

Review of Student Radio in Aotearoa New Zealand 2020



September 2020

Review of Student Radio for NZ On Air
Dr Matt Mollgaard



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Authorship

Dr Matt Mollgaard is Head of Radio & Audio Media at Auckland University of Technology. He has a 30-year career in the field as a radio worker, teacher and researcher. He has published widely on radio issues - including radio and music, radio and government policy and radio in the digital age. He reviewed the Access Community Radio sector for New Zealand On Air in 2018.

Executive Summary

Student Radio in Aotearoa New Zealand continues to successfully provide critical spaces for local musicians and other groups targeted by the Broadcasting Act 1989 that are not available elsewhere in the media landscape.

Student Radio in Aotearoa New Zealand features unique, challenging and alternative music and other programming for younger audiences that is deeply rooted in the cultural melee of the nation.

Student Radio in Aotearoa New Zealand has a loyal and engaged audience who are listening to programmes, using digital platforms and are attending events created by these organisations.

Student Radio in Aotearoa New Zealand is generally underfunded, with the stations not directly supported by the universities they are embedded in suffering significant financial strain year on year. All stations are at severe financial risk from the fallout of COVID-19. Funding should therefore be reviewed to account for these risks, inflation and the increasing costs of multiplatform production and transmission.

Student Radio is ready for a more cooperative future through the Student Radio Network to enhance support for New Zealand music and programming for their unique audiences and for wider society.

The Student Radio Network should be supported as the vehicle to take Student Radio in Aotearoa New Zealand into a multiplatform future that further benefits New Zealand musicians and their audiences.

“Student Radio in Aotearoa New Zealand continues to successfully provide critical broadcast space for local musicians and other groups targeted by the Broadcasting Act 1989 that is not available elsewhere in the media landscape.”

PART A:
**The Student Radio Sector in New
Zealand**

What is Student Radio?

Student Radio refers to five individual organisations that operate in Auckland, Palmerston North, Wellington, Christchurch and Dunedin that broadcast through FM and online platforms. It is governed by a mixture of student unions, charitable trusts and incorporated societies. The radio stations broadcast on non-commercial frequencies overseen by the Ministry for Culture and Heritage and the individual organisations also provide their programming through their own websites. The stations are charged with providing unique content for younger audiences and being champions of New Zealand music. During the interview phase of this research, it was clear that Student Radio managers and programmers took great pride in being able to provide training for new media talent – ranging from school-aged children to older people volunteering to provide specialist music and information content. They were also notably proud of the space for alternative voices they provide in our media ecology. In terms of New Zealand music, it is a truism that many musical acts find their first airplay on Student Radio, and that airplay and support is essential to keeping their musical dreams alive. Most of our successful musical acts have had their time on Student Radio, with recent examples such as Lorde, Kimbra, Concord Dawn and Fat Freddy’s Drop all leveraging significant international success off support from Student Radio in Aotearoa New Zealand. In a 2020 study of the experiences of New Zealand musicians for the Ministry for Culture and Heritage conducted by Dr Zita Joyce of the University of Canterbury, *Supporting New Zealand Musicians*, it was clear that this group gets significant support and value from Student Radio:

“A significant majority of respondents feel that student radio is relevant for them and their music (82.97%) and have had music played on a student radio station (75.09%). A majority has also been interviewed by student radio stations, and feel supported by them” (Joyce, 2020, p.42).

These stations are loosely grouped under the moniker “Student Radio Network” (SRN). This grouping has seen varying levels of cooperation develop amongst the five participants, with more recent efforts to form common purpose resulting in innovations such as the Student Radio Network Top 10 – a countdown of the most popular New Zealand songs that is created from airplay across the network and carried on every station weekly. This cooperation points to the potential to do more across the network that supports New Zealand music and alternative programming. There are opportunities to enhance NZOA support for the SRN through better coordination of the group that will lead to better outcomes for New Zealand music. These opportunities are in developing better online cooperation, creating and pursuing a more unified and powerful proposition for advertisers, sharing more music content and enabling more joined-up thinking and activity between the SRN and other NZOA funded activities. The potential for the SRN to not only be the leader in championing New Zealand music, but also the enabler of other organisations to enhance their inputs into and use of New Zealand music should be further explored and exploited.

Student Radio Economics

Student Radio is not-for-profit as per Ministry for Culture and Heritage non-commercial broadcasting licensing requirements. It can generate income from a limited amount of advertising per hour, by seeking programme sponsorship, by collecting donations directly from the public, selling subscription services such as student discount cards and by seeking community-based funding from charities and local councils. In the case of two organisations, Radio Control and Radio One, they are also funded directly by student unions and university grants to provide information, events and welfare programming for students on university campuses. While this is on the surface an agreeable arrangement for the stations, the universities, unions and for NZOA, there is real danger that these structural advantages can be very quickly dismantled according to the financial stresses put on the universities and unions that support them. This was evidenced by the loss of Contact FM – the student radio station at The University of Waikato – which had its full-powered FM frequency sold and funding stripped in 1989 by its student union when the union became voluntary and could no longer meet its own costs. This loss is still felt by musicians and audiences in the Waikato.¹ Both Radio Control and Radio One are also susceptible to the vagaries of the institutions they are embedded in, to an extent not seen elsewhere in the group, leaving them vulnerable to financial stress if arrangements change. Student Radio currently receives on average about one-third of its funding from NZ On Air (NZOA) which funds stations primarily to deliver content required under s37(d) of the Broadcasting Act 1989 to:

“Ensure that, in its funding of sound radio broadcasting, reasonable provision is made to assist in the production and broadcasting of drama programmes and in the broadcasting of New Zealand music.”

and also s36(1)(c), that requires NZOA to:

"Ensure that a range of broadcasts (including online) is available to provide for the interests of women, youth, children, persons with disabilities and minorities in the community, including ethnic minorities [and] to encourage a range of broadcasts that reflects the diverse religious and ethical beliefs of New Zealanders."

These two Sections of the Broadcasting Act 1989 are actioned through Student Radio by NZOA thus:

¹ I have previously discussed the Contact FM experience in Mollgaard, M. (2009). Student media. In R. Miller (Ed.), *New Zealand Government and Politics* (pp. 444-55). Melbourne: Oxford.

“Our aim is to ensure ‘great New Zealand music is valued and enjoyed by many New Zealand audiences.’ The student radio network allows us to ensure audiences for diverse music, often not featured on mainstream radio.”

and

“Student radio has a role to play in core public media principles - enriching the New Zealand cultural experience, ensuring content is accessible, strengthening community life and promoting informed debate.” (NZOA website, n.d).

