

NZ On Air | Public Attitudes and Awareness Survey

Prepared by Colmar Brunton

For | NZ ON AIR

May 2015



Executive summary

Objectives and method

- NZ On Air commissioned Colmar Brunton 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.
- Between 13 and 28 April 2015 Colmar Brunton conducted a survey of 600 New Zealanders aged 15 years or over. Of the 600 interviews, 500 were conducted by telephone, and 100 were conducted online so that New Zealanders who do not have a landline could also be included in the research.
- The sample was structured and weighted to be representative of the New Zealand adult population as a whole.

Most New Zealanders are aware of NZ On Air. It is best known for its funding of local television content

- Ninety two percent of New Zealanders are aware of NZ On Air (a similar proportion to 2014 when 93% were aware of NZ On Air).

New Zealanders think NZ On Air supports:

- Television – 90%
- Radio – 72%
- Community broadcasting – 70%
- Music – 63%
- Digital media – 30%

Awareness NZ On Air supports each of these areas has decreased since 2014. This is mainly due to an increase in 'don't know' responses in 2015 after the addition of the probe 'if you are not sure you can just tell me.'

New Zealanders think NZ On Air supports local content by:

- Funding it – 81%
- Broadcasting it – 81%
- Promoting it – 69%
- Producing it – 63%

Awareness NZ On Air supports local content by *promoting it* has decreased from 79% in 2014 down to 69% in 2015. This is due mainly to an increase in 'not sure' responses after the addition of the probe 'you can answer yes, no or not sure'.

Executive summary continued

Support for NZ On Air's Mission has been maintained

- 73% of New Zealanders agree NZ On Air supports television programmes and activities that are important to New Zealanders (similar to the 75% in 2014).
- 68% agree NZ On Air supports local content for radio that is important to New Zealanders (the same proportion as 2014).
- 75% New Zealanders believe it is important for NZ On Air to support community broadcasting (down from 81% in 2014).
- 70% believe it is important for NZ On Air to support local music and artists (similar to the 72% in 2014).
- 52% believe it is important for NZ On Air to support digital media (similar to the 49% in 2014).

Views on content supported by NZ On Air are generally similar to last year

- 71% of those who are aware of NZ On Air's support for TV content like that content i.e. they like the TV content supported by NZ On Air (similar to the 70% in 2014).
- 70% of those aware of NZ On Air's support for music like the music and artists supported by NZ On Air (similar to the 65% in 2014).
- 62% of those who are aware of NZ On Air's support for community broadcasting like the supported community broadcasting content (the same proportion as 2014).
- 59% of those who are aware of NZ On Air's support for digital media like the digital media content supported by NZ On Air (similar to the 53% in 2014).
- 55% of those who are aware of NZ On Air's support for radio like that content (similar to the 52% in 2014).
- 66% of New Zealanders believe NZ On Air funding results in a greater depth and quality of local content than would otherwise exist (similar to the 70% in 2014).

Other questions

- 84% of New Zealanders believe it is important to have publicly funded television that is free to air (similar to the 83% in 2014).
- 77% believe it is important to have a broad range of diverse local content (similar to the 75% in 2014).
- 45% of New Zealanders are aware NZ On Air sponsors the New Zealand Music Awards (new question in 2015).



Objectives and method

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- NZ On Air commissioned Colmar Brunton 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

- Colmar Brunton conducted a survey with 600 respondents between 13 and 28 April 2015. A mixed method approach was undertaken, with 500 interviews being conducted by telephone, and 100 completed online to ensure that those without a landline were also included in the research.
- Random Digital Dialling was used to obtain landline telephone numbers. A random adult in the household was selected by asking to speak with the person with the next birthday. The Colmar Brunton online consumer panel was used to source New Zealanders without a landline.
- Interviewers used Computer Assisted Telephone Interviewing (CATI) to assist with question routing and data entry. Those who completed the survey online were sent a link to the questionnaire via email.
- The sample was structured and weighted to be representative of the New Zealand adult population as a whole (using 2013 Census data).
- Whenever differences are reported (for example an increase or decrease since last year) these are statistically significant at the 95% confidence level or greater.
- Sometimes the sum of two proportions (for example, 'nett agree') is one percentage point higher or lower than the two individual proportions combined, this is due to rounding.

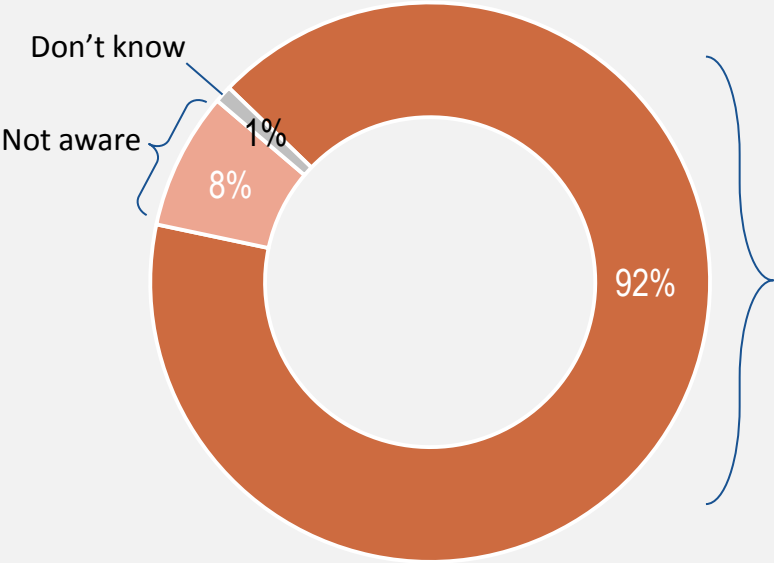


Awareness and Understanding

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Almost all New Zealanders are aware of NZ On Air (92%), this level of awareness has remained relatively unchanged over the past five years (see the next slide for the historical trend)

