

NZ On Air Public Perception Research

*Quantitative survey
undertaken in April 2011*

Prepared by
Premium Research



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 several NZ On Air SOI indicators
 - continues key time series measures
 - measures viewing and enjoyment of television programmes made with the help of NZ On Air
 - measures sources of music
 - measures children's viewing habits.
- In 2011 new questions were added on:
 - Understanding of the role of NZ On Air
 - Methods of watching television
 - Children's viewing preferences – that were asked directly by children aged between 5 and 14 years
- Wherever possible, comparisons are made between results of this survey and the previous NZ On Air quantitative surveys of the general public.

METHODOLOGY

Methodology (2011)

- Computer Assisted Telephone Interviewing (CATI)
- 15 minute interview
- Interviewing undertaken in April 2011
- Households to call are randomly identified
- Either the person who answers the phone (if eligible) or person with the next birthday is interviewed
- Main sample of n=750 (people aged 18 years plus living in households with landlines)
- Supplementary sample of n=124 children aged 5-14 years
- The majority of this report is based on the main sample only
- Main sample stratified for regional representation to match population distribution
- **Red** text indicates a significant change over time or significant difference between two results
- 2011 sample profile similar to 2010 sample. Two significant differences between the samples:
 - Less people aged 18-24 years in the 2011 sample*
 - More Pakeha and less Maori in the 2011 sample

SUMMARY

Key Performance Measures

- 74% 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.
- 71% of NZers agree: *NZ On Air's support of NZ music on radio is important.*
- 65% of NZers agree: *NZ On Air supports radio programmes that are important to New Zealanders, like radio programmes on Radio New Zealand and on commercial radio stations.*
- 63% of NZers agree: *NZ On Air supports digital and archiving services that are important to New Zealanders, like the website NZ On Screen and keeping radio programmes for future generations.*
- 61% of NZers agree *NZ On Air supports community broadcasting programmes and services that are important to people, like regional television and access radio.* The proportion that agree with this statement has increased from 55% in 2010, this is a statistically significant increase.

Understanding of NZ On Air

- 91% of NZers have heard of NZ On Air.
- The roles most frequently associated with NZ On Air are: funding and promoting programmes.
- The television programmes funded by NZ On Air that are most closely associated with the organisation are Country Calendar and North/South. 40% of NZers cannot name any television programmes funded by NZ On Air.



Television

- 31% of NZers think the amount of NZ made programmes on television should increase.
- The most watched **and** enjoyed programmes made with the help of NZ On Air (we asked about) were:
 - Country Calendar
 - TV 1 Documentaries
 - Politically Incorrect Parenting
 - What’s Really in Our Food
 - TV3 Inside NZ Documentaries
- Considering the ways people now watch television: 89% have watched live television in the last three months, 36% time delayed and 21% online.



Music/Radio

- 67% of New Zealanders think it is important *that radio stations are encouraged to play more New Zealand music*. This is a statistically significant increase on the result of 60% in 2010.
- The most common sources of new music are:
 - Radio (51%)
 - Friends/family (26%)
 - Internet (12%)
 - In TV/radio advertising (12%).
- The most common sources of ‘daily music fix’ are:
 - Radio (78%) - statistically significant increase from 73% in 2010
 - My own collection (31%)
 - TV (14%) – statistically significant decrease from 21% in 2010
 - iPod (10%)
 - Internet/podcasts (9%).

Children's programmes on television

- 84% of NZers think it is important that *there are New Zealand made children's programmes on television*. The proportion that agree with this statement has increased from 80% in 2010, this is a statistically significant increase.
- 23% of NZers think *NZ On Air should use public funding for children's programmes that screen only on pay channels*. The proportion that agree with this statement has decreased from 47% in 2010, this is a statistically significant decrease.



Children's programmes on television

- Parents say their children (5-14 years) watch children's television on the following channels most often:
 - TV2 (27%)
 - Disney Chanel (19%)
 - Nickelodeon (13%)
 - Cartoon Network (9%).
- Children (5-14 years) say they like to watch children's television on the following channels best:
 - TV2 (29%)
 - Disney Chanel (24%)
 - FOUR (11%)
 - Cartoon Network (10%)
 - Nickelodeon (10%).
- Children (5-14 years) say their favourite programmes are: Sponge Bob (15%), Ben 10 (9%) and the Simpsons (6%). What Now and Sticky TV were each mentioned as their favourite by 3% of children.

