

NZ On Air | Public Awareness & Attitudes Survey

Prepared by Colmar Brunton

For | NZ ON AIR

June 2014



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.
- Colmar Brunton conducted a telephone survey with 500 respondents between 28 April and 12 May 2014.
- The sample was structured and weighted to be representative of the New Zealand adult population as a whole.

Awareness and understanding of NZ On Air

- Ninety three percent of New Zealanders are aware of NZ On Air (this is similar to 2013 when 91% were aware of NZ On Air)
- New Zealanders think NZ On Air supports:
 - Television – 95%
 - Radio – 82%
 - Community broadcasting – 80%
 - Music – 70%
 - Digital media – 30%
- New Zealanders think NZ On Air supports local content by:
 - Funding it – 85%
 - Broadcasting it – 80%
 - Promoting it – 79%
 - Producing it – 64%

Executive summary continued

Support for NZ On Air's Mission

- 75% of New Zealanders agree NZ On Air supports television programmes and activities that are important to New Zealanders (this compares with 78% in 2013)
- 68% agree NZ On Air supports local content for radio that is important to New Zealanders (this compares with 74% in 2013)
- 81% New Zealanders believe it is important for NZ On Air to support community broadcasting (this and the next three statements were not asked in 2013).
- 72% believe it is important for NZ On Air to support local music and artists
- 49% believe it is important for NZ On Air to support digital media

Views on content supported by NZ On Air

- 70% 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)
- 65% of those aware of NZ On Air's support for music like the music and artists supported by NZ On Air
- 62% of those who are aware of NZ On Air's support for community broadcasting like the supported community broadcasting content
- 53% of those who are aware of NZ On Air's support for digital media like the digital media content supported by NZ On Air
- 52% of those who are aware of NZ On Air's support for radio like that content
- 70% of New Zealanders believe NZ On Air funding results in a greater depth and quality of local content than would otherwise exist

Other questions

- 83% of New Zealanders believe it is important to have publicly funded television that is free to air
- 75% believe it is important to have a broad range of diverse local content



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 - NZ On Air,
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 - and their views on that content.

Methodology

- Colmar Brunton conducted a telephone survey with 500 respondents between 28 April and 12 May 2014.
- 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.
- Interviewers used Computer Assisted Telephone Interviewing (CATI) to assist with question routing and data entry.
- 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.

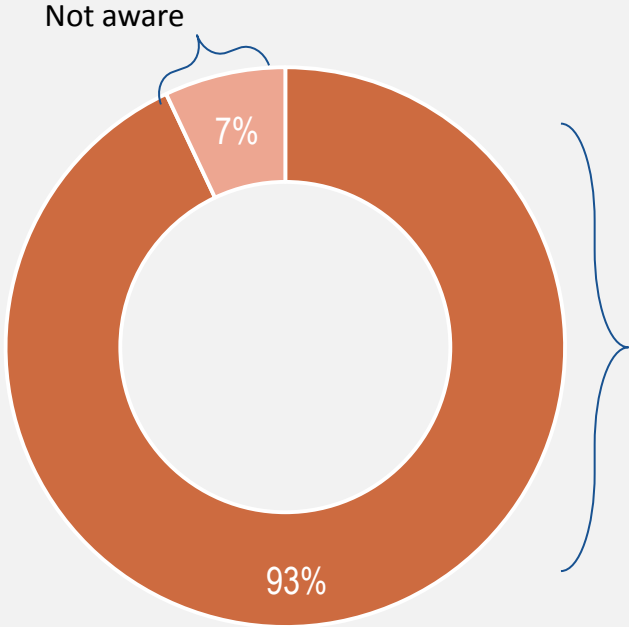


Awareness and Understanding

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Awareness of NZ On Air is 93%, which is similar to previous public perceptions research for NZ On Air (see next slide for historical trend)