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



92% of New Zealanders are aware of NZ On Air

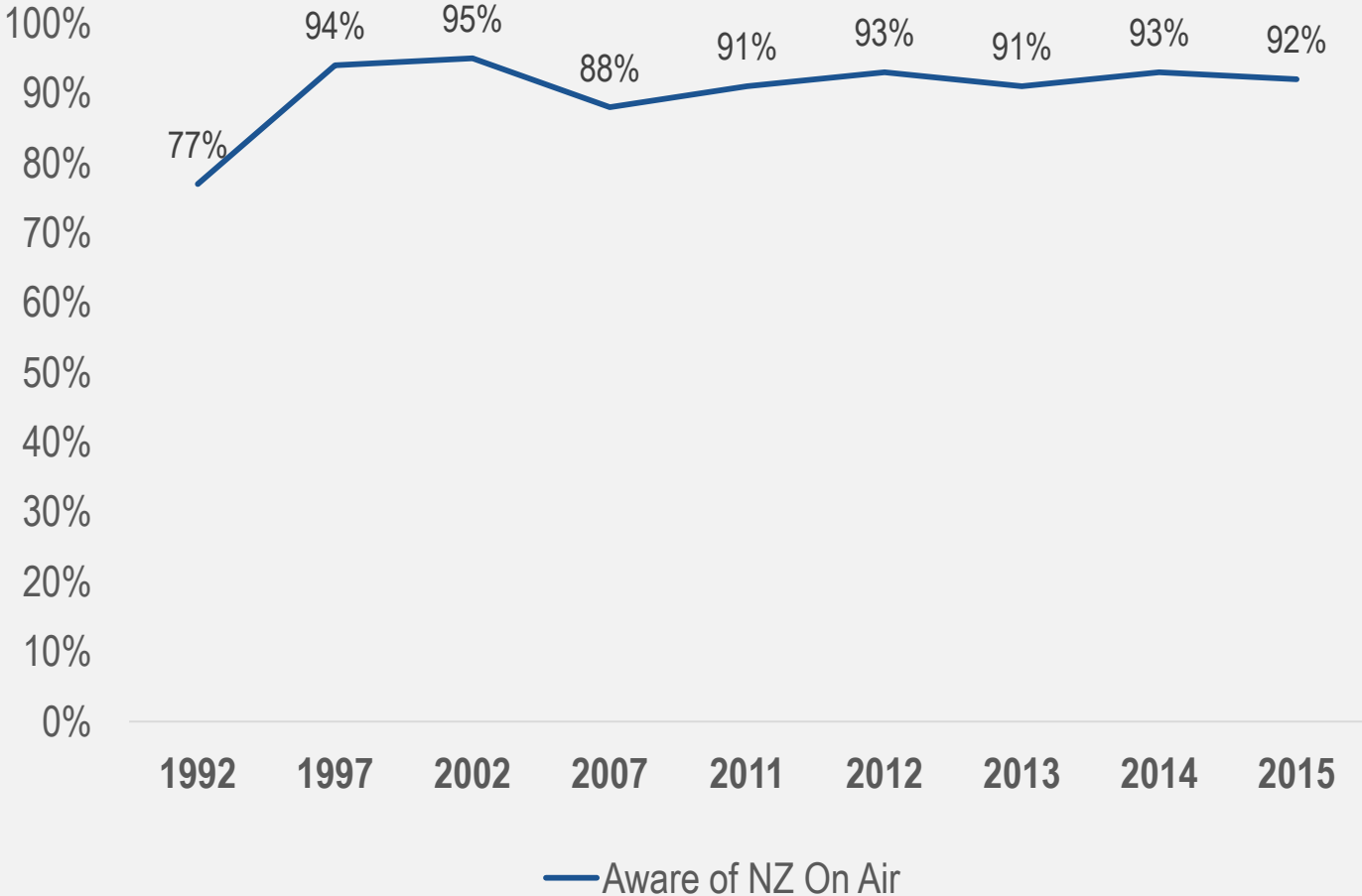
Base: All New Zealanders aged 15 and over (n=600).
Source: A1.

Certain demographic groups have above or below average awareness of NZ On Air:

- NZ Europeans and Maori have above average awareness (97% and 100% respectively).
- Asian and Pacific* ethnic groups have below average awareness (54% and 72% respectively).

