

Media in New Zealand, July 2008

New Zealand population 4,256,000 (June 2008)

Television

Eight free-to-air channels: **TV One** and **TV2** (Crown Owned Company, Television New Zealand), with 67% share audience share of the free-to-air (FTA) audience, and 56% of the total television market (tvnz.co.nz, July 2008). Primarily funded through advertising revenue (90%) + Charter funding + NZOA-funded programming

TVNZ6 and **TVNZ7**, digital-only channels available on Freeview (one-off payment for set-top box). Repeats of NZ programming, some new NZ programming, overseas programming. TVNZ also provides TVNZ On Demand.

TV3 Owned by MediaWorks NZ, which is 90% owned by Australian private equity firm Ironbridge Capital (formerly CanWest Global Communications, Canada), 19% FTA audience share (2006).

Prime TV (previously owned by Prime Networks Australia, purchased by Sky Network in 2005). Up to 5% FTA audience share.

State-funded **Maori Television Service** (MTS), launched June 2004. Attracts between 50-70% non-Maori viewers. Programming is 90% locally produced. Second channel **Te reo** launched in 2008.

Pay TV : Sky Network Television with 80+ channels of terrestrial + satellite digital service + radio and audio channels. 78% owned by Independent News Limited (INL) + 8.39% Commonwealth Bank of Australia. (44% of INL is owned by Rupert Murdoch's News Corp). In 46% of NZ households (720,919 subscribers, Dec 2007; 85% residential digital connections, Sky introduced PVR (personal video recorders) capability in 2005. After years of losses, Sky made \$35m profit in 2004, with a 2007 revenue of \$328.7m (90% from subscriber fees). 23% share of the total NZ television audience (2006). 19% share of 20-54 year olds (April 2008)

Regional TV: numerous regional channels eg Christchurch (NowTV, CTV), Invercargill (Mercury TV), Nelson (Mainland TV), Channel 9 (Dunedin)

Community TV: eg Triangle TV (Auckland)

From 2005, some funding available from New Zealand On Air.

Radio

Over 320 radio frequencies in New Zealand. 212 AM and FM radio stations (April 2002). 49 FM stations in the Auckland market, August 2004 (New York=43; London=36)

Commercial radio networks: The Radio Network . NZ's biggest radio network, with 118 stations and eight nation brands. Wholly-owned subsidiary of Australian Radio Network (ARN)—owned in turn by APN News & Media and Clear Channel Communications (USA) 46% of all radio listeners.

RadioWorks/Radio Pacific/More FM/Mau FM network . Covers about 45% of the NZ radio market. A component of Mediaworks, sold to Ironbridge in June 2007/.

Non-commercial, public radio networks: Radio New Zealand (National Radio, Concert FM), funded through NZOA (\$29m annual baseline funding; additional \$10.9m over four years, in 2008 Budget); Student Radio network

Access/community radio (NZOA funded) and iwi radio (Te Mangai Paho funded)

Newspapers

1.6 million New Zealanders read a daily newspaper, and 74% of people aged 15+ read at least one newspaper each week (Nielsen Media Readership Survey, 2007)

26 daily newspapers, majority are morning editions. *New Zealand Herald* largest metro circulation (194,706, Sept 2007); *Waikato Times* largest provincial circulation.

Two major newspaper companies:

Fairfax (Australia), with 62.9% (May 2005) of daily and weekly newspaper circulation formerly owned by INL, including *Dominion Post*, *The Press*, *Waikato Times*, *Sunday Star Times*, *Sunday News*, 61 community papers).

APN News & Media, with 28.5% of daily and weekly newspaper circulation. Australian-based subsidiary of Dublin-based Independent News & Media, headed by Tony O'Reilly. Owns *New Zealand Herald*, *Herald on Sunday* and nine provincial newspapers.

8.6% of newspapers are independently owned, including *Otago Daily Times*

Cinema

Three cinema exhibition/distribution chains:

Sky City . Own 69 SkyCity cinemas, 67% ownership Village Cinemas Fiji; 50% ownership of Rialto Cinemas (22 screens). Jointly cover 75% of NZ market). Currently trying to divest cinema ownership.

Reading Cinemas (subsidiary of Reading International, USA). Cinemas in Wellington, Hastings, Napier, Queenstown

Hoyts (subsidiary of Hoyts Australia, owned by Pacific Equity Partners), cinemas in Auckland, Wellington, Christchurch and Dunedin

Small number of independent cinemas eg Penthouse (Wellington), Regent (Te Awamutu), Victoria (Hamilton)

NZ b.o. record, March 2002=\$42.7m; single week record 6-12 July 2006=\$6.4m. 2007 b.o.=\$151.74m Up to 300,000 New Zealanders visit a cinema weekly

[Total US b.o. in 2001=\$US8.35 billion]

Magazines

More 3,700 titles available in New Zealand; 900 New Zealand published or New Zealand editions. PBL Media and ACP Magazines dominate the magazine market.

Top titles include: *NZ Woman's Weekly* (readership of 891,000 in 2007) *TV Guide*, *AA Directions*, *Woman's Day*, *Skywatch*, *New Zealand Gardener*, *Cuisine* Some important titles are overseas-owned eg *Metro*, *North & South* (Australian Consolidated Press); *Listener*, *New Zealand Women's Weekly* (Wilson & Horton/APN)

Computers and Telecommunications

About 60% of NZ homes are web-connected, with 54% broadband connected. .The New Zealand 'online population' is equivalent to 85% of the population (Australia=80%).(Nielsen Online, 2008)

New Zealand schools are 96-99% Internet connected.

The three leading telecommunication providers (telcos) are: Telecom (1.7m fixed lines + 1.8m mobile customers, July 2006); TelstraClear (subsidiary of Australia Telstra), and Vodafone (UK owned), two million subscribers (2006). Telcom now instructed to unbundle its local loop monopoly.

Advertising

The 2007 total advertising spend was 2,335 billion, with \$654m (28%) on television advertising and \$826m (35.4%) on newspaper advertising). Magazines have a 11% share, and radio 11.7%. Online advertising is the strongest growth sector, but was only 5.8% in 2007. There are close to 150 advertising agencies, mainly affiliates of global companies;

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