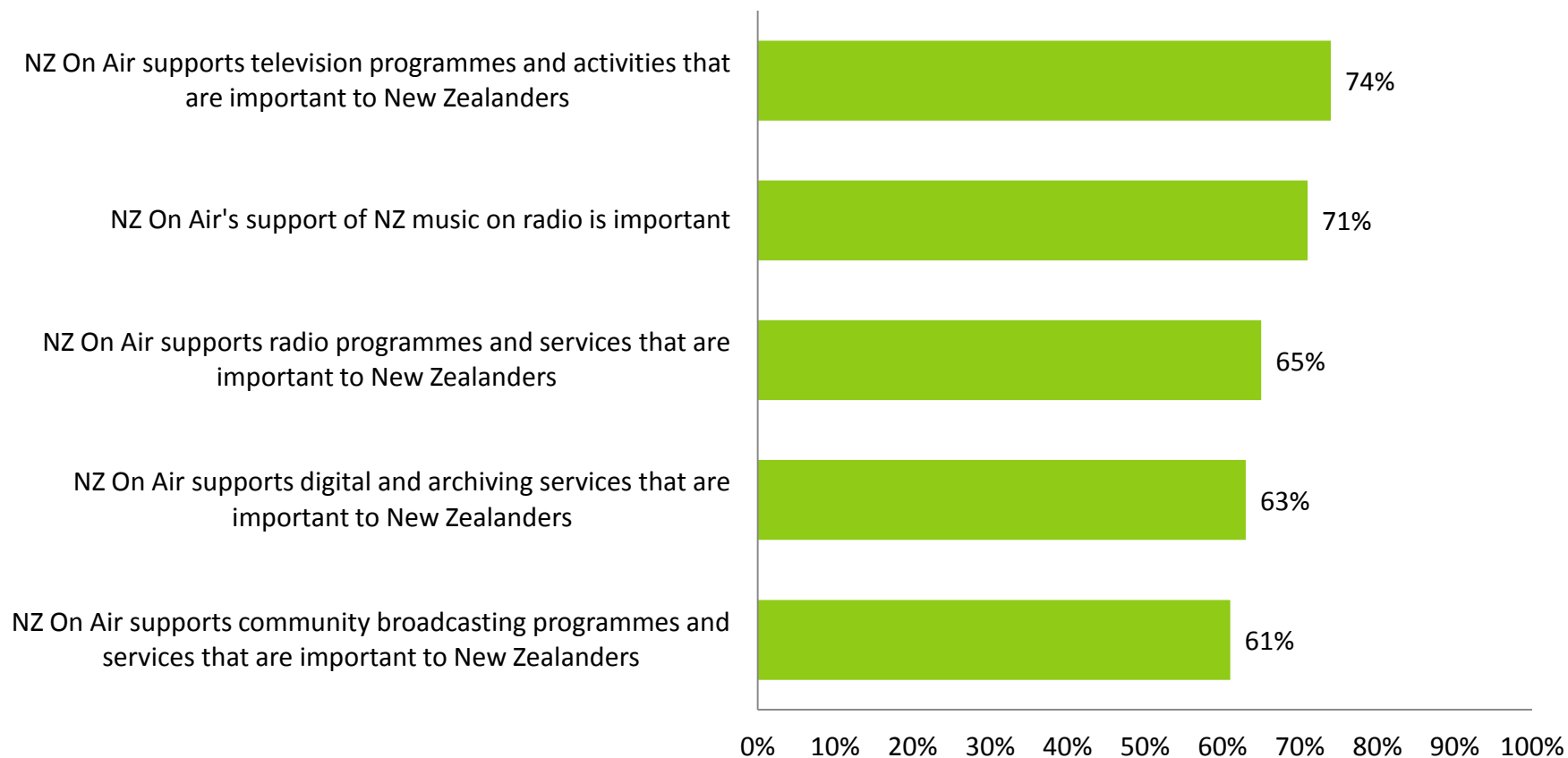
Children's programmes on television

- What Now had been watched by 69% of the children. Of those who had watched it, 26% said it was one of their favourite programmes and 49% said they watch it a lot.
- Erin Simpson Show had been watched by 52% of the children. Of those who had watched it, 25% said it was one of their favourite programmes and 45% said they watch it a lot.
- Sticky TV had been watched by 73% of the children. Of those who had watched it, 16% said it was one of their favourite programmes and 29% said they watch it a lot.

