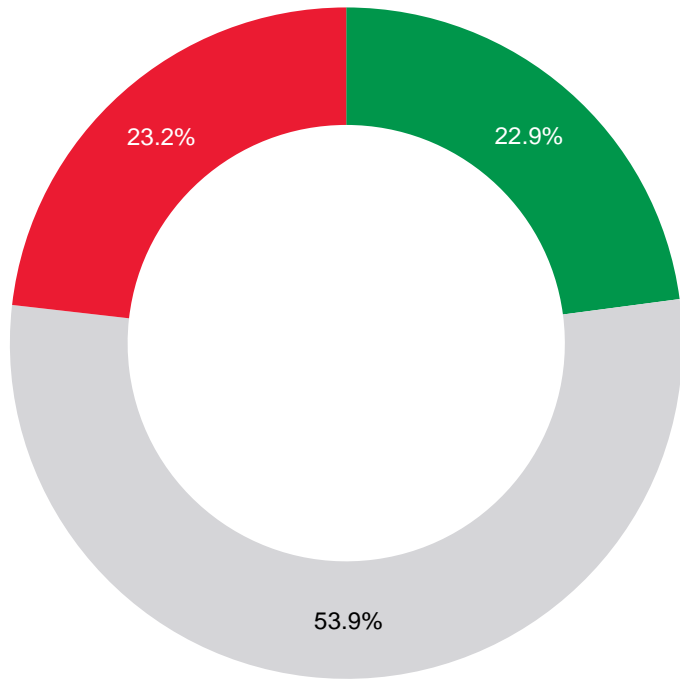
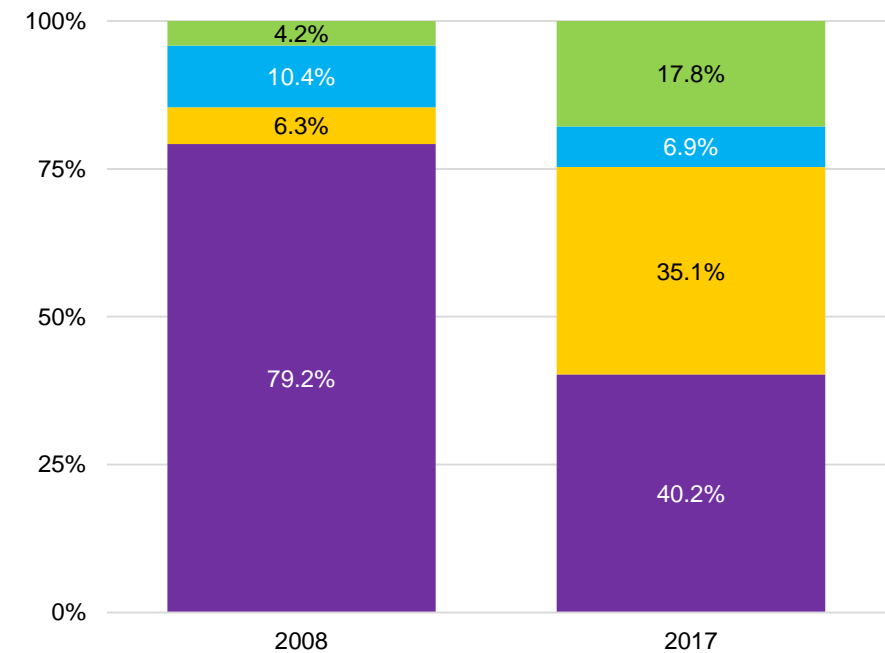
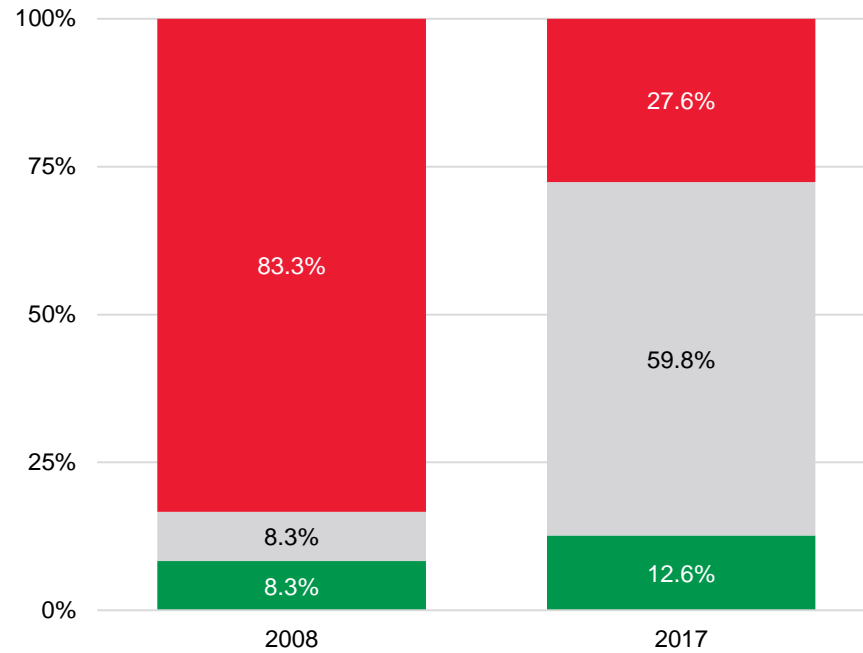


