

NZ On Air

Public Perception Research

*Quantitative survey
undertaken in June 2012*

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INTRODUCTION

Introduction

- This presentation provides the results of survey research on New Zealander's perceptions of local content and NZ On Air. This survey:
 - reports on awareness and understanding of the role of NZ On Air
 - reports on NZ On Air SOI indicators
 - measures sources of music.
- Wherever possible, comparisons are made between results of this survey and the previous NZ On Air quantitative surveys of the general public.

METHODOLOGY

Methodology (2012)

- Computer Assisted Telephone Interviewing (CATI)
- 15 minute interview
- Interviewing undertaken in June 2012
- Households to call are randomly identified
- Either the person who answers the phone (if eligible) or person with the next birthday is interviewed
- Sample of n=500 (people aged 18 years plus living in households with landlines)
- Sample stratified for regional representation to match population distribution
- In 2012 quotas were also added for age, gender and ethnicity (based on the Census 2006) to make the sample better match the population. The 2012 sample profile is significantly different from previous samples in that there are more:
 - Young people
 - Males
 - Maori, Pacific and Asian
- The sample changes should be taken into account when considering apparent changes over time
- **Red** text indicates a significant change over time or significant difference between two results

SUMMARY

Key Performance Measures

- 78% of NZers agree: *NZ On Air supports television programmes and activities that are important to New Zealanders.* The proportion that agree with this statement has trended up since 2008.
- 69% of New Zealanders agree *NZ On Air supports local content for radio that is important to New Zealanders.*

Understanding of NZ On Air

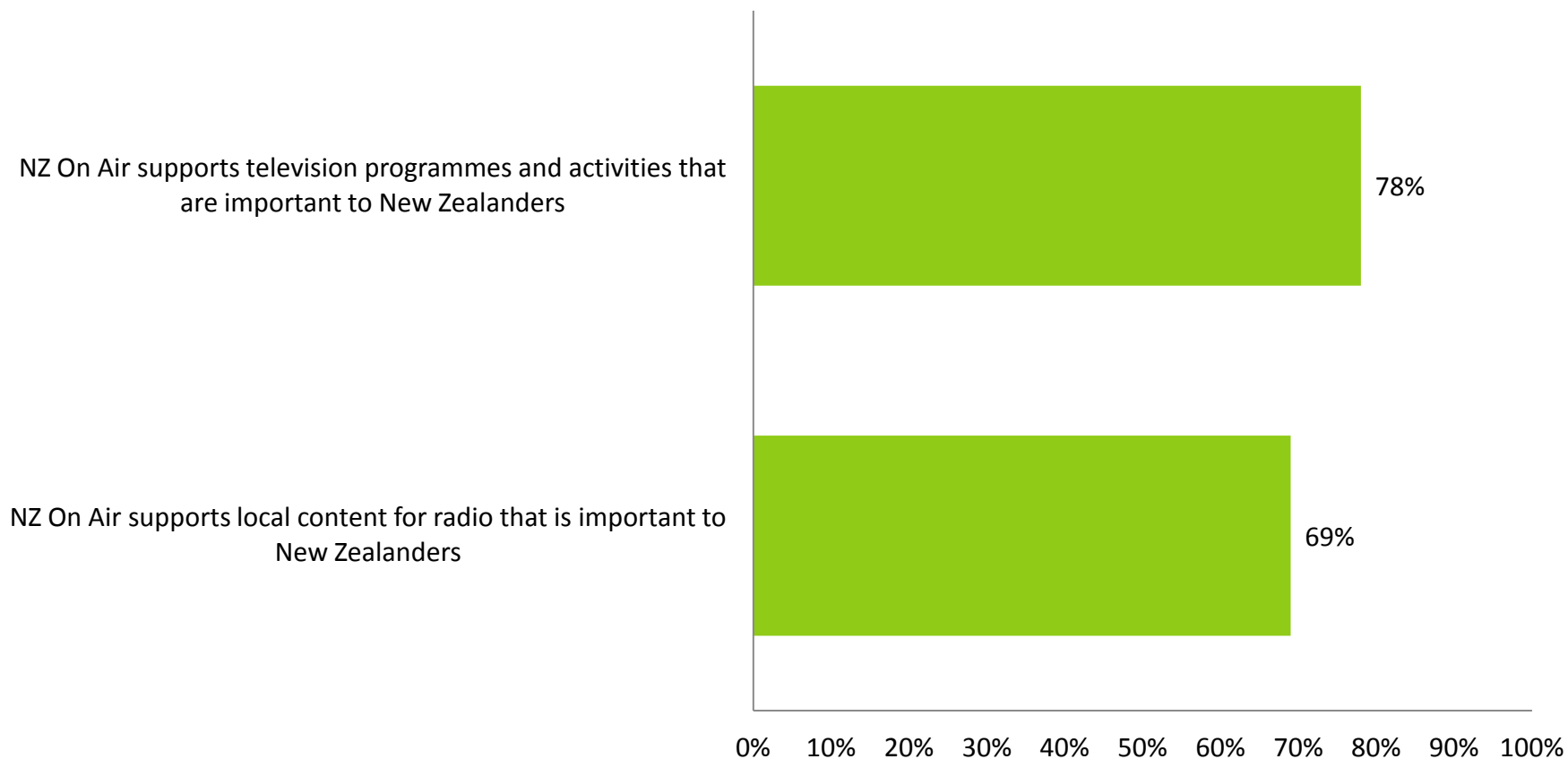
- 93% of NZers have heard of NZ On Air.
- The roles most frequently associated with NZ On Air are: funding NZ programmes and promoting NZ made programmes.
- There has been a statistically significant increase between 2011 and 2012 in the proportion of people who spontaneously recall that NZ On Air funds New Zealand TV programmes (up from 42% to 52%).

