

REVIEW OF NZ ON AIR’S ‘NEW MUSIC’ FUNDING SCHEMES (FOCUSING ON NEW MUSIC SINGLE, NEW MUSIC PROJECT)

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INTRODUCTION

New Zealand's music industry has, like the recorded music sector worldwide, experienced repeated and often disruptive change in the past 25 years.

NZ On Air funding of music for broadcast has been a constant through that time, and has played a significant role in the development of skills and infrastructure in the sector. In a generally collegial industry, NZ On Air is also seen as a valuable facilitator of relationships between a range of actors – broadcasters, labels, artists, managers, audio and video producers and others.

The single most significant change in the way the music business works – the move from sales to streaming as the primary source of revenue in the past decade – has had an impact on the way NZ On Air funding is structured and its impact measured. Various other changes have also influenced the way funding schemes work and the scope of industry support.

Not all of these are in the music business itself – the broadcast sector has also evolved in significant ways. For instance, first music television and more recently the importance of conventional music video have receded. This has obviously been significant for an agency which entered the music sector as a funder of music videos.

NZ On Air has restructured its music funding schemes several times in the past decade and a half, and it seems certain that further adjustment will be required in years to come. This review aims to assess the fitness for purpose of the current New Music funding schemes, which were introduced three years ago, along with key adjustments to those schemes since. It also ventures on the overall role of the agency and its relationship to the two sectors it serves; music and broadcasting.

SUMMARY POINTS

This report makes the following observations:

- NZ On Air's current funding music schemes are largely regarded as fit for purpose, unlike the previous reviews.
- The New Music Single scheme has an increasing volume of applications and many of the unsuccessful applications are of sufficient quality to be funded. New ways to address this volume should be evaluated, and include a new step to provide mentoring for "bedroom" artists who show strong creative promise but do not yet have adequate industry relationships or marketing skills.
- Bearing in mind the success of NZ On Air's recent targeted funding for Pacific artists, NZ On Air should investigate a scheme to uncover and develop promising artists and producers in other New Zealand ethnic communities. And, where possible, to work with NZ platforms serving those communities.
- Production skill is an increasingly crucial element of pop music success. NZ On Air contributes financially to the Recorded Music NZ *New Zealand Music Producers Series* and APRA's *SongHubs*, but could consider ways to incorporate local producers directly in funding schemes. It may be possible, for instance, to develop a scheme in which producers are funded to work with new artists.
- NZ On Air should explore ways to incorporate critical and creative achievement in the reporting for funded works. Simply reporting broadcast, streaming and social media metrics may often provide a useful assessment of the return on the agency's investment, but sometimes ignores the real, cultural achievement.
- The music industry, even at the level of independent artists, is increasingly data-driven. NZ On Air is requiring the reporting of increasingly detailed metrics, but needs to develop its own competence in handling, understanding and presenting data.

The overall level of investment in music from NZ On Air has declined proportionally against other funding lines. The agency should seek to redress some of that decline, not simply by increasing music investment, but by developing new initiatives with specific goals and purposes. The current funding schemes offer a sound basis from which to do so.

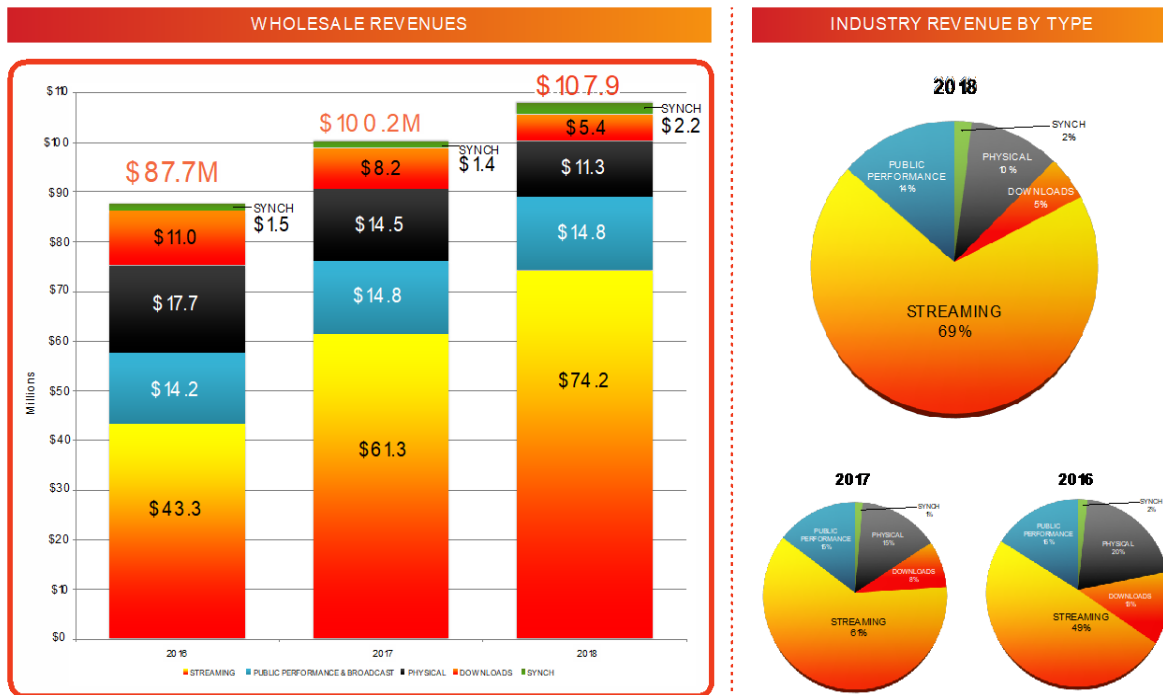
PART 1: THE MUSIC INDUSTRY – ENVIRONMENTAL SCAN

The last restructuring of music funding, the introduction of [New Music Single and New Music Project](#), took place just as revenue for recorded music in New Zealand was beginning to grow for the first time this century.

That growth is the result of a sometimes painful transition to the new business model of streaming. Ten years ago, music in physical formats accounted for 80% of the business in New Zealand. In 2019, two of the three majors no longer handle their own physical distribution and streaming revenues account for 70% of major label income.

The infographic below shows the growth in New Zealand recorded music revenue 2016-2018 – and highlights the role of streaming music income in that growth.

RECORDED MUSIC REVENUE SUMMARY 2018



Source: Recorded Music New Zealand 2019.

More than half of major label income derives from one digital service provider (DSP): Spotify. Further, a single commercial relationship – Spotify's partnership with Spark – has had a significant and positive influence on income per stream, which is higher in New Zealand than in Australia.

The Spark partnership has also contributed to Spotify's dominance. A background paper written by the Head of Music provided to the NZ On Air board in April 2016 lists a dozen DSPs available, or

soon to be so, in New Zealand. In 2019, YouTube remains a very popular music platform, but it is not an exaggeration to say that the local recorded music business is dependent on Spotify.

The music publishing sector, which experienced revenue stagnation rather than the sharp falls experienced in recorded music, is also doing well, for similar reasons. Publishers now earn five times more from Spotify than they do from radio, and the royalty rate from streaming is effectively twice the old mechanical royalty they earned on physical formats.

This return to prosperity has seen the three majors, Sony, Universal and Warner, return to A&R activity locally – signing and developing New Zealand artists. Sony has been particularly active, with nearly 20 artists signed either to Sony NZ or an independent dance music label that comes under its wing.

But not everyone is doing well in the new environment. The consumption of New Zealand music on digital services remains stuck around the 7% mark. On one hand, it is difficult for New Zealand artists to simply get noticed on platforms which have no New Zealand offices and offer a massive catalogue of music – a catalogue which, according to Spotify founder Daniel Ek, is now growing by almost 40,000 songs every day. On the other hand, many more New Zealand artists achieve meaningful streaming results than meaningful radio play. (See 'Targets', below)

The streaming model works best for industry participants who consistently attract very high numbers of streams for individual recordings or, more likely, represent large catalogues of music – such as major labels, publishers, collecting societies and distributors.

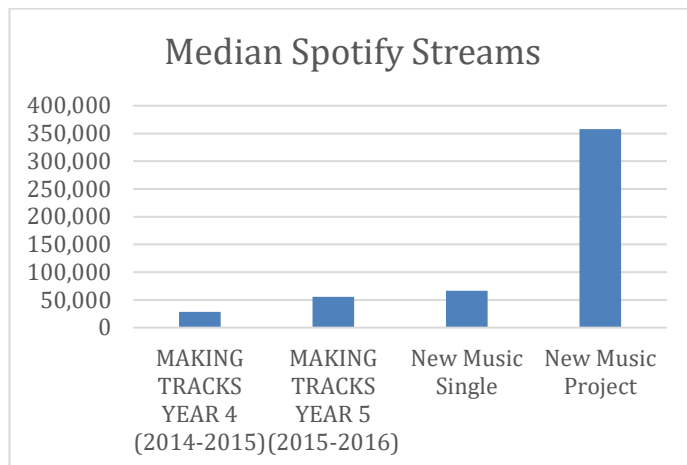
The shift from sales to streaming has also had a marked impact on a traditional way for artists to gain visibility – the official music charts, which now encompass streams. Where motivated fans could once have a crucial impact on sales charts – by all buying a new record in the week of release – this kind of dynamic is now substantially muted by more passive music consumers simply continuing to play what they played the week, or the month, before. To some extent, the "Heatseeker" chart introduced by Record Music NZ and other indexes such as the Shazam charts balance this shift, but they are much less visible to the public.

