

Stakeholder 2025

Research Report

May 15, 2025



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Key findings

Stakeholders view NZ On Air's funding and support as essential for the sector's stability and growth.

However, 80% of stakeholders are increasingly pessimistic about the sector's future due to evident challenges in the current media environment.

The findings in this report should be interpreted with this context in mind.

1

Advocacy is steady, and is particularly evident among those stakeholders who find funding criteria appropriate and understand the decision making process. NZ On Air's staff and service delivery remain an important driver of advocacy.

2

Most stakeholders currently view NZ On Air as effective in fulfilling its purpose. As seen in previous years, many stakeholders appreciate NZ On Air's funding efforts, while some disagree and think funding is too thinly spread.

3

Most stakeholders have a clear grasp of the funding criteria, indicating general awareness of application requirements. There is opportunity to enhance transparency regarding the decision-making and application evaluation processes.

4

The service provided by NZ On Air staff is rated highly by most stakeholders, who continue to appreciate the courtesy and helpfulness of service delivery.

5

Trust and communication effectiveness remain strengths for NZ On Air. Effective communications impact how stakeholders feel about many aspects of NZ On Air's service, including its funding criteria and decision making.

Background & Methodology

Objectives and methodology

Objectives

The primary objective is to undertake research to better understand how stakeholders perceive NZ On Air.

This research was last completed in 2022, and as such this latest wave is used to compare back to 2022, and to highlight areas of improvement or decline.

Sample source

The sample was comprised of stakeholders who had interacted with NZ On Air for various reasons (contract types, government stakeholder etc.). Reasons have remained consistent with previous waves. Post-weighting was used to ensure this was representative of the overall population of stakeholders in 2025, and to meet the target proportions below. The profile is largely in line with 2022:

Funded content (scripted & non-fiction)	59%	Music - singles	10%
Platform – operational	5%	Industry Development	5%
Platform – content	6%	Government sector	3%
Music - projects	7%	Game development sector	6%

Method



Target audience – Stakeholders who have interacted with NZ On Air in the last two years.



Survey dates – 24 February to 30 March 2025.



Method – A 15-minute **online survey** with stakeholders sourced from NZ On Air's database of stakeholders.



Sample size – 152 stakeholder participants.

Perceptions and Advocacy

Advocacy remains steady.

Advocacy is higher among stakeholders who:

▲
88% Think the funding judging criteria are appropriate

▲
85% Agree with NZ On Air funding decisions

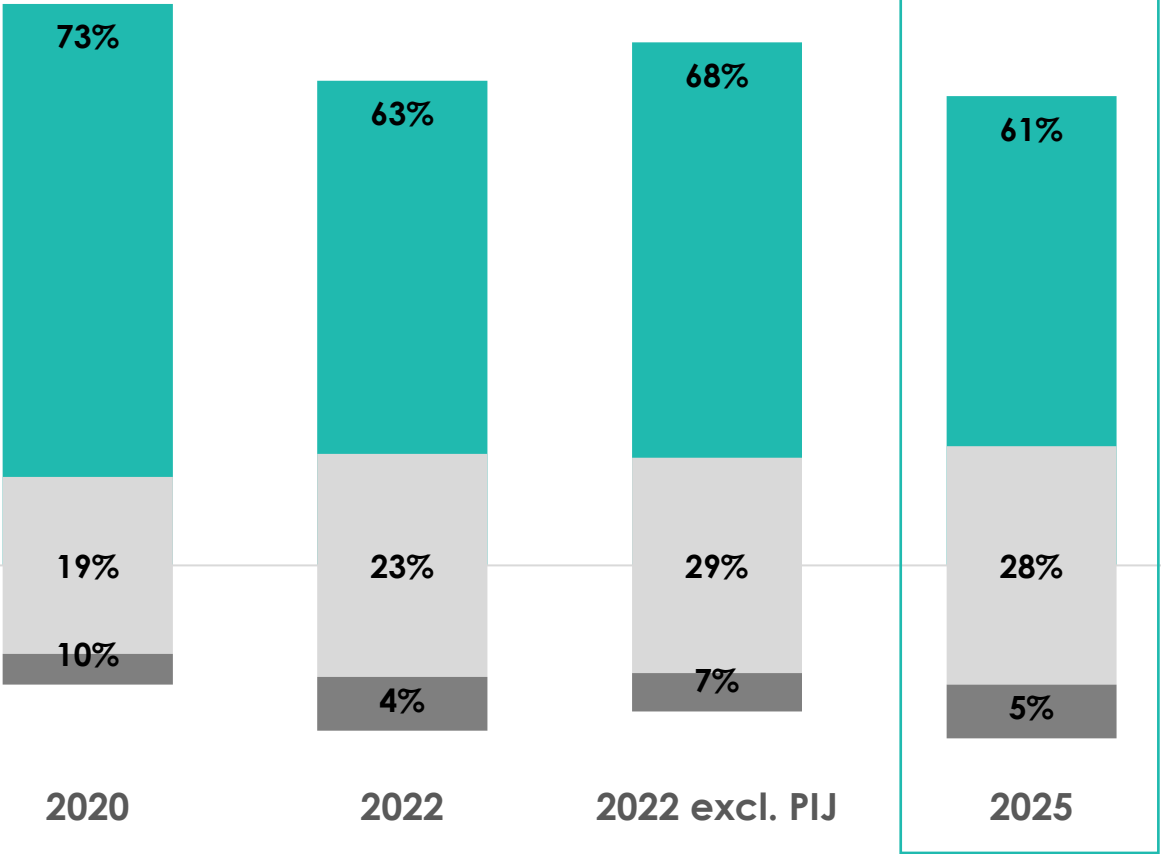
▲
78% Find it easy to understand the funding decision making process

Advocacy

Advocates

Neutral

Critics



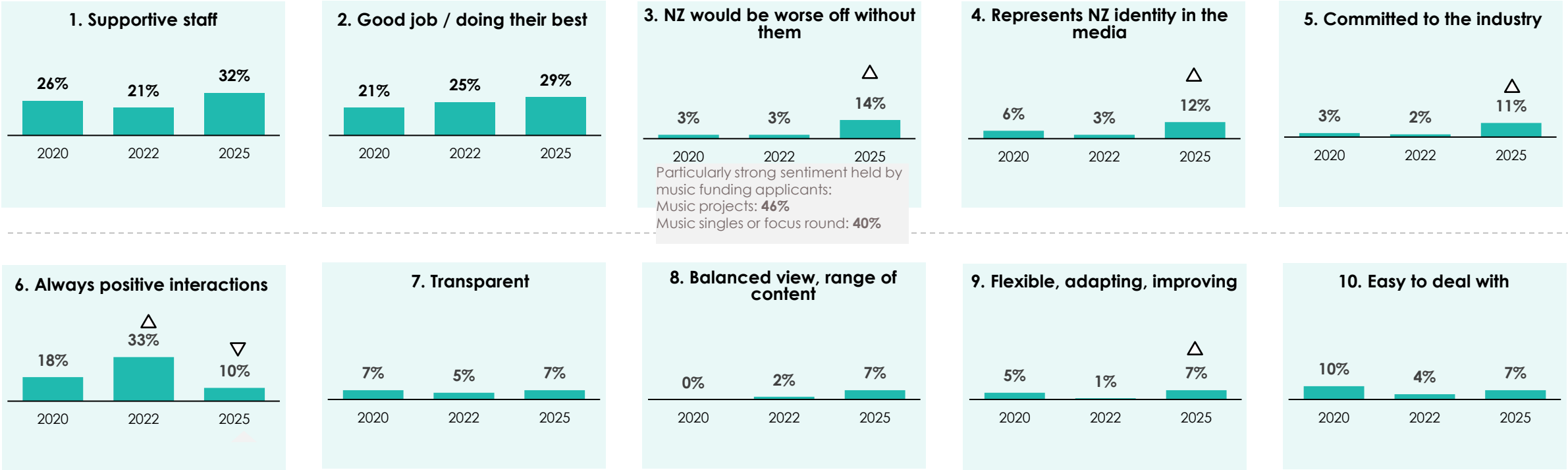
Source: Q4 Thinking about your relationship with NZ On Air, please select the statement that best reflects your opinion and perceptions of them
Base: 2020 n=100, 2022 n=144, 2022 (excl. PIJ) n=123, 2025 n=152

Significantly higher than total ▲ / than previous year △
Significantly lower than total ▼ / than previous year ▽

Staff remain the backbone driver of advocacy.

Many advocates think NZ On Air is committed to the industry, strives to do its best in the current market, and that its contributions positively impact the nation and our identity.