While the focus of this review is on the work of Student Radio in delivering space for diverse New Zealand music to radio and online audiences as per s37(d), it was clear in the interviews with station staff and management and from engaging with Student Radio content on-air and online during this research that the sector also provides unique and important spaces for news, current affairs, information and debate that fits under s36(1)(c) of the Broadcasting Act 1989. This was reaffirmed by the extraordinary lengths the workers and volunteers of these stations went to stay on-air as the country went into lock-down as the COVID-19 crisis unfolded. The interview phase of this research coincided with the first few weeks of lockdown and the efforts of all these organisations to keep operating to serve their audiences was both notable and a reminder of the important role they have in entertaining and informing a particular section of the media market, who are generally not catered for elsewhere. The fact that these very lean and economically vulnerable stations were able to keep up a full roster of shows is testament to the passion and dedication of the people who have chosen to be part of these unique media organisations.

Environmental Scan: Student Radio in the New Zealand Media Ecology

Student Radio operates in one of the most competitive radio markets in the world, against a backdrop of a dominant commercial radio sector, a multiplatform non-commercial public broadcaster, 21 local Iwi stations, a significant number of one-watt Low Power FM (LPFM) radio stations, nationwide Christian radio networks, 12 Community Access Radio stations and an ethnic radio sector that is providing language and programming services to different parts the country. The expansion of radio services on the Freeview platform has also increased the nationwide reach of many of these organizations, broadening content choices for all audiences, including those targeted by Student Radio.

The emergence of internet-based music communities such as SoundCloud and Bandcamp can be seen as emerging threats to traditional Student Radio audience sizes, although these international platforms cannot provide the targeted local services and promotion that Student Radio excels at. Podcasting and other audio services along with the growing reach of online video services such as YouTube and Streaming Video on Demand (SVOD) services that carry material that radio has traditionally provided is also challenging the radio sector.

Despite these developments, radio remains popular in New Zealand. According to radio ratings released by the official measurement company, GfK in November 2019, 3.58 million people or 82 per cent of New Zealanders aged 10+ listen to radio each week (GfK, S4, 2019). While traditional radio audiences now have a multitude of audio options and platforms, there is still a rich radio culture in New Zealand that is partly due to the long, skinny and mountainous geography of the country and the tight and high urban environments that favor AM and FM broadcasting. This is supported by a wide variety of radio listening options, catering to every sector of the market. The ongoing popularity of radio in New Zealand is also due to the domesticity of the technology in our homes, cars, workplaces and social venues and the high level of professionalism and audience targeting created by intense competition. The cost, reliability and geographical reach of data to stream content has also been a critical factor in broadcasters and audiences preferring broadcast over internet-based platforms for continuous reception of radio. This is changing as listeners are increasingly using multiple platforms to access radio content. The distinctions between these delivery systems is blurring, with streaming services such as iHeart radio offering easy access to radio station streams that rivals the simplicity and audio quality of using traditional radio tuners, with very low data costs.

In this sense, the internet is the most serious challenge to traditional media as the low cost of entry and the storage and transmission abilities of online media providers pulls away audience attention and time. Student Radio stations in New Zealand have reacted to the challenges of the internet by becoming multiplatform content providers themselves. This emerging trend has seen all five Student Radio stations deploy websites that provide both live and on demand access to their programming and extra material that compliments the linear and time-shifted audio outputs of the station. Of note

is the creation of bespoke recorded musical content, often by way of video recordings of live performances in station studios or at station events that showcases New Zealand bands in performance. These bands are often new and independently publishing and promoting their music. The drive to having live performances captured and made available online in a relatively sophisticated format is a feature of the changing work of Student Radio as they become sources of multiplatform production and promotion for independent and alternative musical acts. Of note too is the local focus of these stations and their ability to source and promote local music as no other platform in New Zealand currently does. These outlets are locally focused and reliant on a roster of local acts to fulfil their New Zealand music objectives, as well as being platforms for new alternative and challenging national music cultures.

In the five cities with Student Radio stations, they are notable elements of the “local” media left in those regions. The pull-out of newspaper mastheads from the regions, the networking of commercial radio and the subsequent rationalizing of music playlists to tightly formatted lists of largely international hit music and the lack of regional television means that Student Radio has developed a niche in local information services, localized music, arts and culture programming and other elements that reflect alternative music and audiences in their home cities. These developments point to an expanded role for these unique local broadcasters as they become multiplatform “media centers”, providing space for alternative music and cultures.

One potential future challenge for Student Radio is the planned new service for young people from RNZ, which is scheduled to launch in 2021. The content directions and goals of the new service are yet to be fully revealed, but it would represent competition for at least part of the Student Radio audience in the cities they operate in. This may be unavoidable as RNZ’s Charter requires it to cater to younger audiences as well as the older cohorts. RNZ’s desire to serve younger audiences better as part of its statutory obligations has recently been a focus for both the Board and management of RNZ. One way to manage this tension should the new network launch would be to find ways to collaborate on content, events and other points of convergence/competition that are mutually beneficial. This could help Student Radio content reach larger, nationwide audiences and help RNZ promote its new service, providing further benefits for NZOA spend.

New Zealand on Air Funding: The Platform System

NZOA funds Student Radio through its closed Platform & Services fund that allocates different funding to stations depending on their potential population reach. Student Radio stations are funded to play at least 40 per cent New Zealand music. The NZOA funding is a contribution to overall costs of running these organisations. These stations also rely on revenue from a mix of advertising, sponsorship, subscriptions, university grants and donations. The funding for each station is currently:

Station Name	Market	2019/20 Funding
95bFM	Auckland	\$220,000
Radio Control	Manawatu	\$ 75,000
Radio Active	Wellington	\$140,000
RDU 98.5FM	Canterbury	\$140,000
Radio One	Otago	\$120,000

This review notes that there had been no regular increase in funding to match inflation and escalating costs such as wages and Kordia broadcasting fees for Student Radio, apart from some redistribution of money previously assigned to Kiwi FM in 2015. The significant drop in income that followed the first lockdown during the early stages of the COVID-19 crisis this year and the continued difficulty in sourcing commercial ad revenue has created an acute need for additional funding to ensure the continued existence of the Student Radio stations. A moderate funding increase was awarded in time for the 2020/21 funding year, with funding now set at:

Station Name	Market	2020/21 Funding
95bFM	Auckland	\$250,000
Radio Control	Manawatu	\$ 85,000
Radio Active	Wellington	\$200,000
RDU 98.5FM	Canterbury	\$200,000
Radio One	Otago	\$130,000

One outcome of this review should be acknowledgement of the escalating costs these stations face in delivering on their New Zealand music obligations and potentials. In real terms, Student Radio has seen its funding eroded by inflation and increased costs for basic requirements such as wages, transmission services and studio maintenance. Student radio has also been expected to create and sustain online platforms and content while funding has remained static. Increasing funding allocations to account for the increased workload and technical costs of digital content creation and distribution as well as the erosion of the baseline due to cost and inflation pressures is critical to the ongoing success of these organisations.