"No-one can have a number one single here anymore – a New Zealand artist can't have a number one single on the basis of success in New Zealand. Unless there's a freak, but the biggest freak to date's been Six60 and the best they could get was number four on the charts. So in any one week, just those global streaming playlists, New Music Friday or whatever, they're providing the absolute power for international. Lorde did it with 'Green Light', but that was on the basis of a global rollout. Six60 were the equivalent but only in New Zealand, they could only get to four. Just creeping into the top 20 is about the best you can do unless you're really Six60 level and you'd probably get top five." -Music executive

The value of a single streaming play is notoriously hard to determine – it depends on each artist or label's deal with the DSP, the territory it was heard in and the nature of the user's subscription. But as a rough rule of thumb, a million Spotify plays earns about \$5,000.

In the 2018/2019 annual results, only 13 of 116 New Music Single-funded tracks achieved more than a million Spotify streams, and 17 of 69 New Music Project-funded tracks achieved more than a million Spotify streams.

The median for Spotify streams for funded tracks is well below one million. This has been a consistent picture spanning the last two years of Making Tracks and the initial results for New Music Single and New Music Project funding, as illustrated below.



Further, the reality is that while Spotify sustains the local industry and the major labels in particular, it does not in itself provide a sustainable income to more than a handful of New Zealand artists.

Only two large independent New Zealand labels, LOOP Recordings and Flying Nun, are now operating and there is a consequent gap in artist development. But many artists release music on their own labels, which gives them flexibility in licensing and distribution deals. One notable such artist is Kings, who operates his own Archangel label, produces and licences his own music and negotiates branding deals around it.

While Kings is an exemplar in working with branding relationships, he is not the only artist for whom such commercial relationships are important. One company that plays a key role in the careers of chosen artists is the beverage-maker Red Bull, which operates its own recording studio and supports live events, which are often curated by the artists it works with.

Most music creators, however, get by on very low incomes. According to [A Profile of Creative Professionals 2019](#), a report published by Creative New Zealand and NZ On Air in May 2019, the median music and sound creators annual income is \$28,300, with a smaller proportion of that representing actual creative income. Music creators were the least likely creatives to express satisfaction with their careers.

Another trend noted in the 2016 NZ On Air report (*Music 2016 Background Paper* May 2016) has continued: more artist development is being undertaken by management companies such as CRS and Page One, who moved in at a time when major labels had scaled back their investment. What may be another important trend is embodied by Sniffers, a music blog now expanding into music

production, concert promotion and project management. Sniffers operates its own music production studio, as do CRS Management and others, and at least one of the major labels is considering such an investment in New Zealand.

Digital distribution has also grown and diversified as a business. While the three major labels service DSPs themselves, others use a variety of services to place – and pitch – their music. The largest New Zealand-based distributor is DRM, which manages a catalogue of more than 50,000 songs on behalf of thousands of New Zealand recording artists.

DRM has also expanded into administering visual content, operating a YouTube network that accounts for millions of YouTube plays a day. It recently began brokering revenue-share deals for music it represents to appear on third-party YouTube channels. The visual content attached to the musical works may be no more than a still image or song lyrics, underlining YouTube's continuing popularity as a music listening platform.

For all its scale, YouTube's payment rate is small – about the same per play as a non-Premium Spotify account. But artists and music companies are becoming used to aggregating multiple smaller revenue streams, usually with the assistance of digital distributors. For independent artists, this also includes revenue from Bandcamp, where releases are offered for sale in high-quality formats, rather than streamed for a subscription fee.

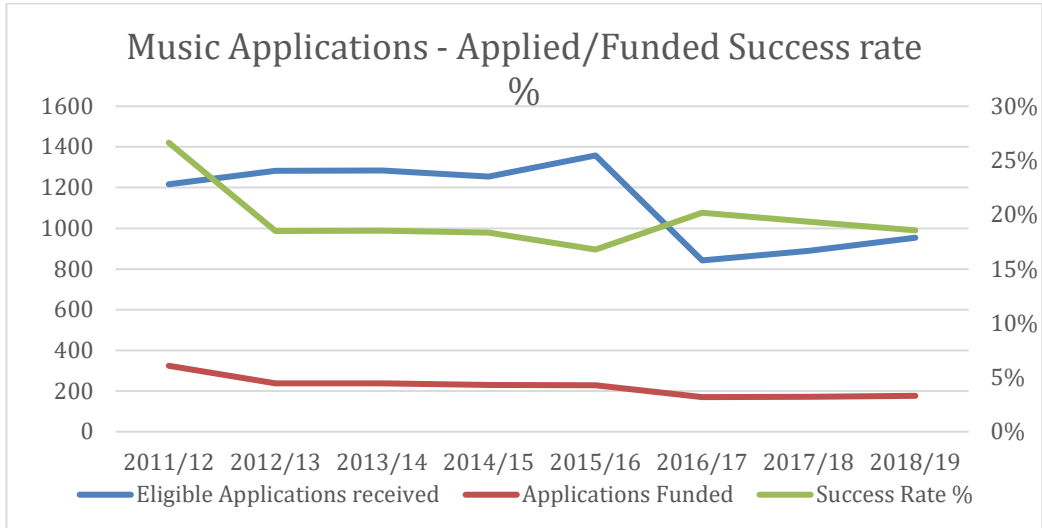
There are also musical genres which operate wholly or largely outside the established industry and beyond the reach of NZ On Air. New Zealand-produced electronic dance music, for example, is delivering hits and even globally-known names within its own sphere.

Understanding data is becoming crucial both in marketing music and managing revenue streams. More sophisticated local companies now track not only the quantum and nature of DSP plays – it means different things for an artist's song to earn plays via published playlists, or "organically" – but the numbers from Shazam, an app that tells the listener what song is playing. Shazam has become a music discovery platform in itself and publishes charts for multiple countries, including New Zealand. This data-driven environment increasingly extends to the way music is marketed.

The New Zealand recorded music industry follows global trends but continues to have distinctive features, including a high degree of collegiality and a desire to foster New Zealand music that extends beyond simple commercial interests. Although the environment has become more stable for companies with larger catalogues, it continues to change and become more complex. This has obvious implications for the design of any music funding scheme.

PART 2: NZ ON AIR AND THE INDUSTRY

Despite the reducing success rate of applications - fewer than 20% of applications are successful - perceptions of NZ On Air are largely positive.

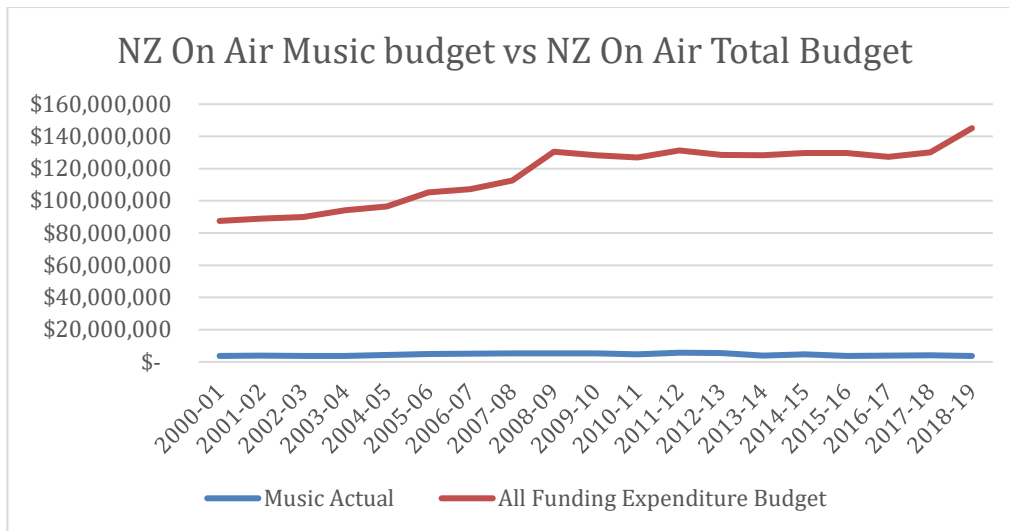


See numbers of applications by scheme in [appendixes](#).

