show who have some journalistic skills or at least others in the team bringing such skills could be balanced with a music expert morning show or a straighter news and current affairs program later.

Entertaining can be described as anything engaging - a guiding principle here is for the audience “if they’re not laughing, they should be learning”.
e) Inform: delivering current affairs to younger people

As above, young people can understand different nuances of content coming from a single brand.

A new station format may have different sides to it that a commercial station wouldn’t display - for example a comedy music program can exist on the same station that has a youth current affairs talk program.

Over-arching brand values and style can unite various formats and types of content under a single banner.

Further too, the above points around peer to peer and inclusive content making are extremely important for current affairs. Journalists and talent covering stories need to do so without ‘talking down’ or ‘about’ young people, this is a subtle area that can be fallen into without careful direction.

The Wireless’ qualitative support shows various interests that a young audience are interested in, which is backed up by triple j’s research with young people in Australia. Travel, the housing market, jobs, money and sex and relationships all become ‘current affairs’ when you focus on the young audiences interested in those topics.

For example, a report into the housing market will be reported differently for millennials getting into the market than it will for Baby Boomers.

That’s where the news agenda might appear to run in parallel between RNZ National and a new youth station, but moreover it’ll be likely that providing current affairs to a younger audience will often mean a completely different reporting agenda.

In the Australian example of triple j, the youth current affairs show called ‘Hack’ - might include original reporting on the influence of Instagram models on young people’s mental health right next to federal politics stories that are reported on mainstream channels.

Young people often don’t have outlets targeting them directly because they’re not where the greatest commercial returns come from.
Here’s a graph that shows the situation at the ABC in terms of reaching a young audience….indexing most likely for ‘young adults 18-29’ to engage with one of our brands.

And check this one out……this really says it all. You can see triple j within the market, in terms of demo by year. Who says young people are turning off radios?

Our growth on FM has been while embracing every other platform and growing on them in parallel.

You can see a decline in older audiences with other ABC networks, which should be a concern for RNZ without diversification too….
Multimedia: radio as a generator of digital content

A new youth content brand should really be platform agnostic, meeting the audience wherever they are.

Multi platform content generation is an ingrained, natural part of the editorial process Social media and online content is not made to cross promote on air content, but rather to have value on the platform it lives on.

Each platform’s audience should be considered unique, that followers there may not engage with the brand across other platforms including FM, however there is the opportunity to gradually cross pollinate between audiences to engage them in a deeper way.

On air teams are themselves generators of digital content, rather than just presenters - however digital specialists should also be embedded within content teams.

Radio generally gains good access to interview talent for on air - artists, celebrities, politicians, people who have done something of note.

This is an opportunity to utilise access to drive content further, sometimes capturing radio content for a digital medium like filming an in studio interview.

However more success is achieved using the above methods where ‘online first’ content is created in addition to the on air material, rather than a repackaging.

Radio’s immediacy also lends itself to creating digital content to be part of the zeitgeist or news agenda.
As above, this can be leveraged with access to talent at the centre of the story or could be created online first, then move to an on air format.

Public broadcasters have a competitive advantage over other media who need to share advertising profits with third party platforms or return users to ‘on platform’ content.

Recently I spoke on a panel at the Commercial Radio Australia conference about engaging millennials. The commercial radio representatives spoke about social media being a driver back to on air listening, which is ultimately how they are measured and monetize their success.

For triple j, we view the reach gained on every platform as unique and significant in its own right.

Content is created for each platform, where if it is reworked from another - it needs to be done to have value on the new platform.

**Challenges: what issues would it come up against?**

**Commercial media lobbying and bad press**

New Zealand’s commercial industry, in particular those with radio interests - the powerful MediaWorks and NZME will see a new station targeting younger audiences as a threat to their own audience figures and in turn, revenue.

It’s highly likely that this will result in not only negative press in those owned media regarding the new format, but also lobbying in Wellington for restrictions to the format or even against its inception entirely.

This should be mitigated by engaging commercial media in up front discussions about the format and how it may help the broader media industry by; bringing more listeners to the radio market, developing New Zealand music industry, taking pressure of unpopular NZ music quotas, developing broadcast talent for eventual crossover.

**Educating the audience of the offering as it’s a completely unique offering to NZ.**

To date New Zealand has not had a non-commercial media offering for young people.

While awareness of RNZ is high, there will be a challenge to educate the intended audience on the brand values and output of the new format.

Without significant marketing investment, this will need to be done through good social media strategy, shareable content and seizing opportunities to differentiate against the market.