Top 10 reasons for advocacy



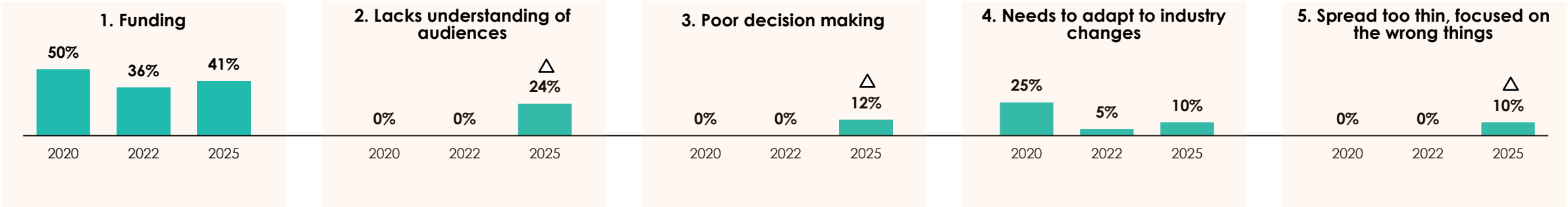
Source: Q4a Why do you say that?
Base: Advocates 2020 n=72, 2022 n=88, 2025 n=92
Note: Responses ≤ 6% not shown, include: Achieve results, responsive, Do a lot with a little, lack of industry engagement, room for improvement, previous experience, other.

Significantly higher than total ▲ / than previous year △
Significantly lower than total ▼ / than previous year ▽

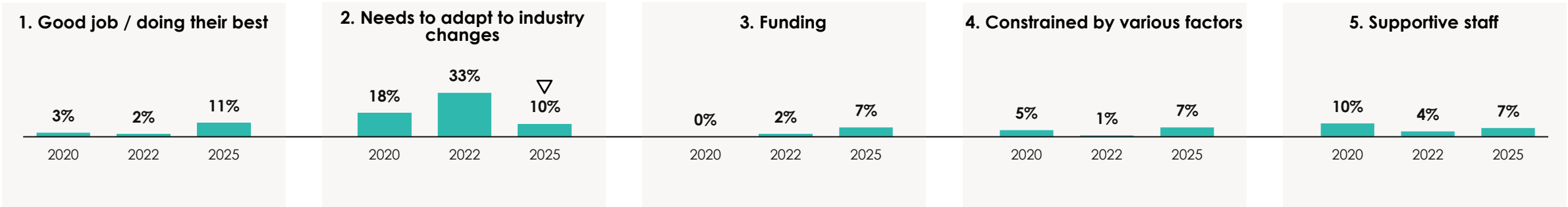
Off a small base, funding decisions remain the key pain point for critics of NZ On Air.

Neutral stakeholders recognise NZ On Air's efforts amid market constraints and the positive impact of NZ On Air staff. This year fewer question NZ On Air's ability to adapt to industry changes. Funding is a concern for some.

Top 5 reasons for being critical* (n=12 stakeholders: SMALL BASE, RESULTS INDICATIVE ONLY)



Top 5 reasons for being neutral*



Source: Q4a Why do you say that?
Base: Critics 2020 n=3, 2022 n=10, 2025 n=12. Neutral 2020 n=25, 2022 n=45, 2025 n=47.
*SMALL BASE, RESULTS INDICATIVE ONLY
Note: Responses ≤ 6% not shown, include: Achieve results, responsive, Do a lot with a little, lack of industry engagement, room for improvement, previous experience, other.

Significantly higher than total ▲ / than previous year △
Significantly lower than total ▼ / than previous year ▽

In their words ...

Advocates:



The staff at NZ On Air are highly skilled professionals always mindful of their role as a provider of public funding - while remaining approachable and understanding and flexible where appropriate. **Capability / discoverability funding**

They try to help local artists, push for their play at radio, and try and keep an industry that faces global challenges afloat. **Music – singles or focus round funding**

I think that NZ On Air has a very difficult job particularly in the current climate, and are doing a very good job in challenging times. **Scripted & non-fiction funding**

Neutrals:



I am concerned about the money being spread too thinly attempting to satisfy everyone. **Capability/Discoverability funding**

I understand that it's a competitive environment and not everything will go our way. **Platform – content distributor**

The unfolding situation with the screen industry at the moment means that they are between a rock and a hard place trying to navigate how to issue funding fairly, and that is unenviable. **Scripted & non-fiction funding**

Critics*:



I don't feel that artists signed to record labels should get taxpayer money. **Music – singles or focus round funding**

Regions are often left out due to insufficient survey data. **Scripted & non-fiction funding**

Key personality traits reflect NZ On Air’s service qualities e.g. professional, approachable, supportive, reliable and helpful.

This underscores the importance of staff interactions fostering positive perceptions of NZ On Air among its stakeholders.

NZ On Air’s personality

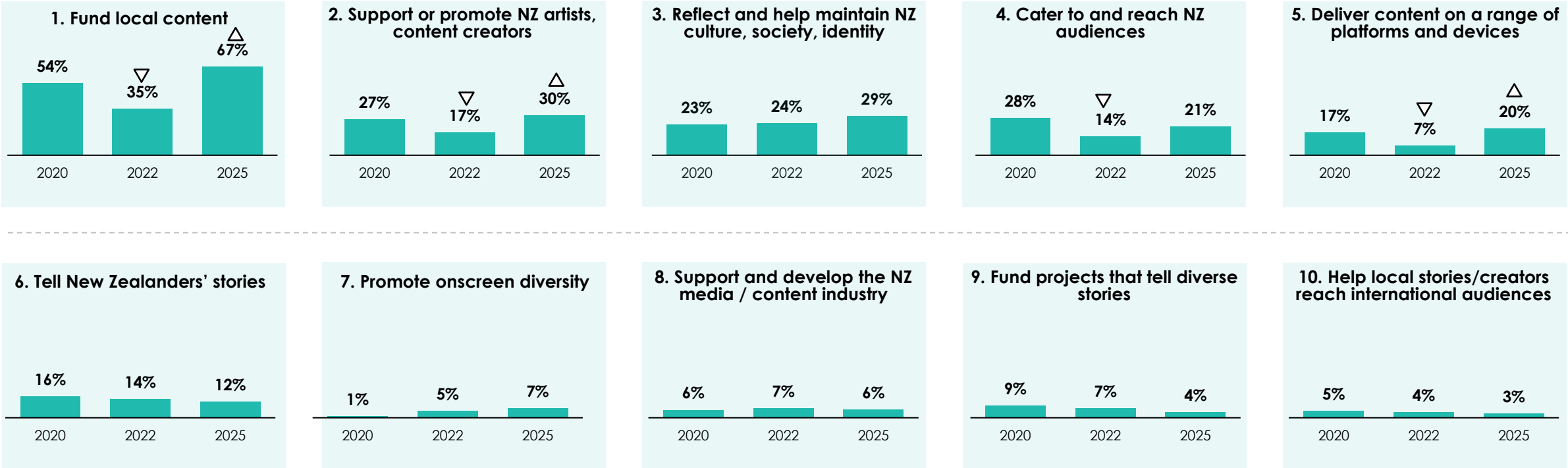


Source: Q2. What do you understand NZ On Air's purpose to be?
Base: 2025 n=150

Stakeholders largely believe NZ On Air’s key purpose is to fund local content, support local creators, and invest in culturally reflective content.

These expectations are strengthening over time.

NZ On Air’s purpose – coded responses



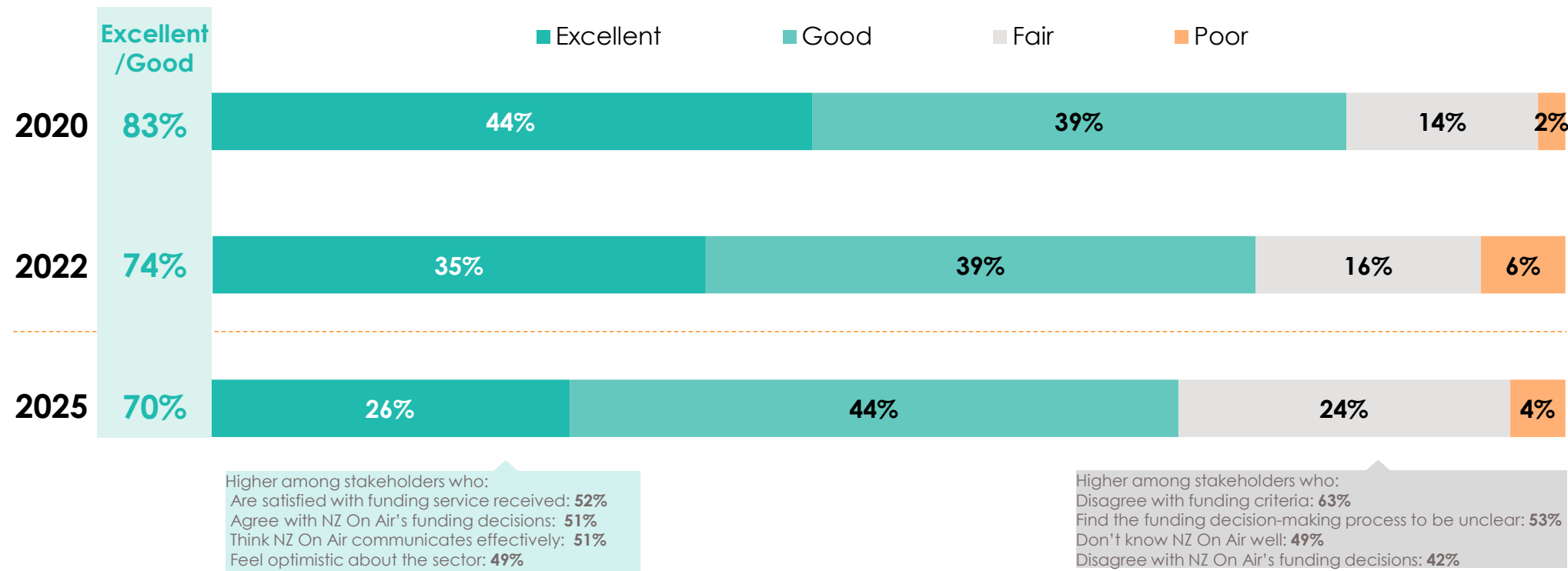
Source: Q2. What do you understand NZ On Air’s purpose to be?
Base: 2020 n=100, 2022 n=144, 2025 n=144
Note: Responses ≤ 2% not shown, include: Emphasis on cultural / non-commercial content, fund projects that otherwise would not exist, support public interest in journalism

Significantly higher than total ▲ / than previous year Δ
Significantly lower than total ▼ / than previous year ▽

Most stakeholders currently view NZ On Air as effective in fulfilling its purpose.