The critical role Student Radio plays in promoting New Zealand music is likely to be undermined by the struggle they now face to stay afloat in a recession and the ongoing impact of health and economic responses to COVID-19 that can't be accurately predicted at the time of writing. During interviews, Student Radio managers were extremely grateful for the support of NZOA – all agreeing that they could not operate as they do without the funding. That said, they were all equally concerned for the future of their organisations as the economic fallout of COVID-19 began to impact their revenue from advertisers, promotional events and subscriptions. This review recommends funding for these stations be revisited to reflect the new realities of a post-COVID world and the changing work of Student Radio as multiplatform champions of New Zealand music.

Recommendations Arising from this Review

1. That NZOA increase the funding of Student Radio to the same amount awarded to Community Access Radio in New Zealand. [REDACTED]

[REDACTED] Both the Community Access Radio and the Student Radio networks use the same type of MCH-assigned frequencies, both operate with the same restrictions on advertising and both have clear “public good” commitments to meet. While the amount of funding allocated to individual Access stations is tied to the required hours of weekly Access programming, aligning Student Radio to the “Tier” system to distribute funding by population potential both makes sense in terms of NZOA priorities for New Zealand content and streamlining the Radio Platform funding structure. Any increases in funding for Community Access Radio should also apply to Student Radio in this configuration. Aligning the Student Radio funding formula to that of Community Access Radio reflects the amount of locally derived music likely to be generated per head of population and the very similar structures and costs involved in running these media organisations. Should this recommendation be taken up, based on 2020/21 NZOA funding for Community Access Radio, the new funding maximas for Student Radio would be:

Tier 1 – Large Metro

Station	Market	NZOA Annual Funding
95bFM	Auckland	Up to \$300,000

Tier 2 – Large Urban

Radio Active	Wellington	Up to \$250,000
RDU 98.5FM	Christchurch	Up to \$250,000

Tier 3 – Provincial City

Radio Control	Palmerston North	Up to \$200,000
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Radio One	Dunedin	Up to \$200,000
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2. That NZOA consider appointing a nationwide coordinator for the SRN in a separate funding allocation. This position would focus on supporting the five organisations to develop and enhance their offerings for new and emerging platforms, to enhance the sharing of New Zealand music content, to improve coordination between the stations and the advertising industry and organisations such as The Radio Bureau, to share best practice across the network and to be a conduit between NZOA and the network – setting priorities, enhancing reporting structures and exploring potential partnerships across all NZOA funded organisations. This position should be carefully designed to be a neutral advocate for the network and with clear KPIs that reflect the core missions of NZOA and the SRN. The recent appointment of a similar coordinator for the Access Community Radio stations augurs well for a more cooperative and synergistic future which will improve the reach and impact of the work of these stations across Aotearoa New Zealand and the multiple platforms available to audiences today. Student Radio managers should begin a process of cooperation to define this role, as the Community Access Media Alliance (CAMA) managers did throughout 2018/19, using tools such as a SWOT Analysis and a position description to create a business case for this new role.

3. With an increase in funding, the SRN should work towards launching an online content sharing platform like the bespoke Access Community Radio accessmedia.nz system. The unique and significant audio and video content being produced across the five Student Radio stations and their websites should be made both easily sharable amongst the group and widely available to the public. This platform could be modelled on the accessradio.nz system that has been developed with the help of NZOA funding, led by Free FM In Hamilton, or it could be a bespoke build for the SRN using an external provider. This review recommends opening discussions with CAMA as a first step to leveraging a stable and easy to use platform off the excellent results achieved by the Access Community Radio sector noted in my previous report to NZOA “Access Community Radio in New Zealand” from 2018. The success that sector has had in repurposing its content for online distribution and the significant growth in online audiences and content uptake is instructive for the SRN, in that it both demonstrates the power of unified action in moving content online and the audience demand for access to interesting and innovative content. The unique music and information content produced every day at the five Student Radio organisations should be made easily available for local and global audiences to enjoy and to share. A common platform, driven by common purpose and managed by one coordinator is the “gold standard” goal. The increased funding recommended herein would be essential to creating and managing such a platform and having this material available widely and archived for future users adds more potential audience reach to NZOA’s funded content in a relatively cost-effective way.

PART B:
Individual Student Radio Station
Reviews



95bFM Auckland

Overview

95bFM is based at the University of Auckland campus and is governed by an independent Board of Directors charged with supporting the station for the Auckland University Students' Association (AUSA). The station is run by a mixture of paid staff and volunteers and is the oldest of the SRN group, tracing its origins back to a 1969 "capping" stunt by students from the University of Auckland.

[REDACTED]
[REDACTED]
[REDACTED] Notable alumni include Marcus Lush, Jeremy Wells, Chloe Swarbrick and Otis Frizzell.

Financial Position

To supplement the \$250,000 NZOA funding, 95bFM runs up to six minutes of advertising per hour, sells a loyalty card and solicits for donations. 95bFM receives some sponsorship support from the University of Auckland and is required by AUSA to break even or return a profit to the union. 95bFM has been unable to do either in the last five years of financial performance that this review examined. Station management reported notable and ongoing financial stress, exacerbated by the shrinking of its advertising support base due to COVID-19 restrictions.

Programming

95bFM's programming is driven by a core philosophy of being different from the commercial radio broadcasters who target younger people in Auckland. 95bFM plays a minimum of 50 per cent New Zealand music across its top rotates. The 95bFM Music Policy (Appendix B) points to a consultative, inclusive and deliberate kaupapa of biasing its core music decisions towards selecting New Zealand artists for at least 50 per cent of its highest music rotates. Key elements also include directives to interrogate playlist decisions in terms of gender, Maori, people of colour and diverse identities.²

² The 95bFM Music Policy *Kaupapa Puoro Aotearoa* reflects the kaupapa of the entire SRN in many ways, as the individual stations all acknowledged their missions included providing space to musicians and others from across the spectrum of New Zealand's diverse peoples and experiences.

95bFM's Individual music shows, largely run by volunteers with expertise in particular genres are a feature of the musical offerings across 95bFM. Exemplars of 95bFM's information services include *The Wire* weekday news hour and current affairs show, accommodation notices, gig guides and a wide variety of challenging talk content across its core daytime shows as well as its long-running children's show on Sunday mornings. Night times and weekends feature a variety of genre-based music shows that reflect the broad and challenging musical offerings of the New Zealand Student Radio sector.

95bFM Online

95bFM has a simple but functional website which includes copies of previously broadcast material, show information, podcasts (bCasts) and textual information services. Playlists and ways to submit music feature, as well as information about forthcoming station-supported gigs and events. 95bFM maintains a reasonable social media presence, with 18,525 Facebook and 19,700 Twitter followers respectively.