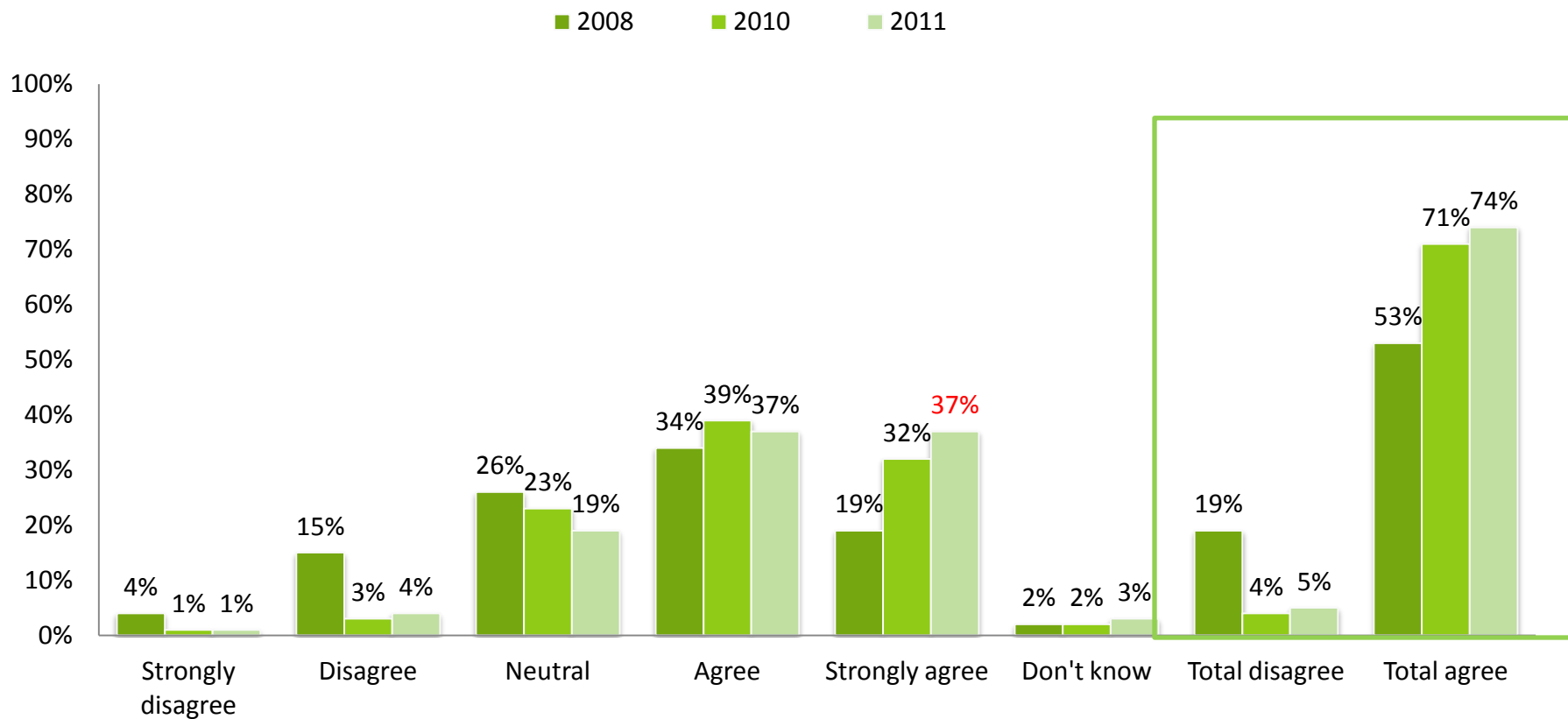
KEY PERFORMANCE MEASURES



Key Measures Comparison (Total Agree)



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



Significantly more likely to disagree in 2011: Auckland

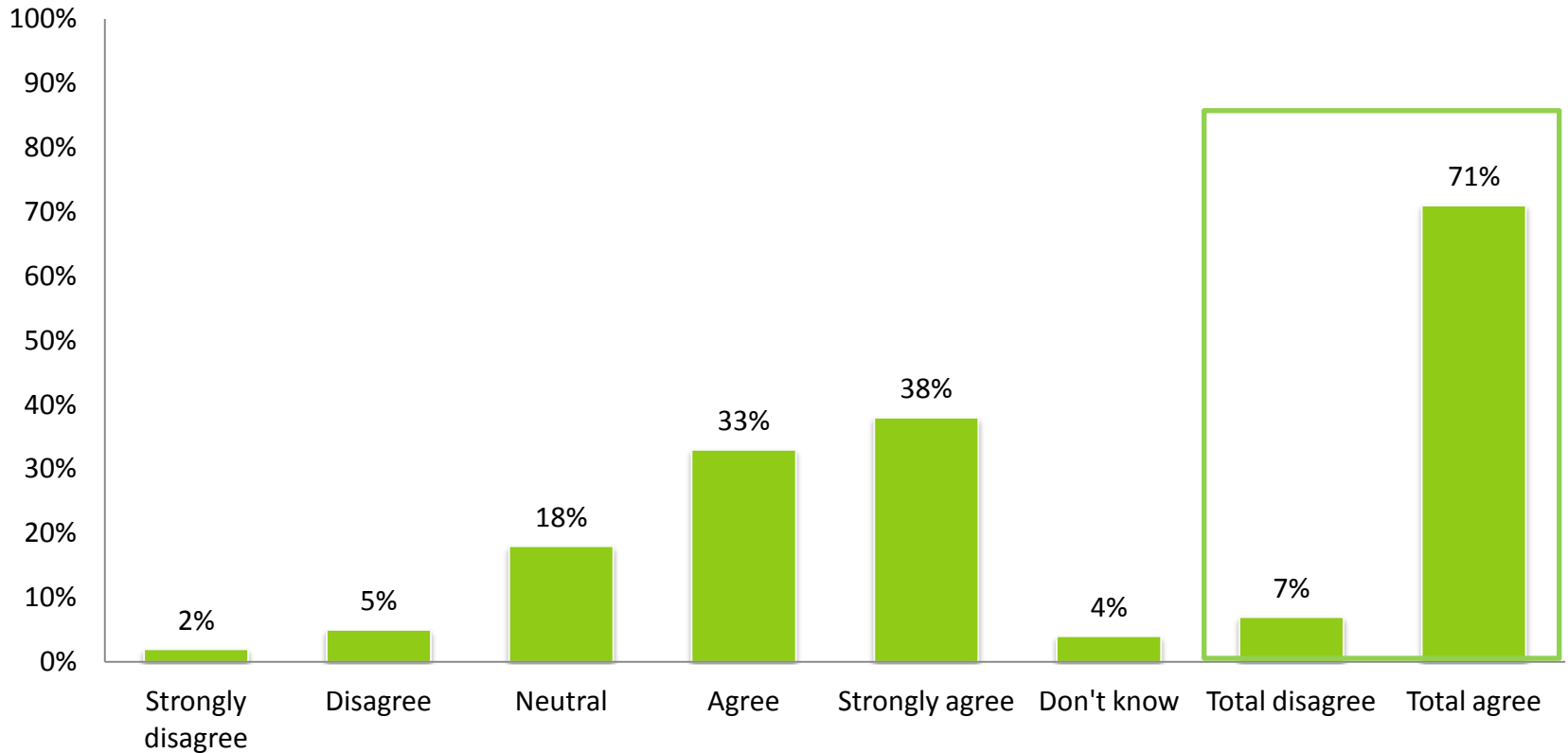
Note: Addition of the word 'television' in 2011 for consistency with SOI reporting



