



NZ ON AIR

PUBLIC AWARENESS AND
ATTITUDES SURVEY
2024

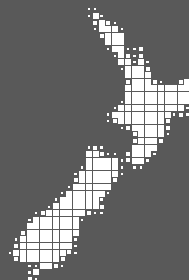
Objectives and Methodology



391 + 210

ONLINE INTERVIEWS MOBILE INTERVIEWS

7 minutes



FIELDWORK DATES:
20TH JUNE – 4TH JULY 2024

OBJECTIVES

NZ On Air commissioned Verian (formerly Kantar Public) to research and track New Zealanders' understanding of:

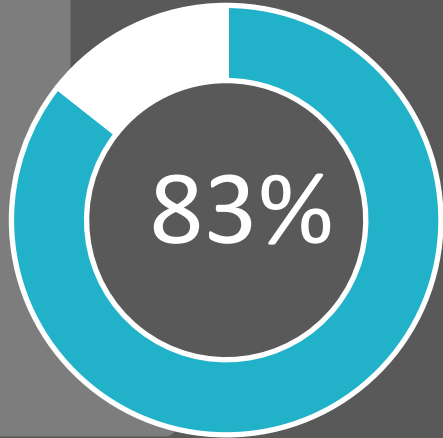
- NZ On Air,
- NZ On Air's role in funding local content, and
- their views on that content.

METHODOLOGY

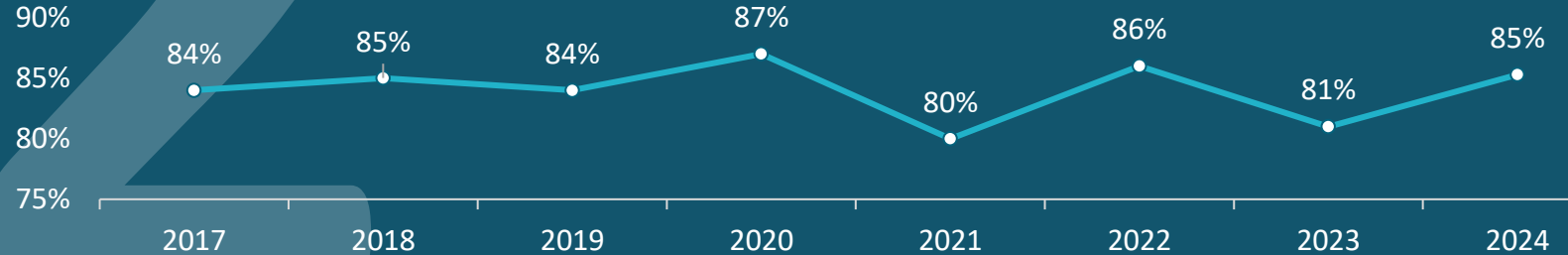
- 391 interviews were conducted online, and 210 completed via mobile phone. The online sample was sourced through an online panel, while the mobile sample used randomly generated mobile phone numbers.
- Changes in 2024: The proportion of interviews being conducted via online panel increased from 50/50 to 65/35.
- Changes in 2022: Previously, the survey used a mix of landline and mobile sampling. The change in method was agreed to place the survey on a more sustainable footing moving forward.
- For mobile numbers, the main user of the phone (over 15 years old) was interviewed. For the online interview, if the respondent had any children aged 15-17 in their household, the respondent had the option of inviting the 15-17 year old to complete the survey. All those aged 15-17 who completed the survey were given a \$10 e-gift voucher, while online panellists (aged 18+) receive their usual panel reward.
- Both the telephone and online scripts used automated question routing to help support the quality of the data.
- Weighting was applied to ensure that the sample was representative of the New Zealand adult population (based on 2018 Census data).
- Whenever differences are reported (for example an increase or decrease since last year, or previous years) these are statistically significant at the 95% confidence level or greater unless otherwise stated.

Executive Summary

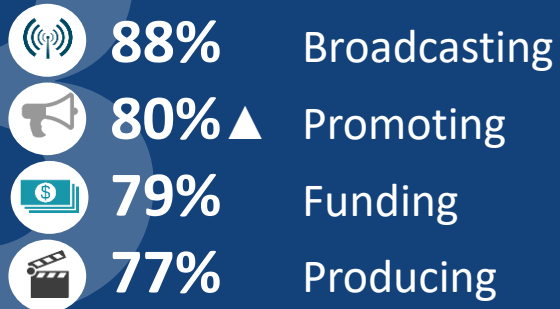
Awareness of NZ On Air has remained stable; **83% of New Zealanders**, vs. 86% in 2023.