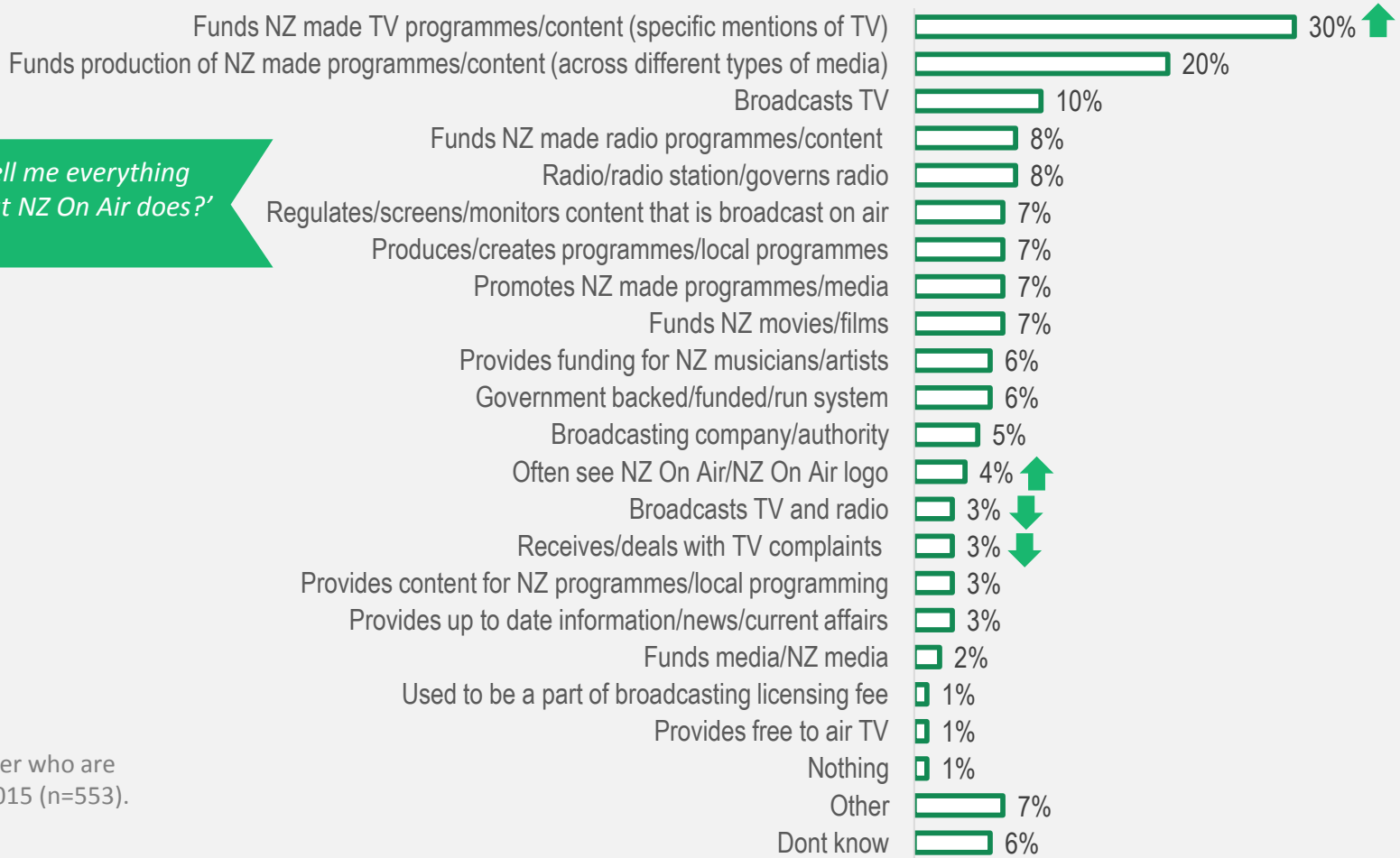
** Small base size for Pacific peoples, result is indicative only.*

Awareness of NZ On Air over time



The main thing New Zealanders think NZ On Air does is funding NZ TV programmes or content, in fact spontaneous mentions of this role has increased significantly since last year. Others still think the organisation has broadcast, regulatory or production roles. Although there has been a significant decrease in attribution to broadcasting and regulatory functions since 2014. (Note that answers are based on an open ended question).

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

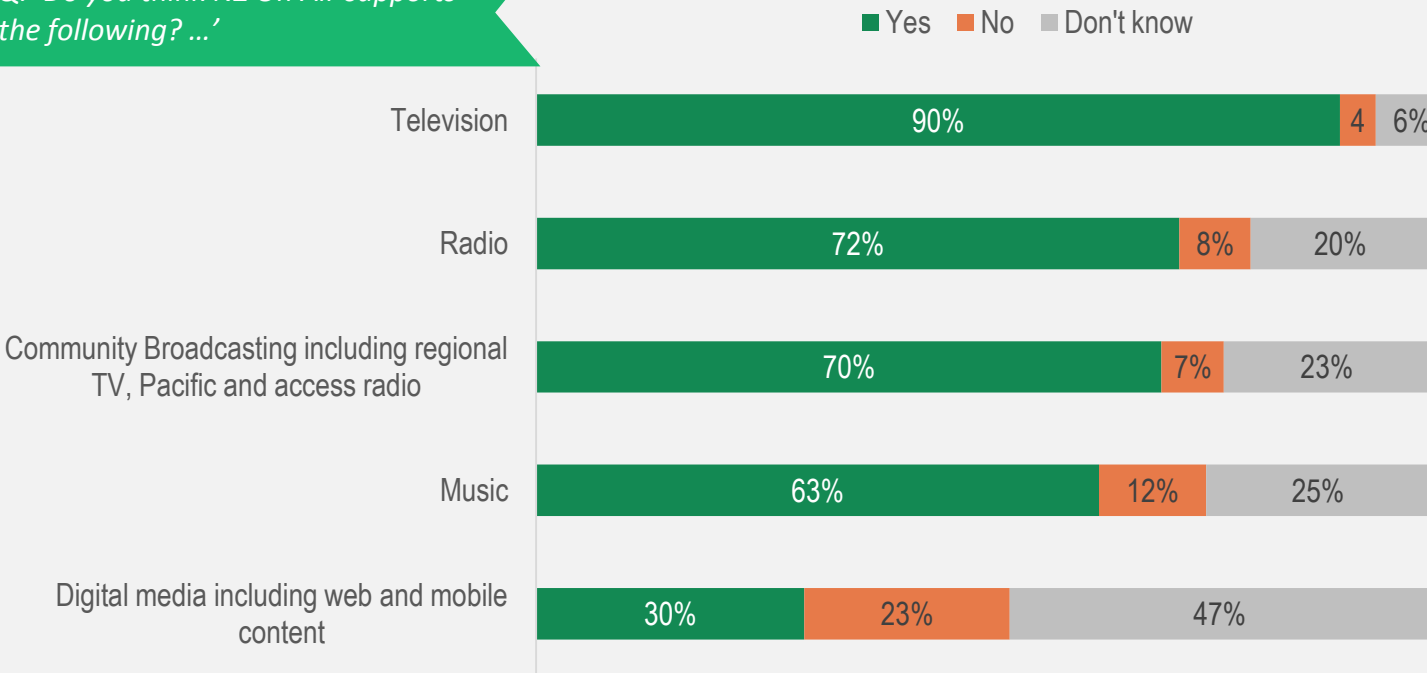


Base: All New Zealander who are aware of NZ On Air, 2015 (n=553). Source: A2.