Base: Main sample n=750



NZ On Air's support of NZ music on radio is important



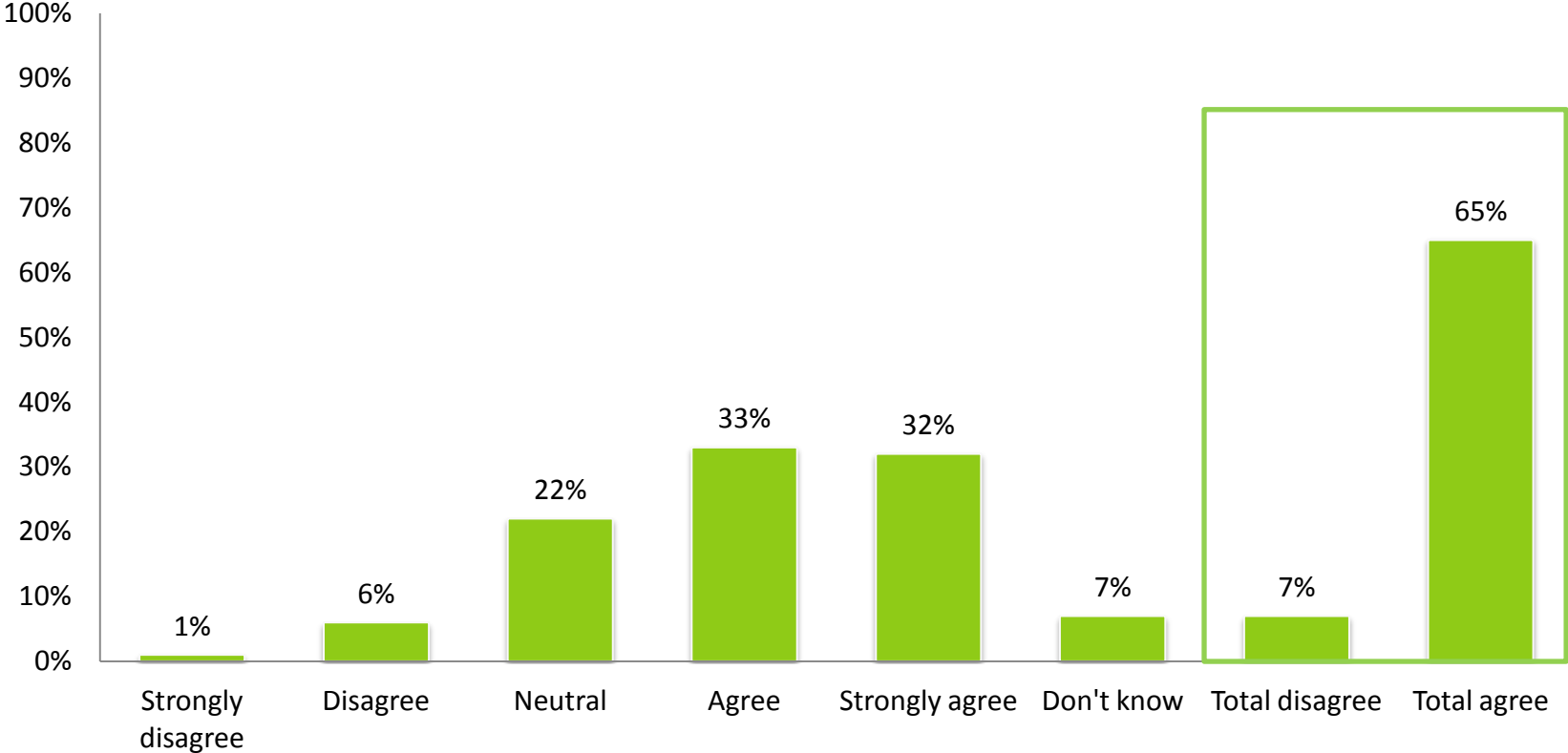
Significantly more likely to disagree: Auckland, 55 years plus, male



Base: Main sample n=750



NZ On Air supports radio programmes that are important to New Zealanders, like radio programmes on Radio New Zealand and on commercial radio stations