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



93% of New Zealanders are aware of NZ On Air

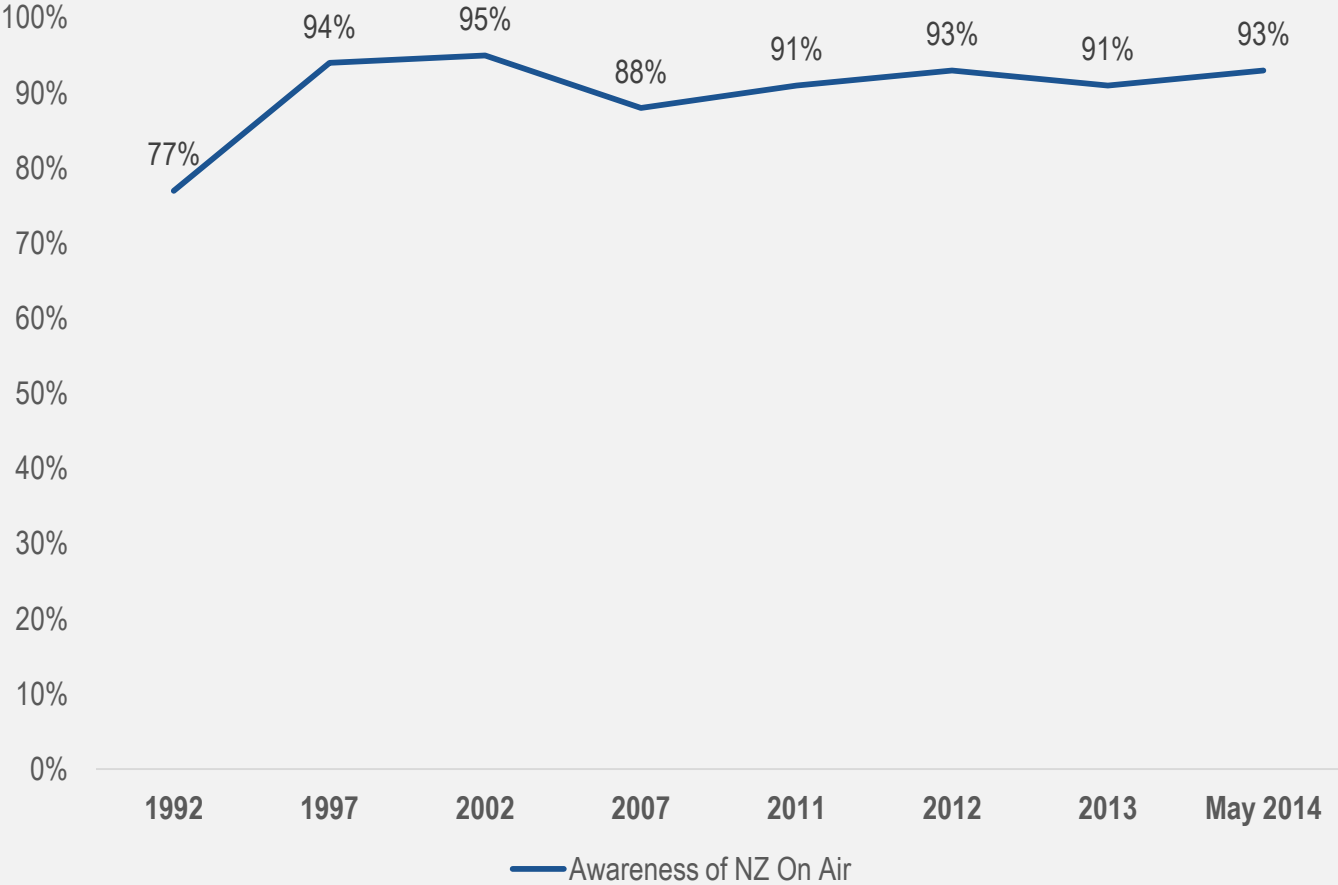
Base: All New Zealanders aged 15 and over (n=500)
Source: A1



- NZ European, Maori and Pacific had a higher awareness (96%, 95% and 94% respectively).
- Asian respondents and 'Other European' respondents had a lower awareness (83% and 80% respectively).
- (There are no other significant differences in awareness by demographics).