Music

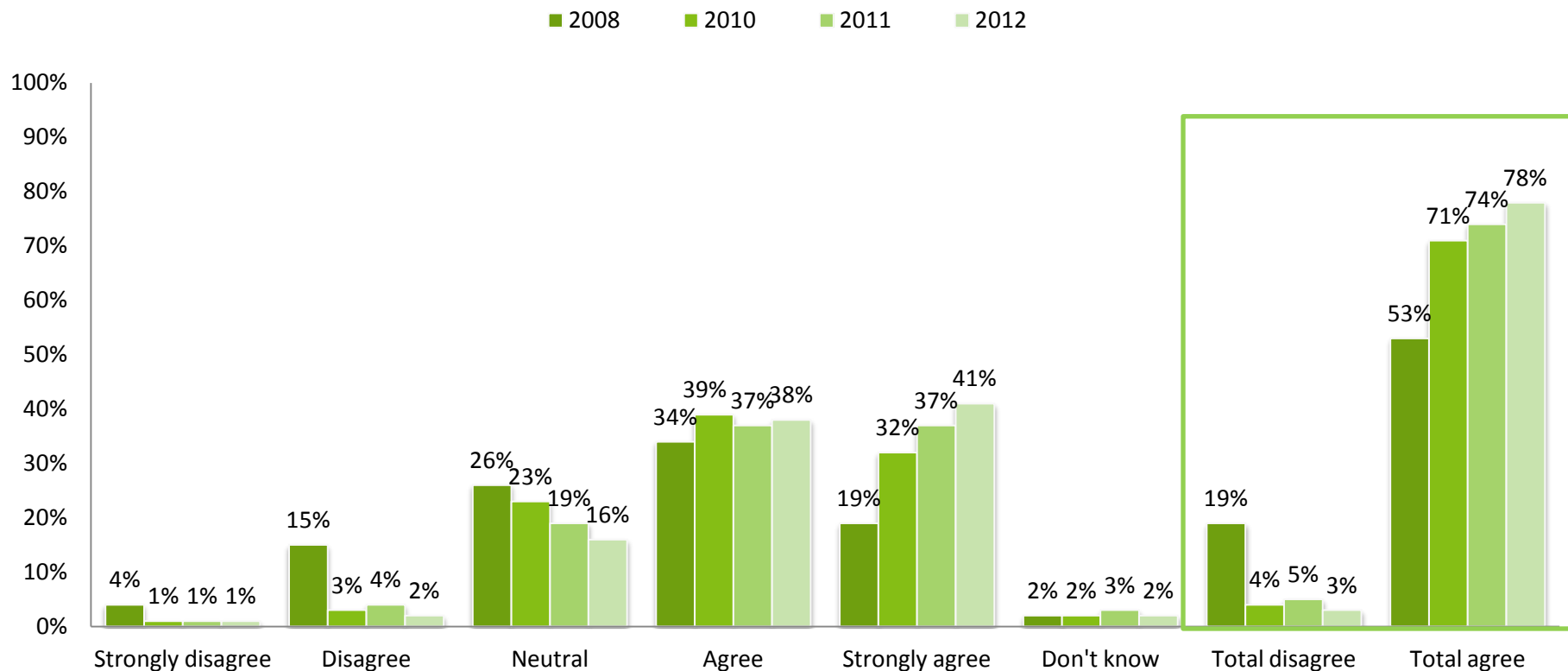
- The most common sources of new music are:
 - Radio (54%)
 - Friends/family (33%) – statistically significant increase from 26% in 2011
 - Internet (25%) – statistically significant increase from 12% in 2011
 - Music TV (13%) - statistically significant increase from 9% in 2011.
- The most common sources of 'daily music fix' are:
 - Radio (77%)
 - Internet (24%) – statistically significant increase from 9% in 2011
 - TV (23%) – statistically significant increase from 14% in 2011
 - CD/vinyl (20%) – statistically significant decrease from 31% in 2011.