## FAVOURABILITY BREAKDOWN (OVERALL)



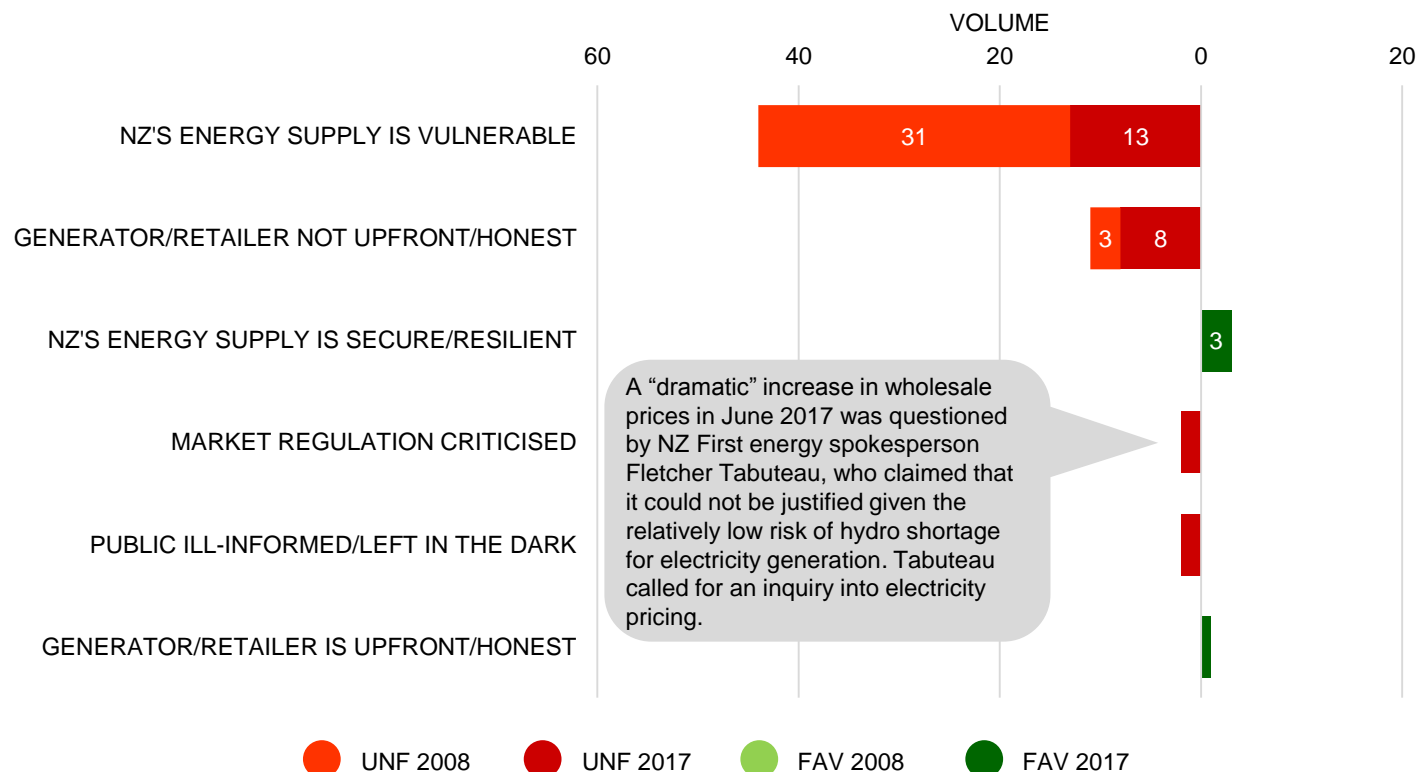
● FAV ● NEU ● UNF

## 2008 AND 2017 COMPARISON (BY FAVOURABILITY AND STORY FOCUS)



● ENERGY SUPPLY ● PRICING ● WEATHER/ENVIRONMENT ● MARKET REPORT

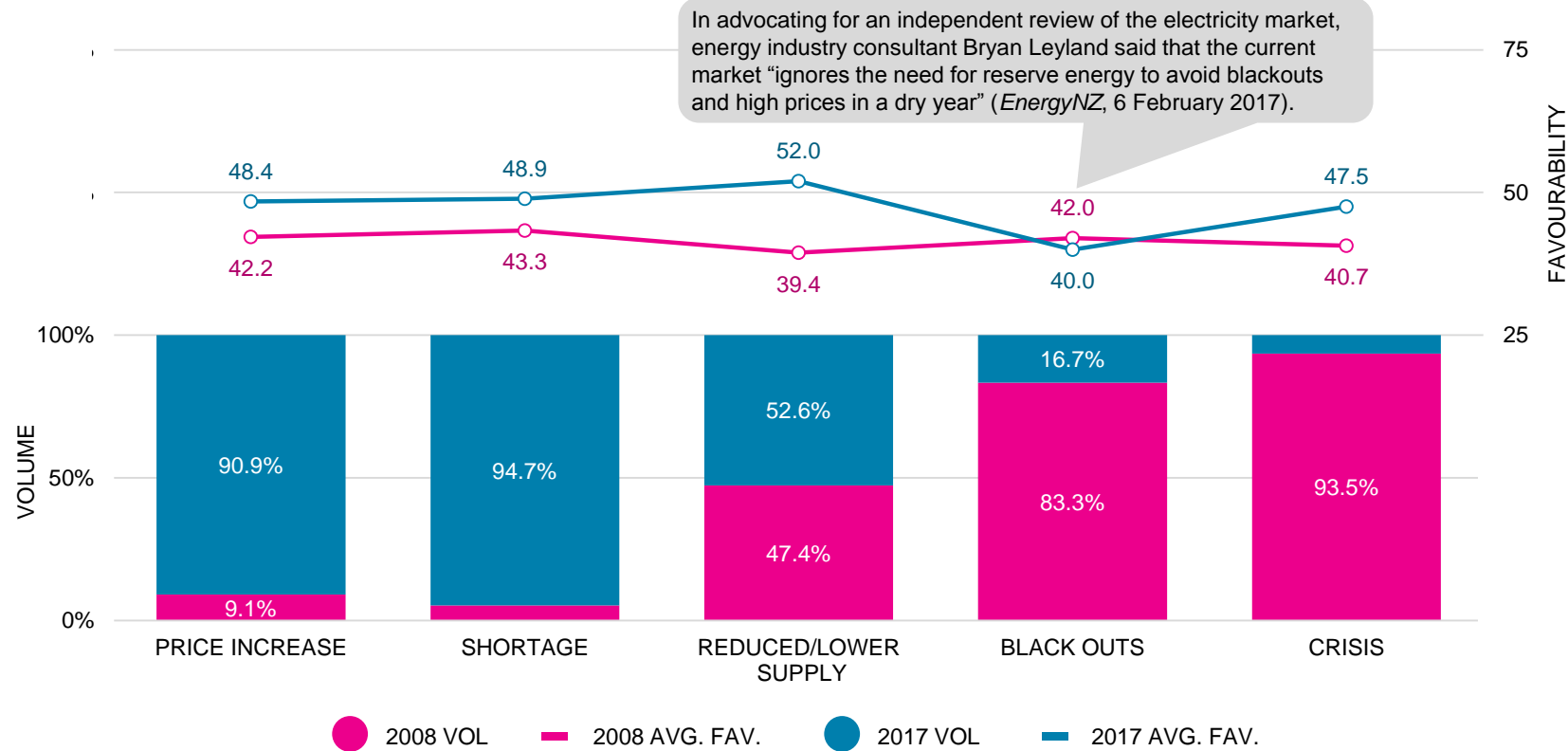
## LEADING MESSAGES (2008 and 2017)