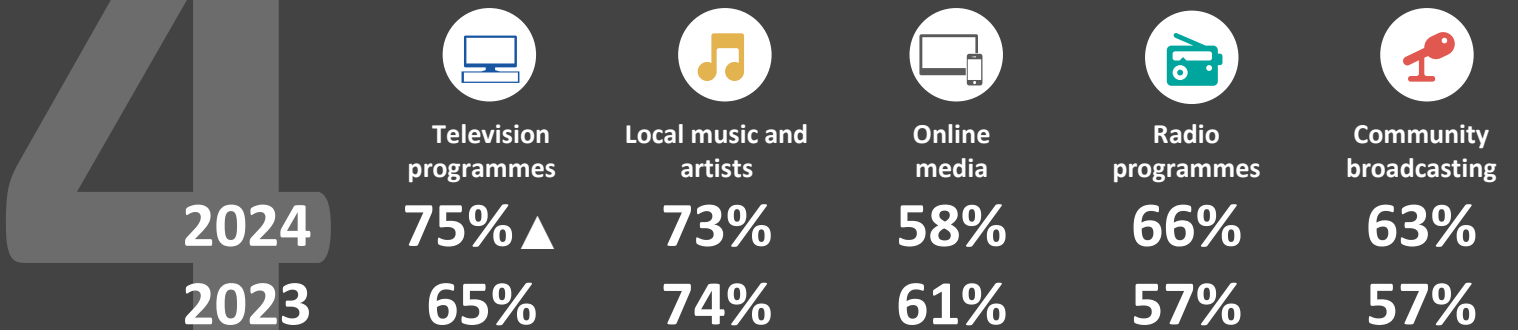
While most New Zealanders continue to support free-to-air publicly funded television content, this support has fluctuated over the last four years.



There is still confusion about NZ On Air's role in the media industry. While funding is stable, all other ways of supporting local content have increased.



New Zealanders are more likely to enjoy television programmes in 2024. Satisfaction of online media continues to decline.





Irirangi Te Motu
NZ On Air

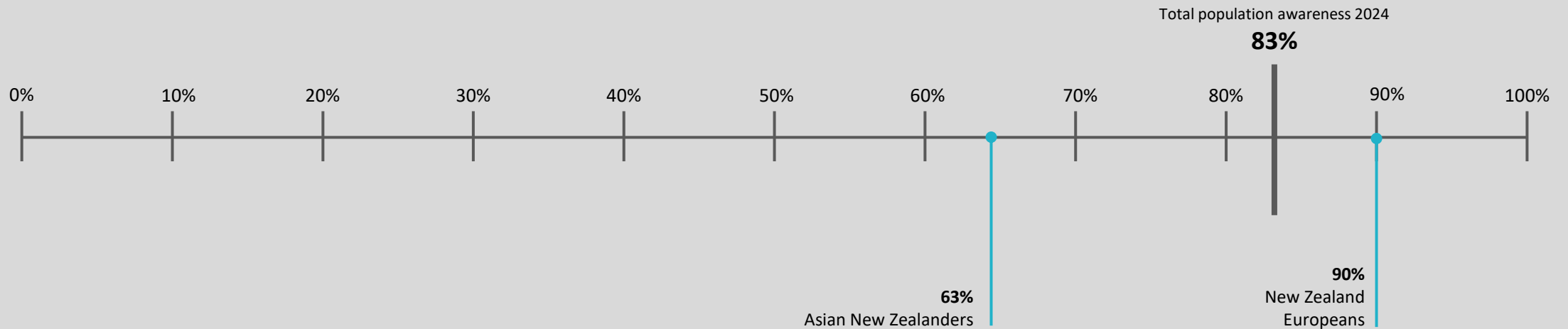
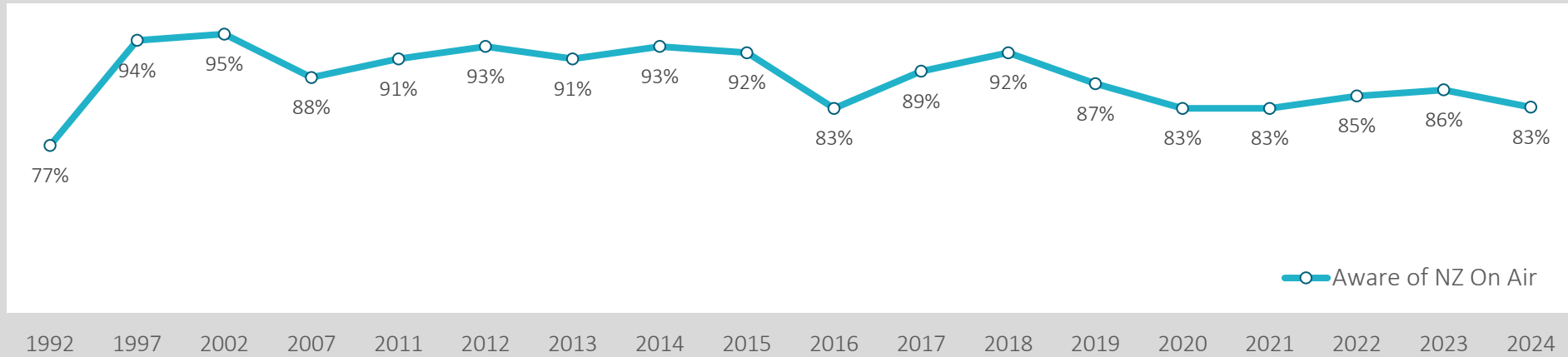


HIGH LEVEL AWARENESS
AND PERCEPTIONS

AWARENESS OF NZ ON AIR:

The majority of New Zealanders continue to be aware of NZ On Air (83%), falling back to 2020 and 2021 levels. In line with last year, New Zealand Europeans are more likely to be aware of NZ On Air, while Asian New Zealanders are less likely to be aware of NZ On Air.