KEY PERFORMANCE MEASURES

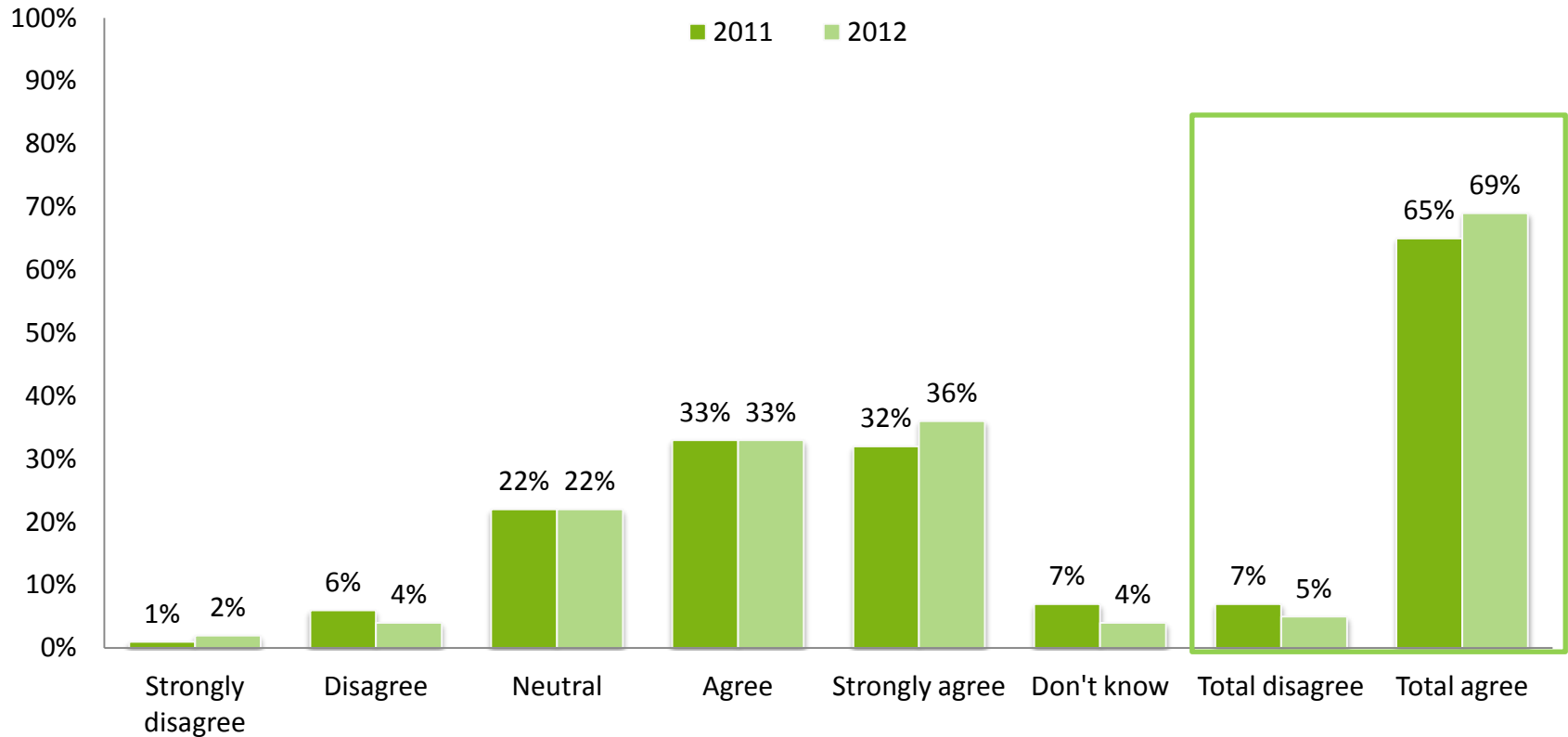
Key Measures Comparison (Total Agree)