Radio Control 99.4FM Palmerston North

Overview

Radio Control is based at the Massey University campus in Palmerston North and is governed by the Massey University Students' Union (MUSA) as a student service. Radio Control plays 60 per cent New Zealand music as a minimum across its highest rotates. The station is run by a mixture of paid staff and volunteers and has been on-air since 1981. [REDACTED]

[REDACTED]

[REDACTED]

Financial Position

To supplement the \$85,000 NZOA funding, Radio Control runs up to six minutes of advertising per hour and is directly supported by a grant from Massey University to help train media students and also receives subsidies from MUSA (\$95,000 in 2020). Radio Control is therefore in a relatively strong financial position, breaking even or slightly better in the last five years of financial performance that this review examined. Station management were notably less stressed than other respondents about the station's financial position but were keenly aware of how reliant the station is on the ongoing support of MUSA and Massey University. Management noted that changes to their funding formula would have a serious effect on Radio Control's ability to provide the range of services and opportunities that it does now. Radio Control is somewhat at the mercy of support from MUSA and Massey University – any changes to this support would make the station insolvent. This is a concern as universities nationwide reduce spending due to the impacts of COVID-19 on their budgets.

Programming

Radio Control's programming is driven the desire to be a radio experience that is "fresh, genuine, and diverse" (Radio Control website). The station is proud of its connection to the local music scene, including close cooperation with *The Stomach*, a local recording, rehearsal and live gig venue that provides new local music for its playlists and events. Radio Control's information services include local news and events that reflect student lifestyles and a wide variety of challenging talk content

across its core daytime and weekend shows. Night times and weekends feature a variety of genre-based music including Alt-Country, Electronica and Swamp Rock shows as well as a range of shows featuring new and challenging music.

Radio Control Online

Radio Control has a simple and functional website with broadcast material easily selected under an “On Demand” menu. The website does not feature the textual information services of other Student Radio websites, with much of that material provided by the MUSA website instead. Playlists and ways to submit music feature, as well as information about volunteering and forthcoming station-supported gigs and events. Radio Control has a relatively small social media presence, with 3,814 Facebook and 889 Twitter followers respectively.



Radio Active Wellington

Overview

Radio Active is based in central Wellington is governed by an independent Board of Directors as a not-for-profit organization. Although the station is no longer part of the University of Victoria, it maintains close links to student groups across all of Wellington's tertiary institutions, giving it a wide catchment of younger listeners. The station is run by a mixture of paid staff and volunteers.

[REDACTED]
[REDACTED]
[REDACTED] Notable alumni include John Campbell, Tova O'Brien and Dai Henwood.

Financial Position

To supplement the \$200,000 NZOA funding, Radio Active runs up to six minutes of advertising per hour, sells branded merchandise and solicits for donations. Despite this, Radio Active has been unable to cover all its costs in the last five years of financial performance that this review examined. Station management reported notable and ongoing financial stress, exacerbated by the shrinking of its traditional advertising support base due to COVID-19 restrictions. Radio Active was being particularly hurt by the COVID-19 lockdown due to its reliance on smaller urban hospitality businesses, live music venues and small retailers for advertising support.

Programming

Radio Active's programming is notably focused on New Zealand music, with 70 per cent New Zealand music in its highest rotates. The station is also focused on Wellington music, a point of pride for station management. Programming elements such as *Active Live* and the *Active Top 11* showcase local bands and provide airtime they would not get elsewhere. Radio Active's information services include a community guide, activity guide and news and opinion programmes across the day to complement the music programming and artist interviews are also a feature. Radio Active plays a

children's show in the weekend. As with other Student Radio stations, night times and weekends feature a variety of shows largely run by volunteers that traverse a wide range of musical styles and community interests.

Radio Active Online

Radio Active has a content-rich and dynamic website which includes copies of previously broadcast material, show information, podcasts and textual information services. Of note was the extra video content of live performances captured by Radio Active. This points to one of the strengths and potentials of all Student Radio in New Zealand - the ability to produce simple but effective multiplatform content that is easily spreadable and allows audiences more insights and connection to New Zealand musicians in more raw and intimate settings. The website also features playlists and ways to submit music, as well as information about forthcoming gigs and events. Radio Active has a reasonable social media presence, with 14,184 Facebook and 6,194 Twitter followers respectively.



RDU 98.5 FM Christchurch

Overview

RDU 98.5FM is based in central Christchurch and is governed as a not-for-profit by a Board of Directors, made up of the Station Manager and one other independent director. Although no longer directly associated with the University of Canterbury, RDU 98.5FM serves the two large tertiary student groups at the university and Ara Polytechnic as well as the alternative Christchurch music scene. The station is run by a mixture of paid staff and volunteers and has a notable pedigree as a survivor – recovering from the loss of its studios during the Christchurch earthquakes by creating a studio in a converted truck in order to safely stay on-air and serve its audience. [REDACTED]

[REDACTED]

[REDACTED]

[REDACTED] Notable alumni include Brent Hansen, Charlotte Ryan and Melody Thomas.

Financial Position

To supplement the \$200,000 NZOA funding, RDU 98.5FM runs up to six minutes of advertising per hour and has promotional partnerships with local venues and businesses. RDU 98.5FM has been under financial pressure for some time, recovering from costs associated with the earthquakes, the general downturn in revenue as the Christchurch rebuild progresses and the more recent impact of COVID-19 restrictions. RDU 98.5FM has been unable to break even in the last five years of financial performance that this review examined.

Programming

RDU 98.5FM calls itself “Christchurch’s Alternative Radio Station” and features an eclectic mix of music from New Zealand and around the world. Local artists feature prominently, both on-air and in

“RDU Live to Air Sessions”, which are also uploaded to You Tube. RDU 98.5FM plays a minimum of 49 per cent New Zealand music across its highest rotates. Information services include news and current affairs slots in key weekday dayparts, podcasts and specialist local shows such as “Anatomy of a Song” and “Radio for Kids”. Gig guides and local artist interviews also feature. Along with regular breakfast and morning dayparts, RDU 98.5FM features a roster of specialist genre shows across the day and night, with a wide variety of musical styles broadcast in a comparatively busy schedule of volunteer-run shows.

RDU 98.5FM Online

The RDU 98.5FM website includes copies of previously broadcast material, show information, and textual information services, including a (surprisingly informative) section dedicated to “how to pronounce band names”. Playlists and ways to submit music feature, as well as information about forthcoming station-supported gigs and events. Links to You Tube videos featuring local bands are another feature, with a significant collection of local bands available and 165,526 views of that material. RDU 98.5FM has 10,864 Facebook followers.



Radio One 91FM

Overview

Radio One is based at the University of Otago campus in Dunedin and is governed by the Otago University Students' Association (OUSA) as a student service. Radio One plays 60 per cent New Zealand music across its highest rotates as a minimum. The station is run by a mixture of paid staff and volunteers and has been on-air since 1981. [REDACTED]

[REDACTED] Notable alumni include Shayne Carter, Samantha Hayes and Charlotte Glennie.