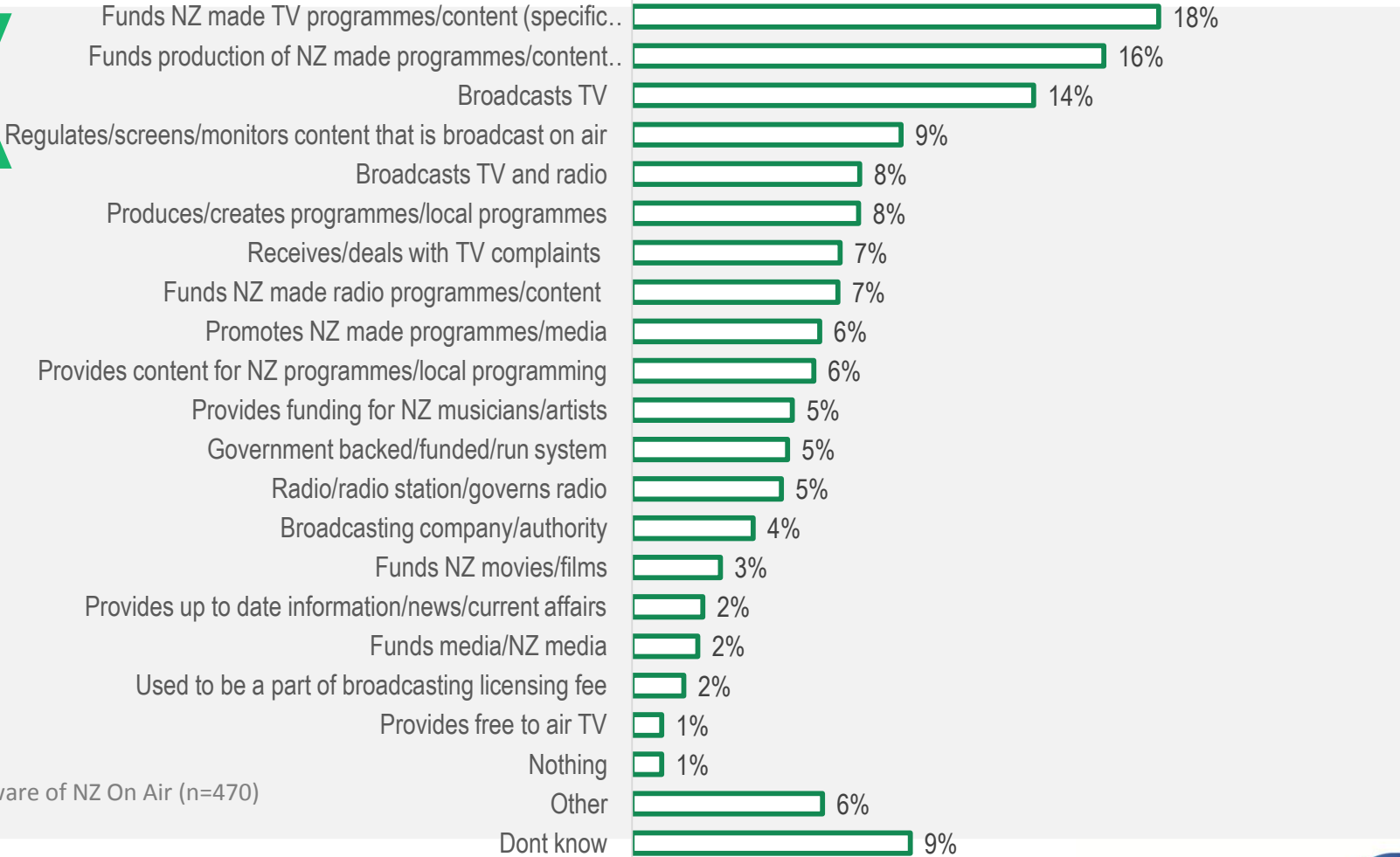


Awareness of NZ On Air over time



The most common descriptions of NZ On Air’s role are to fund NZ TV programmes or content. But others think the organisation has broadcast, regulatory or production roles. (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)



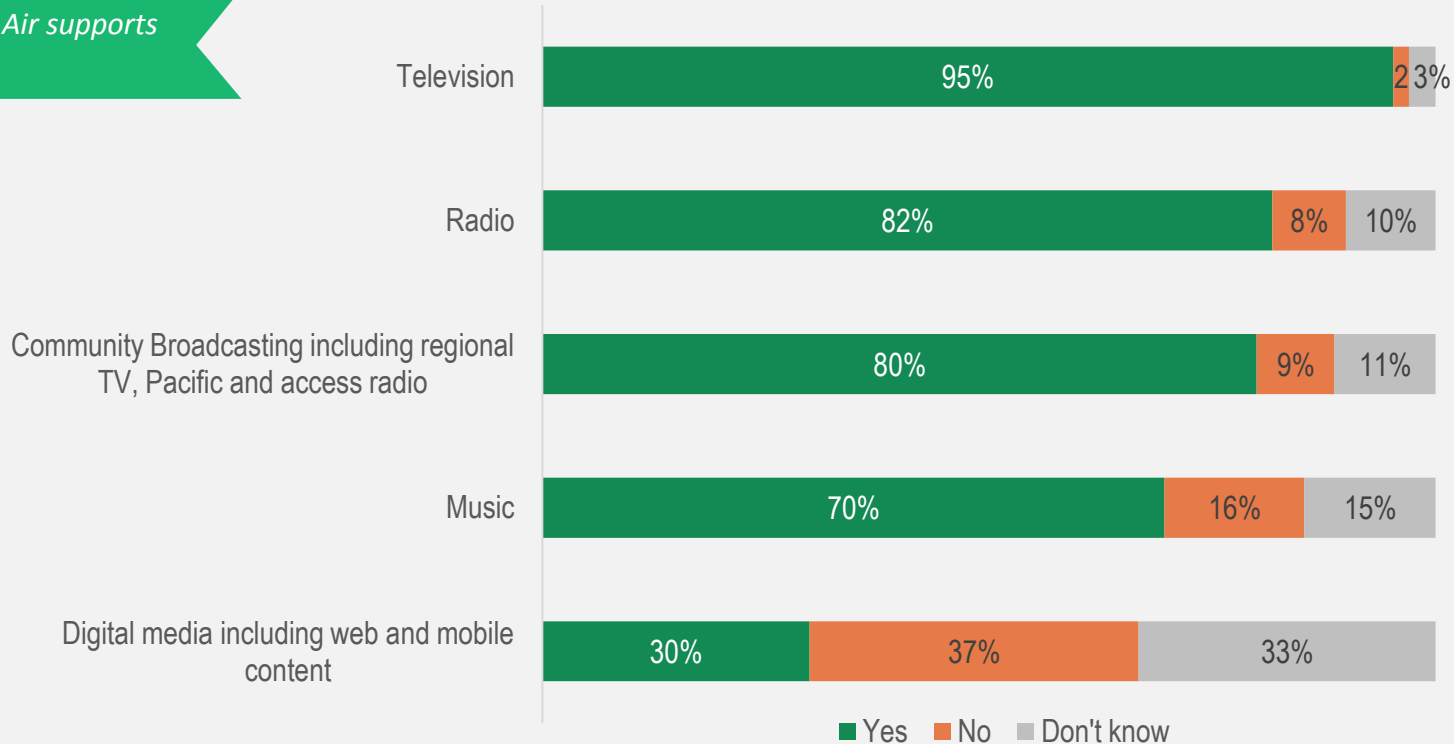
Base: All New Zealander who are aware of NZ On Air (n=470)
Source: A2