Strong sentiment relies on satisfaction with funding, clear communications, and sector optimism. Low performance stems from uncertainty of funding criteria, disagreement with funding decisions, and unfamiliarity with NZ On Air.

Purpose rating



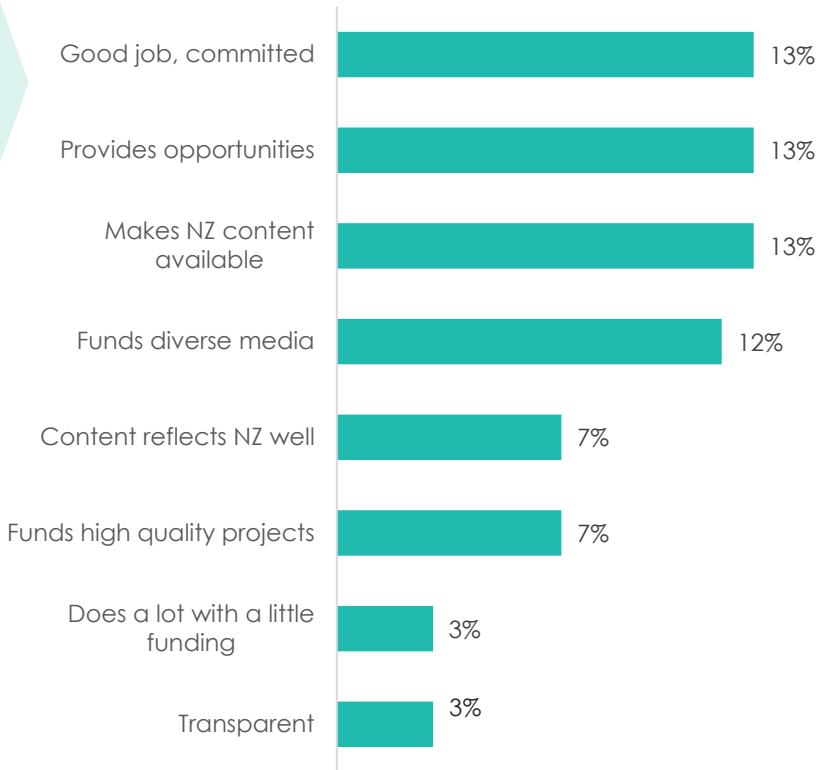
Source: Q3. Thinking about its purpose, how would you rate NZ On Air's performance?
Base: 2020 n=100; 2022 n=144, 2025 n=152

Significantly higher than total ▲ / than previous year △
Significantly lower than total ▼ / than previous year ▽

Many stakeholders acknowledge NZ On Air’s commitment to the sector and local content production opportunities.

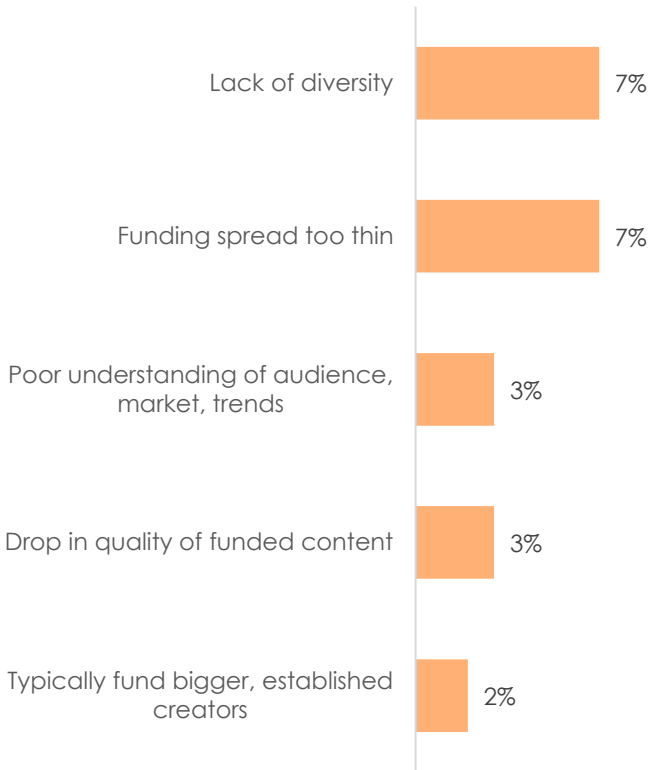
Some stakeholders believe funding for diverse media is sufficient, while others do not - highlighting differing views on funding effectiveness.

Reasons for stronger sentiment



At the heart of NZ On Air is their strong and focused commitment to showcasing New Zealand voices. **Platform - content distributor**

Reasons for weaker sentiment

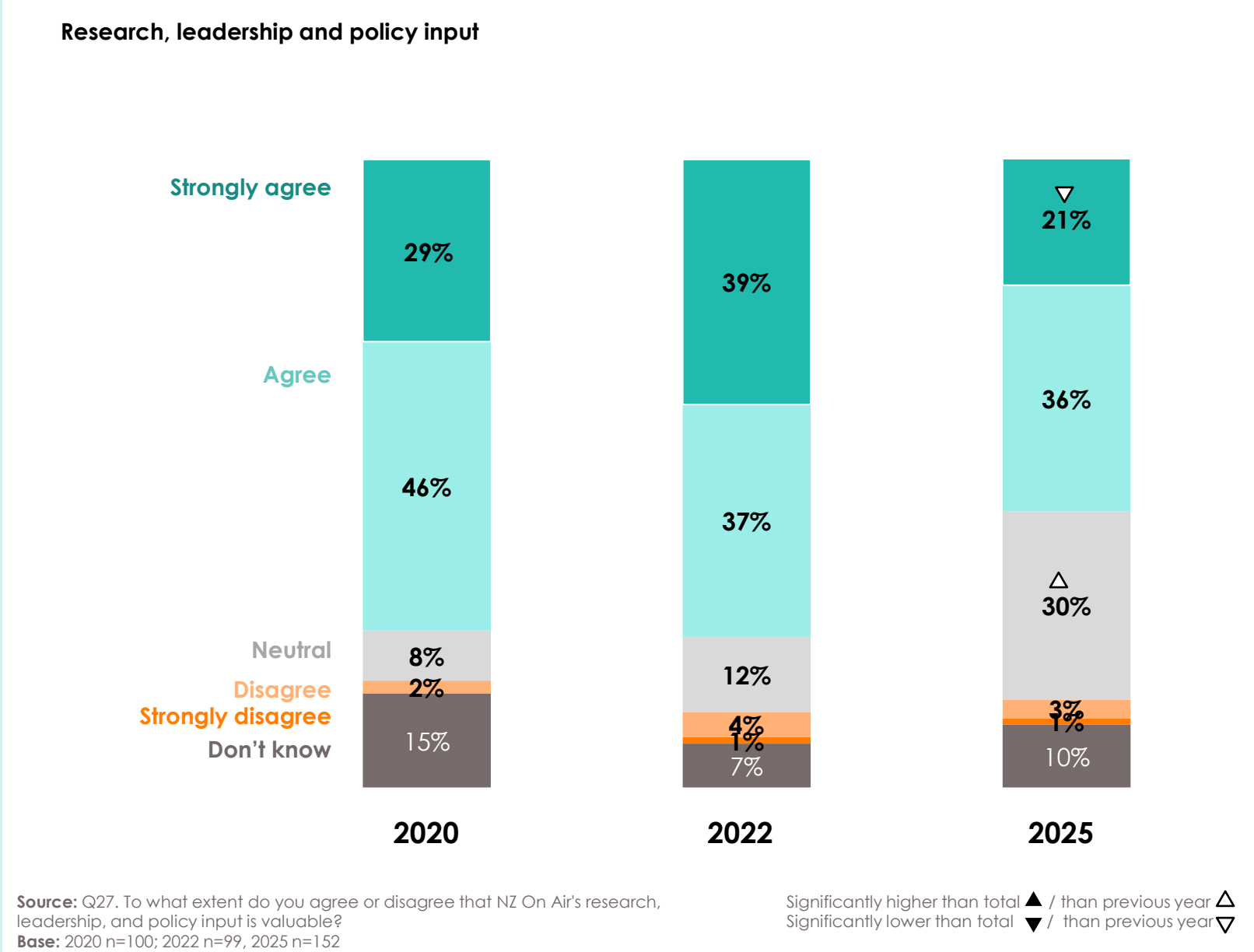


It feels like ... smaller, future producers of New Zealand are missing out due to so many boxes to tick. **Platform - content distributor**

The value stakeholders place on NZ On Air’s research, leadership and policy input has softened...