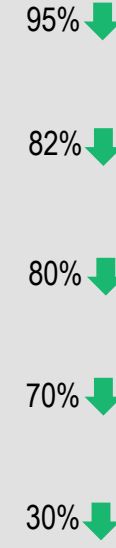
In total, 52% of those aware of NZ On Air mention 'funding' when describing its role, this is a significant increase since last year when 36% mentioned funding.

When prompted, the majority of New Zealanders know that NZ On Air supports TV, radio, community broadcasting and music. The role of supporting digital media continues to be comparatively less well known.

Q: 'Do you think NZ On Air supports the following? ...'



% YES 2014



Awareness that NZ On Air supports each of these areas has decreased significantly since 2014. This is mainly due to an increase in 'don't know' responses in 2015 after the addition of the probe 'if you are not sure you can just tell me.'

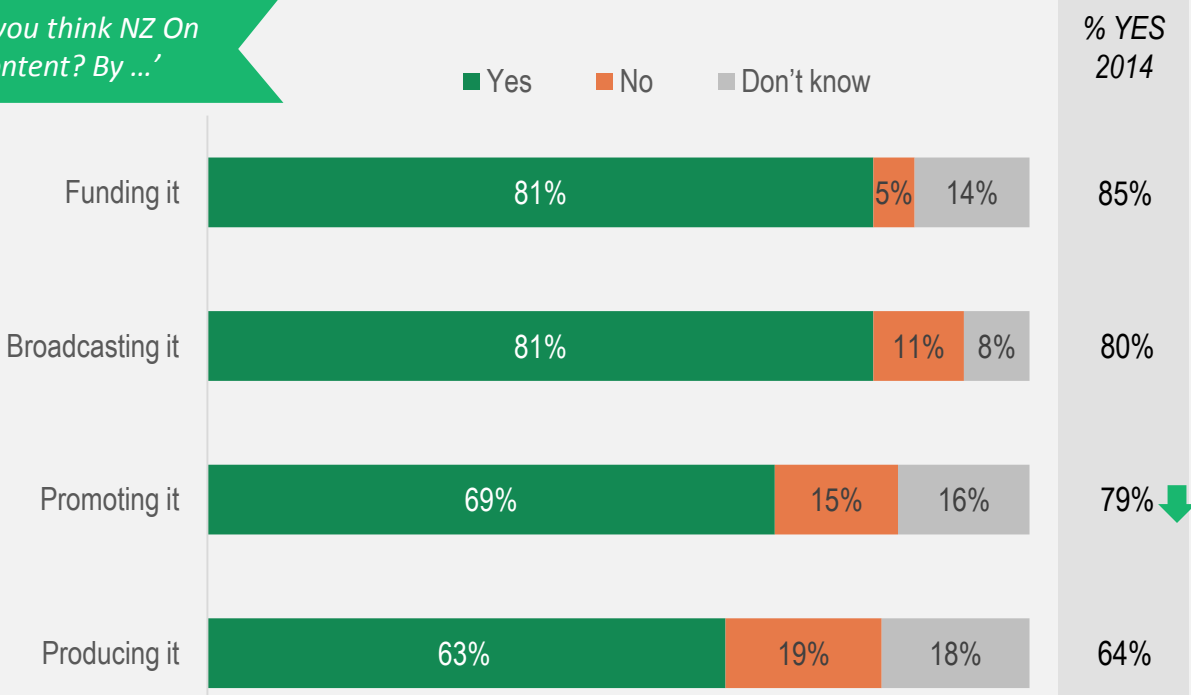
- Certain demographic groups are more or less likely than average to:
- Know that NZ On Air supports *TV*:
 - 75+ year olds are less aware (77%).
 - Know that NZ On Air supports *Music*:
 - Pacific* ethnic groups are more aware (88%).
 - * Small base size for Pacific peoples, result is indicative only.*
 - Know that NZ On Air supports *Digital media*:
 - 15-34 year olds are more aware (45%), as are Maori (52%).
 - 60-69 year olds are less aware (18%), as are 'Other European' ethnic groups (16%).

Base: All New Zealanders who are aware of NZ On Air, 2015 (n=553), 2014 (n=458). Source: A3.



When prompted, around eight in ten say NZ On Air supports local content by *funding it* and/or *broadcasting it*. Almost seven in ten think that NZ On Air supports local content by *promoting it* (a significant decrease since 2014), and approximately six in ten say NZ On Air *produces* local content.

Q: 'In what way do you think NZ On Air supports local content? By ...'



Belief that NZ On Air supports local content by *promoting it* has decreased significantly since 2014. This is mainly due to an increase in 'not sure' responses in 2015 after the addition of the probe 'you can answer yes, no or not sure.'

In general, younger people are more aware than older New Zealanders of how NZ On Air supports local content. Younger people and ethnic minority groups are more likely to believe NZ On Air broadcasts and produces local content.

- Certain demographic groups are more or less likely than average to:
- Know that NZ On Air is involved in *funding local content*:
 - 75+ year olds are less aware (59%).
 - Believe that NZ On Air is involved in *producing local content*:
 - 25-29 year olds are more aware (83%).
 - 70-74 year olds are less aware (42%).
 - Believe that NZ On Air is involved in *broadcasting local content*:
 - 15-24 year olds are more aware (93%), as are Maori (92%), and Pacific* ethnic groups (100%).
 - Know that NZ On Air is involved in *promoting local content*:
 - Maori are more aware (84%).
- * Small base size for Pacific peoples, result is indicative only.

Base: Those who know of at least one type of media NZ On Air supports, 2015 (n=540), 2014 (n=450). Source: A4.





Support for NZ On Air's Mission

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Around seven in ten New Zealanders believe that NZ On Air supports TV programmes and radio content that is important – no change since 2014.