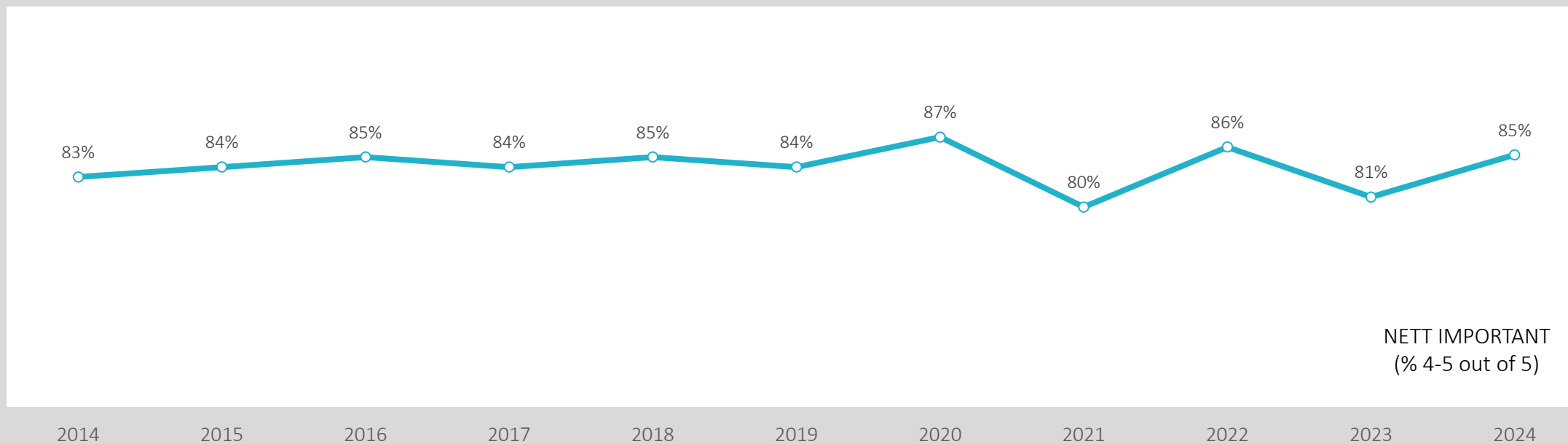
Q: 'Do you know that there is an organisation called NZ On Air?'



IMPORTANCE OF PUBLICLY-FUNDED CONTENT:

The majority of New Zealanders think it's important to have publicly-funded television content that is free to consume (85%), this result has fluctuated over the last four years. There are no demographic differences, so is difficult to pinpoint which group is driving this result.

Q: 'How important is it that publicly funded television content is free to consume, means you don't have to pay a SKY, Netflix or paywall subscription?'¹



NETT IMPORTANT
(% 4-5 out of 5)

There are no demographic differences of note for this question

RECOGNITION OF THE IMPACT NZ ON AIR FUNDING MAKES IN TERMS OF LOCAL CONTENT:

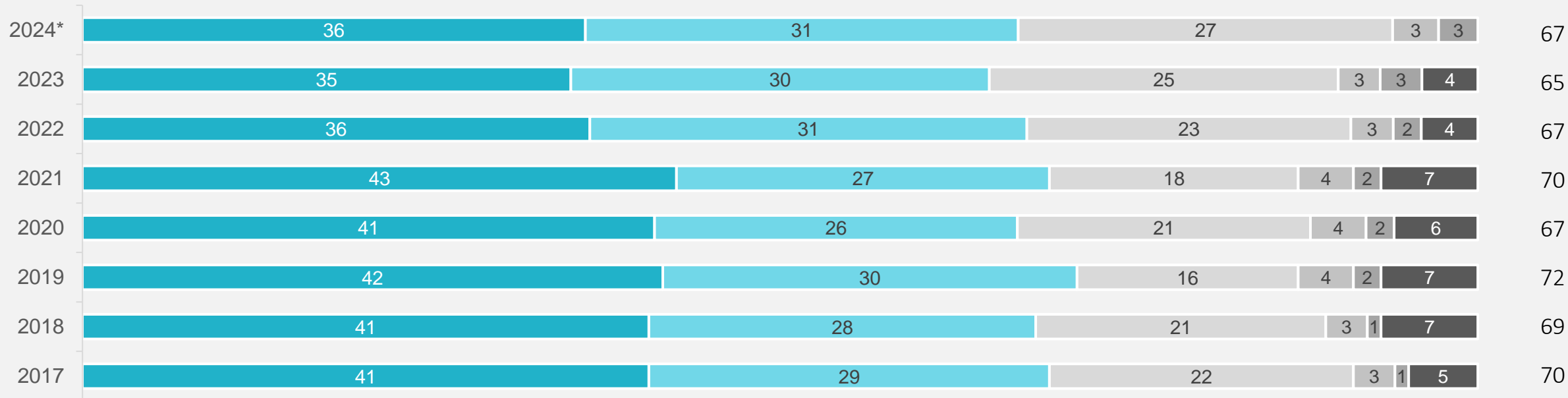
Two thirds of New Zealanders think that NZ On Air funding results in greater diversity of local content, which is in line with previous years. However, similar to the last two years, sentiment has softened since 2021, with lower proportions who strongly agree.

Q: 'How much do you agree or disagree that NZ On Air funding results in a greater diversity of local content than would otherwise exist?'