... with a neutral stance becoming common.

This is possibly due to the potential merger raising uncertainty about the value of research, leadership and support for existing initiatives.



Views on funding

This year stakeholder perceptions have become more neutral, with less agreement or disagreement about whether NZ On Air funds the right things.

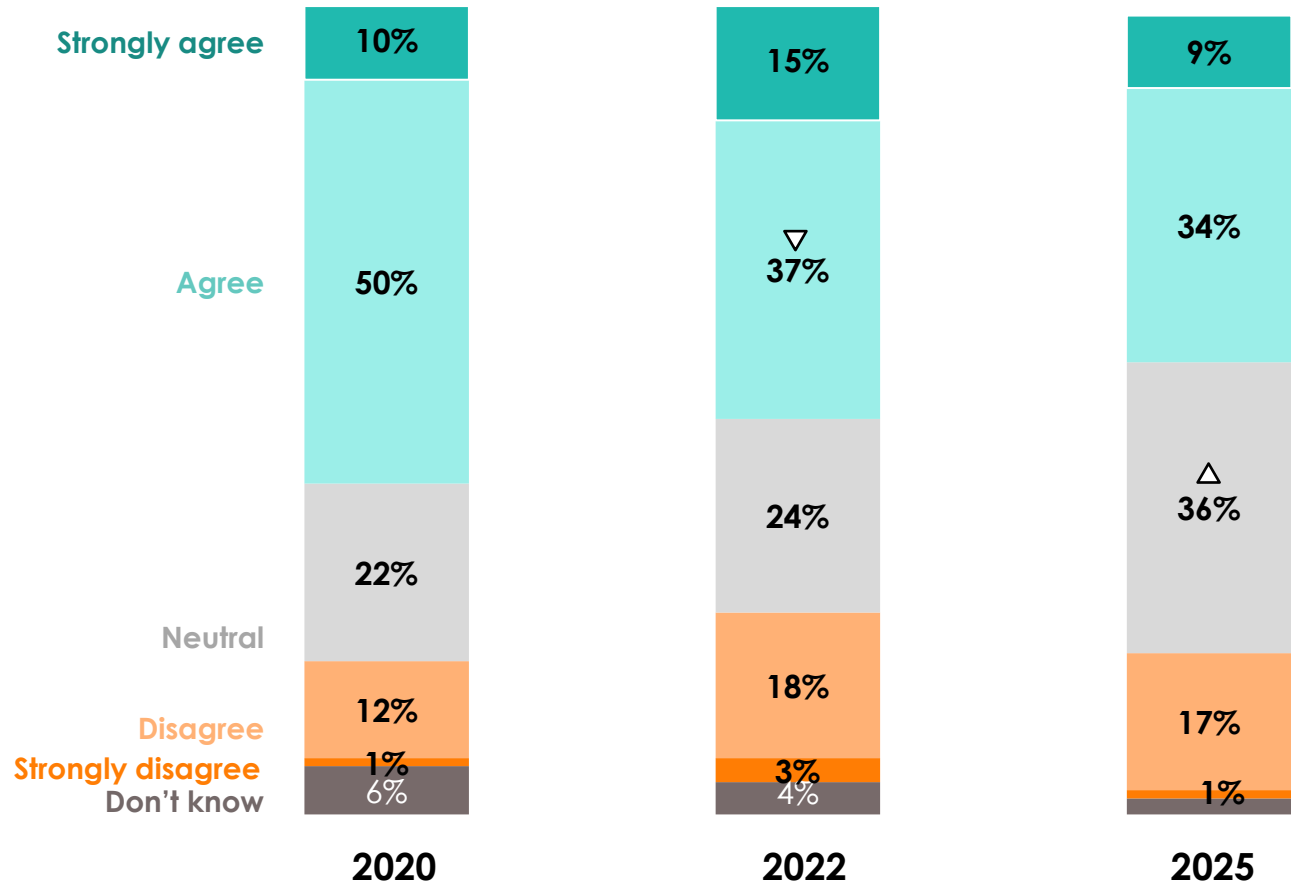
Stakeholders **more likely** to agree:

- ▲ Think NZ On Air are strong communicators
- ▲ Find the funding decision making process easy to understand
- ▲ Agree with the funding criteria
- ▲ Feel optimistic about the current state of the sector

Stakeholders **less likely** to agree:

- ▲ Neutral / critics of NZ On Air
- ▲ Don't agree with the funding criteria
- ▲ Don't find the funding decision making process easy to understand
- ▲ Feel pessimistic about the current state of the sector

NZ On Air focuses on funding the right things



Source: Q6. To what extent do you agree or disagree with the following?
Base: 2020 n=100, 2022 n=144, 2025 n=152

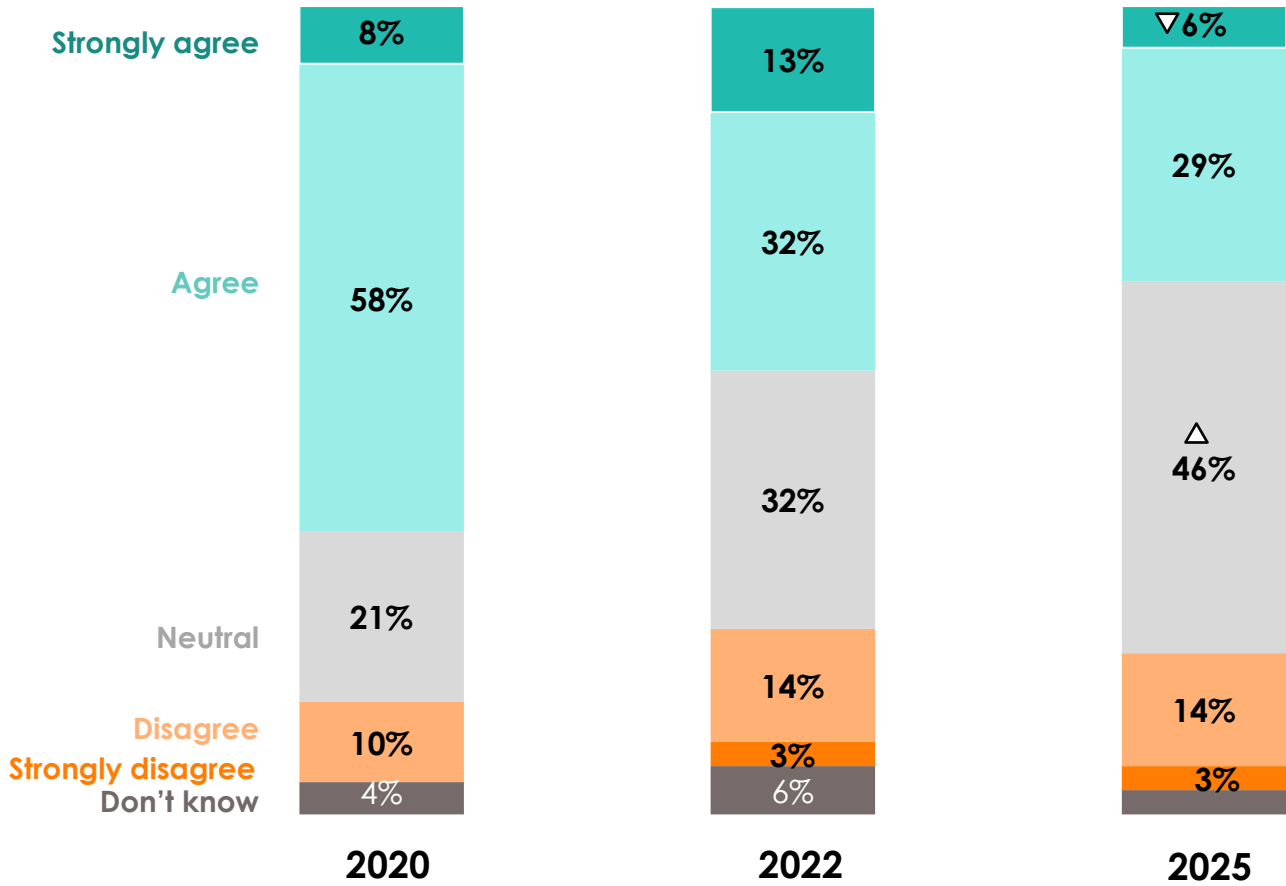
Significantly higher than total ▲ / than previous year △
Significantly lower than total ▼ / than previous year ▽

Perceptions of NZ On Air's funding choices have also softened, with more stakeholders adopting a neutral stance.

Stakeholders who are more likely to agree are a similar profile to those who agree that NZ On Air focuses on funding the right things (see previous slide).

The same is true for those less likely to agree.