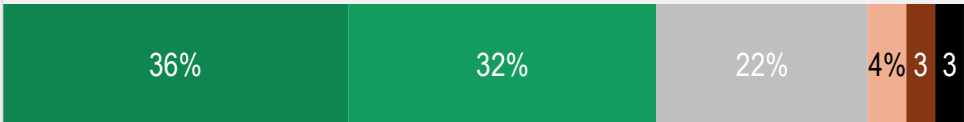
Q: 'To what extent do you agree with each of the following statements?'

NZ On Air supports television programmes and activities that are important to New Zealanders



NETT Agree 2015	NETT Agree 2014
73%	75%
68%	68%

NZ On Air supports local content for radio that is important to New Zealanders



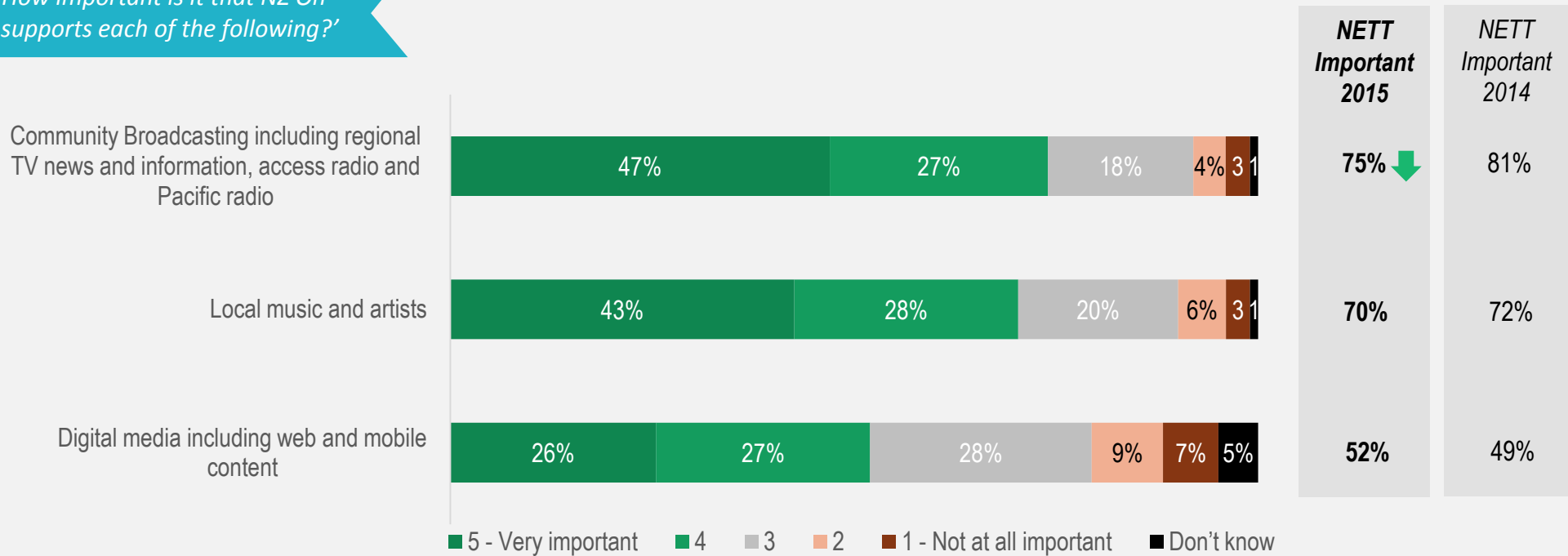
■ 5 - Strongly agree ■ 4 ■ 3 ■ 2 ■ 1 - Strongly disagree ■ Don't know

There are no significant demographic trends.

Base: All New Zealanders aged 15 and over, 2015 (n=600), 2014 (n=500). Source: B2.

Three quarters of New Zealanders say it is important for NZ On Air to support community broadcasting, this is a significant decrease since last year. Like in 2014, around seven in ten New Zealanders think it is important for NZ On Air to support local music and artists, and just half think it is important to support digital media.

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



Certain demographic groups are more or less likely than average to think it is important for NZ On Air to support:

- **Community broadcasting:**
 - 75+ year olds are more likely to (87%), as are Pacific* ethnic groups (98%).
- **Local music and artists:**
 - Asian ethnic groups are less likely to (55%).
- **Digital media:**
 - Maori and Pacific* ethnic groups are more likely to (73% and 72% respectively).

* Small base size for Pacific peoples, results for this group are indicative only.

Base: All New Zealanders aged 15 and over, 2015 (n=600), 2014 (n=500). Source: B2b.



Informed New Zealanders continue to be more supportive of NZ On Air's mission.

New Zealanders who are aware that NZ On Air supports different types of media are more likely than average to think the support provided is important.

% that think NZ On Air's support is important

Media type	Aware of NZ On Air's support	Unaware of NZ On Air's support
Television	76%	25%
Radio	74%	57%
Local music and artists	82%	46%
Community broadcasting including regional news and information, access radio and Pacific radio	79%	60%
Digital media including web and mobile content	70%	33%