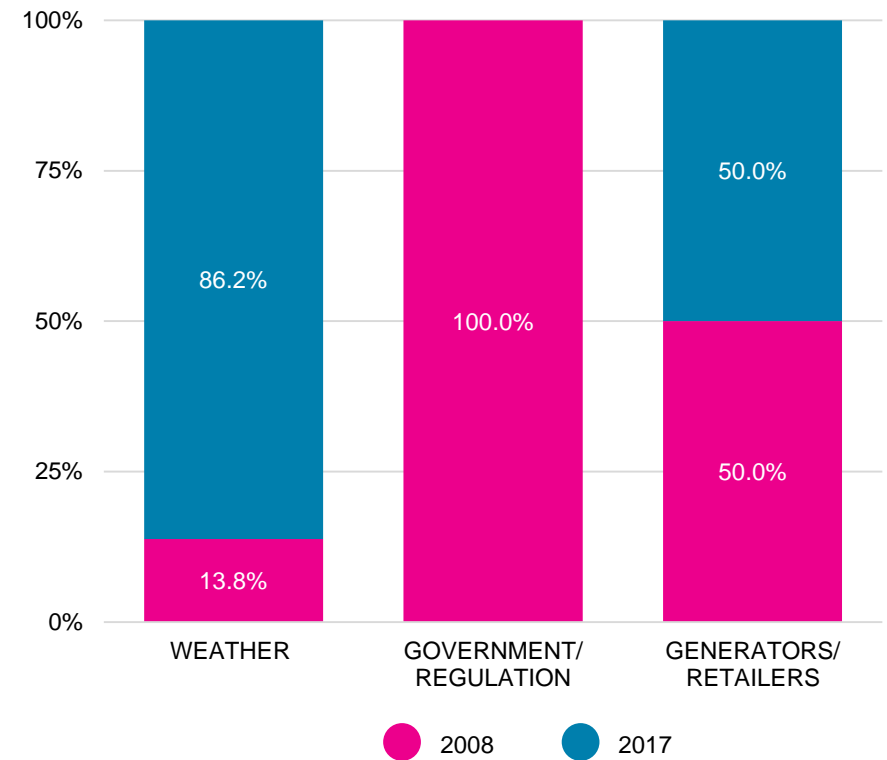
## KEY FINDINGS

- A total of 716 reports mentioning the topic of dry winters and their impact on electricity supply between 1 January 2008 and 31 August 2017 was analysed. A large proportion of this coverage was neutral or balanced in tone, as the majority of reporting remained factual and focused on communicating weather-related information and hydro lake levels.
- However, reporting during the dry winter of 2008 was overwhelmingly unfavourable (83.3%). Speculation on the security and resilience of the country's energy supply was widespread (the focus of 79.2% of the coverage), with many expressing concerns that it *is vulnerable* (31 mentions).
- While a sizeable proportion of coverage during the 2017 winter period also focused on energy supply (40.2%), criticism of the security of supply was less prevalent, with only 13 mentions of the message that it *is vulnerable*.
- Instead, pricing emerged as a key issue in 2017, as low hydro lake levels drove an increase in spot prices. This was of particular concern to customers of wholesale power companies such as Flick Electric and Paua to the People, with the former at times accused of *not being upfront or honest* (eight mentions).
- Despite the price spikes, the *resilience of NZ's energy supply* was also praised in a small number of reports, as some commentators acknowledged the industry's capacity to deal with cold, dry winters and the contingency plans it has in place.