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



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



Significantly more likely to disagree: Auckland, Male

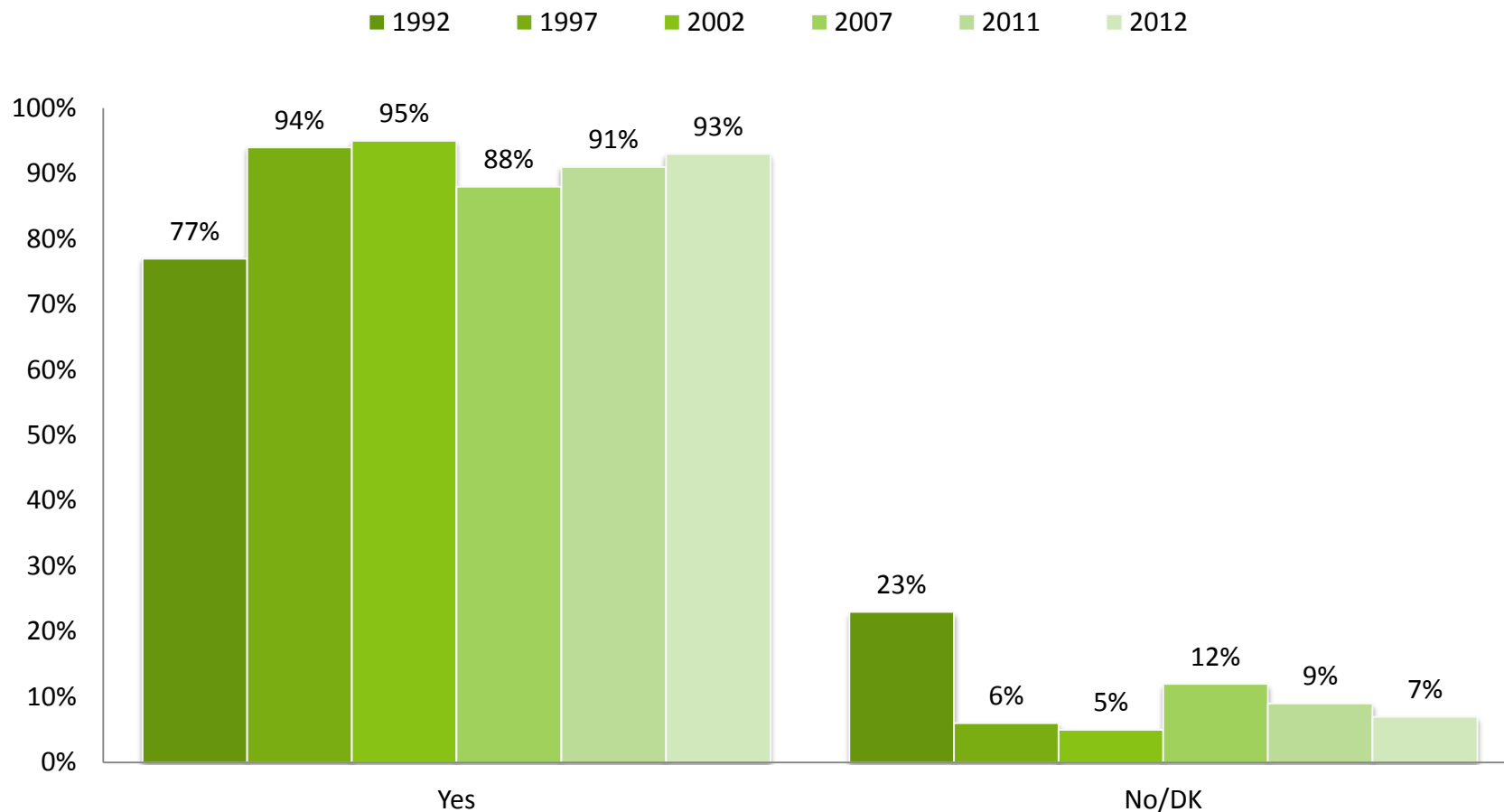


Note different wording in 2011: NZ On Air supports radio programmes that are important to New Zealanders, like radio programmes on Radio New Zealand and on commercial radio stations

Base: n=500

UNDERSTANDING OF NZ ON AIR

Did you know there is an organisation called NZ On Air?