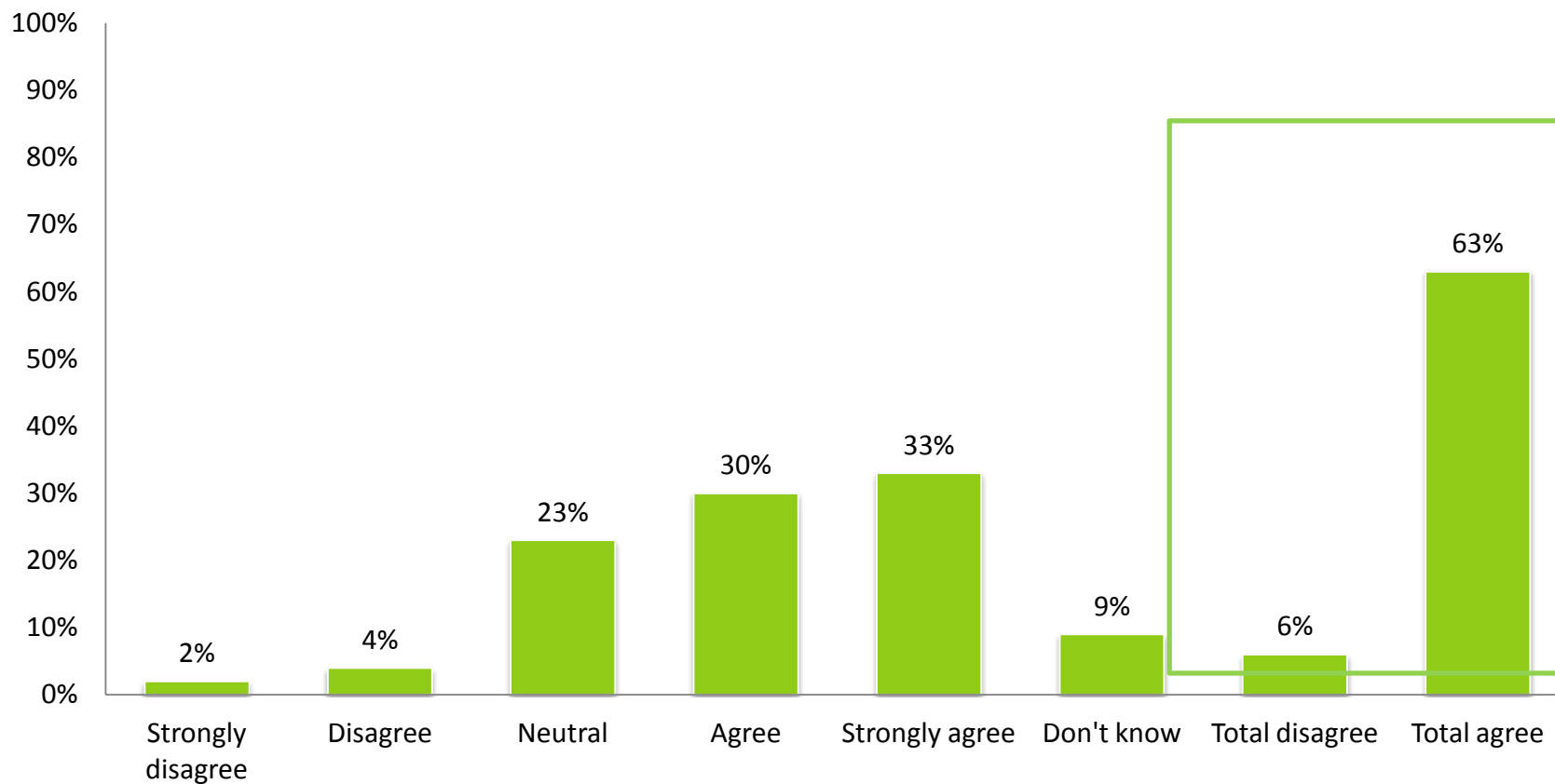
Significantly more likely to disagree: Auckland, Male



Base: Main sample n=750



NZ On Air supports digital and archiving services that are important to New Zealanders