Financial Position

To supplement the \$130,000 NZOA funding, Radio One runs up to six minutes of advertising per hour, is supported by the University of Otago and OUSA (which included rent-free premises), sells its "Onecard" to the public and offers merchandise for sale through its website. Despite this, Radio One is in a relatively poor financial position, running at a notable loss over the last five years of financial performance that this review examined. Station management were concerned about the station's financial position but were proud of the services they were able to deliver to Dunedin's student population and the musical culture of the city. Radio Control is at the mercy of support from OUSA in many ways – any changes to this support would deepen their financial struggles. This is a concern as universities nationwide reduce spending due to the impacts of COVID-19 on their budgets.

Programming

Radio One's programming is typical of the group, with the website stating "We're about variety. We're about diversity. We're about goodness". The station's schedule demonstrates a commitment playing a wide variety of music from New Zealand and the world that is diverse and challenging. The

weekday dayparts feature political, social and cultural talk programming aimed at a variety of audiences, with a skew to under 40s. A dedicated sports talk and opinion slot was a unique offering amongst the group. The volunteer shows across the evening and weekends take a variety of approaches, with shows covering a wide range of genres, programming for children and Maori programming examples of a diverse listening experience.

Radio Control Online

Radio One has a relatively rich website with broadcast material easily selected under the “Podcasts” menu. Links to a local Gig Guide, promotional material around the station’s free-to-students “Onecard” loyalty discount programme and countdowns, merchandise and “live-to-air” with New Zealand bands populate the website too. Radio One maintains a reasonable social media presence, with 13,168 Facebook and 8,831 Twitter followers respectively.

PART C:
The 2020 Student Radio Survey

The Student Radio Survey 2020: What do audiences think?

A key part of this research is assessing how audiences use Student Radio and what they think of it. This is to help contextualize it as a media service in 2020. The individual stations came together as the SRN to produce a survey that they thought would best serve this purpose. The survey was promoted on-air and through station newsletters and websites during the early part of 2020, including during the COVID-19 lockdown, with one question pertaining directly to the crisis (have you heard a COVID-19 message on station?) providing direct evidence of the reach of these organisations. Another question relating to advertising reach also tells a similar story. There were 1033 respondents to the survey from across New Zealand, represented by station here:

95bFM – 241

Radio Control 99.4FM - 20

Radio Active 88.6FM - 218

RDU98.5FM – 438

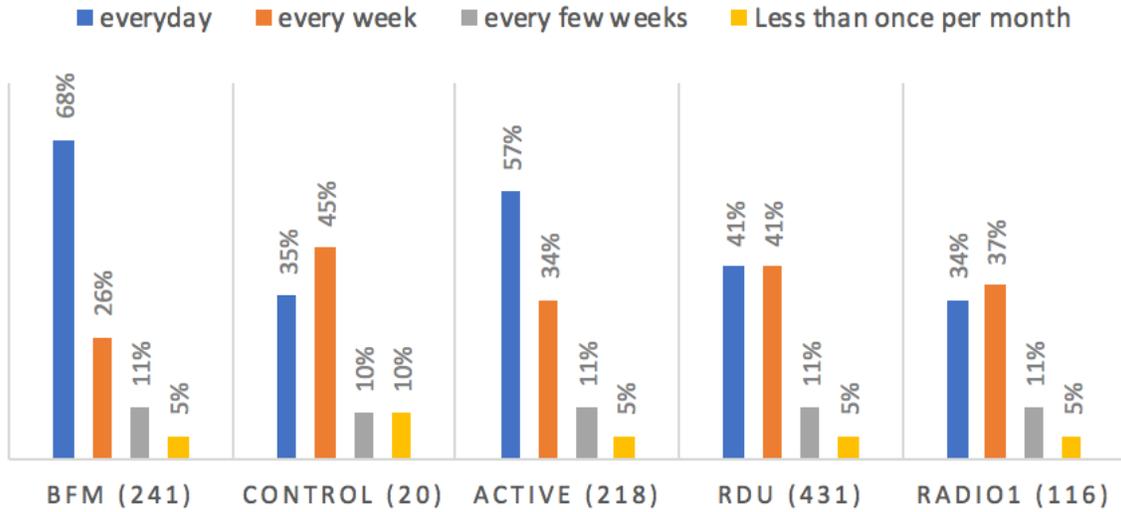
Radio One 91FM – 116

This is a reasonable sample size from which to draw conclusions about the impact and value of Student Radio in New Zealand. The data was collated by James Meharry from RDU98.5FM and presented here in graphical form. It shows that audiences are generally loyal to these stations, proactively engaged with their broadcasts and digital platforms and appreciative of their editorial independence, cultural content and musical offerings.

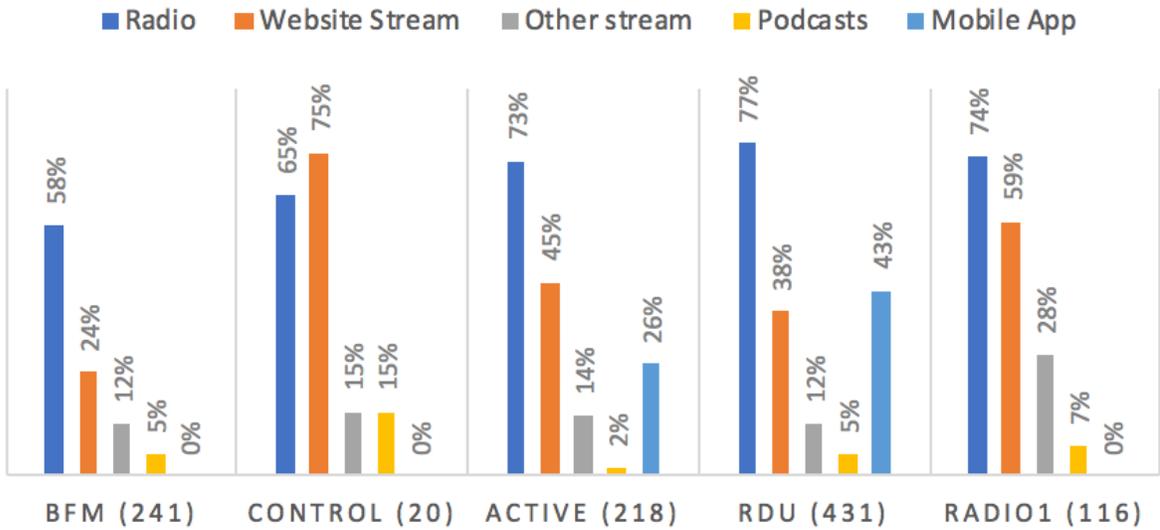
There is also strong support for station events notable in this survey, a key driver of connections between New Zealand musicians and Student Radio. The synergistic relationships between these outlets, the musicians they promote and the audiences that attend their events are important facets of the local live music experience in New Zealand - something noted by all the interviewees during this project. The strong support from the SRN for the *Save Our Venues NZ* movement post-lockdown is further evidence of the importance of these symbiotic relationships.