NZ On Air makes the right funding choices



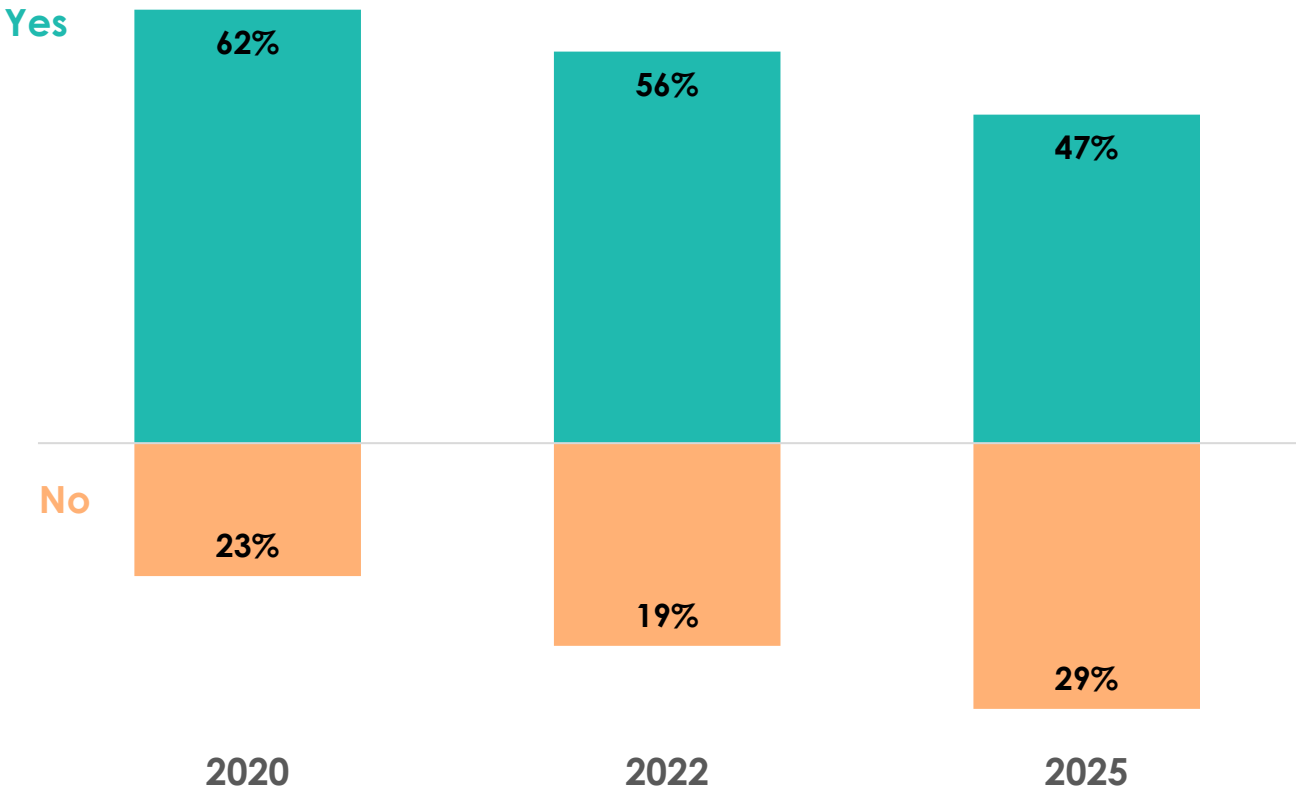
Source: Q6. To what extent do you agree or disagree with the following?
Base: 2020 n=100, 2022 n=144, 2025 n=152

Significantly higher than total ▲ / than previous year △
Significantly lower than total ▼ / than previous year ▽

Just under half of stakeholders say they agree with NZ On Air’s funding choices.

- Those less likely to agree with funding choices include:
- ▼ Critics
 - ▼ Those who don't find the funding decision-making process easy to understand
 - ▼ Those who don't agree with the judging criteria
 - ▼ Feeling pessimistic about the current state of the sector

Does NZ On Air fund what you think it should?

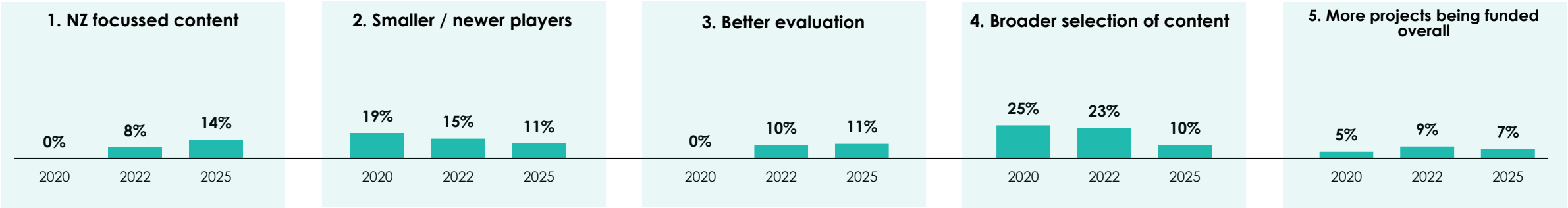


Source: Q7. Does NZ On Air fund what you think they should fund?
Base: 2020 n=100, 2022 n=144, 2025 n=152

Significantly higher than total ▲ / than previous year △
Significantly lower than total ▼ / than previous year ▽

Stakeholders who are not satisfied with what NZ On Air is currently funding want to see more funding of New Zealand focussed content, support for smaller less established players, funding across a more diverse range of projects ... and increased funding overall.

What should NZ On Air fund instead?

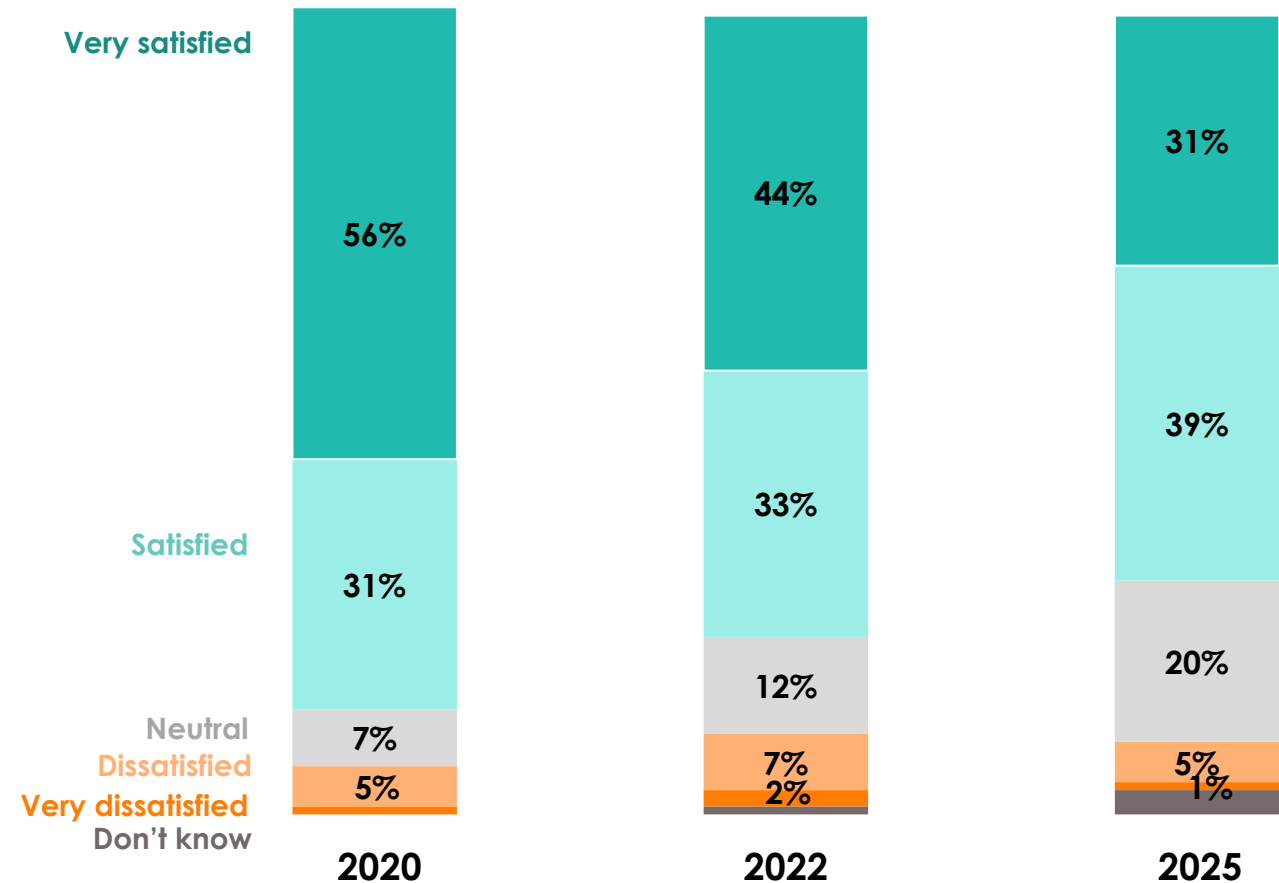


Source: Q8. What do you think they should be funding instead?
Base: Stakeholders who think NZ On Air are not funding what they should fund. 2020 n=21, 2022 n=43, 2025 n=28.
Note: Responses ≤ 4% not shown, include: Increased diversity, additional platforms, some projects given too much funding, more artist support, harder to reach audience stories, interactive/digital content, journalistic support

Significantly higher than total ▲ / than previous year △
Significantly lower than total ▼ / than previous year ▽

70% Are satisfied with the recent service they received from NZ On Air.