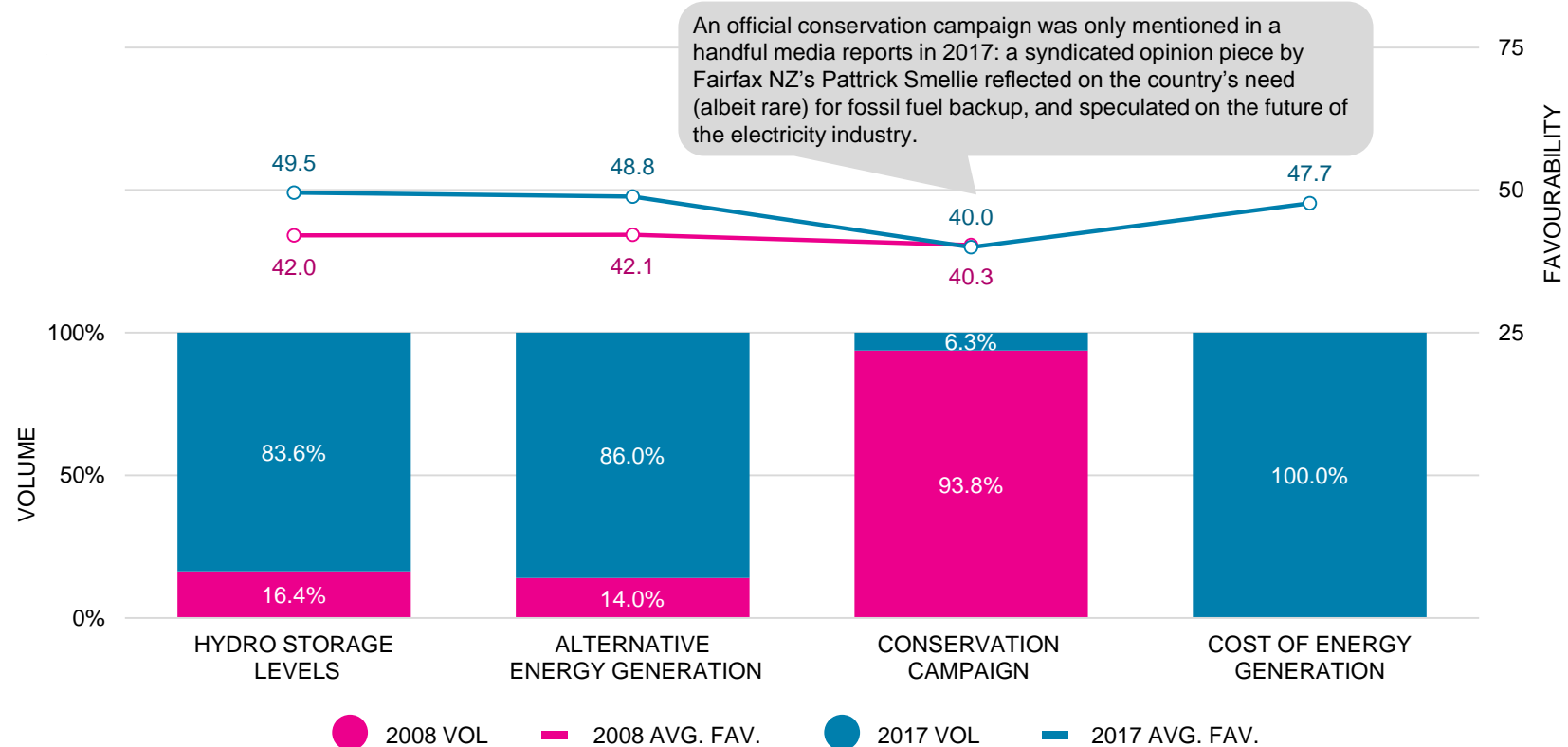
## IMPACT OF DRY WINTER



## BLAME/RESPONSIBILITY



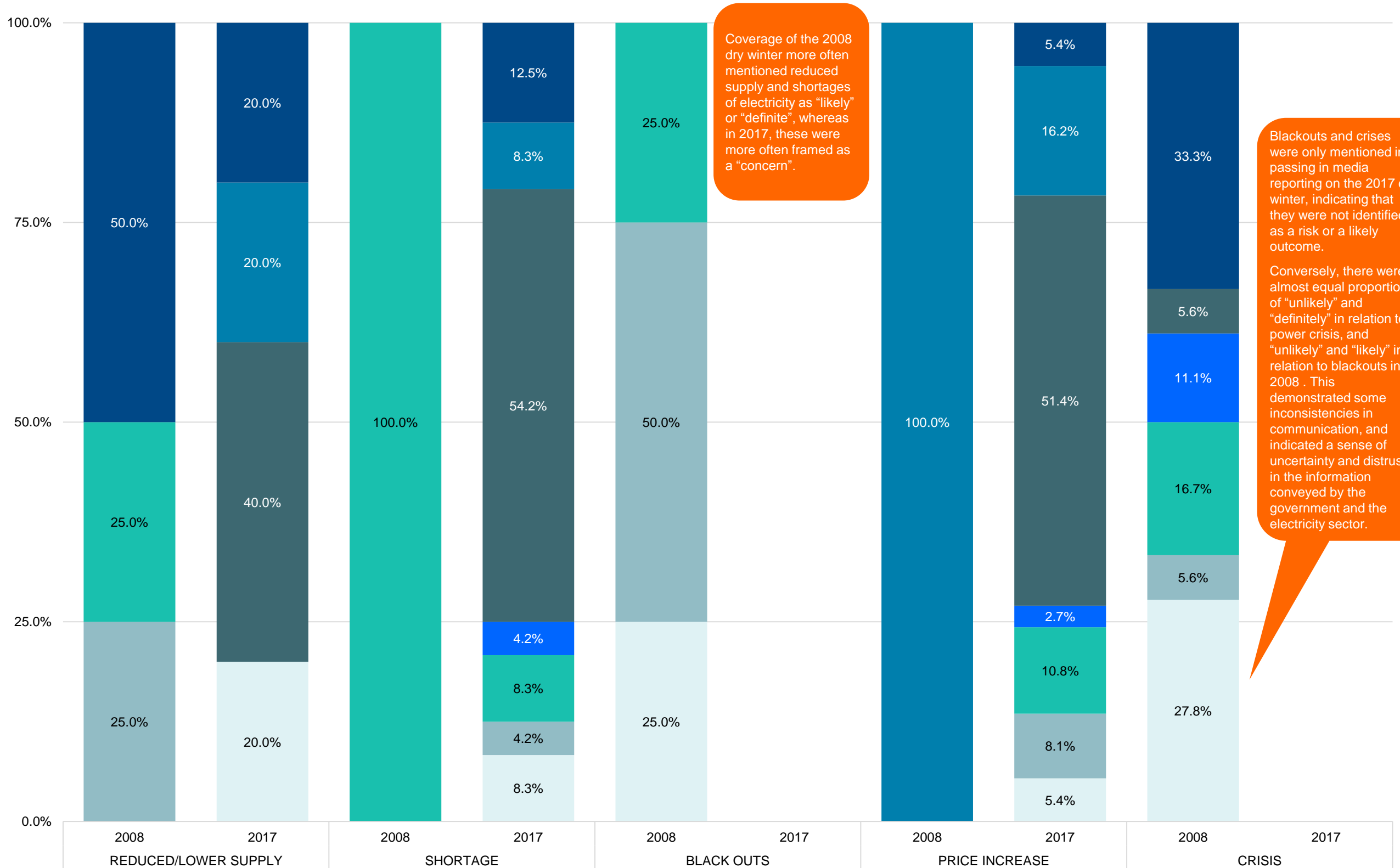
## RESPONSE & RELATED TOPICS



## KEY FINDINGS

- Reporting on the 2008 dry winter was often framed by the likelihood of an electricity crisis (93.5%) and concerns of black outs (83.3%), which were mentioned only in passing in 2017. On the other hand, price increases and concerns about electricity shortages were key topics of discussion in reporting on the 2017 dry winter, and were seldom mentioned in 2008.
- Reporting on the 2008 dry winter and its impact on the electricity market frequently associated it with regulatory failings and political discourse, particularly by then-National energy spokesperson Gerry Brownlee. Brownlee was a prominent critic, as he