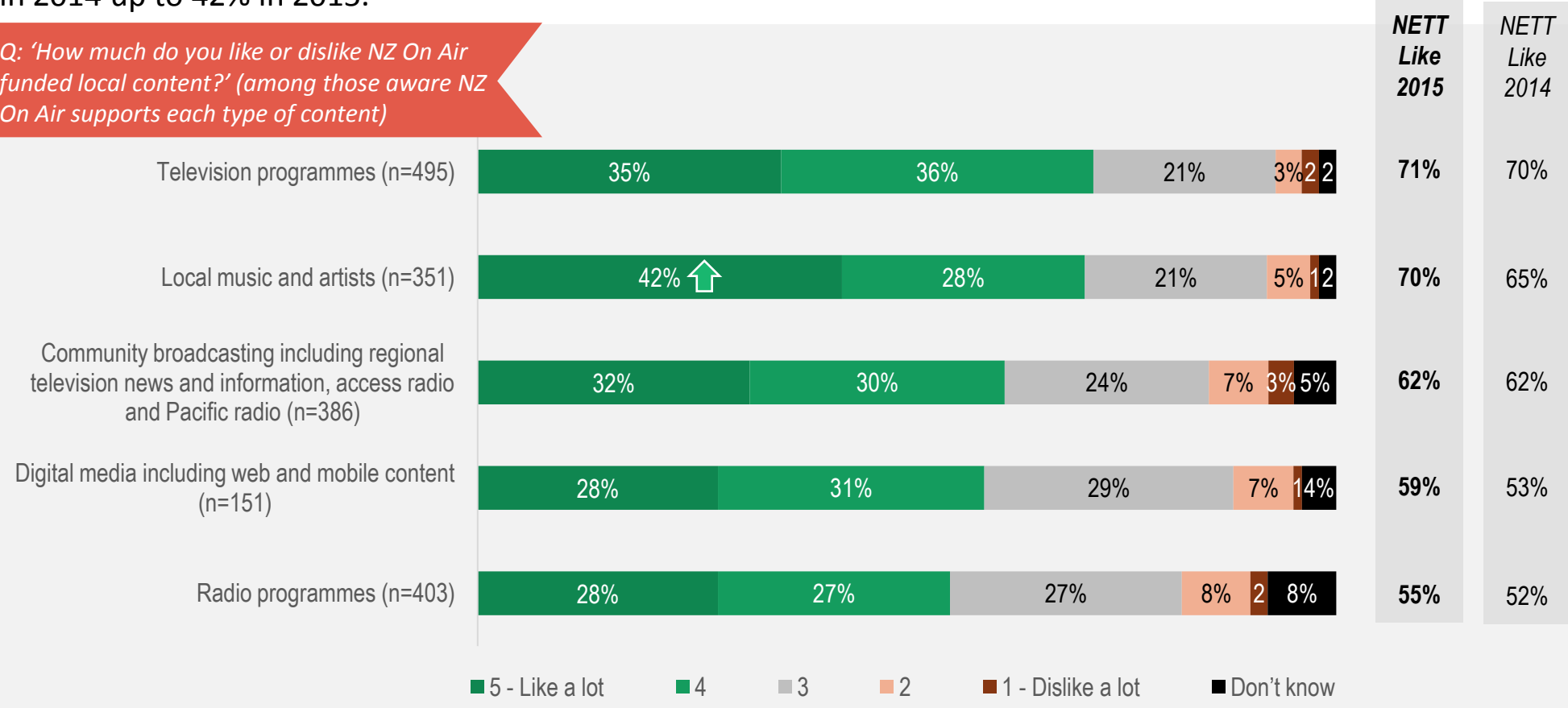


Views on content supported by NZ On Air

**Colmar
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A Millward Brown Company

Around seven in ten of those who are aware that NZ On Air funds TV content or local music and artists, like that content. About six in ten of those aware NZ on Air funds community broadcasting or digital media or radio programmes, like the content. These 'Nett' results haven't changed significantly since 2014, however the proportion who say they like funded content produced by local musicians and artists 'a lot' has increased significantly from 34% in 2014 up to 42% in 2015.

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)



[Differences among demographic groups].

Significant demographic differences in NETT 'like' ratings - among those aware NZ On Air supports each type of content:

Television

- No significant demographic differences in terms of 'Liking' NZ On Air supported TV content.

Local music and artists

- Older New Zealanders aged 60+ years who know NZ On Air supports music or artists are less likely than average to 'like' the content (46%).

Digital media

- No significant demographic differences in terms of 'Liking' NZ On Air supported digital media.

Radio

- Asian* ethnic groups that are aware NZ On Air supports Radio content are less likely than average to 'like' the content (24%).
** Small base number of Asian respondents, result is indicative only.*

Community broadcasting

- Among those who know NZ On Air supports community broadcasting, older New Zealanders aged 75+ years are more likely than average to 'like' the content (80%).

Reasons New Zealanders like content funded by NZ On Air [Some illustrative quotes]

Television

- “Because we need to hear more New Zealand stories.”
- “Well I think it's bringing parts of NZ we don't see to our screens.”
- “Enjoy locally made shows.”
- “It's free, and we don't have to pay for it, and that is what TV should all be about.”
- “Just to keep up local news, and local interest programmes, and interest programmes to all NZ.”

Radio

- “I love National Radio.”
- “It is necessary to have a non-commercial view such as National Radio.”
- “I just think that without a strong level of public funding support, there is a lot of stuff from our minority group(s), like investigative journalism, that the private sector wouldn't produce.”
- “Because I think it is good quality. I think it is very informative, and the subject matter is relevant and important.”

Artists and Music

- “It's important because New Zealand artists need as much funding and growth as they can get.”
- “...Well it's to give New Zealanders a chance, local musicians a chance to be heard.”
- “I think it is a good platform for NZ artists, be it any musical variety.”
- “Music is a hard industry to get into, and it's good to have some NZ acts who are doing well, promoting the country on an international level, being role models, and having some good music.”
- “I like discovering local artists.”

Question: You said you strongly like NZ On Air funded content – can you tell me the main reason for this?
Source: B4.

Reasons New Zealanders like content funded by NZ On Air [Some illustrative quotes]

Community Broadcasting

“I think it’s really important for the community to feel it has a voice and each community has things it feels are important and a broad mainstream approach helps those voices to be heard.”

“I think that everyone should know what is happening in their community, and...what is going on around them.”

“Advises of what’s happening in the community; mainly events.”

“Just because it sort of gets people the idea of what is happening locally.”

Digital Media

“I mean NZ and the world is moving to a more online or technical world, for mobile phones or smart devices, so seeing all the information on that is the way forward. Having TV programmes available on that.”