Overall satisfaction with the service received during your recent funding application or interaction with NZ On Air?

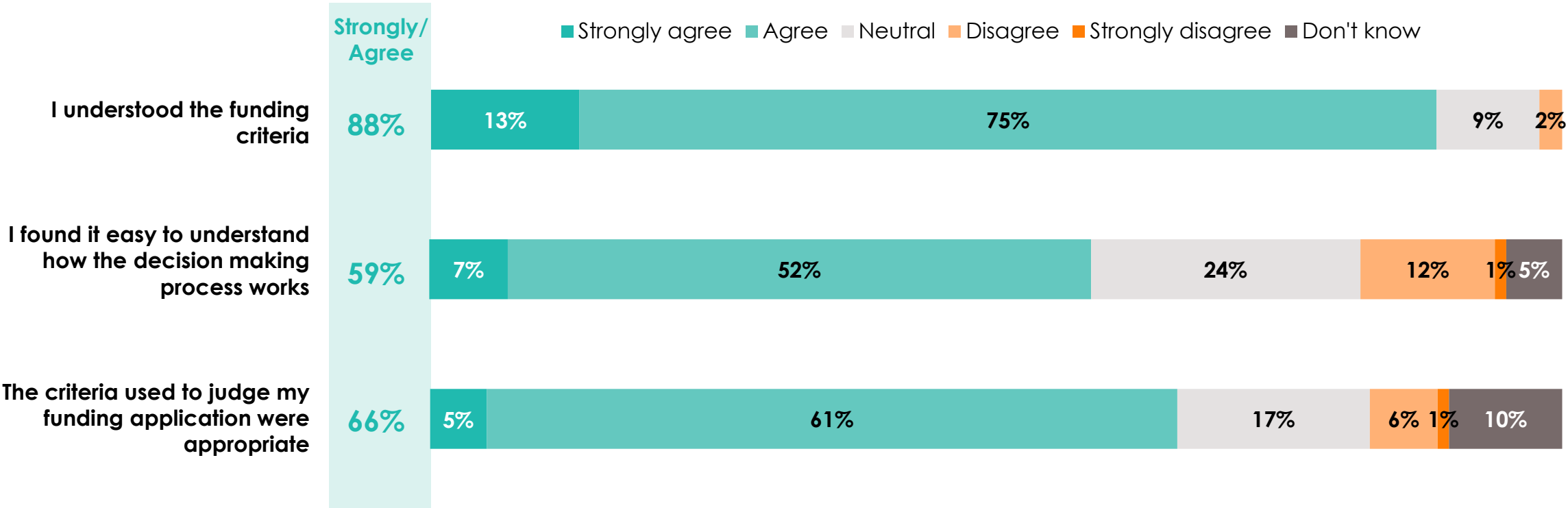


Source: Q19. Overall, how satisfied or dissatisfied are you with the service you received during your most recent funding application / interaction with them?
Base: 2020 n=100; 2022 n=144, 2025 n=152

Significantly higher than total ▲ / than previous year △
Significantly lower than total ▼ / than previous year ▽

Most stakeholders who applied for funding understood the funding criteria. There is an opportunity to enhance understanding of the decision-making process and application evaluation.

Understanding funding criteria

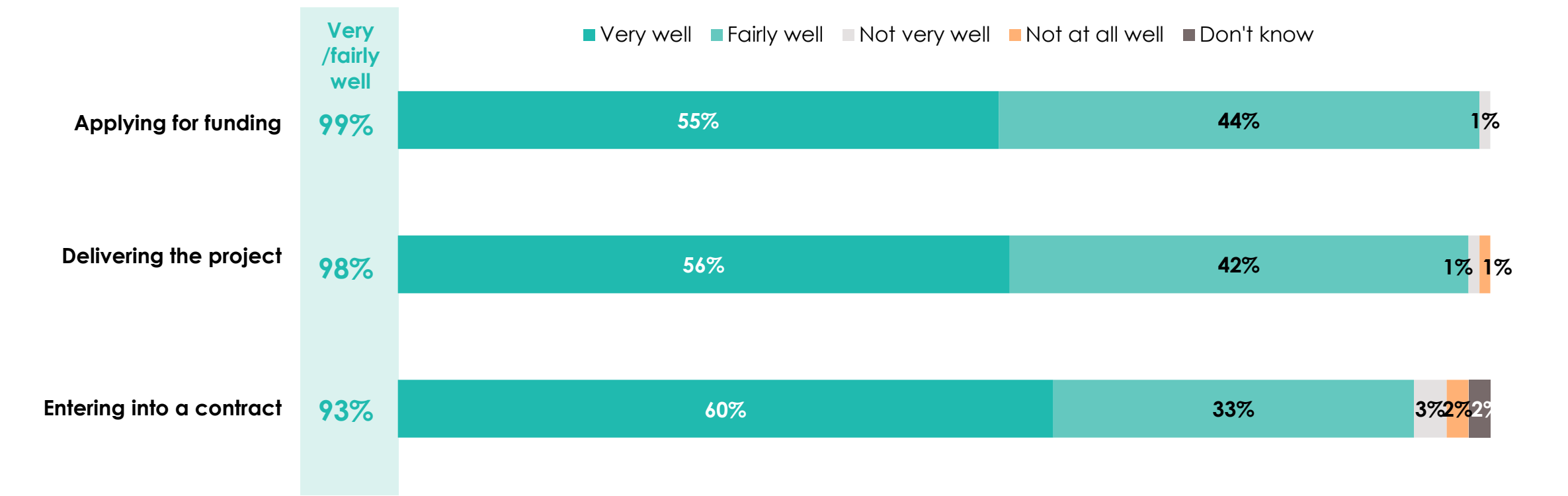


Source: Q17. To what extent do you agree or disagree with the following statements about the application process for your most recent funding application?
Base: Those who applied for funding 2025 n=88

Significantly higher than total ▲ / than previous year △
Significantly lower than total ▼ / than previous year ▽

Most stakeholders were clear in their understanding of the various funding requirements.

Understanding NZ On Air’s funding requirements when ...



Source: Q18. Thinking about your most recent funding application, how well, or not, did you understand what NZ On Air required of you when doing the following?
Base: All stakeholders who have applied for funding / received a funding decisions. 2025 n=88

Significantly higher than total ▲ / than previous year △
Significantly lower than total ▼ / than previous year ▽

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Working relationships

68% Of stakeholders trust NZ On Air

Higher for stakeholders who:

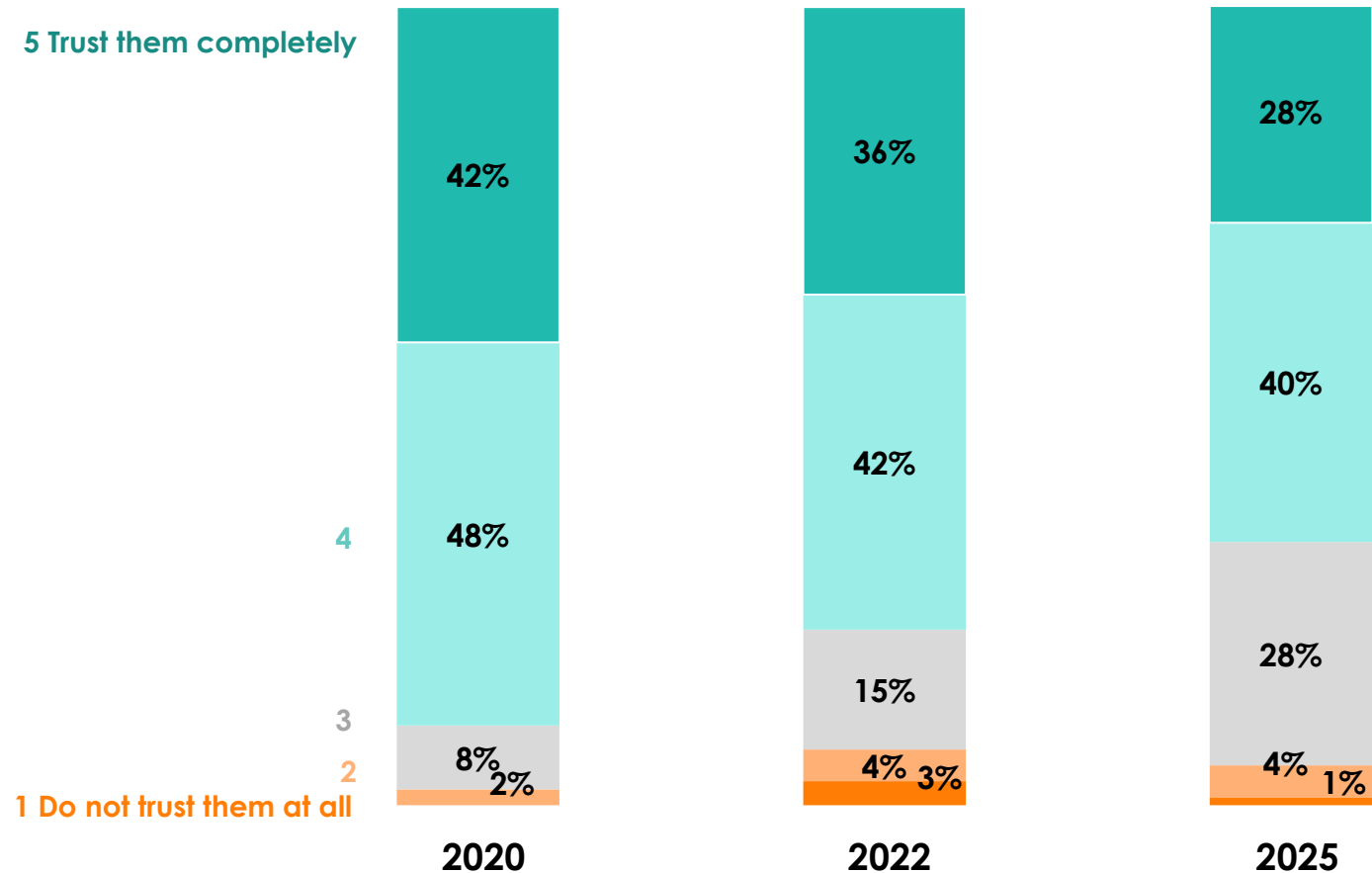
- ▲ Think NZ On Air communicates effectively
- ▲ Advocates
- ▲ Understand the decision-making process
- ▲ Agree with funding judging criteria
- ▲ Feel optimistic about the sector