called for a conservation campaign to be launched and accused the government of being reluctant to declare a crisis in an election year.
- Conversely, these topics were notably absent in 2017, when discussion about the impact of the dry winter was often closely associated with weather events and the performance of electricity companies (in relation to customer relationship and profitability).
- As a result, media reporting on the 2017 dry winter and its impact on the electricity market was less unfavourable overall compared to 2008.

## LIKELIHOOD OF EVENTS – 2008 vs. 2017

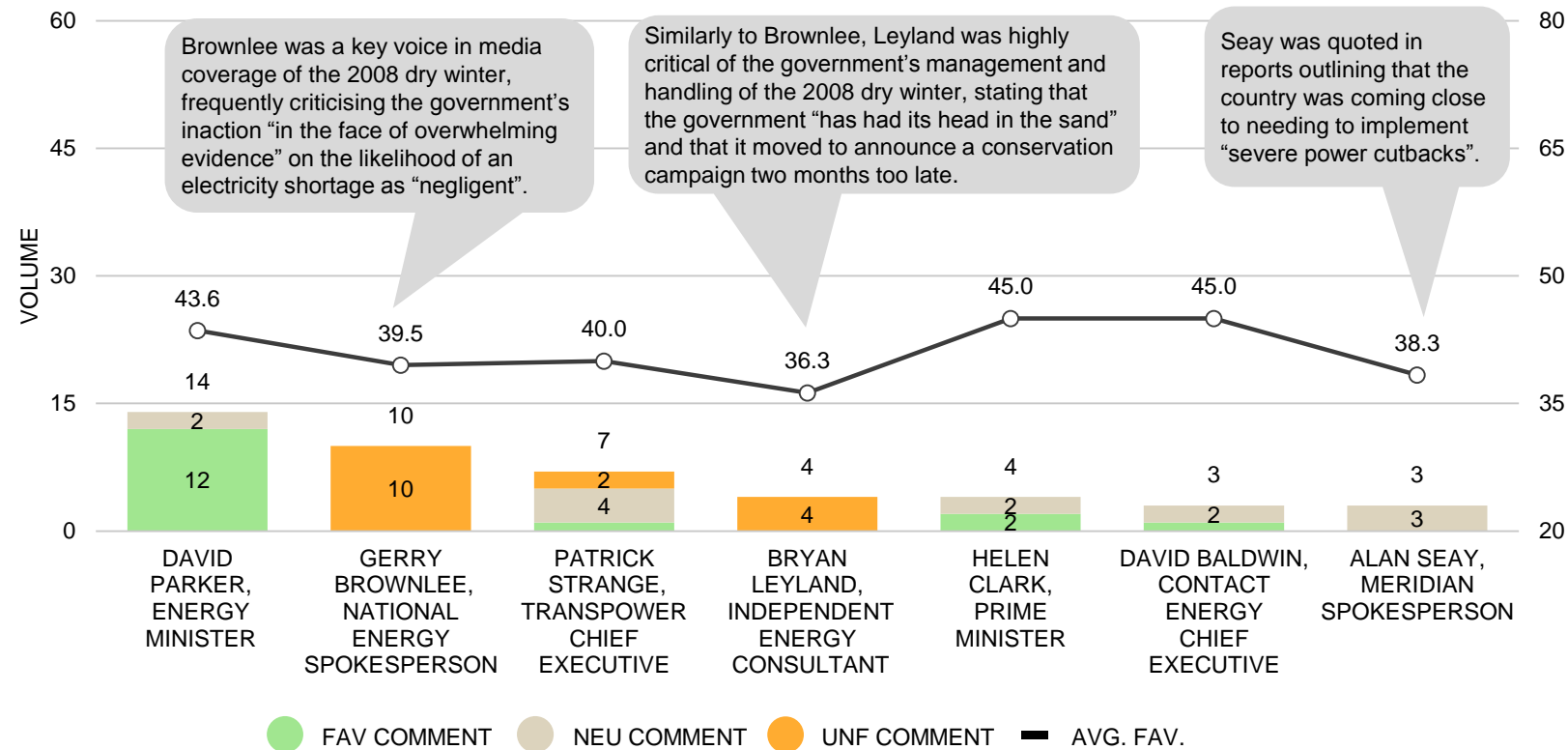


Coverage of the 2008 dry winter more often mentioned reduced supply and shortages of electricity as “likely” or “definite”, whereas in 2017, these were more often framed as a “concern”.