“Just because [I’m] using a lot of digital things.”

“Because it gets the product out, and advertises the product.”

“...[We’re] in [the] information age, probably that’s why [it] seems to be the trend for the younger [people], and for everyone now, and it’s informative.”

Question: You said you strongly like NZ On Air funded content – can you tell me the main reason for this?
Source: B4.

Reasons New Zealanders dislike content funded by NZ On Air [Some illustrative quotes]

Television

“I think a lot of the programmes are crap. All these reality programmes and cooking programmes are a waste of our tax payer’s money.”

“... Children are always [watching] TV and watch the silliest programmes, and I think that they should be getting access to New Zealand history. There are too many of those American comedy programmes; it's called NZ On Air, not America On Air.”

“They're not particularly good and the scripts are not particularly good. They don't seem to come up to the standard of everything else that we see.”

Radio

“I just don't like the music being produced, so I don't listen to it. I am not their target audience. It is not relevant for me.”

“I don't really listen to radio.”

“I like local programmes, [but] I don't like listening to the radio, too busy, I'm a farmer.”

Artists and Music

“The music and artists are not my taste.”

“Just doesn't appeal to me, not something I would want to listen to, so personally it's a waste of money.”

“The reality for me is that I don't listen to local artists and music and I don't listen to secular music, as I listen to a lot of gospel music.”

“Because I listen to more Asian music.”

Question: You said you strongly dislike NZ On Air funded content – can you tell me the main reason for this?

Source: B4.

Reasons New Zealanders **dislike** content funded by NZ On Air [Some illustrative quotes]

Community Broadcasting

“The main reason I think that its mainly irrelevant. I think it’s highly politicised in that it tends to be more about supporting minorities without dealing with the underlying issues.”

“I don’t know, don’t really listen to it, and don’t know anyone that listens to it.”

“I don't think that the taxpayer should be paying for that kind of content as it is too small.”

Digital Media

“I don’t have a computer so I don’t know what you are talking about.”

“Basically I think so much stuff got so tied up in the web side of things, and I'm of an older age group and the digital side doesn't interest me at all.”

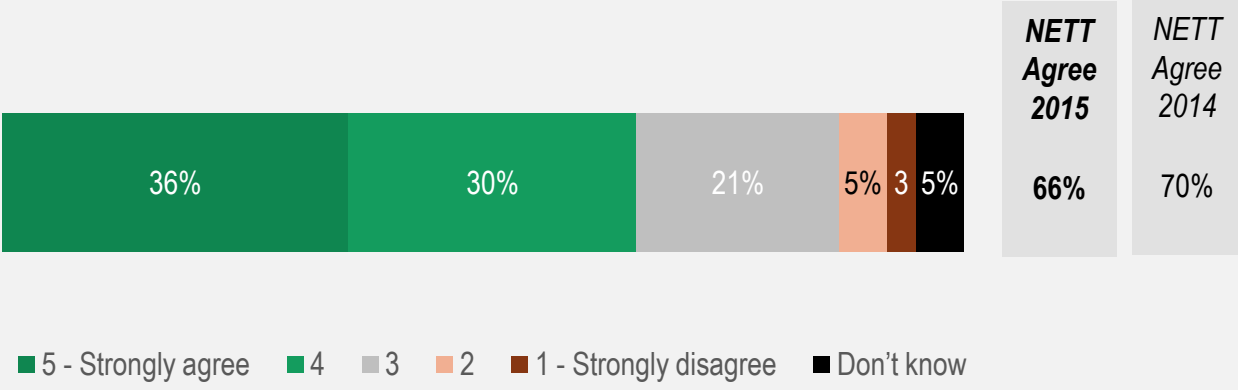
“...it doesn't get to everybody, not everybody is going to want to do that. It's only the younger ones that do it, the old people don't do it .”

“I don’t think it's important because there is free content available and they should redirect their funds elsewhere.”

Question: You said you strongly dislike NZ On Air funded content – can you tell me the main reason for this?
Source: B4.

Two thirds of New Zealanders think NZ On Air funding results in a greater depth and quality of local content than would otherwise exist - a similar result to last year.

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



Base: All New Zealanders aged 15 and over, 2015 (n=600), 2014 (n=500).
Source: B5.

Certain demographic groups are less likely than average to believe this:

- Pacific* and Asian ethnic groups are less likely to (42% and 44% respectively).

** Small base size for Pacific peoples, result is indicative only.*

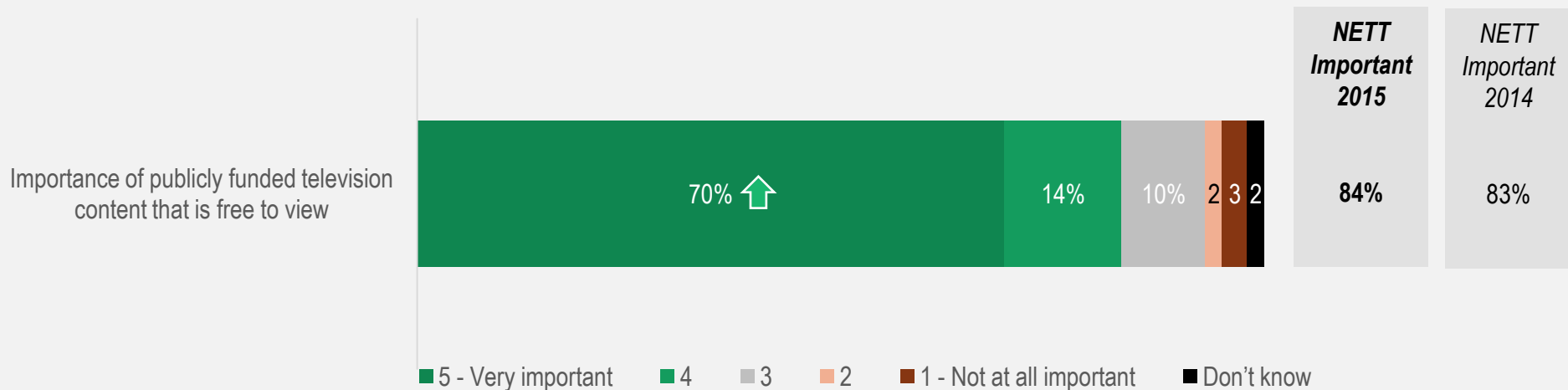




Other questions

More than eight in ten New Zealanders feel it is important to have publicly funded television content that is free to view, a similar proportion to last year. While the 'Nett' figure hasn't changed, the proportion who think it is 'very important' has actually increased significantly from 61% in 2014 up to 70% in 2015.