In one of triple j’s style guide documents, it’s noted “how do you tell people you don’t have ads without running an ad saying you don’t have ads?”

At the launch of the Nova network in Australia, a key strategy was to only play two ads in a row. In an audience survey asking which network played the least ads, many listeners cited Nova as playing less ads than triple j because they were constantly telling their audience ‘we have the least ads’.
More esoteric brand values like independence, credibility, accuracy and public broadcaster editorial policy will take more time to communicate to the audience. This potentially means a slow burn of audience growth and loyalty.

This could be mitigated with good use of available marketing, utilise influencer channels, strategic partnerships and clear, public aims and brand values statements.

**Lag in setting up processes for music servicing and editorial workflows**

The new format will be starting with existing RNZ resources like technical equipment and relationships with industry bodies like NZ On Air.

However creating content to find new, younger audiences will require new systems, news values and workflows. Some of this will be achieved by trial and error on the new station, while new talent and staff may only be attracted once the format is working to some extent.

A high rotation of New Zealand music will also mean the format is hungry for discovering local acts with efficient quality control. In Australia, triple j takes direct music servicing from labels, promoters, managers and pluggers while also canvassing new and independent artists through the Unearthed platform.

Unsigned acts can upload their music straight to the platform with a team based at triple j listening on the other end.

This streamlines music discovery and the opportunity to highlight local artists further. A platform like this in New Zealand would be beneficial but would take time to develop, market and utilize before seeing an on air outcome.

**Where will the live listening?**

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**Where will the live listening?**
- **Reach gained from social media content**
  Meeting young audiences where they are, on social media - with good content branded and presented by key talent will bring a portion of radio listening to the FM output.

  This will be done mainly by matching the brand values and content direction online to those on air, so people who see the online content first have more reason to tune in.

  This may take time as some online fans may never switch to the radio listening, but it will likely extend reach overall.

- **New Zealand music and live music fans**
  New Zealand’s major festival lineups (Auckland City Limits 25k, Laneway 12k, Rhythm n Vines 25k, Homegrown 17.5k) are filled with touring acts that get little to no airplay in the current market.

  By partnering with these events and reflecting their music programming, there is a big opportunity to bring their audiences into the new format.

  This will tap into the excitement of these events, have ownership of marketing collateral and branding on the day, as well as access to create content with the artists involved.

  Supporting and playing the best local music means a deep connection to New Zealand’s live music scene and fans across the country.

  A ‘presents’ relationship with promoters and venues for relevant artists will mean a credibility and opportunity to build listenership amongst the music fans noted in the

  The spreadsheet below indicates the limited news and information presented across the news and information

  This reflects a lack of content in the news and current affairs space, particularly aimed at the

  This is an excellent doc (link below) that RNZ Music have just put together with a

  https://docs.google.com/spreadsheets/d/180DShtWrllwSWkRlkFhpLOi48pUK1kWEq2k
Assuming there is merit in a new radio “spearhead” for the RNZ Music brand, and that it would create digital content and might be supported by additional genre-or audience segment-specific music services (via online streaming, apps and digital TV), what suggestions would you make around providing Music content with a focused online/on-demand offering?
In house legal and rights negotiation with labels and independents’
Major labels have varying but reasonably strict rules governed internationally about the use of their music in on demand content.

Typically this type of content isn’t covered under a radio formats APRA licensing so will need to be negotiated separately, eg for publishing a live performance video to social media / online.

To regularly engage in creating on demand / online music content, in house rights management and legal support is necessary.

It’s also useful to have an ability to negotiate commercially for this type of content, with the likes of Youtube monetising posts on behalf of the label and the publisher, a licensing agreement will usually mean more ability to post on 3rd party platforms.

Focused podcast production rather than ‘catch up radio’ for 3rd party platforms like iTunes’
With the rise of podcast listening, quality on demand audio productions and an understanding of audience expectations, the days of editing a live to air radio program into ‘highlights’ as a podcast are numbered.

To really engage with audiences on demand, content should be designed for that medium as much as possible. That if podcasting is a desired audience outcome, these are commissioned or radio content is significantly reworked for that medium.

It’s also worth noting that the first point around music rights clearing for podcasting is currently a nebulous area. It’s most likely that only small samples of uncleared music will be possible for review purposes.

‘Digital TV is a worthwhile platform, around 50% of Double J (DAB+ / online / mobile / TV only) is on Australian digital TV’
Though TV listening is somewhat counter-intuitive for radio reach (insert Buggles joke here), TV can drive at home listening and for little cost will increase brand awareness through EPG searches.