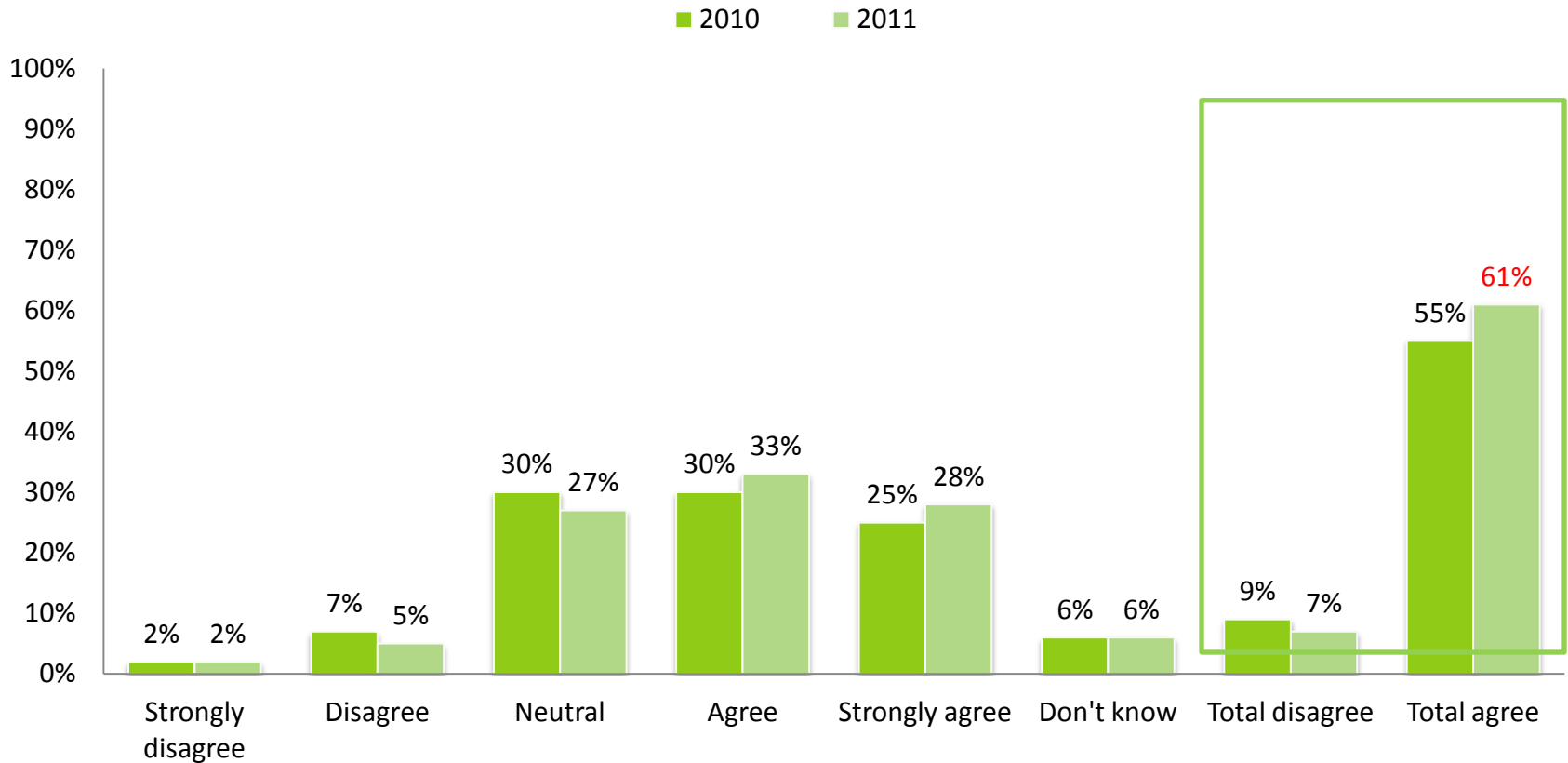
Significantly more likely to agree: 35-44 years



Base: Main sample n=750



NZ On Air supports community broadcasting programmes and services that are important to New Zealanders, like regional television and access radio



Significantly more likely to disagree in 2011: Auckland, Male

Significantly more likely to agree in 2011: South Island, Female

Note: Different wording in 2010: NZ On Air supports important community broadcasting programmes and activities, like [inserted regional TV/radio from respondents area]