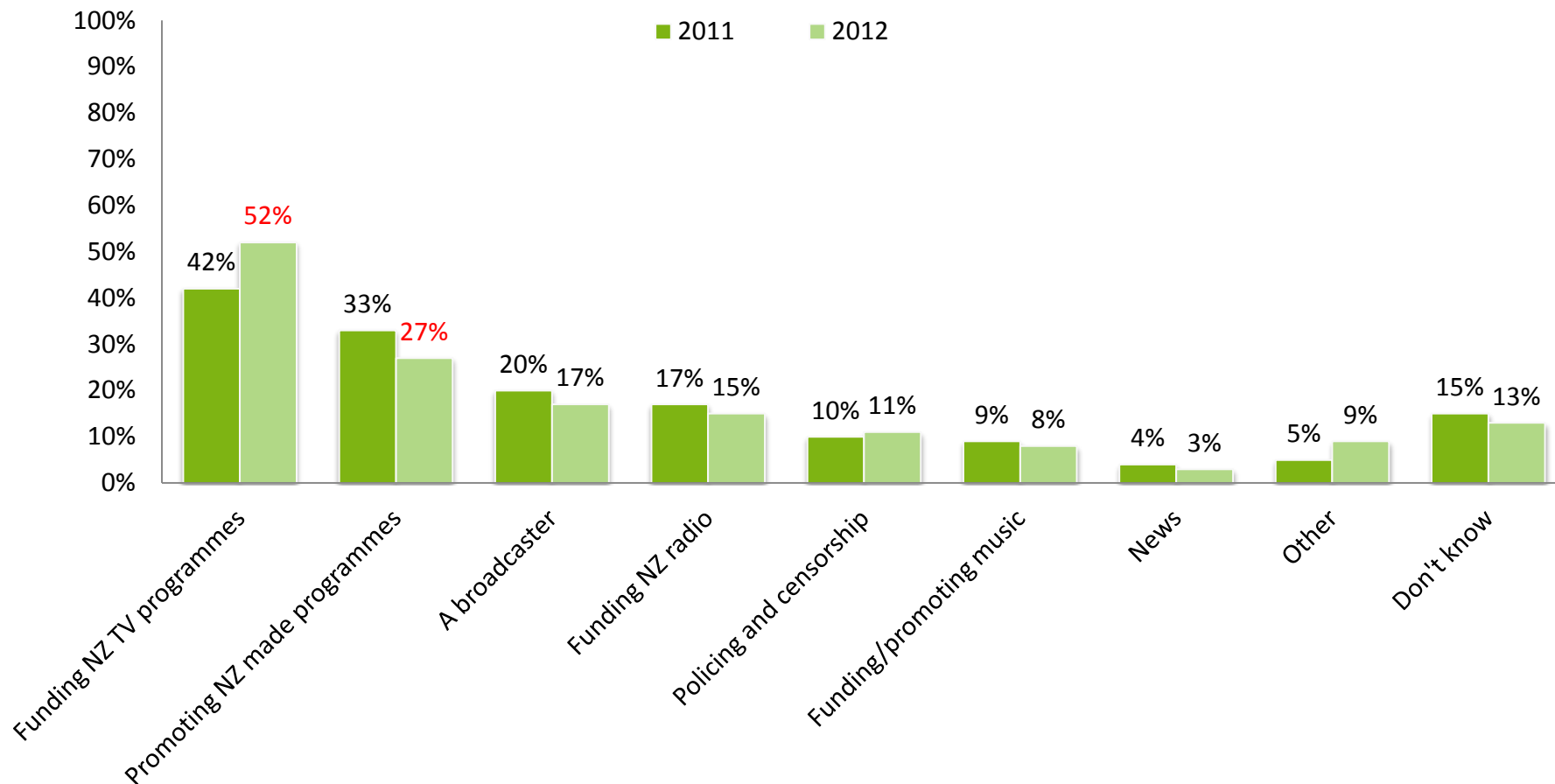


Significantly more likely to say yes in 2011: Pakeha

Significantly more likely to say no in 2011: Asian