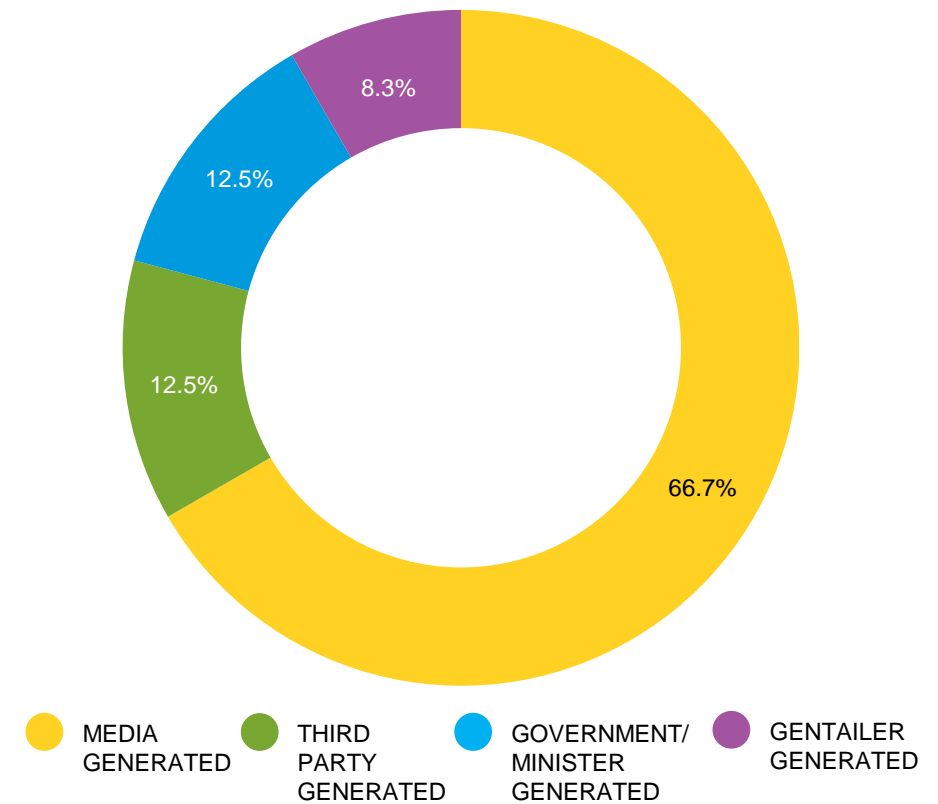
Blackouts and crises were only mentioned in passing in media reporting on the 2017 dry winter, indicating that they were not identified as a risk or a likely outcome. Conversely, there were almost equal proportions of “unlikely” and “definitely” in relation to a power crisis, and “unlikely” and “likely” in relation to blackouts in 2008. This demonstrated some inconsistencies in communication, and indicated a sense of uncertainty and distrust in the information conveyed by the government and the electricity sector.