In total 36% of respondents spontaneously describe ‘funding’ when describing NZ On Air



When prompted, most New Zealanders think that NZ On Air supports TV, radio, community broadcasting and music. The role in supporting digital media is not well known.

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



Base: All New Zealander who are aware of NZ On Air (n=470)
Source: A3

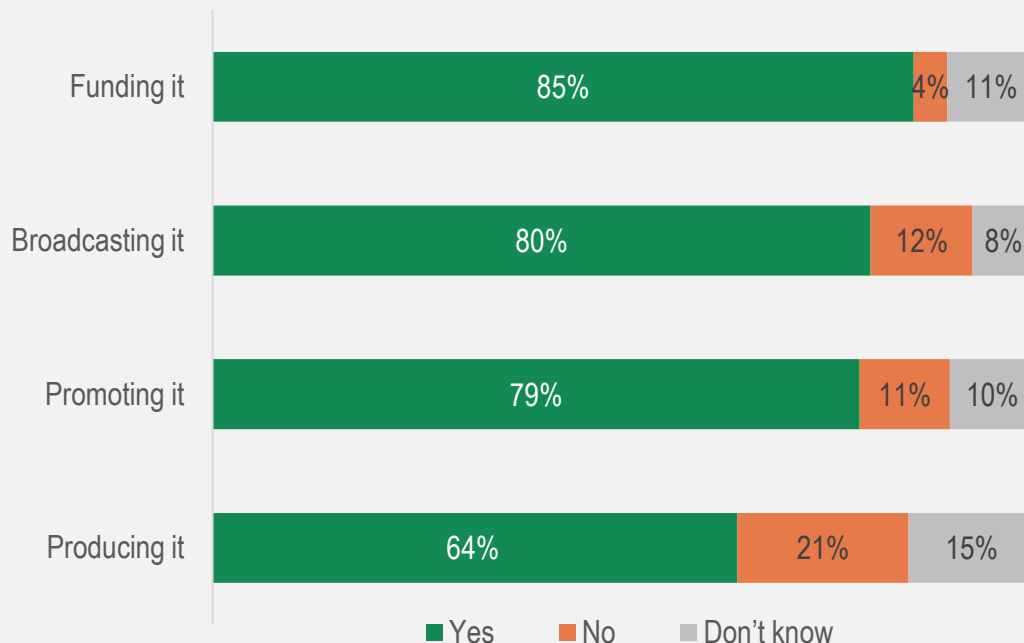
Significant differences in knowledge:

- Know that NZ On Air supports *Digital media*:
 - 15-34 year olds are more likely to know (45%)
 - Asian respondents are more likely to know (75%)
- Know that NZ On Air supports *Community broadcasting*:
 - 70+ years olds are *less* likely to know (51%)



When prompted, 85% say they know that NZ On Air *funds* local content. But most (around 8 in 10) also think that NZ On Air is involved in broadcasting and promotion. Almost two-thirds think that NZ On Air is involved in production.

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



Base: Those who know of at least one type of media NZ On Air supports (n=462)
Source: A4

Significant differences in knowledge about NZ On Air funding:

- Maori respondents are less likely to know that NZ On Air is involved in *funding* (71% are aware)