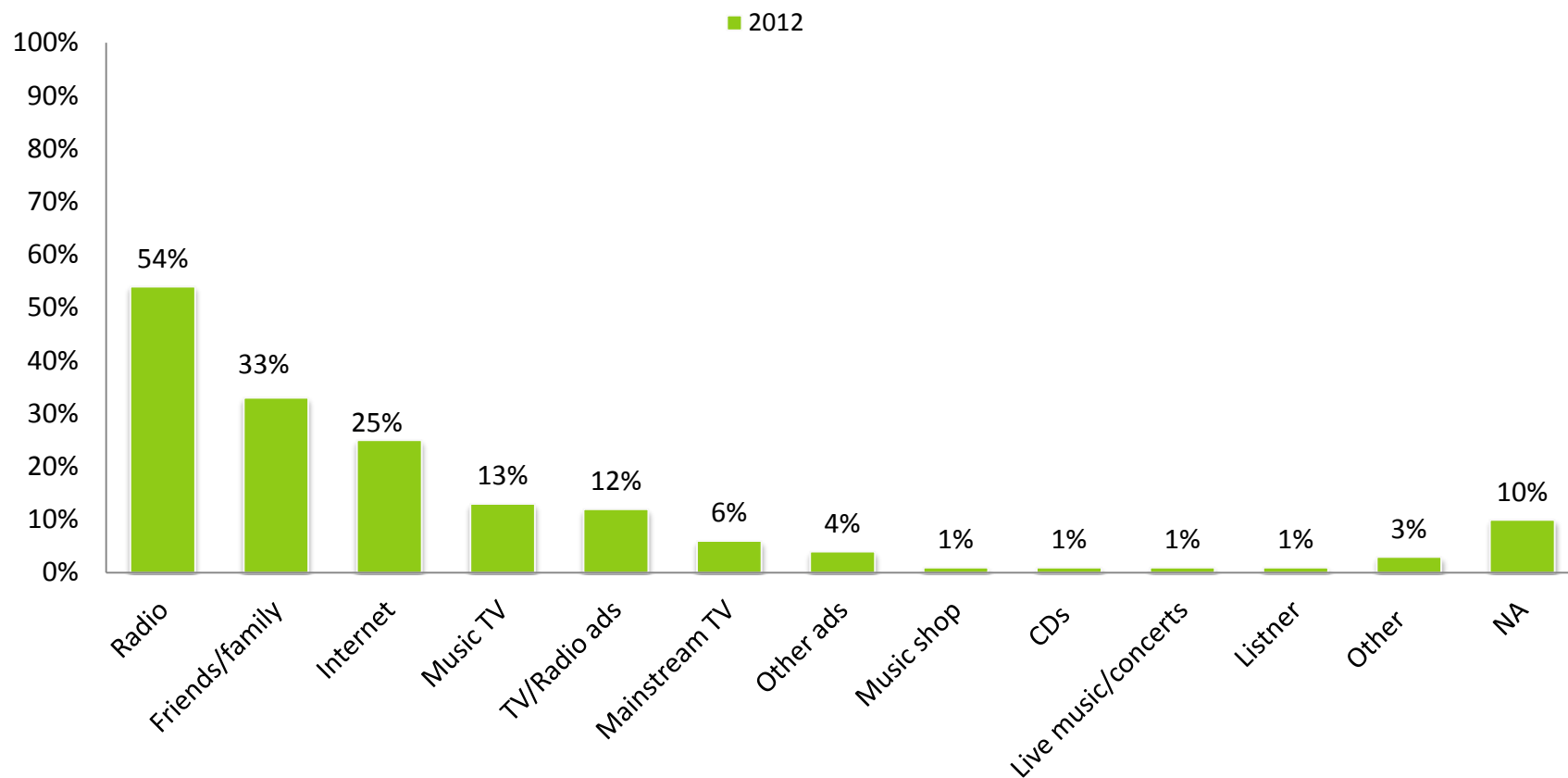
Base: n=500

Can you describe to me what you think the functions of NZ On Air are?



MUSIC/RADIO

How do you find out about new music?