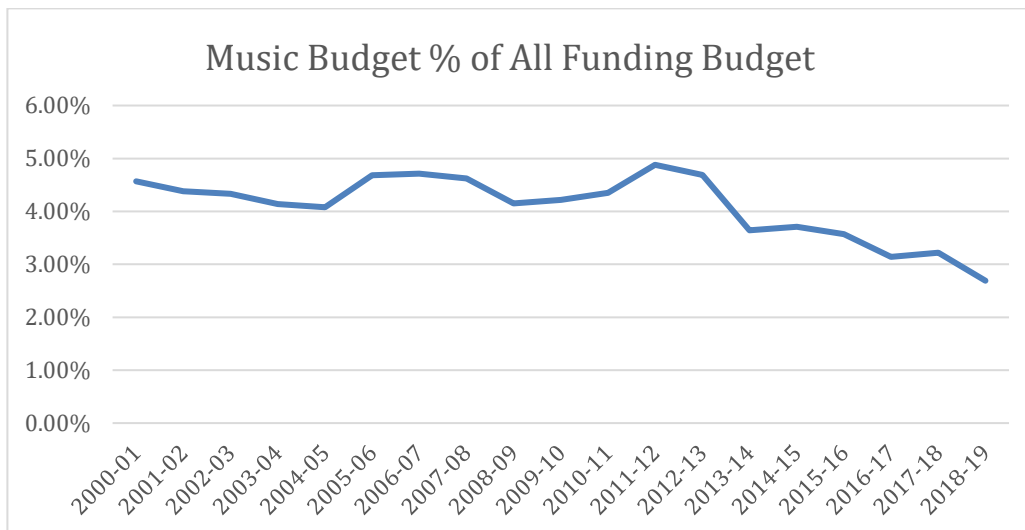
In particular, having a head of music based in Auckland, where most of the industry operates, has strengthened longstanding relationships and allowed new relationships to develop more readily. The agency is seen as an actively-engaged participant.

A good deal of that perception is also a tribute to the current head of music, David Ridler. Almost all respondents reported having spoken to or corresponded with David recently the relationships extend into the broadcast sector, where he is seen as having a good understanding of that industry's realities.

The decline in Music's share of the overall NZ On Air funding allocation is notable. Funding increases for NZ On Air have tended to be either for Radio NZ, or for targeted purposes that have not included music, such as the former TVNZ Charter funding.



Investment in music has declined proportionally against other funding lines over the past two decades.¹



¹ NZ On Air notes that some funding was transferred to the NZ Music Commission in 2013 when NZ On Air exited international promotion; that all Music personnel costs were transferred from the Music budget to NZ On Air’s administration budget; and that new Government funding has mostly been tagged specifically for screen content.

PART 3: THE MUSIC FUNDING SCHEMES

A new funding structure, which splits funding between two schemes, New Music Single and New Music Project, was proposed to the NZ On Air board in May 2016 and introduced shortly afterwards.

According to the papers proposing the change, the existing Making Tracks scheme was regarded as dated by both NZ On Air staff and industry stakeholders and this was the basis for funding reform. This review, notably, has not found a similar sentiment. While two senior industry figures argued the case for a much broader reform, an idea which is examined below, the current funding schemes themselves are largely regarded as fit for purpose.

Applicants for the schemes come from a variety of places in the industry: labels, management companies and artists. The approach to funding varies among the three major-label companies. Universal regards a decision to seek funding as a matter for the artist – it will not change the label's overall investment plan, but does mean an artist has a better chance of recouping their debt to the label – while for Sony, music funding is a key part of its business model.

The major complaint about both schemes was the delay between submission dates and the official announcement of decisions

"I don't want any more application submission dates in the calendar, but just having the answers within four weeks would be good. Because you do have a Plan A and a Plan B, and six weeks is a long time to wait to know whether you're executing Plan A and Plan B. You might actually sign a recording contract with an artist that says, if we get NZ On Air funding your budget is X, and if we don't your budget is Y, we're still going to sign you. You're going to have a much better time, or bigger budget, if we get NZ On Air." -Label manager

In summary, respondents generally accepted and understood the renewed focus on accountability in the schemes, even where they sometimes found the reporting requirements onerous, or had difficulty accounting for all spending. It was suggested that the agency could be more forgiving and accept, say, a screenshot showing proof of purchase where an original invoice was proving difficult to obtain from a touring artist.

At the same time, the new flexibility in the way funds can be spent, and in the ability to amend proposals in response to shifting industry realities, was widely applauded. Particularly where amendments must be agreed, this does place an additional communications burden on all parties, but it is plainly the right approach in the music business of today.

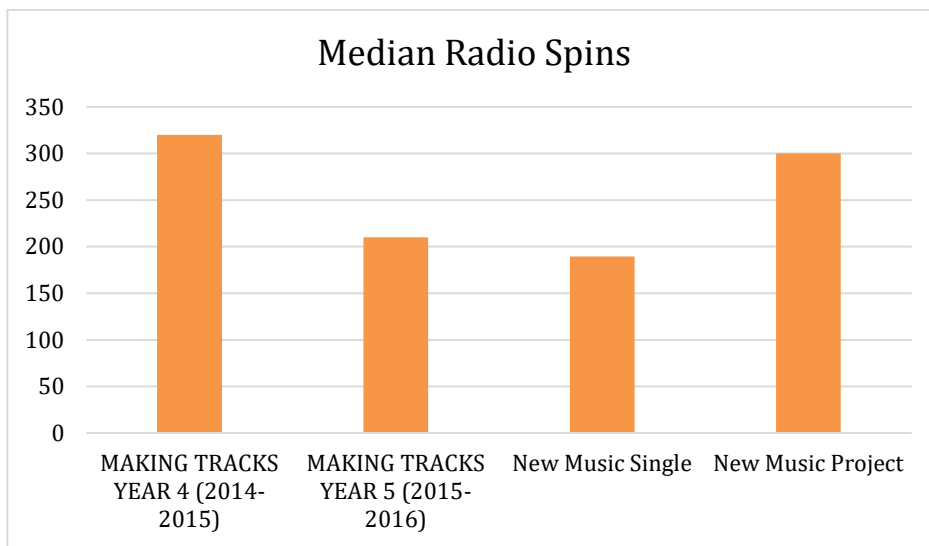
"Flexible, but accountable" seems a strong overall principle for NZ On Air funding schemes, however they evolve.

PART 4: TARGETS

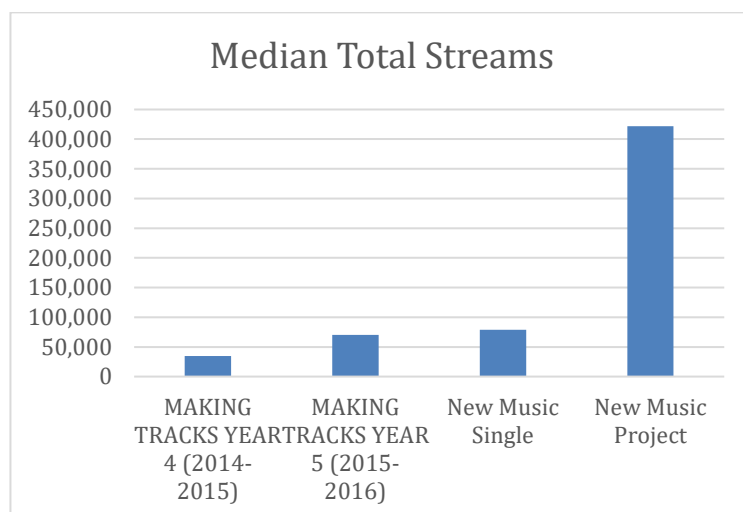
A clear picture emerges from analysis of reporting data for funded tracks.

For both New Music Single and New Music Project, the **median** result was significantly below target for radio spins and significantly above target for streams.

For radio spins, the target is 250 cumulative radio plays for New Music Single tracks and 750 cumulative radio plays for New Music Project-funded tracks (focus singles). Neither scheme has achieved a median result over the target.



Online results (combining Spotify and YouTube streams/views) have been much stronger, especially for New Music Project-funded singles. The online target for New Music Single tracks is 50,000 streams, and for New Music Project the target is 250,000 streams.



Reach figures – that is, accounting for the likely number of listeners to each radio spin – were not available. But they would presumably show an even greater disparity between "winners" and "losers".

The bottom line is that even in an era when NZ On Air can fairly take credit for a historically high presence of New Zealand music on radio, that presence is largely composed of a small minority of funded tracks. The target of 750 plays for a New Music Project-funded track equates to A-rotate status on all major pop and adult contemporary stations for several weeks, but even a downward adjustment of radio targets would not alter the reality. Radio in 2019 has room for only a few winners.

The agency could consider adjusting the streaming targets upwards to more closely match the median. But in comparison to radio, the spread of success is much broader. In New Music Single, 51 of 116 tracks achieved more than 100,000 streams (twice the target). In New Music Project, 30 of 69 tracks achieved 500,000 streams (twice the target).