%

■ 5 Strongly agree ■ 4 ■ 3 ■ 2 ■ 1 Strongly disagree ■ Don't know

NETT AGREEMENT
(% 4-5 out of 5)

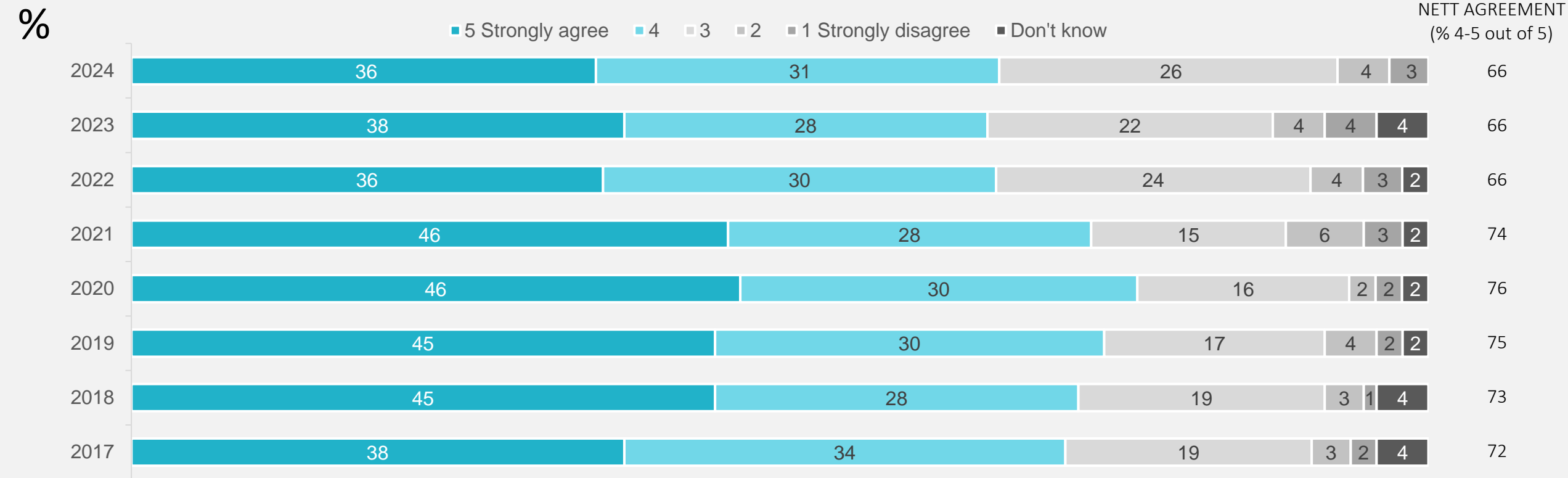


There are no demographic differences of note for this question

VALUE PLACED ON DIVERSE LOCAL CONTENT:

Two thirds of New Zealanders value the diversity of local content funded by NZ On Air, which is consistent with previous years, but lower than 2021 and earlier.

Q: 'How much do you agree or disagree with the following statement... you value the diversity of local content funded by NZ on Air?'



Those aged 50+ (12%) are more likely than other age groups to disagree (Nett disagree 1-2 out of 5)