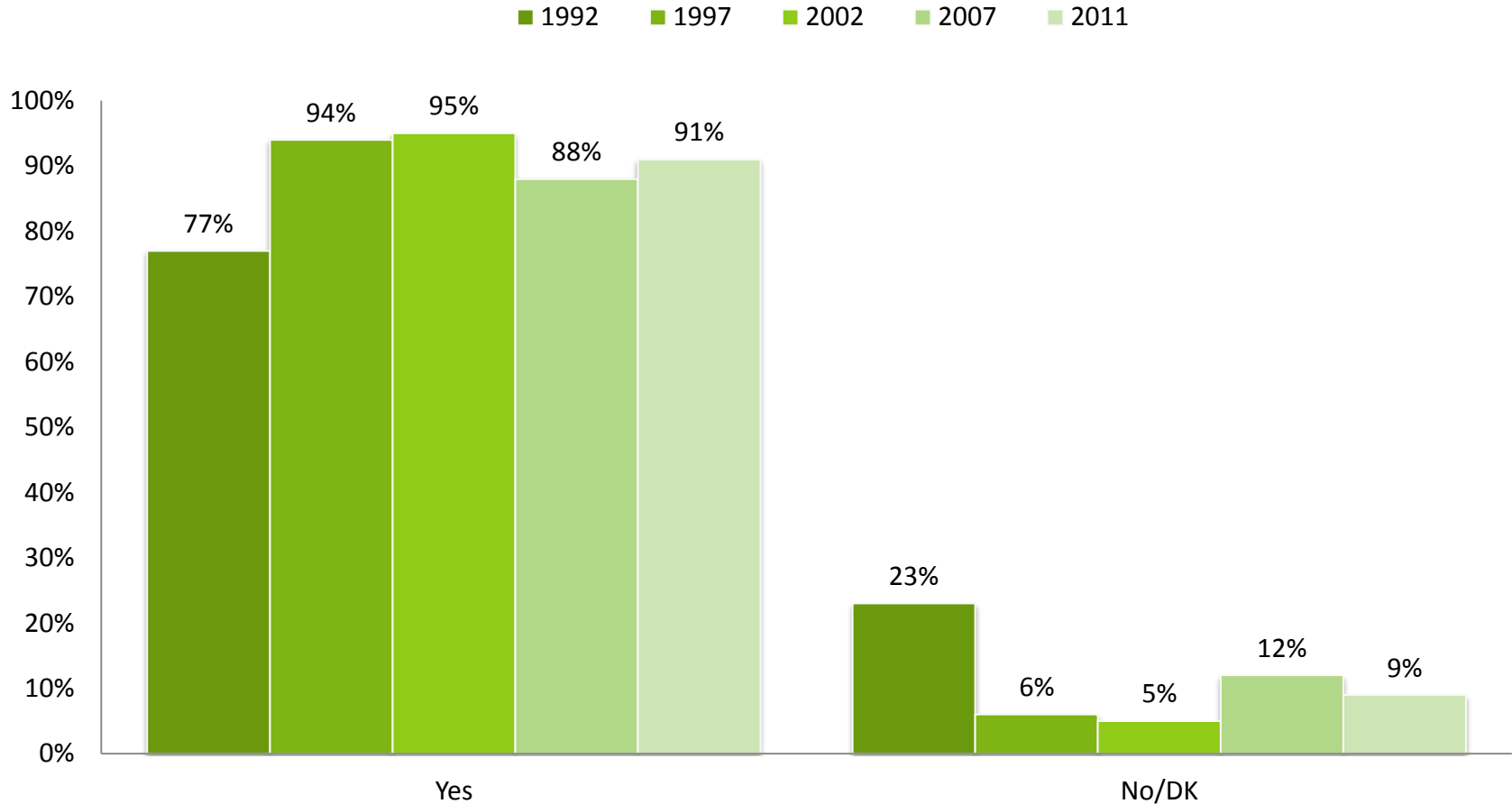
Base: Main sample n=750



UNDERSTANDING OF NZ ON AIR



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



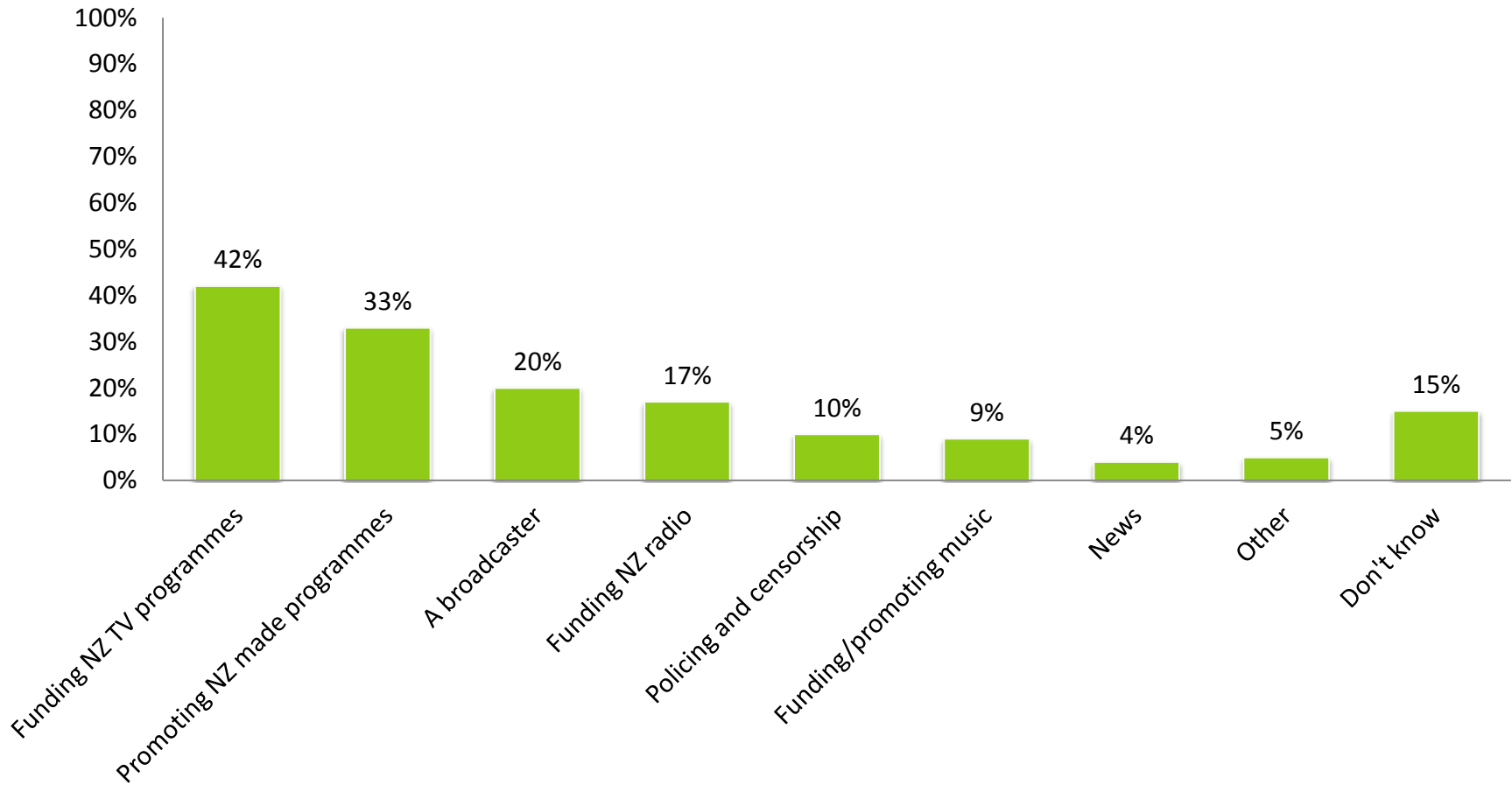
Significantly more likely to say yes in 2011: Pakeha, 35-54 years