This is the case even as the proportion of New Zealand music consumed on streaming platforms remains stubbornly stuck around 7%. For New Zealand artists overall, streaming versus radio could be seen as a matter of a smaller slice of a much bigger pie.

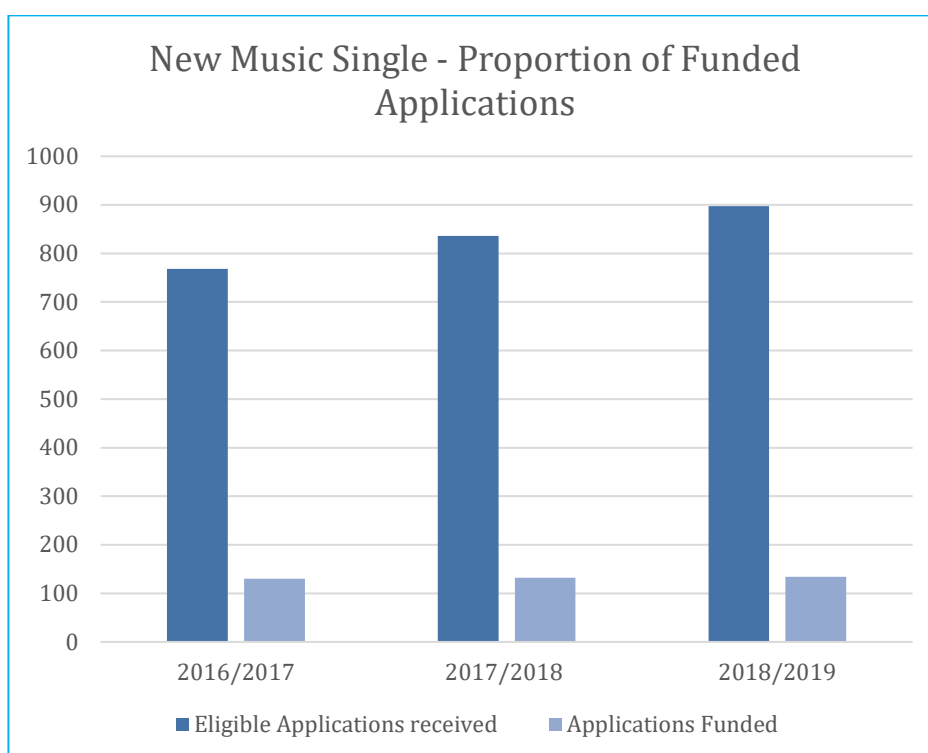
PART 5: NEW MUSIC SINGLE

New Music Single, which provides smaller grants for one-off recordings, remains fit for purpose, but lacks a clear identity in comparison to New Music Project. The latter is clearly understood – and approached – as a means of support for relatively sophisticated projects with detailed budgets and goals. New Music Single is pitched as a scheme to develop one-off hits, but (and the more demanding targets for New Music Project emphasise this) it is by its nature less likely to deliver a true "hit".

This does not mean that Single funding is ineffective, but its role can simply be in providing support – for example, with one or two video grants – to larger projects that are not in themselves funded.

There are also varying views on the required standard for applications.

One obvious issue is the sheer number of funding applications – typically up to 200 in every round. This represents a significant demand on the time of the industry panel tasked with assessing applications – and perhaps also on the majority of artists and labels whose bids fail.



Some respondents feel the bar should be set higher for these reasons. Others, including one major label, felt that the requirements (which include a demonstrated degree of social media reach) are too onerous. Major label artists should properly expect their label to invest and help them to this relatively low standard, but there is some risk that a "bedroom genius" with few industry contacts will miss out on what could be vital assistance with artist development.

Capture by expert users is an issue for any creative funding scheme, but in music they may have a specific implication: if another artist of the stature of Lorde were to emerge, NZ On Air would still lack a means to support them. There is no bottom rung for an artist without a track record.

NZ On Air could consider how better to support artists with little or no track record but a great song. This would need to be carefully approached.

Previous iterations of music funding schemes with a lower bar to entry have resulted in a deluge of applications and difficulties with accountability from artists with little in the way of planning or business skills.

One approach could be to better utilise established recording or management companies to help a new artist, or group of new artists, through the production and budgeting process. (This occasionally already happens informally, when a funding panellist tips off a management company about a promising artist who has not made the grade for funding on their own.)

A similar approach – paying heed to the agency's historical success in breaking down cultural boundaries – could be taken to discovering and developing popular music from New Zealand's many ethnic communities.

This would not be a matter of starting from scratch. NZ On Air has already funded tracks and videos by electronic music producer Suren Unka, composer Levi Patel and Rwandan-born rapper Raiza Biza. Auckland-born and educated Shirley Setia has become a star of Indian pop music since she began making YouTube videos in her bedroom. Music also plays a key part in the likes of the Satellites Asian arts programme supported by Auckland Council, which has featured productions by sought-after K-Pop choreographer Rina Chae.

It seems worth noting that while the [NZ On Air Diversity Report 2018](#) included music funding for the first time, it listed only the gender balance of music funding recipients and had no data on ethnic identity.

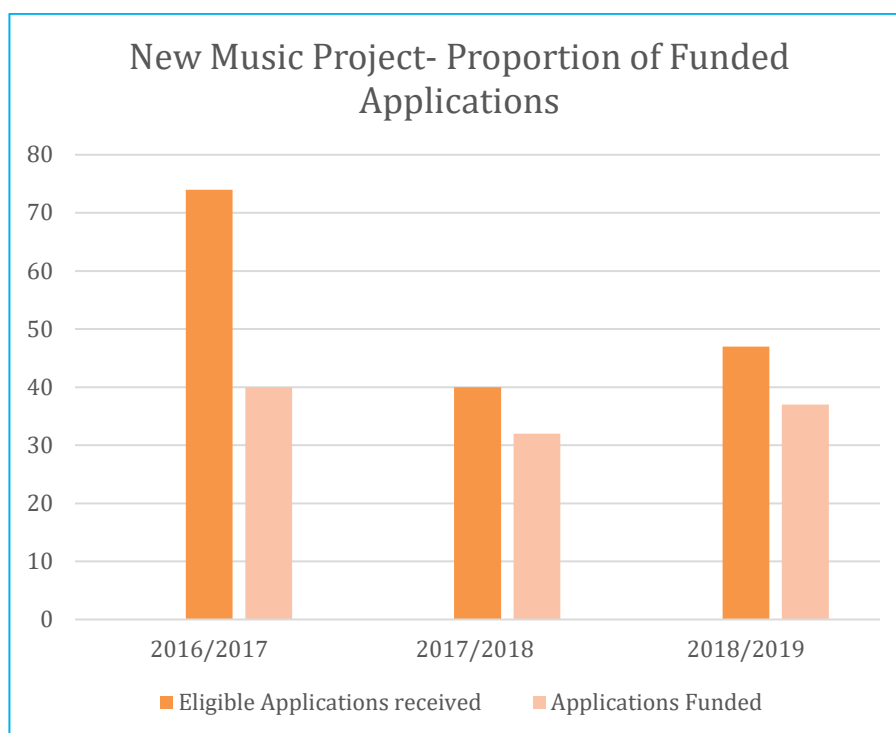
Such schemes would also benefit from broadcast partnerships. These are explored in the radio section below.

"That Singles panel's almost like a monthly gatekeeper. There's nowhere else. The thing we don't have here, and NZ On Air have been involved in a couple of failed attempts to replicate it, is a built-in discovery thing like Triple J Unearthed. Year in year out, Triple J Unearthed throws out 10 or 20 acts that immediately rise to a new level. There's a culture around it – if you appear on Triple J Unearthed, you're a bit of a winner. You've got some validation in the eyes of the kids. That creates an audience." - Artist manager

PART 6: NEW MUSIC PROJECT

New Music Projects seeks funding applications for a series of releases, with detailed budgets and marketing plans. The high standard required is made clear in advance to potential applicants and further gatekeeping is done in person by the head of music, who speaks to potential applicants before they embark on proposals.

This scheme is well-regarded and successful applicants appreciate the flexibility it offers them – including the ability to change elements of a project while it is underway. Its requirements seem to be well-understood.



Part of the initial rationale for New Music Project was that it would lower the risk for established companies in investing both in artists and in their own capability. This seems to be the case. Some respondents regard it as a key factor in taking on an artist. There is some feeling that the scheme drifts away from its capability-building role when it funding applicants who may only have occasional projects to pursue.

Conversely, one potential hazard – common to all arts funding – is capture by a small group of expert users, or at least the perception of that on the part of unsuccessful applicants. But New Music Project should for the time being be regarded as an effective funding scheme that meets the needs of the industry in delivering successful releases.