Irirangi Te Motu
NZ On Air

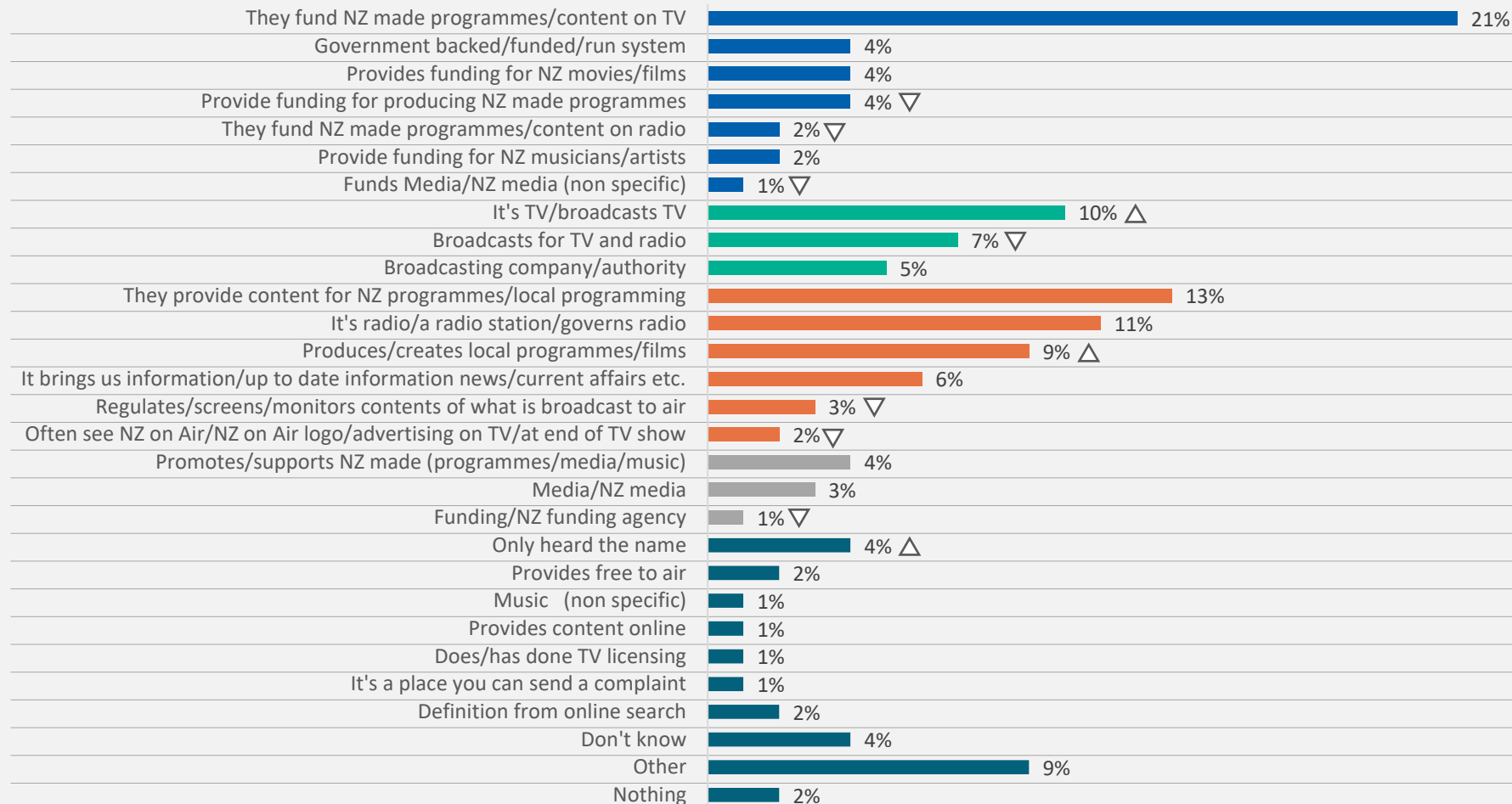


DETAILED AWARENESS
FINDINGS

UMPROMPTED AWARENESS OF NZ ON AIR'S ROLES:

Of those aware of NZ On Air, just under one third are aware of the agency's funding role. However, one in five New Zealanders incorrectly believe that the agency is a broadcaster, a similar proportion compared to 2023 (24%).

Q: 'Can you please tell me everything you know about what NZ On Air does?' (Open ended question)



NETT: Funding
29%

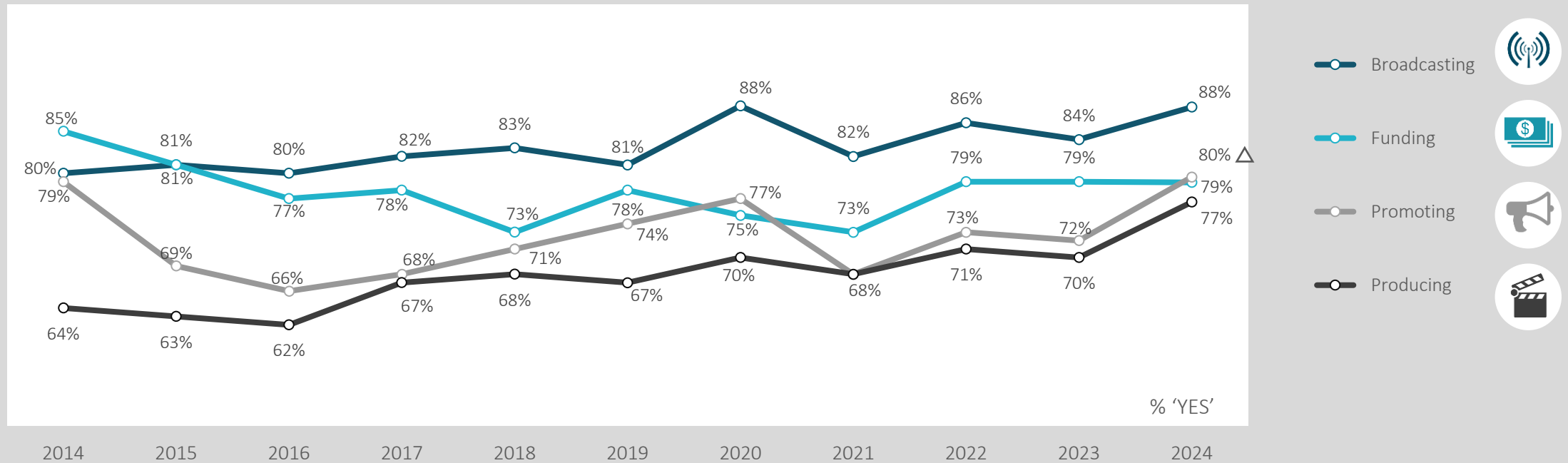
NETT: Broadcasting
21%

PROMPTED AWARENESS OF NZ ON AIR'S ROLES:

Compared to 2023, significantly more New Zealanders correctly assume that NZ On Air promotes content (80%), while those who acknowledge that NZ On Air supports local content through funding remains stable (79%).

However, there is confusion about NZ On Air's role, with an increasing proportion falsely believing NZ On Air is a broadcaster (88%) or producer (77%).

Q: 'Below is a list of different ways that local media can be supported. Please indicate whether or not you think NZ On Air is involved in each. Do you think they are involved in.....'



- New Zealanders aged 15 to 29 years (90%) are more likely to incorrectly believe that NZ On Air **promotes** content.
- Those aged 25-59 (85%) are more likely to believe that NZ On Air **funds** local content, while those aged 70+ (58%) are less likely to.