Lower for stakeholders who:

- ▼ Feel they don't know NZ On Air well
- ▼ Critics
- ▼ Do not know how the funding decision-making process works
- ▼ Do not agree with funding judging criteria

Trust

Rating 1-5 out of 5:
5 Trust them completely



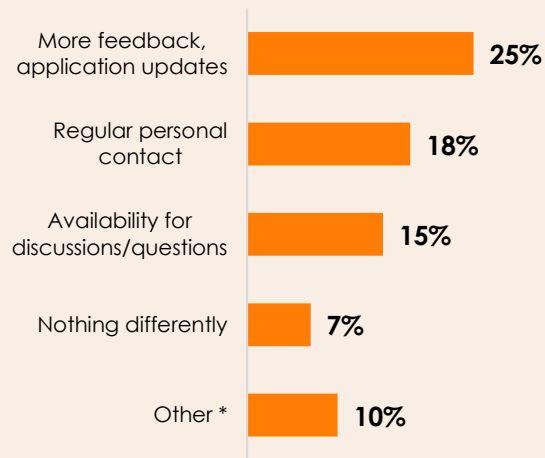
Source: Q5. Overall, to what extent do you trust NZ On Air?
Base: 2020 n=100; 2022 n=144, 2025 n=152

Significantly higher than total ▲ / than previous year △
Significantly lower than total ▼ / than previous year ▽

80%

Of stakeholders think NZ On Air's communication is effective

Things NZ On Air could do differently. **Top five** requests from stakeholders:

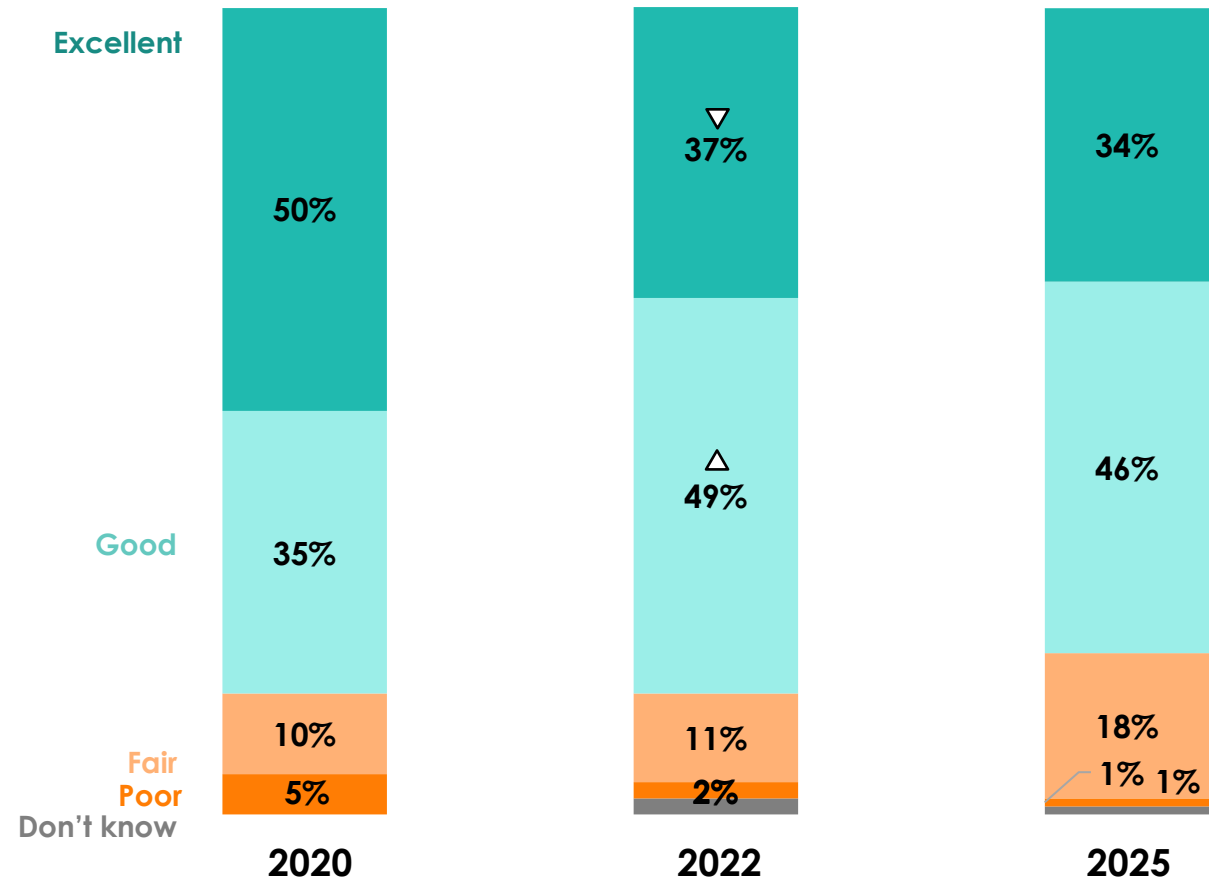


* Other comments include: simplify – fewer people, less paperwork, less hoops to jump through, be less involved; better comms at the lower levels; stick to dates; more survey's about presenters

Source: Q12. What, if anything, would you like them to do differently in how they communicate with you?

Base: 2025 n=33

Effectiveness of communications



Source: Q11. How would you rate the effectiveness of how NZ On Air communicates with you?

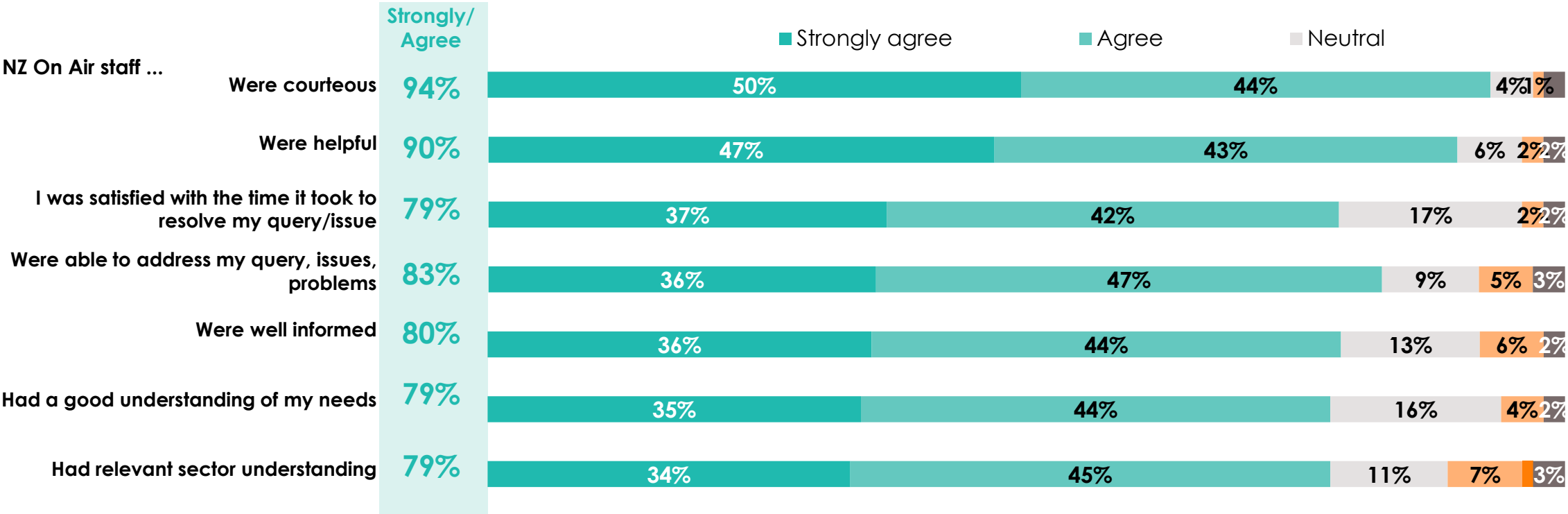
Base: 2020 n=100, 2022 n=144, 2025 n=148

Significantly higher than total ▲ / than previous year ▲
Significantly lower than total ▼ / than previous year ▼

NZ On Air staff continue to provide high-quality service appreciated by stakeholders.