"If you want to just release a single and make a video from Single funding, then you've got to work out how you get to the next step, it doesn't really inspire a lot of strategic thinking. But Project funding does allow you to be more strategic. The flexibility and understanding around that is really good. That's why I think it's a good scheme." -Artist manager

PART 7: ADJUSTMENTS TO THE SCHEMES

Two significant adjustments have been made to the schemes since they have been operating: the introduction of a subsidy for independent publicity and a generalising of the language around what has traditionally been music video funding, to refer to a "visual representation" of the music, rather than a conventional music video.

The publicist subsidy:

There is a widespread feeling that the production of music itself is no longer the most significant cost in a release – and that that is now simply getting the release noticed.

The publicist subsidy has, as designed, resulted in labels and artists who might not have been able to afford it before using professional publicists. In principle, this is seen as a good thing.

But publicists report that the broader media environment makes it increasingly difficult to win coverage, especially for New Music Single recipients. There are no national music magazines, scant space for music coverage in newspapers and TV and only a handful of specialist music websites. Radio of all kinds, but especially RNZ and student radio, provides publicity opportunities, but stories off the back of a single release can be a hard sell.

The small number of publicity service providers have skills around working with blogs and established and social media, but digital marketing competence is less developed. Publicity outreach can also cross over with radio plugging and roles are not always clear. Like other parts of the industry, those roles can change quickly. One publicist who said early on in research for this report that their role was not to pitch DSPs was meeting with Spotify by the time it was being written.

There are numerous examples of specific industry skillsets being developed as a by-product of NZ On Air funding and this may be the case with independent publicity and promotion services. It is certainly the case that journalists, bloggers and media producers hear from publicists more consistently than they did before the subsidy was introduced. But it would be worthwhile – not least in maximising the return on the subsidy – for NZ On Air to consult with publicists as a group to establish exactly what the role encompasses and where there may be skill gaps.

There is a further question around where the subsidy can be spent, given that the key to streaming performance, even domestically, often lies offshore. Part of the subsidy can currently be applied in Australia and this option has been useful to several projects.

The New Music Project scheme also includes a budget for digital marketing and some respondents – typically those with higher capability international markets – now see that as a more effective and important form of promotion than conventional publicity.

Given the importance of publicity, promotions and marketing in the modern industry, it may be useful to examine all of them as a group of methods and seek a consistent approach to their costs. This is not necessarily limited to the newest digital skills: promotional CDs are a marketing cost that

cannot currently be recouped from funding. And some publicists now send out vinyl records where available, which are seen as being more memorable and of higher value than a digital promo.

"I don't think NZ On Air needs to invest any more in the creation of music. The funds available are sufficient – we're producing enough stuff, there's enough quality and diversity. Promotion is where the greatest injection needs to happen. The labels want their NZ artists to have cut through – but competing against 40 million songs? That's a big ask. And I think they need more help with how to do that." -Industry executive

"I don't see why NZ On Air shouldn't allow us to hire, which we did out of our own pocket, really reputable PR and plugging services in Los Angeles for North America and London for Europe. Or even, if you're even more serious, Germany for Europe, Germany for Germany, etc. We probably spent an extra \$20,000 on one artist just plugging America and the UK. So I don't see why we shouldn't be allowed to claim back 60% of the pluggers in any other territory outside New Zealand and Australia, like we are for Australia." -Label manager

"For us, including manufacturing would be a godsend to a certain degree, because, when we manufacture CDs, we do manufacture promo CDs as part of that – and it's just part of one bill, and I can't claim the promo CDs off that, because it's just one bill. And I understand why not to fund manufacturing as well, there's a good argument for it, but for us as it's such a key part of our marketing, it's an important expense." -Label manager

"The budget that we've put aside for PR, even the last year, has dropped significantly, and digital marketing, like media buying, has gone up. I spend more money on a digital marketing company than I do on a publicist." -Label manager

"I definitely think it helps. But publicity in itself is a challenging game too. There's only so many spots at radio, so the plugging may or may not be successful. And then there's only so many media outlets, and there's only so much coverage one can get. I think, though, that the difference between not hiring a publicist and hiring a publicist is usually noticeable. It's just that there's only so many outlets to get results with." -Distributor

From video to visual collateral

The change in language around video is universally welcomed. Video platforms are as important as ever, but as one senior executive put it:

"If I had \$15,000 for a YouTube strategy, I wouldn't spend it all on a video."

For some artists, a conventional music video is still the right thing. But it is now common for music-related visual content to include lyric videos, still-image videos of tracks or whole albums, teasers, micro-videos, documentaries and more.

What was music video funding is now effectively funding for visual collateral which helps market the music and in some cases (Avantdale Bowling Club's innovative 'Old Dogs' mini-documentary is a notable example) expands on the original message of the song. This shift has a resonance for NZ On Air's music funding, which began with the funding of music videos.

Most respondents pointed to an absence of broadcast outlets for music video, although Mediaworks continues to regard its Edge TV channel as a relevant part of its commercial offering, especially in terms of synergy with the Edge radio network. However, The Edge TV no longer broadcasts on terrestrial television and is now an online-only offering.

The rise in the past year of TikTok, a mobile phone app that makes it easy for users to overlay their own short videos over their favourite songs – and thus become the video creators themselves – is significant in marketing terms and to a lesser degree in revenue terms (not all rights-holders license to TikTok and the platform's meagre payouts are becoming a contentious issue for those who do). The year's biggest global pop hit, Lil Nas's 'Old Town Road' developed much of its early momentum on TikTok

TikTok's impact has been limited in New Zealand so far, but one local artist, Theia, has had a TikTok "hit" already – at the time of writing, nearly 35,000 TikTok users have used her song 'Not Your Princess' in their videos. Because TikTok's parent company, ByteDance, is Chinese, many of those uses have been in Asia, a market that can be difficult for New Zealand artists to access.

ByteDance, which has a capital valuation of more than \$75 billion (three times that of Spotify) is widely thought to be planning the launch of a music streaming platform for the more than a billion users it reaches with TikTok and other businesses. Meanwhile, another Chinese company, Tencent, a direct competitor to ByteDance, is seeking a 10% stake in Universal Music.

Both companies have made extensive use of machine learning and other forms of AI in their ventures. It seems evident that they will play a significant role in the music industry in the next few years.

"I would rather put ten grand into an audio-visual package than a video. And that's where contracts are actually starting to change, we don't specifically refer to music videos, but an audio-visual fund to be used, because music videos last for three days, it's sort of over and gone. If you deliver music it's available on YouTube anyway, through the system. Is spending ten, fifteen thousand dollars on a music video the best way to spend your money? It might be better to do 10 small short-form pieces, a much greater reach with a better creative idea, than one song." -Music executive

PART 8: RADIO

The presence of New Zealand music on New Zealand radio has strengthened considerably in the past year and on the major commercial stations now approaches 20%. In the past, commercial stations have sometimes buried local songs in off-peak dayparts in order to reach voluntary targets, but this does not happen in 2019 and local artists – almost all of them in receipt of NZ On Air funding – are added, including to A-rotate playlists, on their merits.

There are three potential reasons for this positive turn: New Zealand artists, labels and producers have become better at delivering the kind of songs contemporary pop radio needs, NZ On Air has become more adept at funding music that meets the needs of commercial radio, or radio has become more amenable to New Zealand music.

Respondents from the radio business emphasised their goodwill towards New Zealand music, but believe the change is primarily in the first two factors.

"There's been a lot more success in the last year than probably the five years before that, to be honest. It seems that NZ On Air have become a bit sharper in terms of the things they're actually looking to fund."

"The record labels have realised that they can make money off this, so have the good artist managers. They've actually taken up the offering that's there from NZ On Air and they're investing their time and energy into it because they know that they get a bit of a hand through the process." - Radio executive

And yet the picture is complicated and not entirely rosy. For the New Zealand artists who receive support from the large commercial stations, the support is real. But that support accrues to perhaps half a dozen artists in the course of a year. Whether the funding system or the local industry itself can deliver more hits and hitmakers than that is a matter for conjecture.

While radio people remain favourably disposed to local music, they are obliged to operate in line with increasingly harsh commercial imperatives. Agency advertising spend is said to be down this year and radio is beginning to suffer the drain of advertising to digital platforms that has affected other established media.

Even after a song has been added to one of the two largest stations playing new music (Mediaworks' The Edge and NZME's ZM) it needs to continue to "test" well to stay on air, let alone make the station's A-Rotate playlist.

The Edge, for example, maintains a listener research database of around 10,000. Each week, a subset of those listeners in the target 18-34 demographic is surveyed, with around 300 responding. Respondents are played clips of songs and asked whether they know the song, whether they would like to hear more of it, whether it might become a favourite. Songs that don't fare well in this process do not stay on air.

Within this system, individual stations exercise different philosophies. ZM, for example, kept Benee's breakthrough hit 'Soaked' on rotate, even when it researched poorly. After the song spent six weeks in a research dungeon, listener recognition kicked in, to the point where, according to an NZME radio manager, "we'd have trouble taking it off, because they loved it so much". The same manager confirmed that a foreign record would not attract similar latitude: "It would be yanked off if it was not testing after 100 plays. There's lots of good music, and so if the audience aren't liking it after 100 spins, then you're probably going to give something else a shot."