Base: Those who know of at least one type of media NZ On Air supports, 2024 (584), 2023 (n = 509), 2022 (n = 520), 2021 (n=511), 2020 (n=498), 2019 (n=497), 2018 (n=552), 2017 (n=542), 2016 (n=531), 2015 (n=540), 2014 (n=450).
Source: A4.

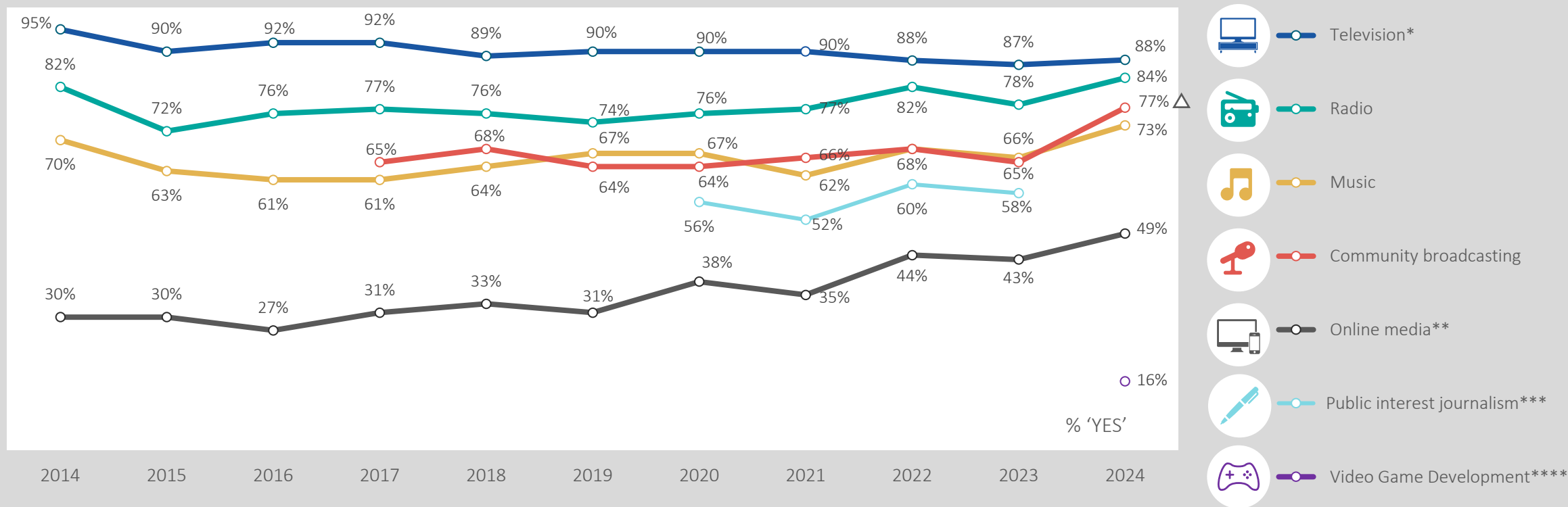
△▽ Significantly higher / lower than 2023

AWARENESS OF MEDIA SUPPORTED BY NZ ON AIR:

Among those aware of NZ On Air, the knowledge of what is being supported by NZ On Air has increased across all content, with music significantly higher compared to 2023.

One in six (16%) consider video game development to also be supported.

Q: 'Below is a list of types of local or New Zealand media content. For each one please indicate whether or not you think NZ On Air supports it?'



- Those aged 15-29 (64%) are more likely to be aware that NZ On Air supports **online media**, while those aged 50+ (35%) are less likely to.
- Those aged 50+ (8%) are less likely to be aware that NZ On Air supports **video game development**.

Base: All New Zealanders who are aware of NZ On Air, 2024 (501), 2023 (n= 537), 2022 (n= 542), 2021 (n=522), 2020 (n=512), 2019 (n=524), 2018 (n=566), 2017 (n=553), 2016 (n=540), 2015 (n=553), 2014 (n=458).

Source: A3.

*Wording change in 2024: added "(including on demand)"; **Wording change in 2024: from "Digital media including web and mobile content" to "Online media including content on websites and social media"; *** Only asked until 2023; ****First asked in 2024