The 2020 SRN survey of Student Radio shows strong support for these stations from their audiences across several vectors and across multiple platforms. This points to an increasingly digital future for the group, with the ability to expand content beyond the audio-only radio broadcast a significant opportunity for the SRN, musicians and NZOA to reach audiences in new and compelling ways.

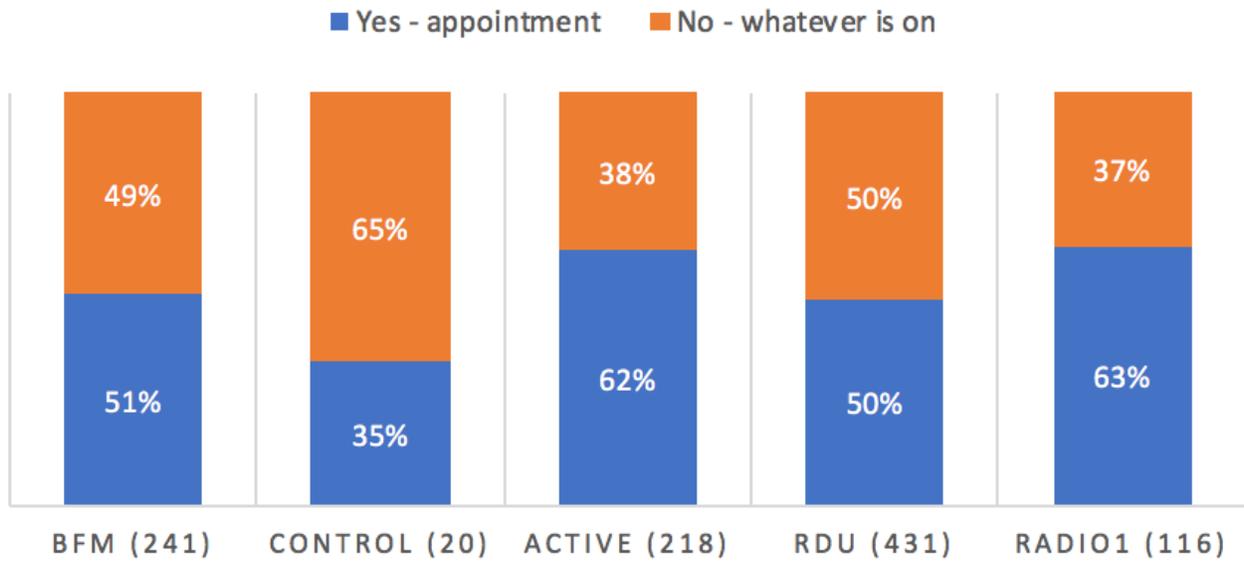
Q1: HOW MANY TIMES DO YOU LISTEN TO STATION (SAMPLE SIZE)



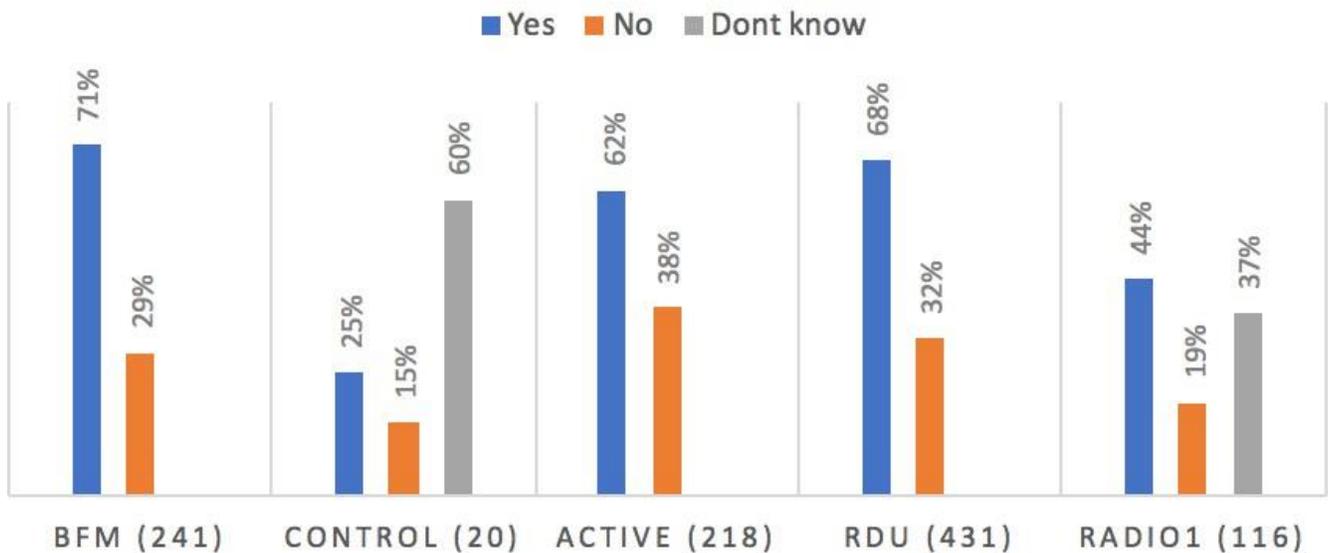
Q2: HOW DO YOU LISTEN TO STATION (SAMPLE SIZE)



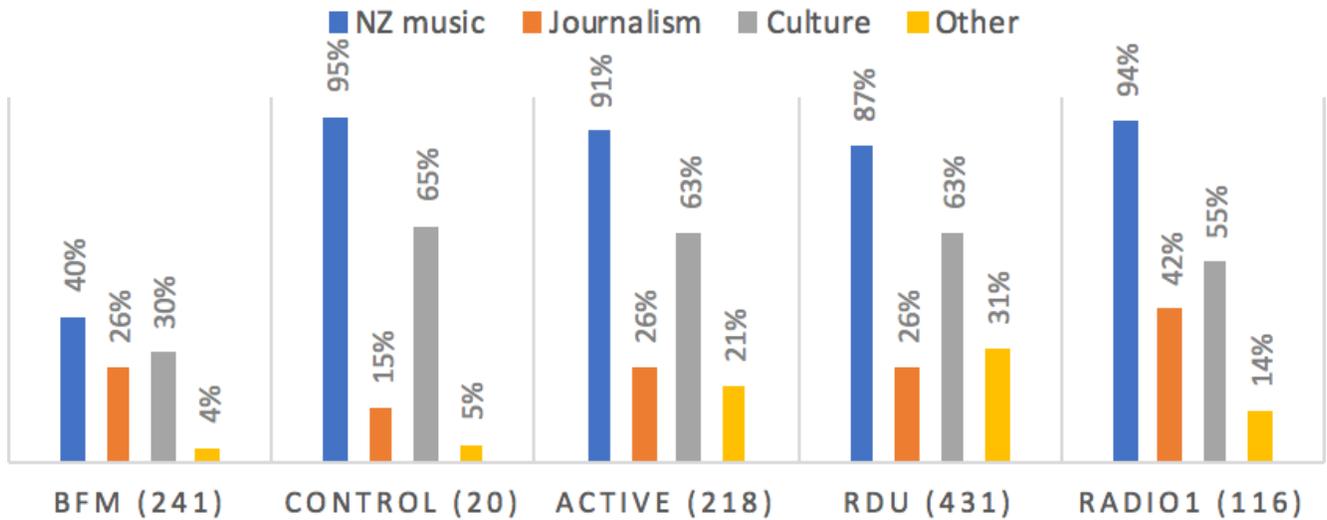
Q3: DO YOU LISTEN TO SHOW OR PODCASTS REGULARLY