On demand offering of catch up from the linear broadcast should be focussed to niche offerings, like genre specialist programs.

For digital catch up to linear broadcast programs (ie full chunks of as broadcast music content online) there should be a clear niche for the content.

Rather than putting general playlist segments on demand, it’s better to have something like “the Hip Hop Show” as on demand for previously broadcast radio content.

This will garner a focused online following, more likely be shared amongst and community or influencers and differentiate the online offering to on air.

‘Create content wherever the audience is that builds music credibility and recommendation’
Wherever the audience is listening to music, the new brand should have a presence as a curator and guide for the potential audience on there.

Spotify or Youtube should be places where the new brand has a presence through playlists to build recommendation credentials.

This will lead to some return listening to on air, or at least recognition amongst savvy audiences and the music industry.

‘Don’t see other music services like Spotify as competition, rather an opportunity to find audiences and build the brand’. As above, if other platforms have potential audience utilizing them and there’s possibility of having the new brand as a presence on them - this is a good thing.

For example, the triple j Hit List is the most popular playlist on Spotify in Australia outside of Spotify’s own playlists and 12th worldwide: [https://www.edmsauce.com/2017/09/26/most-followed-spotify-curators/](https://www.edmsauce.com/2017/09/26/most-followed-spotify-curators/)

‘Build strategic partnerships with 3rd party platforms like TuneIn, Apple Music and Youtube’

The strategy of meeting audiences where they are will be engrained in the new brand. Third party platforms and new media need content curators and music recommenders within them.

When people access the world’s back catalogue on Spotify where do they start? If you’ve seen one live performance video of a new local act you like, can you get another via subscription on Youtube?

These platforms benefit from partnering with expert partners who do the curating for them, while the partner will be promoted and be more prominent within that platform. There may be commercial exchanges or some sort of barter required such as return promotion.

Accepting the prevalence of social media use among younger people, is radio the best primary platform to target 16-29 yr olds, over digital / social media platforms?

The move to a new radio brand will have an emphasis on the FM linear broadcast as that will have the highest daily reach. However it’s crucial that social media content is incorporated into production of the content teams.

This new brand aimed at young people is a social media brand.

It is a radio brand. It is an online brand.

Any media organisation with a reasonable scale should have the target audience in mind and meet them where they are, in this case young New Zealanders can be reached across a range of platforms - ideally multiple touch points.
For example, a follower of the brand’s Facebook may also be a listener and may also come through to native online offerings via socials from time to time.

The aim will be to have frequent contact with the brand across several content streams.

In this regard, yes the radio could be seen as a primary channel because the bulk of brand awareness, resources and daily reach will come from that medium.

But the strategy for content makers and management should be to create a content brand, initially led by radio, but finding young New Zealanders wherever they are.

Wouldn’t FM radio be better used to re-activate lapsed listeners/music fans in the 30-50 yr demos? (and build an audience to feed into RNZ National which will, by its talk-tastic nature, continue to be an older demo.)?

Framing this in sociological rather than demographic terms:

**Millennials**: have The Wireless, and are clearly engaging with RNZ primarily online via social and web.

This is good and should be continued, adding to the prospect of a new broadcast brand, this audience are multiplatform and will continue to respond online.

There will be opportunity to utilise this online audience to test content, build hype and audience cross over.

**30 - 50 year olds** are well catered for in music terms on existing New Zealand radio.

So it would be harder to compete for new music listening audiences Coupled with the majority of new music being aimed at and connected with younger audiences, the greater opportunity is to aim younger and pick up this older demographic by extension.

Importantly, millennials are forming their identities, they’re ready to be part of a community and music creates a strong sense of self for young people finding their way in the world.

Gen X and Y are likely to be more passive in their habits to support new media. Although millennials have a reputation of being apathetic, they’re actually in many ways looking for things to put their energy behind.

With a lack of strong non-commercial / mainstream youth brands in New Zealand, there is an opportunity to galvanise a loyal young audience of millennials.

**Gen X/Y**: NZ media offers little for the punk/hip hop/politically aware, social change-makers who came of age in the 80s/90s/00s, supported the 2% > 20% of NZ music, Channel Z, and local Music TV (all gone now).

This is true and is a convincing reason for 25 - 39 year old demographic
The older end of this demo would also be receptive to content aimed slightly younger if it is smart and represents the spirit of youth - keen to learn, explore new ideas, hear new music and remember their own time in a younger space. There is a wide array of music that would be a touchpoint for this audience but is currently not being played on New Zealand radio, such as Radiohead, LCD Soundsystem, Arcade Fire - all bands with strong back catalogues and appeal to 25-50 year olds but also still releasing new music.