△▽ Significantly higher / lower than 2023



Irirangi Te Motu
NZ On Air

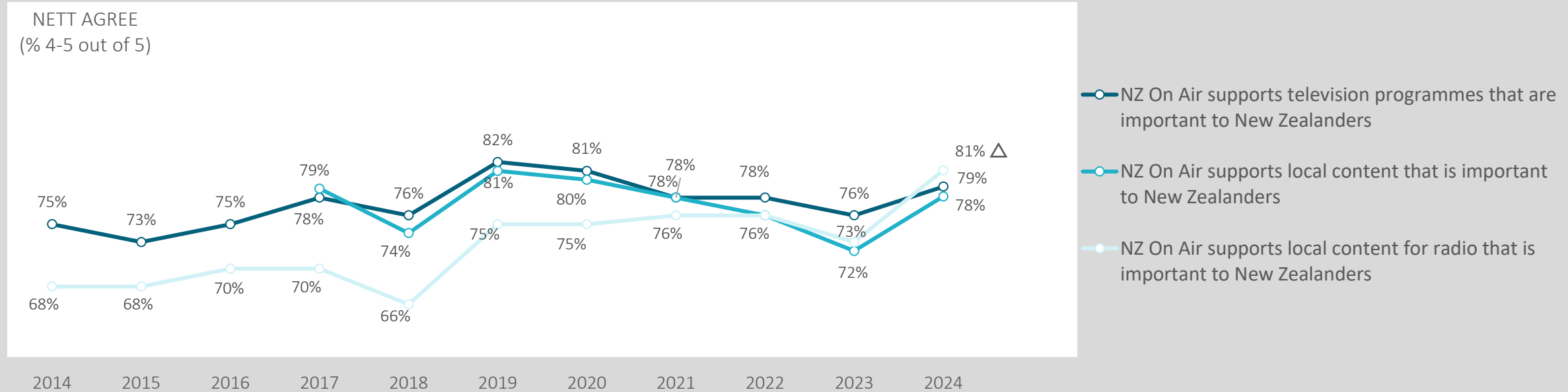


SUPPORT FOR
NZ ON AIR'S MISSION

AGREEMENT THAT NZ ON AIR SUPPORTS IMPORTANT CONTENT:

All content has seen an increase in importance compared to last year. However, the radio content that NZ On Air supports is considered significantly more important this year, even more important than local content and television programmes.

Q: 'To what extent do you agree with each of the following statements?'

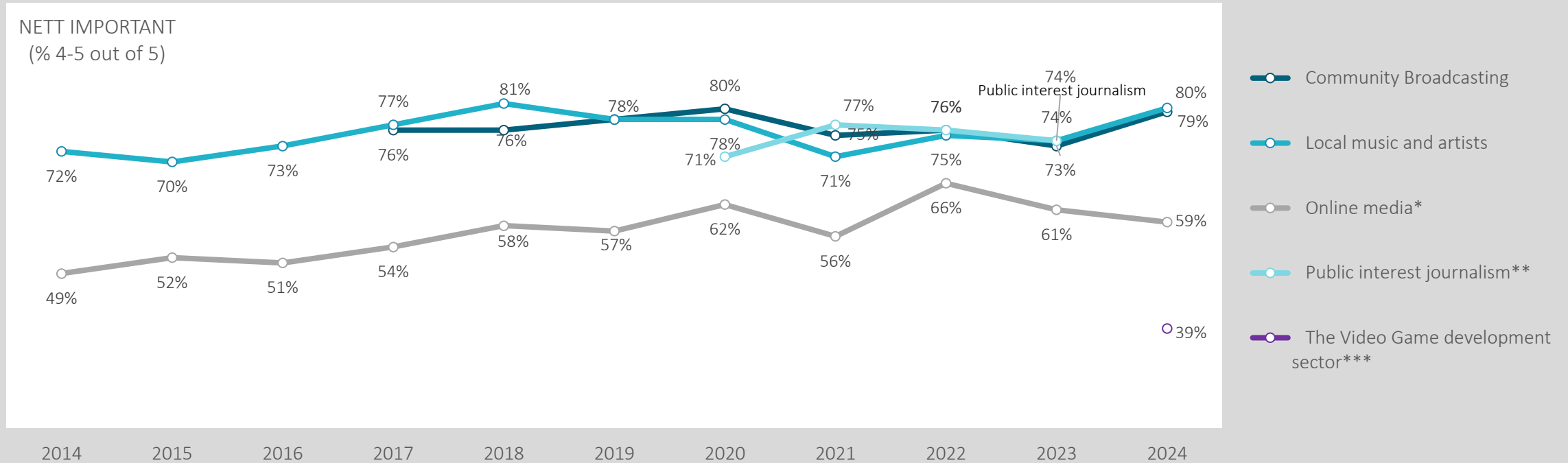


- Females (84%) are more likely than males (73%) to agree it is important that NZ On Air supports **television** programmes and activities that are important to New Zealanders.

IMPORTANCE OF SUPPORTING DIFFERENT TYPES OF CONTENT:

While we see a slight but not significant increase in importance for local music and artists (80%) and community broadcasting (79%), the proportion who believe it is important for NZ On Air to support online media declines for a second year (59%, compared with 66% in 2022). Two in five believe it is important to support the video game development sector.

Q: 'How important is it that NZ On Air supports each of the following?'