Given the positive impact staff service has on driving advocacy and 'good will' toward NZ On Air, maintaining these high service standards is essential.

Understanding funding criteria



No significant changes versus 2022

Source: Q21. Thinking about your most recent interactions with NZ On Air staff, please indicate how much you agree or disagree with each statement.

Base: All stakeholders who had interactions with staff, excluding those who say, 'not applicable'. 2022 n= 119, 2025 n=136

Significantly higher than total ▲ / than previous year △

Significantly lower than total ▼ / than previous year ▽

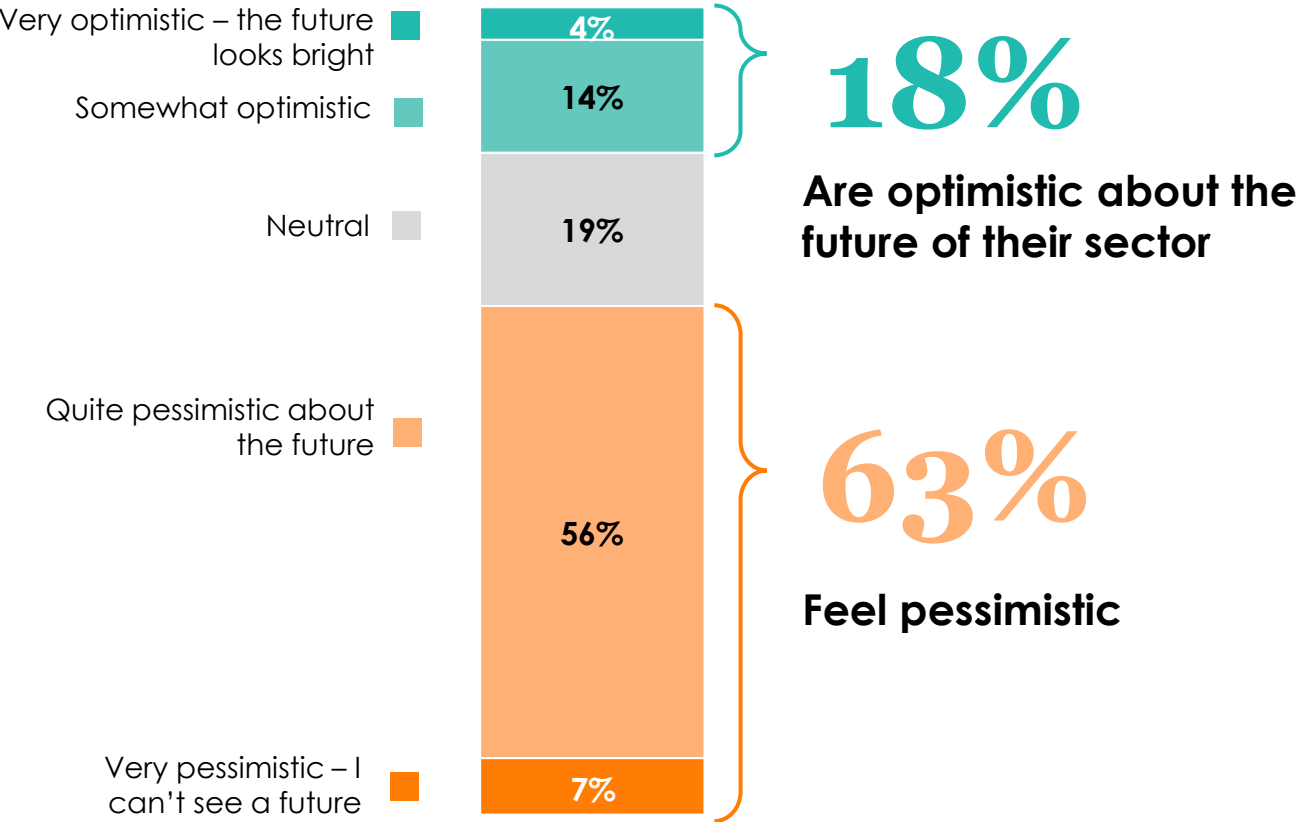
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Looking forward

Currently, optimism for the future of the sector is low.

Most stakeholders are feeling increasingly pessimistic.

How stakeholders feel about the current state of their sector



78% Of stakeholders say their levels of pessimism have increased over the last two years.

Pessimism is higher for stakeholders who:

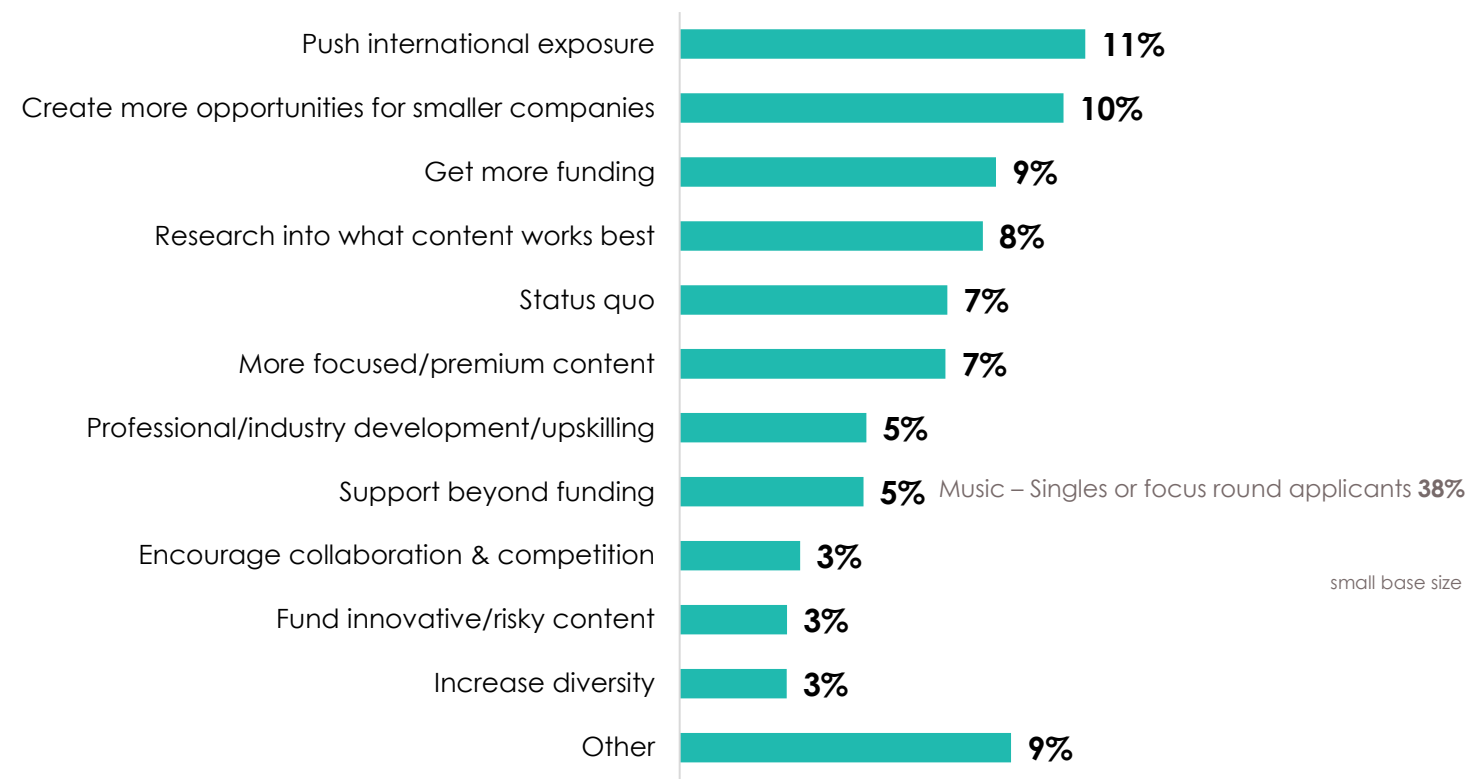
- ▲ Are platform content distributors
- ▲ Scripted & non-fiction content creators
- ▲ Music – singles or focus round
- ▲ Received only some or no funding at all

Source: Q32. How are you feeling about the current state of the sector in which you operate?
Base: 2025 n=152

Moving forward, stakeholder requests are mixed and reflect a desire for continued research to identify content opportunities.

Enhanced international exposure is appealing for some, along with continued opportunity for smaller companies / emerging creatives.

What do stakeholders want moving forward?



Source: Q9. What else, if anything, could NZ On Air be doing to assist the industry?
Base: 2025 n=87

Ngā mihi

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Powering decisions
that shape the world.