● UNLIKELY 
 ● COULD/POTENTIALLY 
 ● LIKELY 
 ● EXPECTED 
 ● CONCERNS 
 ● WARNING 
 ● DEFINITELY

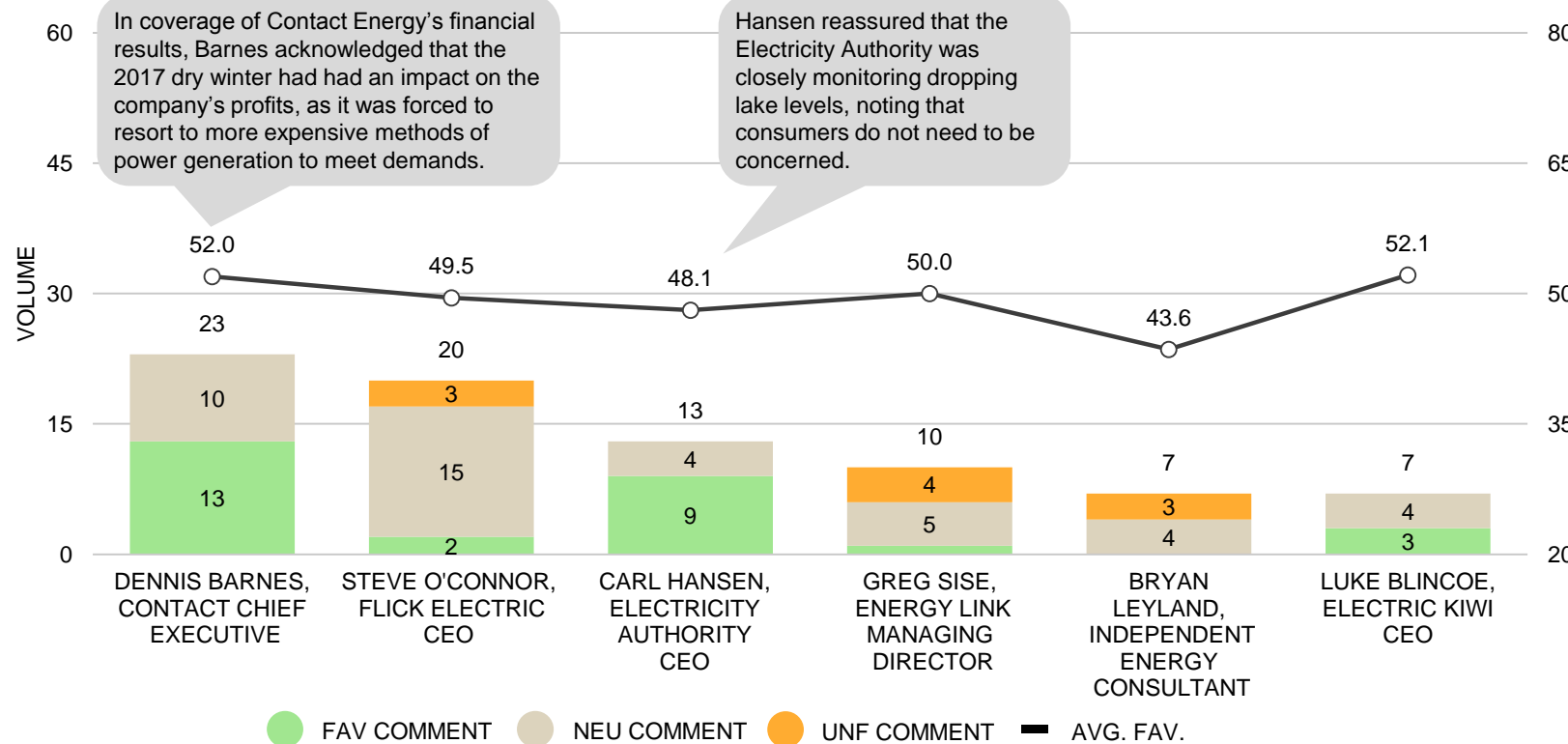
## LEADING SPOKESPEOPLE – 2008



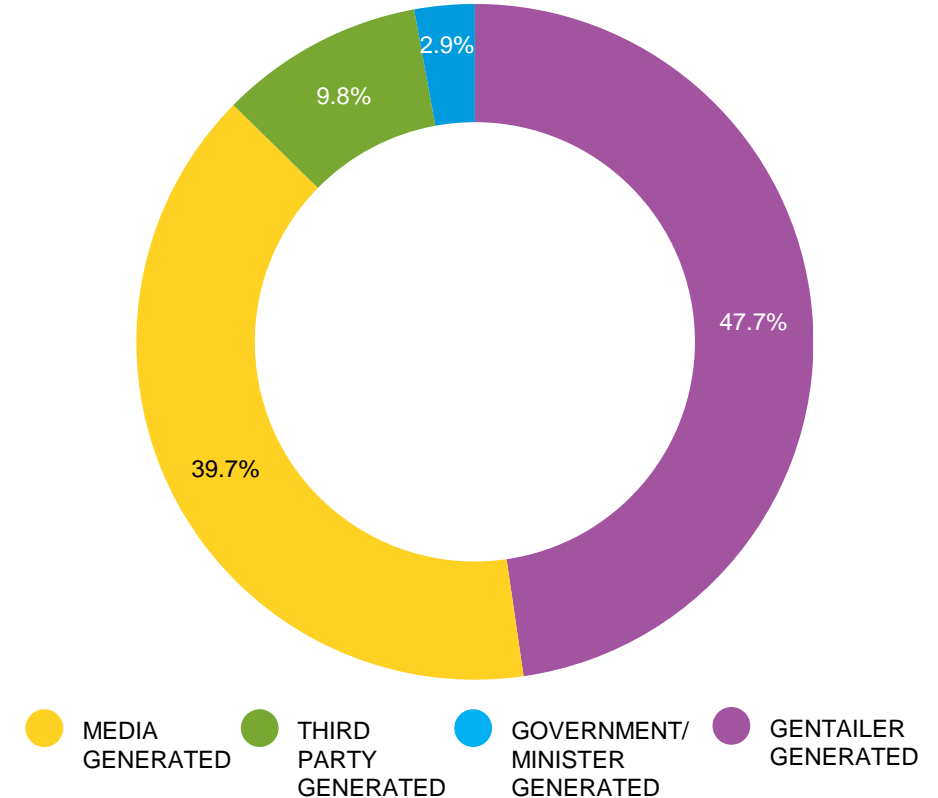
## COVERAGE BY ORIGIN – 2008



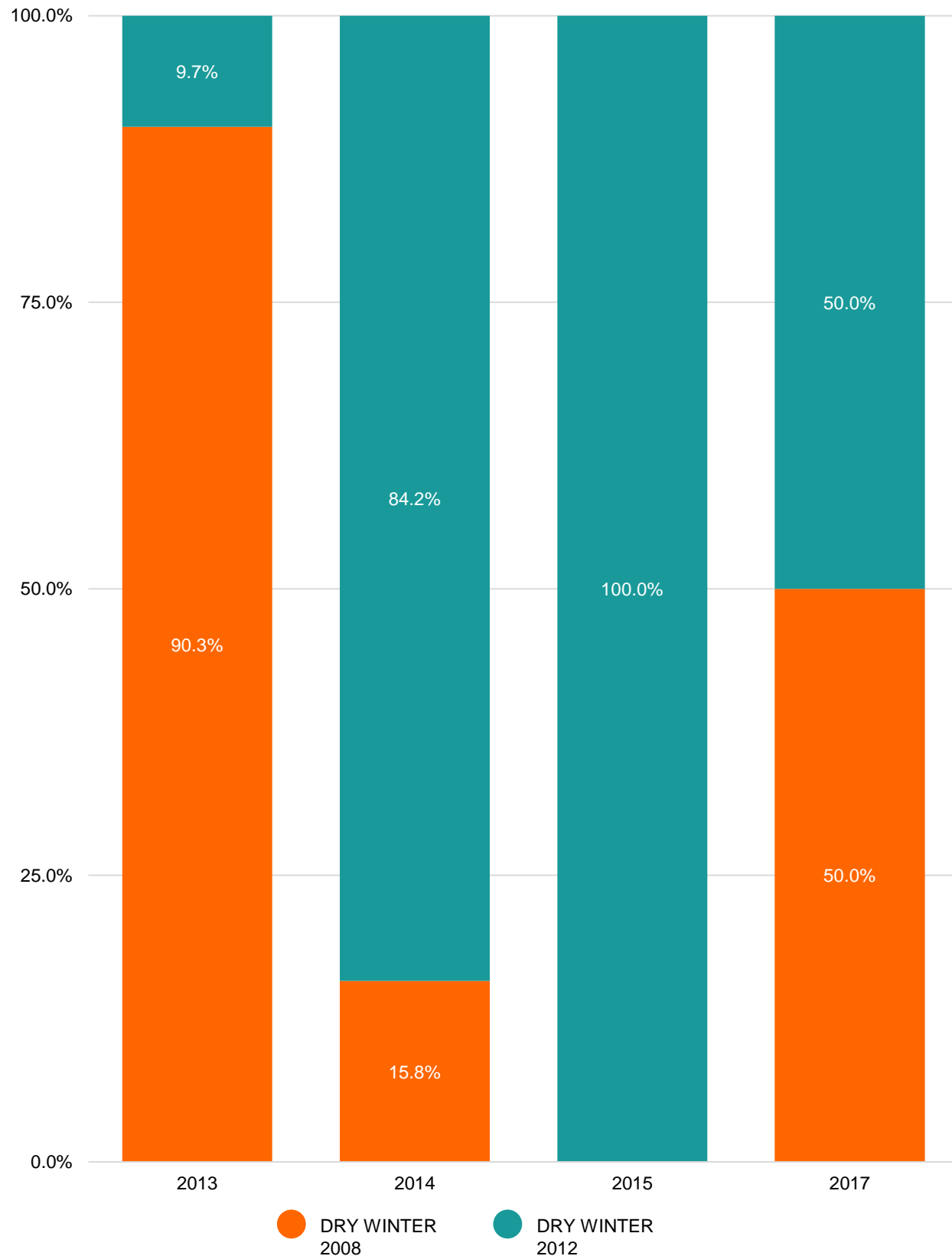