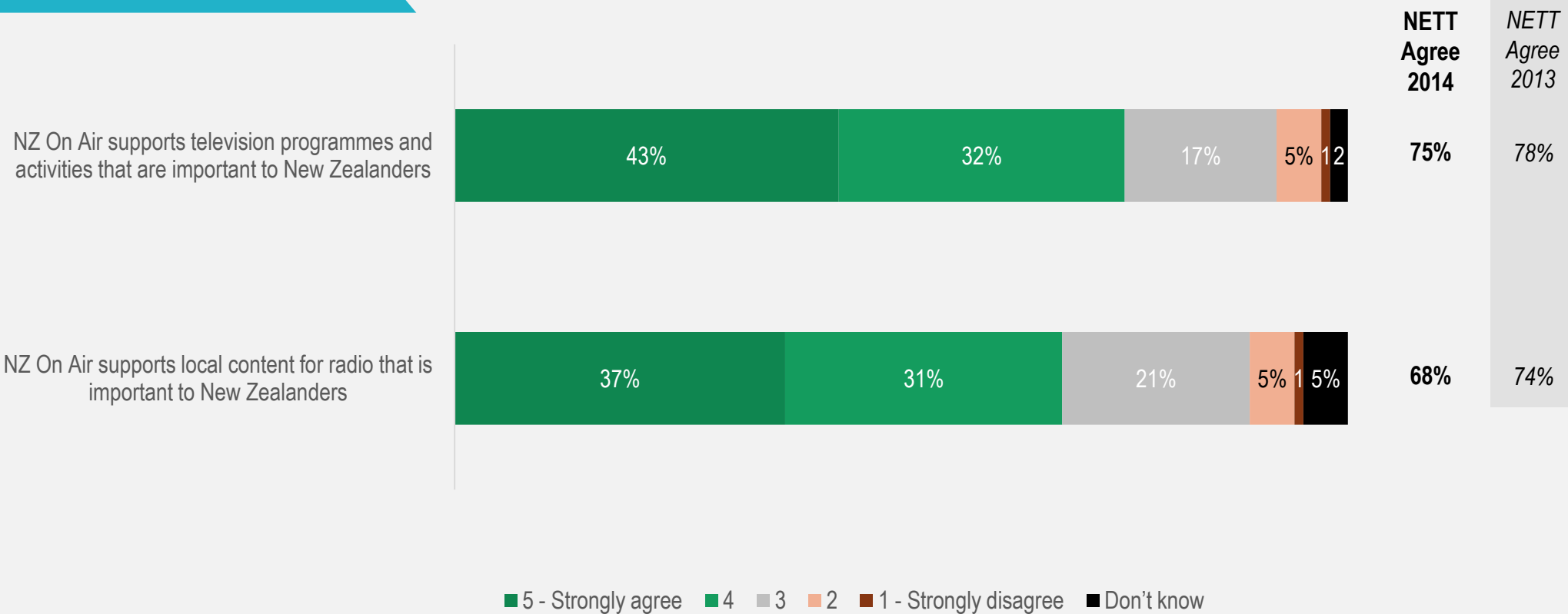


Support for NZ On Air's Mission

**Colmar
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A Millward Brown Company

Around 7 in 10 New Zealanders believe that NZ On Air supports TV programmes and radio content that is important. Since 2013 the proportion that agree that “NZ On Air supports local content for radio that is important to New Zealanders” has decreased (from 74% to 68%).

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

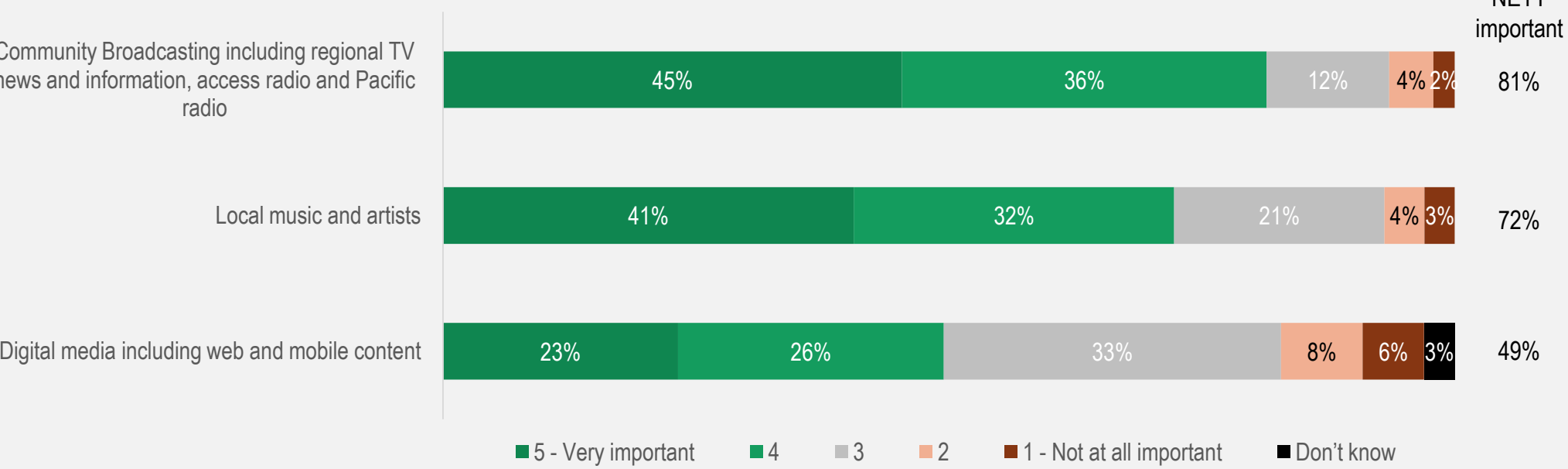


Base: (n=500)
Source: B2



Most agree it is important for NZ On Air to support community broadcasting and local music and artists. But only half think it is important to support digital media.

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



The only significant differences in importance is:

- Asian respondents are more likely than average to say that it is important for NZ On Air to support digital media(75%)

Base: (n=500)
Source: B2b



Informed respondents are warmer in their support for NZ On Air's Mission

Respondents who are aware of NZ On Air's funding for different types of media are more likely to support NZ On Air's mission for that type of media.