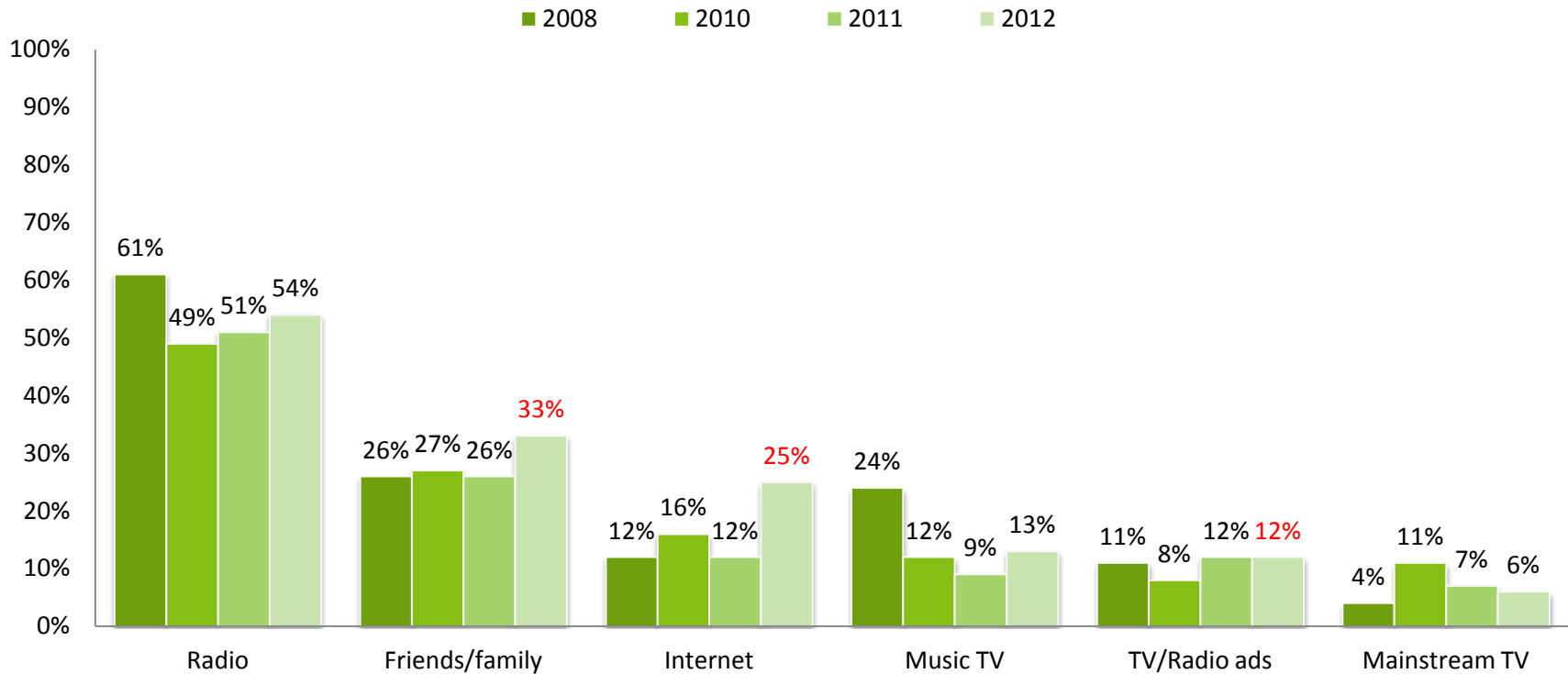


Significantly more likely to say:

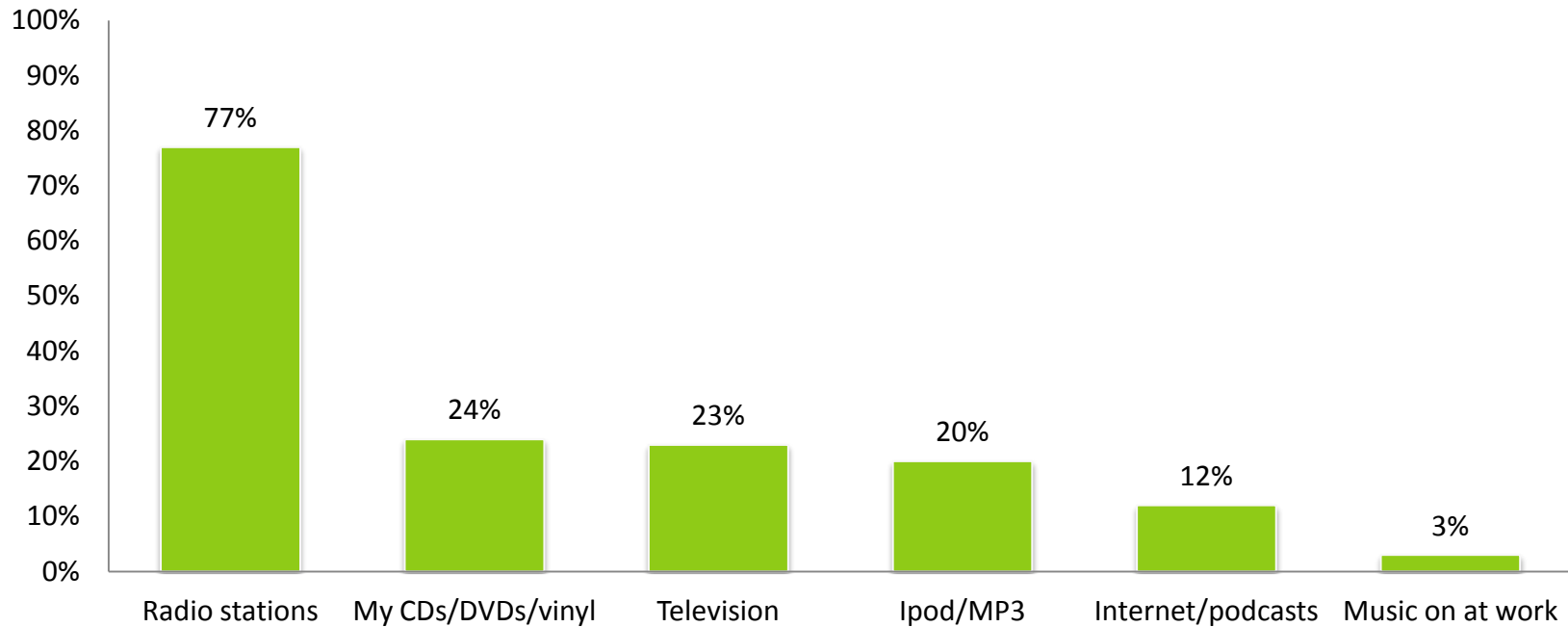
- *Radio: 35-44 years*
- *Friends and family: Maori*
- *Internet: 18-34 years, male*
- *Music TV: Maori*
- *Mainstream TV: North Islanders living outside Auckland*

How do you find out about new music?