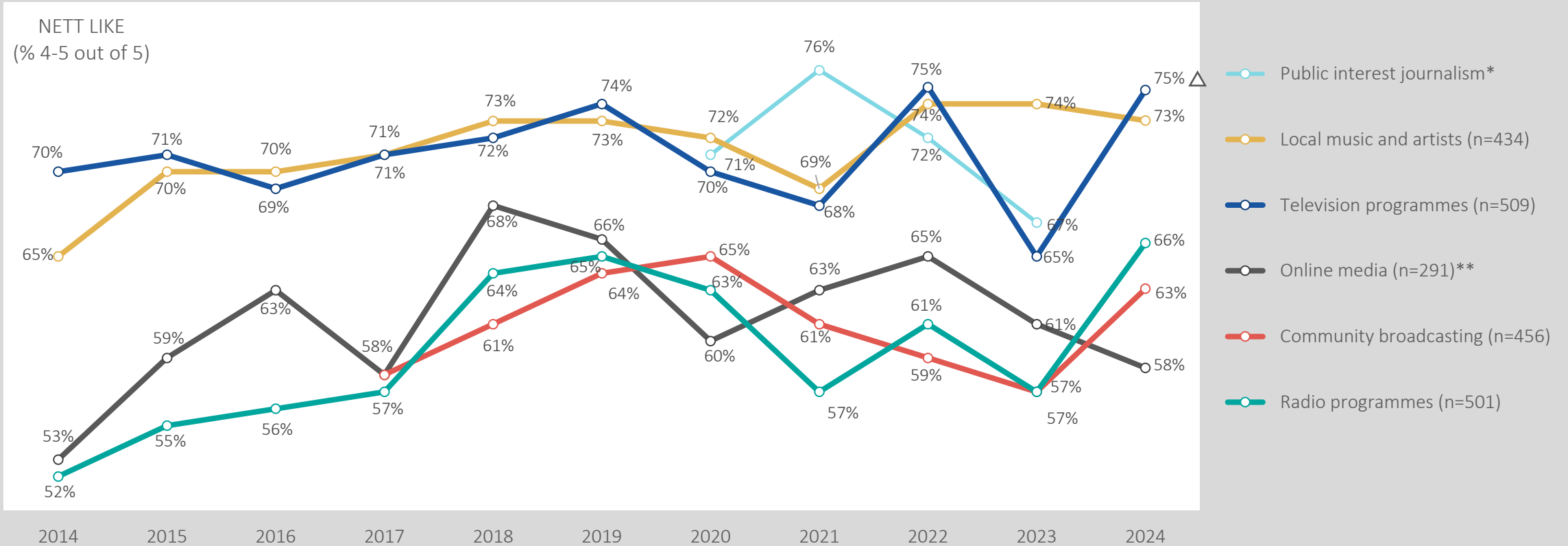
- Females (87%) are more likely than males (74%) to think it is important to support **local artists and music**.
- Those aged 15-39 (47%) are more likely to think it is important to support **video game development**, while those 50+ (31%) are less likely to think so.
- Those aged 15-44 (66%) and Asian New Zealander (73%) are more likely to think it is important to support **online media**, while those 45+ (51%) and New Zealand European (54%) are less likely to think so.

LIKEABILITY OF CONTENT:

Of all the content mediums, likeability of local music and artists remains the most stable over time, while online media declines for a second year running, now the least liked content.

All other mediums appear to have recovered from last year's low, especially television programmes which have seen significant increases.

Q: 'How much do you like or dislike NZ On Air funded local content?' (among those aware NZ On Air supports each type of content)



- NZ On Air funded **local music and artists** are more liked by 15–49-year-olds (77%) compared to those aged 50+ (67%).



LIKE



TELEVISION

"Content is well made and nice to see your culture reflected back in the content you watch."

"We produce some fairly good shows which helps develop New Zealand actors and provides jobs to people in the industry."

"So, we will be learning things about New Zealand through that content."



RADIO

"The media content is needed for New Zealanders to know what the news is and all the local activities that are going on whether it's their community or elsewhere that you can keep up to date on what's going on."

"It promotes what is relevant to the New Zealanders. It is more of a culturally sensitive programmes."

"I like it because it is local and relevant to me being a Kiwi."

"Free, unbiased and without the influence of large companies."



COMMUNITY BROADCASTING

"A way of keeping up with your local things, like your local news, events happening locally, it is good to know what is going on."

"The main reason that I like that is because it's New Zealand made. It's not overseas. It gives you more knowledge on New Zealand."

"It focuses on sometimes smaller regional areas and brings their content to the nation."



MUSIC AND ARTISTS

"Otherwise local music and artists would not have the opportunity to produce their music."

"NZ is an extremely talented country in all genres of the arts and NZ on Air allows the development and air time for the local artists, who otherwise would go unnoticed."

"It's very hard for new local musicians and artists to get ahead in a small country, and seriously needs funding."



ONLINE MEDIA

"The reason I like it is it's funding people who want to be creative to be able to do that. It funds people in New Zealand to make good online content."

"I believe more of this generation with their smartphones, the ease of access to online would reach out to more of our New Zealand population. Basically, in my opinion most people are online rather than listening to the radio."



 TELEVISION

"I don't think that the views represents the opinions of New Zealanders."

"I don't view a lot of it, as it is not appealing, so I end up not watching it."

 RADIO

"[...] I no longer listen to the radio, and I believe news is censored by the government and it's biased, so I chose to find my news from around the world and online instead of radio and TV programming, New Zealand radio is full of advertising, I would rather listen to Spotify or podcast."

"I don't listen to those types of radio programmes. I support it, it's fine, it's good but personally myself I don't watch or listen to it."

 MUSIC AND ARTISTS

"I'm not particularly interested in NZ music."

"Not really interested in modern music."

 COMMUNITY BROADCASTING

"They don't get totally involved in people and communities, they have got their own agenda, they don't really alter from their agenda and they don't show the community the right sorts of information. So extremely left orientated in their programmes. They don't show enough what real New Zealand is."

"I never listen to it. I listen to Spotify. I listen to stuff from overseas."

 ONLINE MEDIA

"I don't like online content, any online content. There's already a lot of online advertising and that can fund online content."

"I can't be bothered dealing turning the computer or phone, gadget or whatever. Too much to do. I've got better things to do with my time, and those sort of media is a waste of time."



Irirangi Te Motu
NZ On Air



FOR FURTHER INFORMATION
PLEASE CONTACT:

Jay Carlsen or Katja Krone

Verian
Level 9, 101 Lambton Quay,
Wellington 6011

Phone (04) 913 3000
www.veriangroup.com/nz