For example, 73% of those who are aware that NZ On Air supports radio agree with the statement "NZ On Air supports local content for radio that is important to New Zealanders" compared with 54% who are unaware.

Similarly, 60% of those who are aware that NZ On Air supports digital media agree with the statement "It is important that NZ On Air supports local Digital media content including web and mobile content" compared with 42% who are unaware.

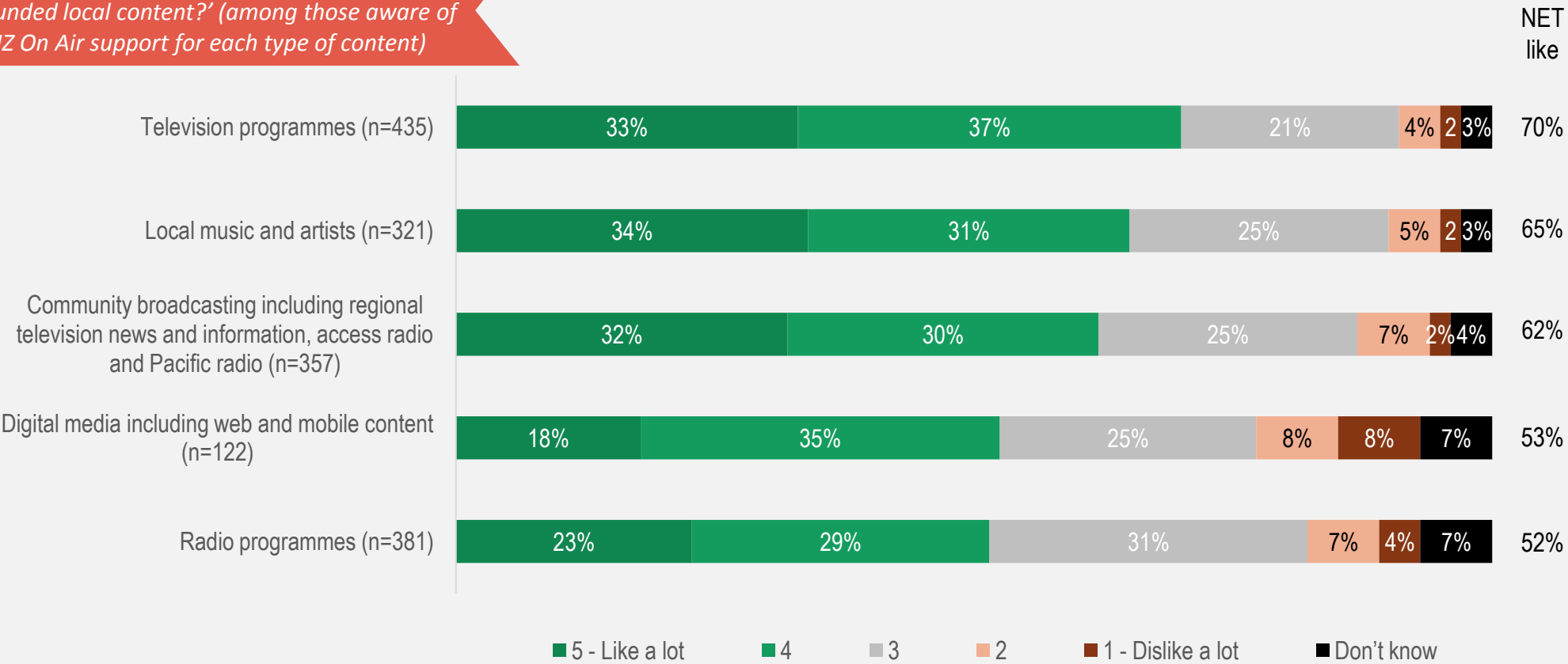


Views on content supported by NZ On Air

**Colmar
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A Millward Brown Company

Most of those who are aware of NZ On Air funded TV content like it. Similar findings exist for community broadcasting and music. But radio and digital media content is less well liked.

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



How much do New Zealanders like content funded by NZ On Air? [Differences among groups].

Significant differences in NETT like rating:

Television

- 'Liking' for NZ On Air supported TV content is evenly spread across demographic categories.

Local music and artists

- The proportion that like NZ On Air supported music generally decreases with age (62% of 15-34 year olds like it, 80% of 35-49 year olds, 62% of 50-69 year olds, and 50% of 70+ year olds).
- Higher 'like' ratings among females (68% of females vs. 63% of males).

Digital media

- The proportion that like NZ On Air supported digital media generally decreases with age (59% of 15-34 year olds like it, 41% of 35-49 year olds, 56% of 50-69 year olds, and 37% of 70+ year olds).

Radio

- The proportion that like NZ On Air supported radio content increases with age (35% of 15-34 year olds, 51% of 35-49 year olds, 63% of 50-69 year olds, and 68% of 70+ year olds).
- Lower 'like' ratings among Maori (26%).

Community broadcasting

- The proportion that like NZ On Air supported community broadcasting increases with age (45% of 15-34 year olds, 70% of 35-49 year olds, 68% of 50-69 year olds, and 81% of 70+ year olds).