Q: 'How important is the following?'



Importance of publicly funded television content that is free to view

70% ↑

14%

10%

2

3

2

NETT Important 2015
84%

NETT Important 2014
83%

■ 5 - Very important ■ 4 ■ 3 ■ 2 ■ 1 - Not at all important ■ Don't know

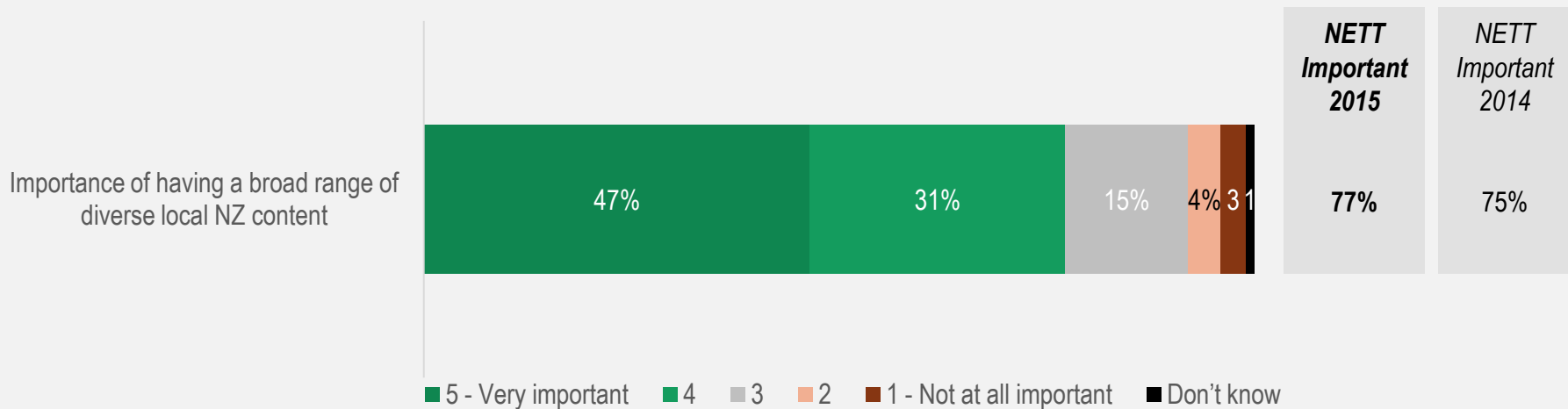
Certain demographic groups are less likely than average to think it's important to have publically funded free to view TV content :

- 15-24 year olds are less likely than average to think it is important (70%).

Base: All New Zealanders aged 15 and over, 2015 (n=600), 2014 (n=500).
Source: B1b

Three quarters of New Zealanders believe it is important to have a broad range of diverse local NZ content, no change since 2014.

Q: 'How important is the following?'

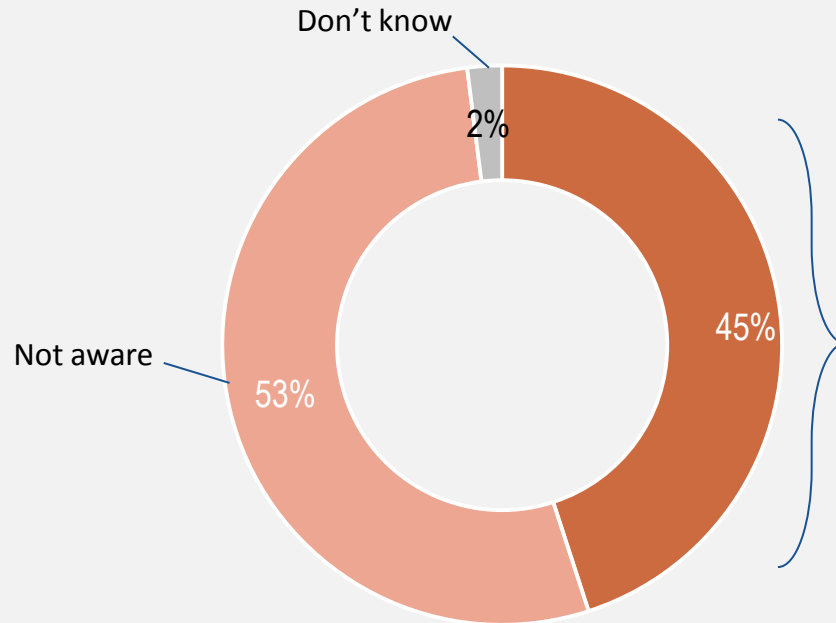


There are no significant demographic differences.

Base: All New Zealanders aged 15 and over, 2015 (n=600), 2014 (n=500).
Source: B1.

Almost half of all New Zealanders are aware NZ On Air sponsors the New Zealand Music Awards (45%).

Q: 'Before today, were you aware NZ On Air sponsors the New Zealand Music Awards?'



45% of New Zealanders are aware NZ On Air sponsors the New Zealand Music Awards.

Base: All New Zealanders aged 15 and over (n=600).
Source: B6.

Older New Zealanders aged 60-69 years are more likely than average to know that NZ On Air sponsors the New Zealand Music Awards (58%).