## LEADING SPOKESPEOPLE – 2017



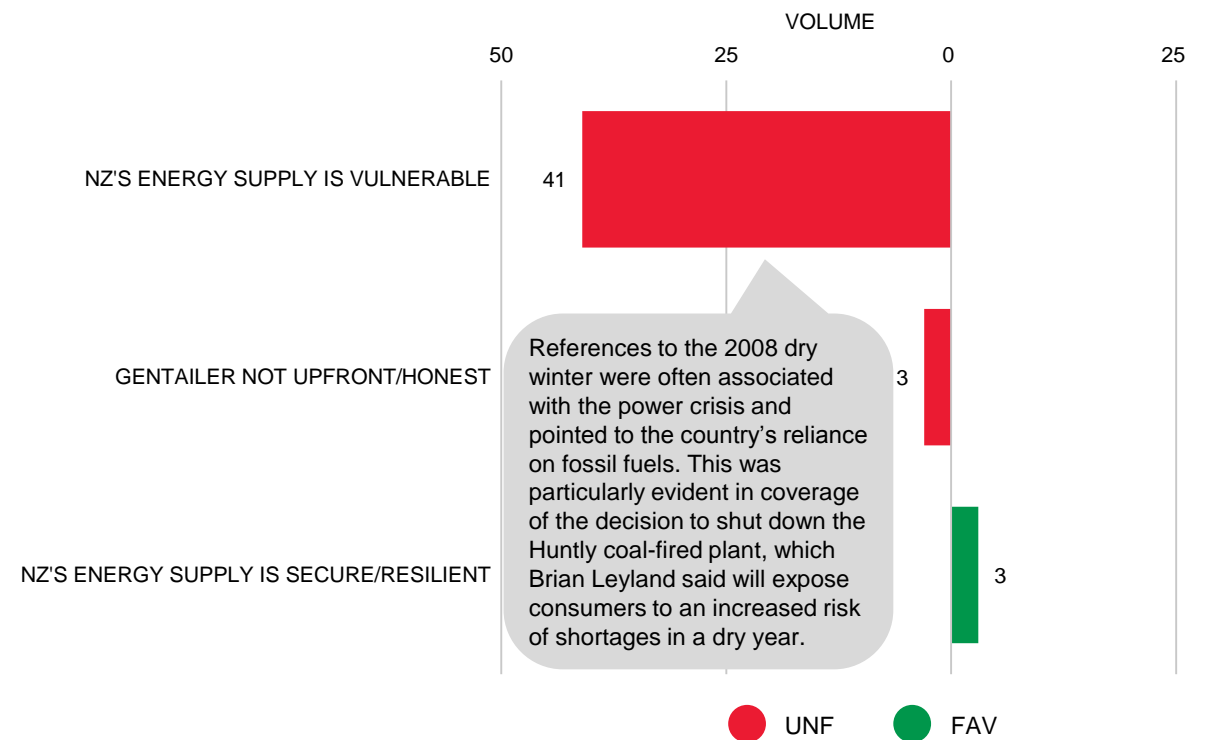
## COVERAGE BY ORIGIN – 2017



## REFERENCES TO DRY WINTER 2008 & 2012



## MESSAGES – REFERENCES TO DRY WINTER 2008



## MESSAGES – REFERENCES TO DRY WINTER 2012