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

Television

“I watch a lot of TV and the local stuff funded by NZ On Air is always pretty good. In particular the comedy and the odd documentary are very good.”

“They do some good native and rural programmes that you wouldn't get to see otherwise.”

“I cannot afford Sky and I like to see local content e.g. church programmes and their disability programmes as well as Pacifica and local news.”

“I like seeing NZ stuff and We should support our own people. It also adds to programming diversity.”

Radio

“It is important that we know what is happening in our country and we get that from well presented programs.”

“I enjoy listening to musical programmes they play, like concerts and reviews of concerts.”

“Its important that we have local voices, I listen to the radio as my main source of news and information.”

“We have to promote our own country a bit more. It covers quite a bit of local content, during and after the earthquakes it covered a lot and kept us in touch.”

Artists and Music

“We need to look after our local talent. If we don't, who else is going to, they might head overseas if there is no funding.”

“I think it is good to support NZ artists.”

“I'm all for local artists getting funding to help them on their way.”

“I just think we should be supporting NZ and everything that is good here including our artists.”

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

Source: B4

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

Community Broadcasting

“It fortifies NZ culture by having our own entertainment provided in a NZ setting.”

“Anything that is locally produced is relevant, it encourages people to be aware of what's going on and be up to date within the country. It provides employment and by doing it they are showing NZ is capable of producing its own programmes.”

“Covers a wide range of things and keeps the community knowing what's going on.”

“It is important for people to know what is going on around them, as well as nationally.”

“I appreciate anything made in NZ, I think it needs to be encouraged and supported.”

Digital Media

“I spend a lot of time online it is my main source for entertainment and information.”

“I use digital media a lot. I think that's the best way to go. The best way to reach people.”

“People online can learn more and know what is happening around them.”

“I think it is a good thing that local online stuff is encouraged.”

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

Source: B4

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

Television

- “Because I find there is nothing good to watch, it is really disappointing.”
- “The advertising. I prefer to watch what I want and not be forced to watch advertising.”
- “Too many reality TV shows and sitcoms. Not enough documentaries.”
- “The programme should be able to support itself.”
- “It is just crap to support government requirements.”

Radio

- “I can go into a commercial radio station and pick up their programmes from overseas. I can't see a reason to fund local radio.”
- “The content that they fund is not interesting me.”
- “I don't think they play what is really going on in NZ, I'd like more knowledge about what is really happening in NZ and the Pacific.”

Artists and Music

- “If they are any good they will fund themselves.”
- “Because its not music I enjoy, I am older and I don't like the modern music.”
- “Might be good for other people, I just don't care about it.”
- “I just switch it off, I have got more important things to do.”

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

Source: B4

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

Community Broadcasting

“ Think it is not important.”

“ Just doesn't interest me.”

“ I'm just not at that stage in life.”

Digital Media

“There is no necessity for NZ On Air to support media, to me supporting watching media on mobile phones etc. is totally absurd.”

“I feel that the more up market these things become the more they should be able to stand on their own and not need the help of NZ On Air.”

“I'm not up with those things, everything is too web based these days.”

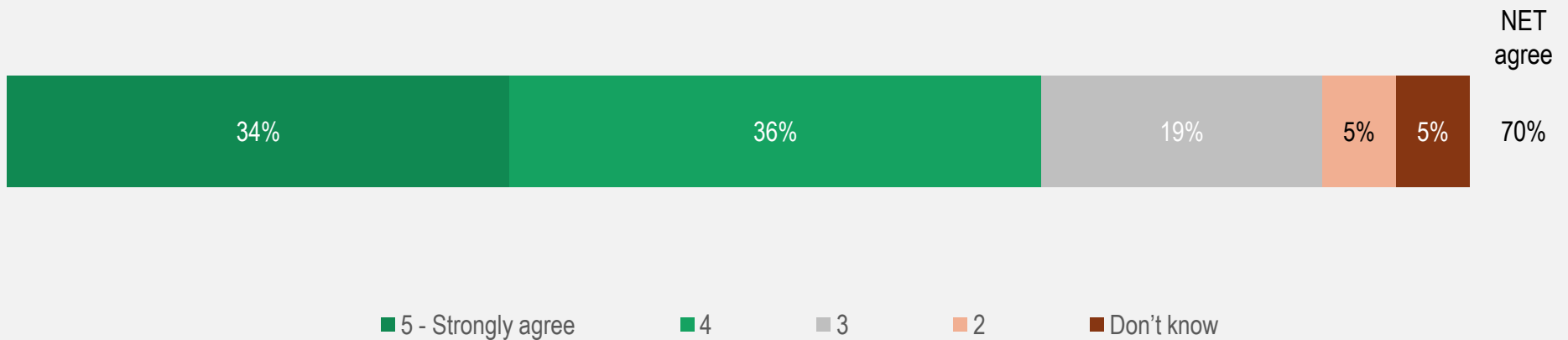
“I just don't worry about anything digital.”