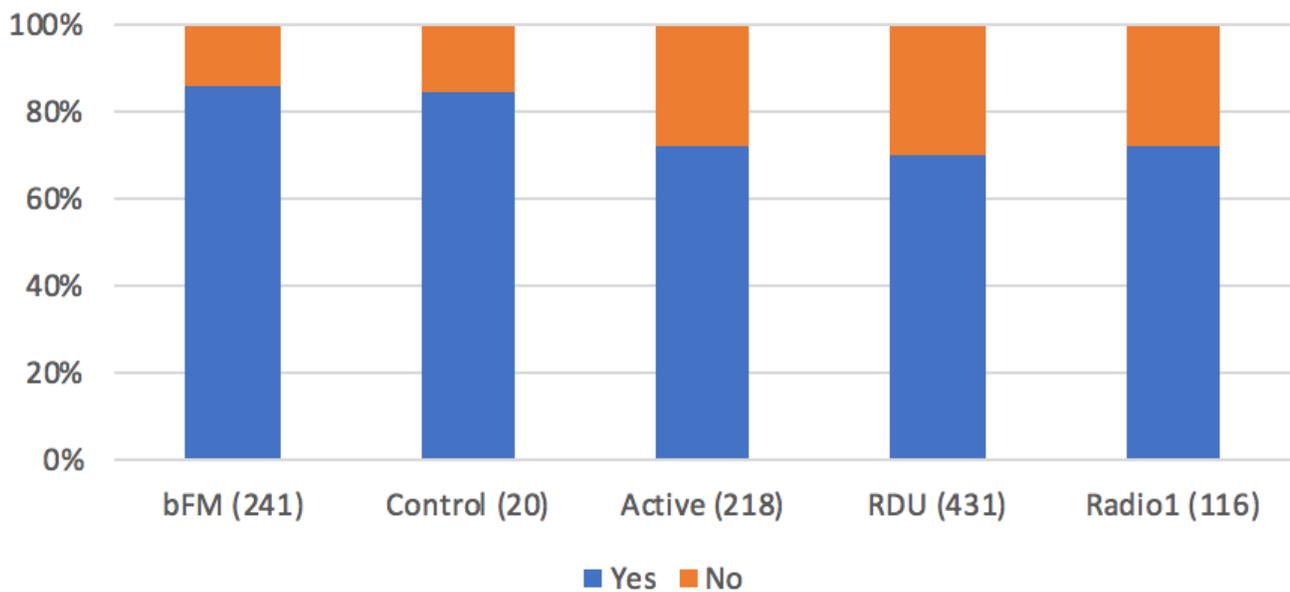
Q6: DO YOU USE ANY OF THE PRODUCTS OR SERVICES PROMOTED ON-AIR (SAMPLE SIZE)



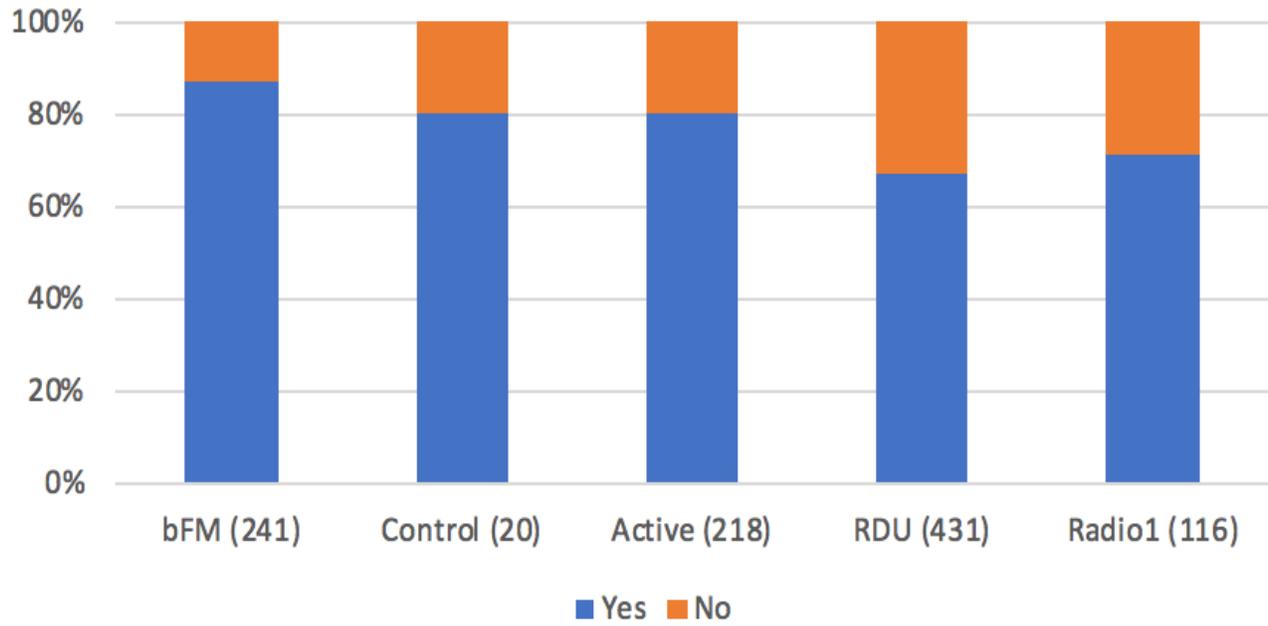
Q7: DO YOU LISTEN TO STATION TO BE INTRODUCED TO ANY OF THE FOLLOWING (SAMPLE SIZE)



Q11: Have you been to an event heard on Station



Q14: Have you heard a COVID-19 Message on Station



References

Access Community Radio Online Content Portal

<https://www.accessradio.org/>

Access Community Radio in New Zealand

https://d3r9t6niqlb7tz.cloudfront.net/media/documents/2018-10_Mollgaard_Access_Radio_Review_2018_FINAL_for_publishing.pdf

Save our Venues NZ Boosted Page

<https://boosted.org.nz/profile/5eadee4bda204c002348ba4a>

Community Access Media Alliance Website

<https://www.cama.nz/>

Ministry for Culture and Heritage non-commercial broadcasting licenses

<https://mch.govt.nz/what-we-do/non-commercial-broadcasting-licences/regional-and-community-broadcasting-framework>

New Zealand on Air Student Radio funding

<https://www.nzonair.govt.nz/about/our-funding-strategy/student-radio-network/>

New Zealand On Air: Where are the Audiences 2018?