(Time Series – only available for some measures)



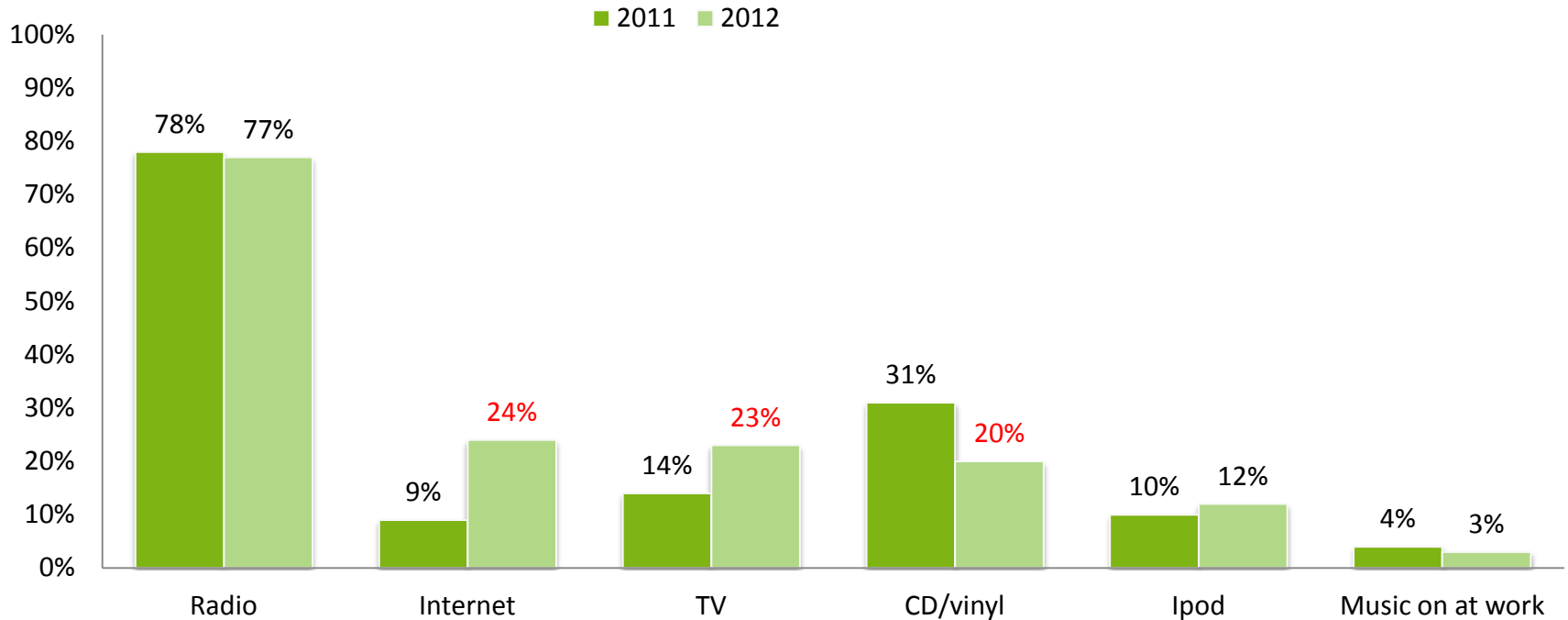
Where do you get your daily music fix from? (Top mentions)



Significantly more likely to say:

- *Radio: 35-54 years*
- *My CDs/Vinyl: North Island (outside Auckland), 55 years plus, female*
- *Television: Maori*
- *Ipod: Maori, 18-24 years and 35-54 years*
- *Internet: North Island (outside Auckland), 18-34 years*

Where do you get your daily music fix from? (Time Series)



Significantly more likely to say:

- Internet: Asian, Auckland. 18-34 years, male
- CDs/vinyl: South Island, 35-54 years
- Ipod: 18-24 years

APPENDIX: SAMPLE PROFILE

Sample Profile

Gender & Area

	2006	2007	2008	2010	2011	2012
Gender						
Male	40%	37%	32%	36%	32%	50%
Female	60%	63%	68%	64%	68%	50%
Area						
Auckland	31%	30%	28%	33%	33%	33%
Other North Island	45%	46%	48%	43%	43%	43%
South Island	24%	24%	25%	24%	24%	24%

Sample Profile

Age & Ethnicity

	2006	2007	2008	2010	2011	2012
Age						
18-24	9%	7%	7%	8%	5%	15%
25-34	16%	17%	11%	12%	9%	22%
35-44	24%	21%	17%	22%	23%	21%
45-54	20%	23%	19%	20%	21%	17%
55-64	15%	16%	19%	17%	19%	12%
65 plus	15%	15%	27%	22%	24%	14%
Ethnicity						
NZ European	Data not comparable		83%	76%	85%	72%
Maori			9%	14%	6%	13%
Total Other			8%	10%	9%	15%
- Asian						8%
- Pacific						6%

Sample Profile

TV Access

	2011	2012
Pay TV		
Subscriber	56%	59%
Non subscriber	44%	41%
Freeview		
Yes	36%	45%
No	64%	54%