“I have a slow Internet and have to wait a long time for things to download.”

“You pay for a connection, whereas you can turn on the TV and it is free.”

7 in 10 New Zealanders believe NZ On Air funding results in a greater depth and quality of local content than would otherwise exist

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 respondents (n=500)
Source: B5

There were no significant differences between groups

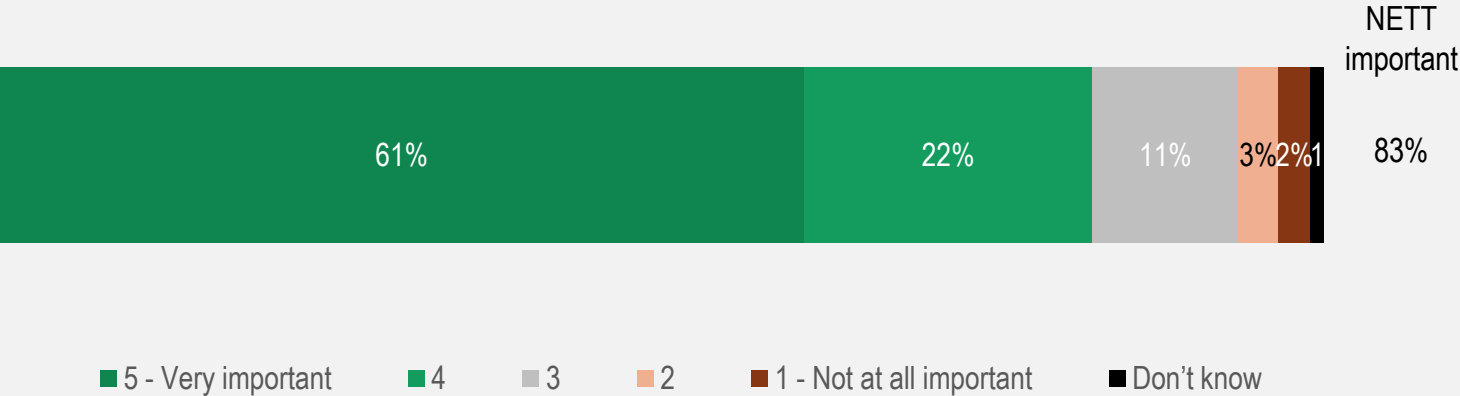


Other questions

Just over eight in ten think it is important to have publicly funded content that is free to view

Q: 'How important is the following?'

Importance of publicly funded television content that is free to view



Base: All respondents (n=500)
Source: B1b

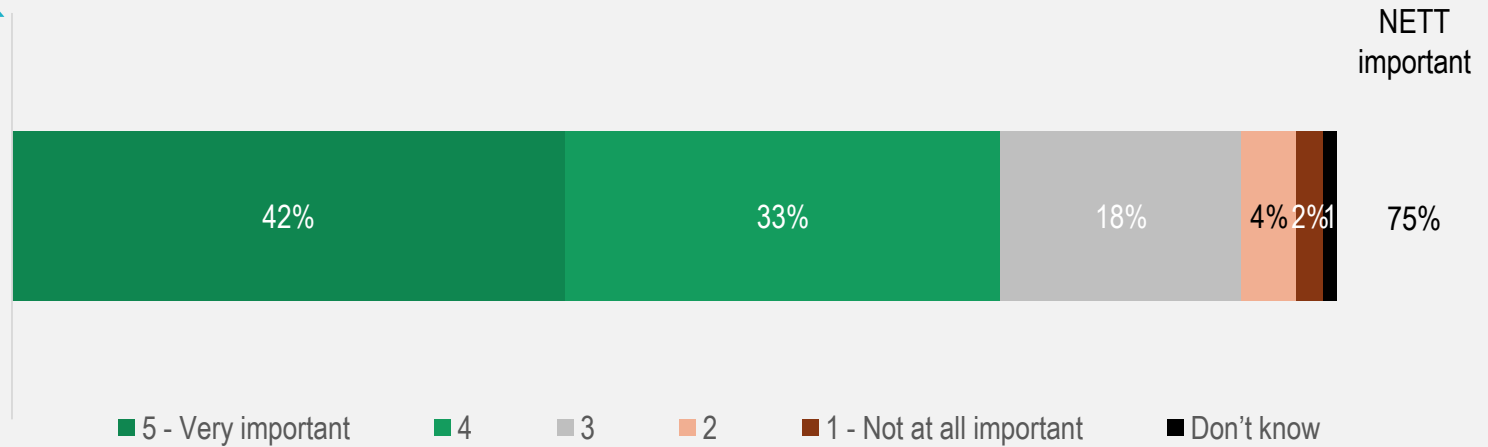
Significant differences in importance:

- 35+ year old females are more likely to think it is important (90%)

Three quarters (75%) think it is important to have a broad range of diverse local NZ content

Q: 'How important is the following?'

Importance of having a broad range of diverse local NZ content



Base: All respondents (500)
Source: B1

Significant differences in importance :

- 15-34 year olds are less likely to say it is important (66%)