<https://www.nzonair.govt.nz/research/where-are-audiences-2018/>

Joyce, Z. (2020). Supporting New Zealand Musicians: Report to the Ministry for Culture and Heritage.

Mollgaard, M. (2009). Student Media. In R. Miller (Ed.), *New Zealand Government and Politics* (pp. 444-55). Melbourne: Oxford.

Personal Communication

95bFM

Sarah Thomson - Programme Director

Caitlin McIlhagga - General Manager

Radio Control

Michael Tilley - Station Manager

Felix Carr - Programme Director

Radio Active

Station Manager, Jennifer Kyle

Programme Director, Harriet Robinson

RDU 98.5FM:

James Meharry - Managing Director

Simon Claridge - Station Manager

Jamie Stratton - Production Manager

Radio One 91FM

Sean Norling - Station Manager

Henessey Griffiths - Music Director

Student Radio Websites

95bFM: <https://95bfm.com/>

Radio Control 99.4FM: <https://www.radiocontrol.org.nz/>

Radio Active 88.6FM: <http://www.radioactive.fm/>

RDU 98.5FM: <https://www.rdu.org.nz/>

Radio One 91FM: [www.https://www.r1.co.nz](https://www.r1.co.nz)

Appendix A



TERMS OF REFERENCE

Student and Niche Music Radio funding

The agreed scope of this review is:

Provide an environmental scan that places student radio and the three additional niche music stations NZ On Air supports with Music Feature funding in the context of similar services both broadcast and online (e.g. LPFM, streaming sites, local internet radio, any other community-based entities targeting specialist audiences including Access Radio);

Compare and contrast station operating models and comment generally on strengths and weaknesses;

Comment on delivery methods – terrestrial FM, online reach, social media reach and how well this serves each station's population base;

Review 2018/2019 station reports provided by NZ On Air and assess broad trends, both collective and by station;

Analyse reported station output, including the proportion of New Zealand music content, s36(1)(c) content, and other spoken word/non-music content and comment on value, diversity and relevance, particularly in relation to the population and area served by the station;

Comment on each station's contribution to the overall NZ music eco-system and whether their work aligns with NZ On Air strategic objectives around the discovery and enjoyment of New Zealand music by New Zealand audiences;

Discuss audience feedback and engagement with each station and assess data supplied by each;

Assess support from within the regions themselves, for example local body awareness, local tertiary student organisations, the range of volunteer announcers recruited and retained, announcer/volunteer churn rates;

Comment on effectiveness of local and sector partnerships and collaborations;

Comment on the effectiveness of governance arrangements;

Consider the financial position and future needs of each station and how this may have changed specifically over the last five years. The reviewer will work with NZ On Air's Head of Corporate Services to analyse financial data and compare and contrast the commercial/sponsorship revenue-plus-public funding model and any other third-party funding options;

Consider whether the NZ On Air's varied approaches to funding these stations is still the best way to apply limited public funding (generally tiered according to population base);

Discuss whether, individually and collectively, there is clear evidence that stations/content are found and valued by target audiences and, if so, discuss ideas for future improvement.

Travel to stations will generally not be required but Skype meetings with station managers and Chairs are expected.

We anticipate the report will be succinct, audience-focused, with detailed data presented as appendices.

We also anticipate you will be available to speak to the final report at one of the subsequent NZ On Air Board meetings to present your findings.

Appendix B

95bFM Kaupapa Puoro Aotearoa

95bFM's programming mission is to be the innovator, leader and indicator of contemporary music and lifestyles within Tāmaki Makaurau and beyond. This is a commitment to:

- Consulting with members of the Aotearoa music scene to develop contributions, collaborations and representations of music and community within Aotearoa.
- Supporting releases, events and art forms from within that community. This includes a commitment to procuring ☐ ingesting ☐ playlisting the latest singles/releases from said community.
- This includes an internal 'mindful representation' policy. E.g.:
 - *“Are there a representative amount of female or gender non- binary artists in my playlist? If not, why not? How can I change this?”*
 - *“Are there a representative amount of indigenous artists or persons of colour in my playlist? If not, why not? How can I change this?”*
- This includes a clear commitment to TeAo Māori and its inclusion in all aspects of station programming.

Technical/rotate aspects of programming of new NZ music include:

- All suitable NZ music (of artistic merit but excluded from mainstream airplay) is ingested. It immediately falls into one of the following categories:
 - **A ROTATE:** ≈ 20 tracks of NZ and O/S origin on heavy rotate (minimum 50% NZ content). Adjusted weekly with tracks later falling into RECURRENT rotate.
 - **B ROTATE:** ≈ 30 tracks of NZ and O/S origin on slightly lighter rotate (minimum 50% NZ content). Adjusted weekly with tracks later falling into RECURRENT rotate.
 - **2020 ROTATE:** Inclusion in some lighter scheduling and available in library format for DJ picked inclusion.
- Live performance opportunities exist for NZ artists throughout the week, on shows such as *Freak the Sheep, Morning Glory, 95bFM Drive, 95bFM Breakfast*. We then host (and replay) the audio (and sometimes video) for the artist, also giving the artist full rights to use the audio/video however they wish.

Appendix C

Report Structure and Methodology

This review is structured along similar lines to five-yearly reviews of curriculum areas undertaken by external experts in the New Zealand university sector. The report examines individual stations in the Student Radio sector and takes a broader view of the operating environment they work in.

This review incorporates interviews with Student Radio workers and/or Trustees, self-reporting of programming outcomes and individual station operational issues, radio ratings data from GfK International, financial data from the organisations (where available), online listening and audience research gathered by the broadcasters themselves.

This information was analyzed in terms of the scope of the review agreed with NZOA and the reviewer, who has been involved in radio as a worker, researcher and teacher for 30 years. Every station is analyzed in its own section, using the Terms of Reference (above) to examine them as individual entities. This acknowledges the unique geographical locations, communities, governance arrangements, challenges and prospects of each organization. This provides both an individual and comparative snapshot of the stations and the sector.

Data Notes

Audience feedback was sought from every Student Radio station at the beginning of this project, with an 8-week window for stations to gather this in any manner they thought would work best for them. Part of this period coincided with the COVID-19 lockdown, so may have been influenced by this in terms of listener attention, recall and engagement, although the nature of the questions asked mitigates any critical concerns about this. The SRN data was gathered by an online survey promoted on all five SRN stations and collated by James Maherry of RDU 98.5FM.