'Soaked' has since become the biggest new-artist chart hit of 2018-2019 and was recently named as a finalist in the 2019 Silver Scroll Awards.

Encouraged by the experience with Benee, ZM has also created a new rotate called 'Kiwi New', which sees a small number of tracks from new local artists played across the day, with a scripted introduction from the host, in the hope that they, too, will catch on with listeners.

To even get to such a point, however, a track will need to embody modern pop song craft – a specific discipline in which New Zealanders are not yet steeped – and will need a production to match the overseas music it sits alongside on air. To an extent, that means sounding like everyone else.

There is broad agreement within both the recorded music and broadcast sectors that the *SongHubs* events, promoted by APRA and financially supported by NZ On Air, are helping foster those skills.

Pop songwriting also overlaps with production. New Zealand has one undoubted production star: Joel Little, who has produced and co-written tracks for Taylor Swift, Imagine Dragons and others. Josh Fountain, who took over the Golden Age studio where Little produced Lorde's first album, has produced a series of successful releases, including Benee's 'Soaked', and may soon step up from the small local tier of skilled producers.

NZ On Air also supports Recorded Music NZ's *New Zealand Music Producer Series*, which brings local producers into contact with top overseas professionals, but may wish to consider whether there are direct ways to foster pop production skills. It may be possible, for instance, to develop a scheme in which producers are funded to work with new artists.

"I think it's almost a perfect storm, where there has been a greater focus on pop music, that the labels are actively investing once again. And people are understanding more about what pop music is, and how it can work here and be made here. All of a sudden we've got producers and songwriters understanding the art of collaboration. And actively listening to and realising how music is made overseas and trying to replicate it here." -Publishing executive

"Local rock music's just not a very high-profile thing right now. It's not like there's a thriving live scene going on. Rock tends to do best when there's a sense of a scene. Culturally, the kind of thing that's being made at the moment doesn't lend itself to that." -Music manager

While The Edge and ZM duel for the big pop audiences and the 18-34 demographic in particular, there is a tier of commercial stations plying particular niches. Flava, Mai FM, Hauraki and George FM all have ongoing relationships with local artists whose work fits their formats.

Radio New Zealand's approach to music is in the process of revision under a new head of music. This process may result in the development of one or two new music brands around Radio New Zealand National – an idea mooted in the past but never followed through. One of these brands may be focused on RNZ's acknowledged expertise in live recording, via its staff engineers. The new head of music wants to make more use of the recordings RNZ makes – currently around 160 of them a year. This should result in more such recordings, more airtime for them – and an easier place to find and listen to them.

Already, a number of funded artists have benefited greatly from performing live-to-air for RNZ. A notable example is the session performed by Avantsdale Bowling Club for the RNZ Afternoons feature NZ Live in August 2018. The session was captured on video and the song 'F(r)iends' was published on the RNZ website, along with audio of an accompanying interview with host Jesse Mulligan, as a YouTube embed. The video has been viewed 50,000 times – an excellent result for the artist, the broadcaster and, to an extent, the funder. (The song did not receive New Music funding and RNZ's video has actually performed better than those for the two songs from the album that did receive Single funding.)

RNZ's plan to put more emphasis on its own productions does raise interesting questions around music whose production is seen to have been funded under either Single or Project, simply because these versions are not the original, funded production. Sense would dictate that they are regarded as positive, reportable results, but the complexity is worth acknowledging.

In general, managers and publicists place a higher value on an interview and performance on a weekday on Afternoons than on RNZ's Saturday afternoon specialist show *Music 101*, simply because the listening audience is so much larger. *Music 101*'s commitment to and knowledge of funded artists is gratefully acknowledged, but it continues to struggle to find its audience – less because of the quality of the programme than because it represents a sharp break with RNZ's usual format. A single play on *Music 101* may go largely unheard by its target audience, while a song that makes the A-rotate at The Edge or ZM could be aired 50 times a week.

The planned changes are intended to raise the visibility of all RNZ National's music offerings. RNZ's head of music has indicated that a digital-only music station is among the options being considered. Perhaps the most significant implication if so would be the adoption of a music playlist system. Repeat plays currently represent a significant difference between commercial music radio and RNZ.

RNZ remains an important partner for NZ On Air, and the agency should keep abreast of any changes – particularly those which may inform its own strategy. This could include a partnership around a show modelled on *Triple J Unearthed*, the Australian broadcaster's discovery show for ground-level artists – which was cited as an example by two respondents with an understanding of the Australian market.

"The thing we don't have here, and NZ On Air have been involved in a couple of failed attempts to replicate it, is a built-in discovery thing like Triple J Unearthed. Year in Year out, Triple J Unearthed throws out 10 or 20 acts that immediately rise to a new level. There's a culture around it – if you appear on Triple J Unearthed, you're a bit of a winner. You've got some validation in the eyes of the kids. That creates an audience." -Artist manager

If NZ On Air did decide to try a development scheme for "bedroom" artists yet to develop industry contacts, such a broadcast partnership, with RNZ, student radio, or both would be important.

Student radio itself has stabilised nationally and links within the Student Radio Network have been re-established in recent years. It continues to be a good friend of New Zealand music and independent labels and artists in particular – but the pipeline between student radio play and commercial radio, which spawned the careers of Bic Runga and others, largely no longer exists. Student stations offer vital recognition to new artists and most sustain vibrant communities, but tend to go their own ways in music programming, limiting any national network effect.

Student stations remain a useful stop for publicists, especially when an artist is on tour, as they tend to have strong connections to their local live music scenes.

PART 9: STREAMING

Music streaming represents a replacement of sales income for music, a form of promotion – and a reportable metric for NZ On Air music funding.

Although several DSPs are present, the overwhelming reliance on one of them, Spotify, is a feature of the New Zealand market. It creates a gatekeeping effect whereby labels and digital distributors are pitching tracks and albums to a single company and, further, within the entities bidding for attention and playlist placement from that company.

And yet there are multiple paths to streaming results for New Zealand releases. Adept users of the system identify "lean forward" and "lean back" listening as different results, and regard "organic" streams as a more encouraging measure of an artist's progress than "passive" streams, where a new song has been heard simply because it is on a popular playlist.

A common theme of discussions for this review was that the key to good streaming results, even domestically, often lies overseas. The key territory is, of course, Australia, which not only represents a much larger music market, but is home to the nearest DSP offices. Momentum generated in Australia will not only help with placement on playlists that New Zealand listeners also hear, but may influence New Zealand radio programming decisions.

Other funded artists simply earn most of their streams in bigger markets, either because they have good press and profile in those markets, or because an individual track has found its way onto a popular playlist in another territory. The latter is not only a prospect for pop artists – there are specialist playlists, compiled by both the DSPs and third parties, that deliver music in particular genres and for specific moods and moments.

Labels, distributors and managers will sometimes pitch for inclusion on third-party playlists the way they pitch to the curators of the DSPs' own, official playlists – DRM, for example, will look for places to place its New Zealand reggae catalogue. But it is also common enough for a track to simply (and mysteriously) appear on a big third-party playlist without pitching. Such an add – particularly to playlists designed for background listening – may deliver millions of streams without listeners ever being aware of who the artist is.

As noted above, the proportion of New Zealand music listened to by New Zealanders on streaming services remains resolutely stuck in single figures. Discovery among the 40,000 songs added to DSP catalogues every day is clearly an issue, and not one easily addressed. NZ On Air tried seeding curated playlists of New Zealand music via its AllTracks.co.nz portal in 2015, but it was not a successful experiment. More recently NZ On Air has been curating a regular rotate of playlists, plus occasional guest-curated specialist playlists without the 'AllTracks' banner.

Spotify does localise New Music Friday and other official playlists, but for New Zealand and Australia. On one hand, this means New Zealand tracks compete with Australian songs for placement. On the other, it means bigger audiences for the tracks that do make the playlists. If Spotify was to fully localise those playlists for New Zealand, it would mean more local artists on the playlists – but a diminished reach overall.

There is, however, some talk of Spotify localising more on New Zealand and the company recently hired a new staff member from NZ On Air.