The counter to setting out to target this demo as the primary is that they're already defined in their habits and will likely be past their formative years where identity can be attached to the media they consume.

Gen X and older Y’s will have distractions in their life like careers and young families, these can present a barrier to attachment of a strong new brand.

**Boomers**: are well catered for by RNZ. Baby boomers are also well catered for in terms of music programming as evidenced by the success of Coast and The Sound.

Not a question, but a thought re: “Unearthed NZ”. www.theaudience.co.nz positions itself in that role in NZ, has excellent industry support and buy-in, but lacks a good media partner.

Partnering could be efficient, build industry support for RNZ Music, and short-circuit some of the potential development lag you identify.

Most definitely, this is a great site! I like the functionality and it shows the current depth in New Zealand music that isn’t finding a home elsewhere.

I like that even by name they’re focused on their audience, it’s a community led approach to bringing like-minded people together. There’s essentially two target groups making this site work through UGC, the artists and the fans.

Artists bring their own communities and fan groups, through their social media reach to a site like this - it can be replicated with on air plays and good relationships early with artists. This site would be a perfect partner to bring a ready-made community spirit and connections to a new brand.
Team Starting Structure example

<table>
<thead>
<tr>
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<th>ONLINE</th>
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<tbody>
<tr>
<td>1</td>
<td>Social Media Manager / Podcasts*</td>
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<tr>
<td>1</td>
<td>Digital Content Producer*</td>
</tr>
<tr>
<td>3</td>
<td>Video Producers*</td>
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</tbody>
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Notes:
Each role should have experience in cross media content making and are not limited to their core role, eg the presenters form part of the wider music team sourcing / listening to serviced music and having input into overall curation.

Not all roles are necessarily full time (* indicates fulltime)

This News team is assuming support from the wider RNZ News team. This includes limited online output with no focused youth current affairs team

Not included:
Marketing / publicity, assuming there’s central RNZ resources to tap into
Specific youth current affairs team (circa 6 people)
Live music / technical operations, again assuming central resources.

The Hack (The Wireless)
I’ve made assumptions about existing RNZ cross over.

I think an area for further consideration is the youth current affairs content. Triple j bulletins come from dedicated triple j News staff from the News division, they don’t actually sit on our books but are essential.

Our Hack team is comprised of:
EP
Radio producer
Presenter
Sydney cross media reporter
Brisbane cmr
Melbourne cmr
Canberra cmr
Writer
Socials

I think you'd rise to an investment like that over time. Triple j had an increase for digital outcomes a year or so ago. Our Hack program is a highly produced 30mins. However it's also similar to The Wireless – so if you keep that squad - there'll be significant efficiencies.
EXECUTIVE SUMMARY

New Zealanders heavily engage with radio and young people are big listeners. GFK shows 20-29 year olds listen to more than 15 hours of live radio each week, an incredible market starting point for a new radio brand targeting this age group.

The established formats and brands of commercial radio in New Zealand however have relatively narrow focus in their music programming and content. Each brand targeting younger audiences are either Top 40 or genre focused, for example rock fans or hip hop fans.

Other content mostly doesn’t reflect the politically engaged, aspirational and informed young people who are looking for trusted sources of news and information, while also wanting to find connection to a community of like-minded Kiwis.

With strong brand recognition and knowledge of the values of RNZ among young people, there is an opportunity to transfer that into a large active audience.

A new radio brand drawing on a range of music programming currently ignored in the market as well as RNZ’s heritage will likely see immediate sampling of a new brand by young people.

Being commercial free with stated intentions for supporting New Zealand music, arts and culture will inspire loyalty amongst a young audience often categorised as being fickle in a crowded media market.

Millennials should be the target group for a new radio brand.

Utilising the good work done by The Wireless as a launch pad into an FM offering, this group are willing to engage en masse with brands that create a meaningful connection.

Being commercial free with a values based approach is a good place to have a new brand set apart in the market and attract a currently underserved group of young New Zealanders who want to see themselves reflected in the media they consume.

They’re likely to be searching for symbols in their creation of identity and are looking for trusted sources of music, opinion and information.

The approach to this target audience with a new FM output can be powerfully combined with a thoughtful multi-platform approach.

A strategy that meets this audience where they are, without the requirement to constantly deliver them back to ‘on platform’ content for advertising purposes will fully realise the opportunity.

The summary of target audience could look like ‘18-34 year old millennial New Zealand music fans’.