"The streaming platforms, you've just got to be in their face. We can pitch it to them, and basically email update them on what's going on, and then maybe they come around – once every three to four months they'll be over. You sit down, you play them all the new stuff, they're really good like that, but it's not like radio where you can just go in every week and talk. You can't ask an algorithm a favour. It'll just do what it does. So you've got to figure out how you're going to beat that algorithm to make it work for you." -Music executive

"You may have heard the expression 'dry streams'. Simply, an artist is huge in streaming, millions of streams, but can't sell a ticket. Couldn't sell a t-shirt, because it's just a track. A key thing we track on streaming services is whether a track's lean-forward or lean-back. Lean-back is basically it's just put in a playlist and the listener has just stumbled on it. Lean forward is they've actively put it into their collection or something like that, and obviously you can have loads of lean-back streams, and that's good, and you're going, oh wow. I would rather have a really highly-engaged smaller streaming artists, because there's a lot more you can do with that." -Music executive

"What inevitably is happening is there's this massive great big single that gets on a playlist that everybody that follows the playlist listens to once, but they're not necessarily going back to again. So you're getting your 12 million streams because of this playlist, but when you release the next five singles you're getting 3,000 streams, because they didn't make the playlist. So those people are not following through, it can just be this one big hit, but it wasn't based on anything other than someone listened to a playlist." -Artist manager

"A lot of people look at analytics and just go cross-eyed. When you're an artist and you just like making songs, you just want to see the numbers of success, not oh, what's my demographic, and what's my territory, and what are their interests? But if you're doing a lot of spends, if you're doing a lot of digital social media campaigns or other digital marketing campaigns or ads or whatever, it is important to know who you're targeting. And what your call to action is. Are you trying to sell tickets? Are you trying to drive traffic to the music video? Are you trying to get people to pre-save your song? What are trying to achieve? Knowing what your fan base is, whether you have an instinctual feel of that, or you have a data-driven feel of that, is important. And it's probably a lot easier data-driven, but I just don't see the widespread acceptance and utilisation of that yet. Some people that we work with are doing it really well, but a lot of people have yet to really learn the ropes on what to look at, what you are looking at, and then how to apply it." -Digital distributor

PART 10: A BROADER CONCLUSION

The first NZ On Air music grant, in 1991, was a contribution towards the cost of making a video for Moana and Moahunters' 'A.E.I.O.U.'. History – and quite possibly NZ On Air's archives – does not record how many times the video was played on TV. But the culture remembers many other things about it.

The real significance of the video was that it represented a path to broadcast for a song that had been roundly rejected by commercial radio for its use of te reo Māori. That it became a pop anthem for the language renaissance. That it provided an enduring mnemonic for any New Zealander who wanted to understand the vowel sounds of te reo Māori. And even that the video itself captured the vibrant multi-cultural life of inner-city Auckland at the time.

Moana Maniapoto was present at the Taite Music Prize ceremony on April this year to accept the 2019 "Classic Album" prize, for the album *Tahi*, from which 'A.E.I.O.U.' was drawn. After she had performed and accepted the award, Avantdale Bowling Club's Tom Scott stepped up to accept the Taite Prize itself. NZ On Air did not help fund the production of the Avantdale album itself, but it did provide two New Music Singles grants that helped expand the original ideas therein. It seems remarkable that the achievement of the country's top creative prize for popular music is not regarded as a deliverable against those grants.

The following evening, Six60, Bic Runga, the Exponents, Shapeshifter and many others played live at Christchurch Stadium and on television for the Aroha Nui concerts to benefit the community devastated by the mosque attacks the month before. Most of the artists who performed have been helped at some point in their artistic and professional development by NZ On Air. Their songs – which in a many cases were originally produced with the help of music funding – were points of coalescence for the crowd. They were cultural tools for which the country was able to reach at a time of need.

The same was true two weeks before at the national remembrance service for the mosque attack victims, where Marlon Williams, Teeks, Hollie Smith and other played. Indeed, Prime Minister Jacinda told the Taites audience that her first thought in planning the remembrance service was for the music it would need.

These performers were not funded purely as artists, nor their songs as art. In each case there was, to a greater or lesser degree, a commercial purpose. Music is a business, a vessel for culture and, as we have been reminded this year, a vital tool in hard times. The awkwardness of this ground between art, commerce and identity is one reason that public assistance for popular music took a long time to arrive. It is this ground that NZ On Air has grown to occupy.

NZ On Air has also played its role in the development of the infrastructure from which the Aroha Nui concerts were organised. In 1991, the country had one specialist music lawyer, management experience was scant and the importance of music publishing was not widely understood. Yet although New Music Projects funding counts the development of broader industry competence as part of its *raison d'etre* that has historically not been the case. It happened simply because it became more viable to invest time and money in music.

This is a complex role, and not necessarily one envisaged in the legislation that created the Broadcasting Commission. With respect to music, NZ On Air should continue to be primarily informed by its original mandate to fund content for broadcast (and its modern equivalents). But the agency and its board should also be informed by the broader significance of what they do.

The music heritage website Audioculture is a good example. On one level, it is simply a matter of the funding of web content. On another, it helps provide a supporting narrative for the music sector as a whole. It is also worth noting that funding for Audioculture was assisted by money freed up when the industry, via the 2010 [Caddick Report](#), made it known that some of NZ On Air's export-oriented funding was not well spent. The agency should continue to be flexible and responsive in this way.

One trend in the industry that NZ On Air needs to follow is the embrace of data. The agency's approach to using data to inform decisions looks relatively old-fashioned in comparison to what applicants themselves are increasingly doing. It is encouraging to hear that this has been addressed in staff recruitment – and that there are plans to use third-party data services.

Some of those working in music believe the country would be better served by a single music support agency – which would primarily mean combining the functions of NZ On Air and the New Zealand Music Commission – but as many or more believe there is a value in distinct agencies with distinct philosophies. Such a reform is beyond the purview of this review, but, in general, governors of the system should recognise that while some overlap is inevitable and even beneficial, agencies should cooperate rather than compete.

The change of language around music video in the current funding schemes represents a subtle but decisive break with the terms on which NZ On Air began to engage with music. But the conditions of the funding schemes, too, represent a change. In 2013, the founding head of music said, truthfully, that NZ On Air was "all about the song" and whether it was right for broadcast, and less about business plans and paperwork. New Music Projects remains "about the song", but it is also concerned with requiring, and fostering, a degree of business and strategic skill in applicants. By and large, this is welcomed by people in the music business.

This review finds the agency in good health with respect to the relationships that define it in the music community. Its people are valued. The review also finds the current funding schemes themselves are fit for purpose – although it would be neither a surprise nor a crisis if the next one found otherwise. The agency's music division has enacted substantial change before, and will do so again.

NZ On Air's original mandate, to fund content for broadcast, has survived through evolution, but its day-to-day role, the place where it is valued most, is within the music community. It is a role that is essentially independent of the funding structure of the day. Perhaps now is a good time to affirm that reality.

DATA APPENDICES

(data provided by NZ On Air).

NUMBERS OF GRANTS BY SCHEME

	2016/17	2017/18	2018/19
NM Single	130/117	132/113	124/101
NM Projects	39	32	38
NM Kids		8	6
NM Pasifika			14

Note: 130/117 means 130 grants made to 117 different artists

RESULTS FOR TOP TEN TRACKS OF EACH FUNDING TYPE:

TOP TEN SONGS FROM MAKING TRACKS YEAR 4 (2014/15)

Top Ten	Totals	Average	Median	Max
Radio Spins	47,684	4,768	3,495	10,004
Online Combined	48,988,659	4,898,866	3,356,066	11,741,674
YouTube	9,348,193	934,819	563,332	2,105,829
Spotify	42,959,302	4,295,930	2,860,368	10,208,270

TOP TEN SONGS FROM MAKING TRACKS YEAR 5 (2015/16)

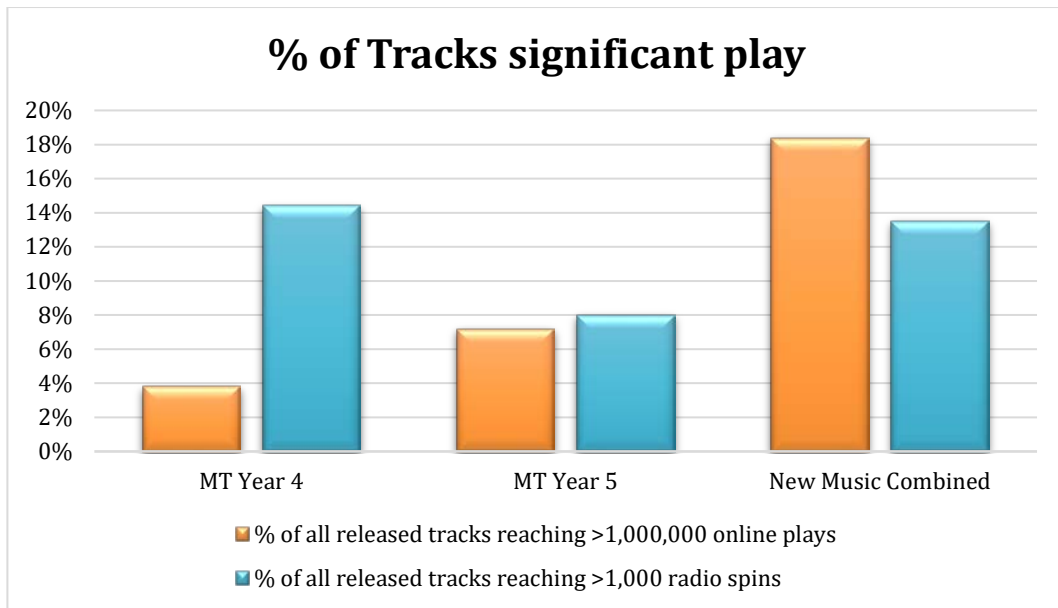
Top Ten	Totals	Average	Median	Max
Radio Spins	29,971	2,997	2,576	6,613
Online Combined	9,519,985	3,732,326	2,634,724	9,519,985
YouTube	2,156,955	627,526	330,929	2,156,955
Spotify	33,604,694	3,360,469	2,140,006	9,352,198