It’s crucial that to target a diverse young audience, the new brand needs to be steered by a team that reflects that target audience.
A community feel amongst the audience will be achieved through peer to peer level programming. If there’s a sense of ‘talking down’ or patronising content at any point, this target audience will quickly turn away.

Therefore presenters, programmers and key content makers will be made up of millennials reflecting the makeup of modern New Zealand society.

A national focus will also aim to unite the audience who feel like they’re tapping into a community of likeminded music fans. It’ll be important to provide content or regional listeners as well as the major urban market focus.

Aucklanders can be a critical audience without programming becoming Auckland centric.

Clear brand values will set this new station apart. The key elements of RNZ will be apparent in the new station; Independence, non-commercial, inclusiveness, trust and integrity.

All key values that millennials engage with, they crave authenticity and clarity of purpose amongst the noise of the world today.

These values should be explicitly signposted up front as well as who the new station is for (young people everywhere in New Zealand who want an alternative to the homogenous mainstream offerings in the rest of the radio market).

Music programming needs to focus on new and alternative music for young millennials. That is the brief and can apply across genres. There should be an emphasis on New Zealand music and support for local acts.

A similar policy to triple j would see playlisted programs by day and specialist genre programs late at night, adding credibility and drawing in audiences from established niche scenes.

Play-listed programs in daytimes would see a range of genres played within a TSL block of 15 minute periods. The audience could expect to hear within a 15 minute period songs across rock, hip hop, pop, funk / soul / dub, rnb and EDM. The link between these tracks will be their relevance to young people.

A sense of connection to music history as well as encouragement of secondary older audiences will also be achieved by more classic or tracks being scheduled a couple of times an hour.

Finally the new brand can cement itself as a tastemaker and support of local culture early in its life through content partnerships.

The station should work through non-commercial partnerships with music festivals like Laneway to leverage an existing audience while gaining special access for content creation. This will also see credibility and support for the station within the music industry and from local artists, giving further access to existing audience networks.

Ollie p.s.

Everyone knows the world has changed.

The words ‘changing media landscape’ have been in every media and content executives’ major speeches since the .com boom.

It’s more important to think about how audiences have changed though. Media isn’t a landscape and even if it were, the shape of the industry is created by the consumers - not the content makers.

In terms of the music industry the most relevant considerations in this evolving scenario are that barriers to entry into music and discovery have collapsed.

Not that long ago you went to a shop to check out what was on the listening posts, then you’d download via Napster or Limewire, later dump your iTunes library onto your iPod or today see what Spotify has put in your Daily Mix.

So crucially, today a listener rents their music rather than buys. You can switch between Mo Town and New Metal without having to think too much about it.

Young audiences are growing up in a world where the entire back catalogue of music is available.

So, are genre demographics as important today as they used to be? In the 90s if you were a West Coast hip hop fan, what were the chances you were also listening to Seattle grunge? Maybe.

What about Kylie Monogue and Metallica? Maybe. But you’d find it hard to find those two cassettes together in a young fan’s collection.

Today, is a Lorde fan potentially listening to Bowie too?

If I like Kendrick Lamar could I also like Broods?

If I do, then what radio station would I listen to?

New Zealand’s radio stations are siloed into formats that represent the old days.

To be fair, days that maybe don’t seem so too long ago. When rock fans just liked The Rock or Hauraki. When hip hop and RnB fans had their Mai or Flava.

These stations have evolved, in some ways, but have mostly stayed in their lanes as far as their listener archetypes go.

They are genre based. That doesn’t reflect today’s world.
But with access to the world’s back catalogue of music, where algorithms are your only real friend - music recommenders can play an important guide role.

For those that don’t have the appetite for relentless searching of the back catalogues of music history or the daily wave of new music, a music recommender to more passive audiences can play an important role.

This forms part of the opportunity at hand.

The other basis of the opportunity at hand is that New Zealand has a really strong radio listening population.

Time Spent Listening for 20-29 year olds of more than 15 hours a week shows an incredible opportunity to gain ears on an FM brand plus extend that reach into other platforms.

Despite the growth and future potential for streaming services, live radio will continue to have a strong base for many years to come.

According to GFK’s Share of Audio Listening research in Australia, live radio still makes up 64.9% of all audio listening - compared to 9.2% to streaming services.

A similar study isn’t in place for New Zealand but with higher TSL and shorter history of streaming brands, it’s likely live radio will remain a powerful platform for accessing audiences.

**SHARE OF AUDIO 2017**

The GfK Share of Audio is the major comprehensive study of Australians’ audio consumption, undertaken annually by multinational research company GfK. The study is considered the authoritative report into the evolution of the audio sector in Australia.