TOP TEN SONGS FROM NEW MUSIC SINGLE TO 2018/19

Top Ten	Totals	Average	Median	Max
Radio Spins	15,537	1,554	1,065	3,581
Online Combined	59,589,174	5,958,917	4,968,025	11,235,974
YouTube	16,049,217	1,604,922	804,963	6,748,182
Spotify	45,206,982	4,520,698	2,374,150	11,148,135

TOP TEN SONGS FROM NEW MUSIC PROJECT TO 2018/19

Top Ten	Totals	Average	Median	Max
Radio Spins	62,230	6,232	5,130	17,182
Online Combined	116,526,018	11,652,602	5,978,054	45,695,185
YouTube	34,132,843	3,413,284	942,038	21,964,995
Spotify	85,797,145	8,579,715	5,138,337	23,730,190



BEST PERFORMING SONGS

FROM MAKING TRACKS YEAR 4 (2014/15)

Top Tracks	Artist	Title	Radio Spins	Online Combined	YouTube	Spotify
Radio Spins	Avalanche City	Inside Out	10,004	2,715,562	621,186	2,094,376
Online Combined	Unknown Mortal Orchestra	Can't Keep Checking My Phone	1,323	11,740,351	1,532,081	10,208,270
YouTube	Six60	Special	9,910	8,037,228	2,105,829	5,931,399
Spotify	Unknown Mortal Orchestra	Can't Keep Checking My Phone	1,323	11,740,351	1,532,081	10,208,270

FROM MAKING TRACKS YEAR 5 (2015/16)

Top Tracks	Artist	Title	Radio Spins	Online Combined	YouTube	Spotify
Radio Spins	Ranea	Tihei Mauri Ora	6,613	6,350	4,483	1,867
Online Combined	Theia	Roam	2,573	9,519,985	167,787	9,352,198
YouTube	Fazerdaze	Lucky Girl	317	2,966,670	2,156,955	809,715
Spotify	Theia	Roam	2,573	9,519,985	167,787	9,352,198

FROM NEW MUSIC SINGLE TO 2018-19

Top Tracks	Artist	Title	Radio Spins	Online Combined	YouTube	Spotify
Radio Spins	General Fiyah	Here To Stay	3,581	3,003,198	1,141,762	1,861,436
Online Combined	Thomston	Acid Rain	276	11,235,974	87,839	11,148,135
YouTube	Jonathan Bree	You're So Cool	240	8,298,204	6,748,182	1,550,022
Spotify	Thomston	Acid Rain	276	11,235,974	87,839	11,148,135

FROM NEW MUSIC PROJECT TO 2018/19

Top Tracks	Artist	Title	Radio Spins	Online Combined	YouTube	Spotify
Radio Spins	Sons of Zion	Drift Away	17,182	13,046,267	1,057,954	11,988,313
Online Combined	Unknown Mortal Orchestra	Hunnybee	451	45,695,185	21,964,995	23,730,190
YouTube	Jonathan Bree	You're So Cool	451	45,695,185	21,964,995	23,730,190
Spotify	Thomston	Acid Rain	451	45,695,185	21,964,995	23,730,190

NEW MUSIC PROJECT PLAYS

BEST PERFORMING SONGS PER MAJOR PLATFORM

Top Tracks	Artist	Title	Radio Spins	Online Combined	YouTube	Spotify
Radio Spins	Sons of Zion	Drift Away	17,182	13,046,267	1,057,954	11,988,313
Online Combined	Unknown Mortal Orchestra	Hunnybee	451	45,695,185	21,964,995	23,730,190
YouTube	Unknown Mortal Orchestra	Hunnybee	451	45,695,185	21,964,995	23,730,190
Spotify	Unknown Mortal Orchestra	Hunnybee	451	45,695,185	21,964,995	23,730,190

TOP TEN SONGS with MOST CUMULATIVE RADIO SPINS

Artist	Title	Cumulative Radio plays (all radio)
Sons Of Zion	Drift Away	17,182
Drax Project	Woke Up Late	8,695
Tomorrow People	Don't Wanna Fight It	7,256
Stan Walker	Thank You	5,279
Sons of Zion	Leave With Me	5,154
Drax Project	Toto	5,106
Mitch James	21	3,989
Sons of Zion ft. Aaradhna	Is That Enough	3,900
Katchafire	Addicted	3,642
Ladi6	Outta Time	2,117

TOP TEN SONGS with MOST CUMULATIVE ONLINE PLAYS*

Artist	Title	Cumulative Online Plays (Spotify and YouTube)
Unknown Mortal Orchestra	Hunnybee	45,695,185
Drax Project	Woke Up Late	15,896,332
Sons of Zion	Drift Away	13,046,267
Mitch James	21	10,534,796
Unknown Mortal Orchestra	Everyone Acts Crazy Nowadays	6,278,215
Sons of Zion ft. Aaradhna	Is That Enough	5,677,893
Stan Walker	Thank You	5,672,010
Drax Project	Toto	4,862,072
Unknown Mortal Orchestra	We're Not In Love We're Just High	4,663,372
Drax Project	Only Us	4,199,876

NEW MUSIC SINGLE PLAYS

TOP TEN SONGS with MOST CUMULATIVE RADIO SPINS

Artist	Title	Cumulative Radio plays (all radio)
General Fiyah	Here To Stay	3,581
Kings	We'll Never Know	2,996
Tommy Nee	Body	1,552
Jon Lemmon	Something True	1,384
Israel Starr	Love Her Mind	1,067
Jackson Owens	Touch	1,063
Mitch James	All The Ways To Say Goodbye	1,061

Vince Harder	Give This A Try	1,037
PT	Trust	987
Openside	I Feel Nothing	809

TOP TEN SONGS with MOST CUMULATIVE ONLINE PLAYS

Artist	Title	Cumulative Radio plays (all radio)
Thomston	Acid Rain	11,235,974
Chelsea Jade	Laugh It Off	10,564,796
Jonathan Bree	You're So Cool	8,298,204
Mitch James	All The Ways To Say Goodbye	8,247,421
Alien Weaponry	Kai Tangata	5,477,419
Jon Lemmon	Something True	4,458,630
Kimbra	Human	3,727,057
General Fiyah	Here To Stay	3,003,198
The Beths	Future Me Hates Me	2,288,904
Alae	Too Strung Up	2,287,571

TERMS OF REFERENCE

Purpose

1. To assess whether NZ On Air's two New Music schemes are fit for purpose and delivering results for the funding investments.
2. To identify options for improvements that may enhance the impact of the schemes.
3. To advise on the range of current metrics in impact measurements and identify any additional opportunities for impact measurement of funded music.

Introduction

4. The New Music funding schemes were implemented by NZ On Air from the 2016/17 funding year to replace the Making Tracks single-track funding scheme that ran for five years prior.
5. New Music funding was split into two tiers using the same \$2million budget – **New Music Project** to partner with established artists and music companies on full multi-single Project releases, and **New Music Single** to continue supporting individual song releases, but with some resource set aside for promotion of the resulting music and visual content.
6. Over the three complete years of New Music funding, NZ On Air will have funded approximately 105 multi-single New Music Projects which between them will have generated over 290 focus single releases. In addition New Music Single funding has seen investment in over 380 individual New Music Single releases from a wide range of contemporary popular music artists.
7. The metrics for measuring success with the New Music schemes have been mainly around radio airplay and online streaming performance for funded songs.

Scope

8. The Report should
 - a. briefly scan the environment of the music, radio and online industries and identify trends and common themes; in particular what has changed since 2016 and what has remained the same. You are expected to speak to and/or survey key stakeholders in this process.
 - b. include observations around the current contemporary popular music ecology following on from this environmental scan
 - c. analyse all available data that NZ On Air can offer on the New Music schemes, including numbers of applications, successfully funded artists, and the results in terms of radio airplay, online plays, and engagement, and any other suitable metrics that indicate connection with NZ audiences.
 - d. analyse data from the final two years of the MakingTracks scheme to identify shifts in overall results between the two schemes.
 - e. analyse any other relevant and readily available external data
 - f. provide informed judgements on the strengths and weaknesses of the New Music funding schemes and offer options for change as necessary.
9. NZ On Air will consider this Report alongside the initial findings from the MCH International Music review, and implement any changes in the 2020/21 funding year.