Significantly more likely to say no in 2011: Asian, 55 years plus

Base: Main sample n=750



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



Base: Those that have heard of NZ On Air n=681

Name all of the television programmes funded by NZ On Air

Shortland Street	22%	Sticky TV	2%
News	17%	Attitude	2%
Country Calendar	15%	Te Karere	1%
North or South	7%	Asia Down Under	1%
Outrageous Fortune	6%	Target	1%
Fair Go	5%	Breakfast	1%
Close Up	5%	Music on TV	1%
Maori TV Channel	5%	Sunday	1%
Documentaries on TV 1	5%	Sports	1%
What Now?	5%	Police 10/7	1%
Documentaries on TV3	4%	Cambell Live	1%
7 Days	4%	Tagata Pasifika	1%
Go Girls	4%	None	5%
The Almighty Johnsons	3%	Other	9%
Masterchef	3%	Don't know	40%



Base: Main sample n=750



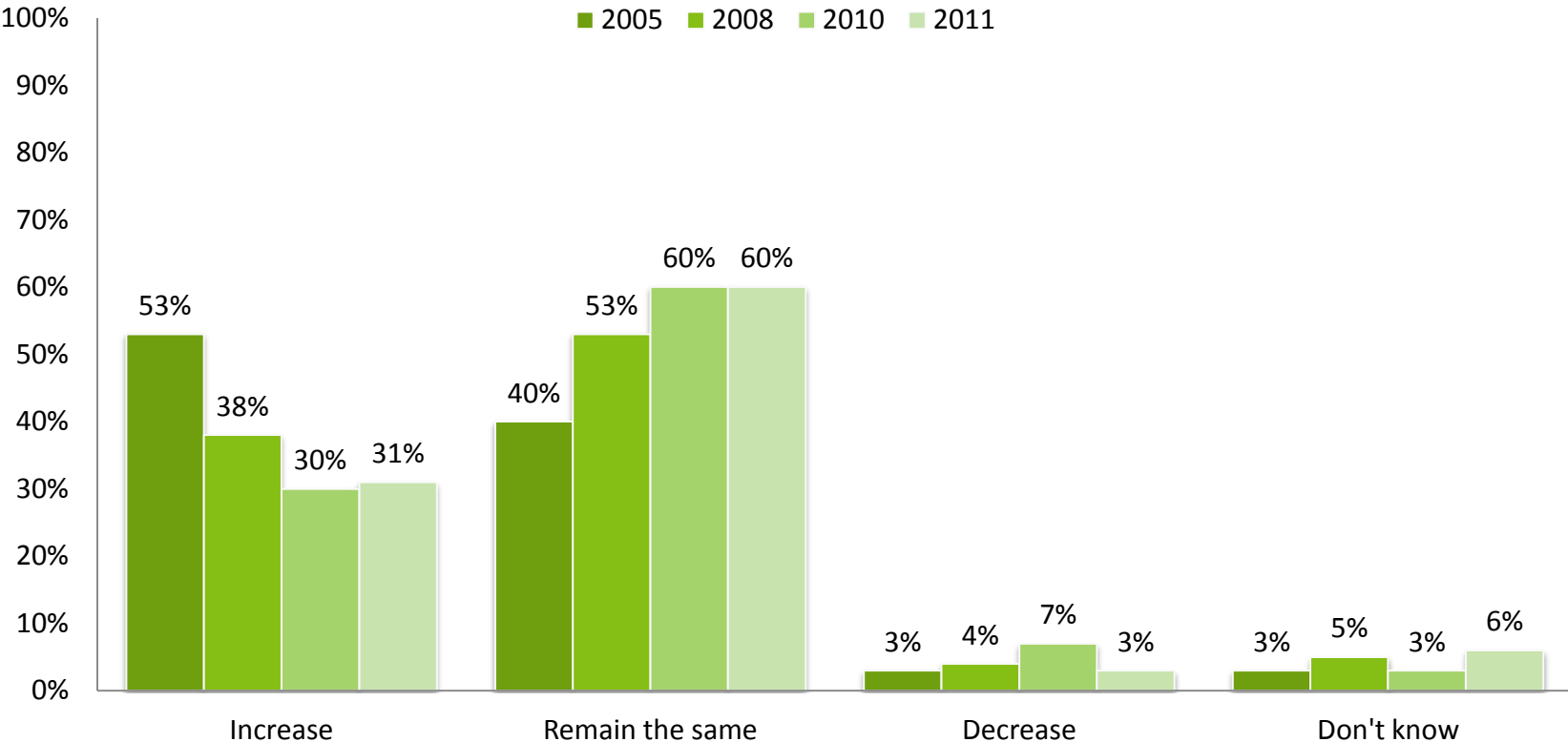
Name all of the television programmes funded by NZ On Air (top mentions only)

	2007	2011
Shortland Street	27%	22%
News	14%	17%
Country Calendar	29%	15%
North or South	-	7%
Outrageous Fortune	8%	6%
Fair Go	6%	5%
Close Up	3%	5%
Maori TV Channel	5%	5%
What Now?	5%	5%

TELEVISION



Currently around 32% percent of programmes shown on television between 6am and midnight are New Zealand made. During prime time, this goes up to 40 percent. Do you think this figure should increase, remain the same, or decrease?



Significantly more likely to say increase: Maori.
Significantly more likely to say remain the same: Pakeha, 35-44 years.



Base: Main sample n=750

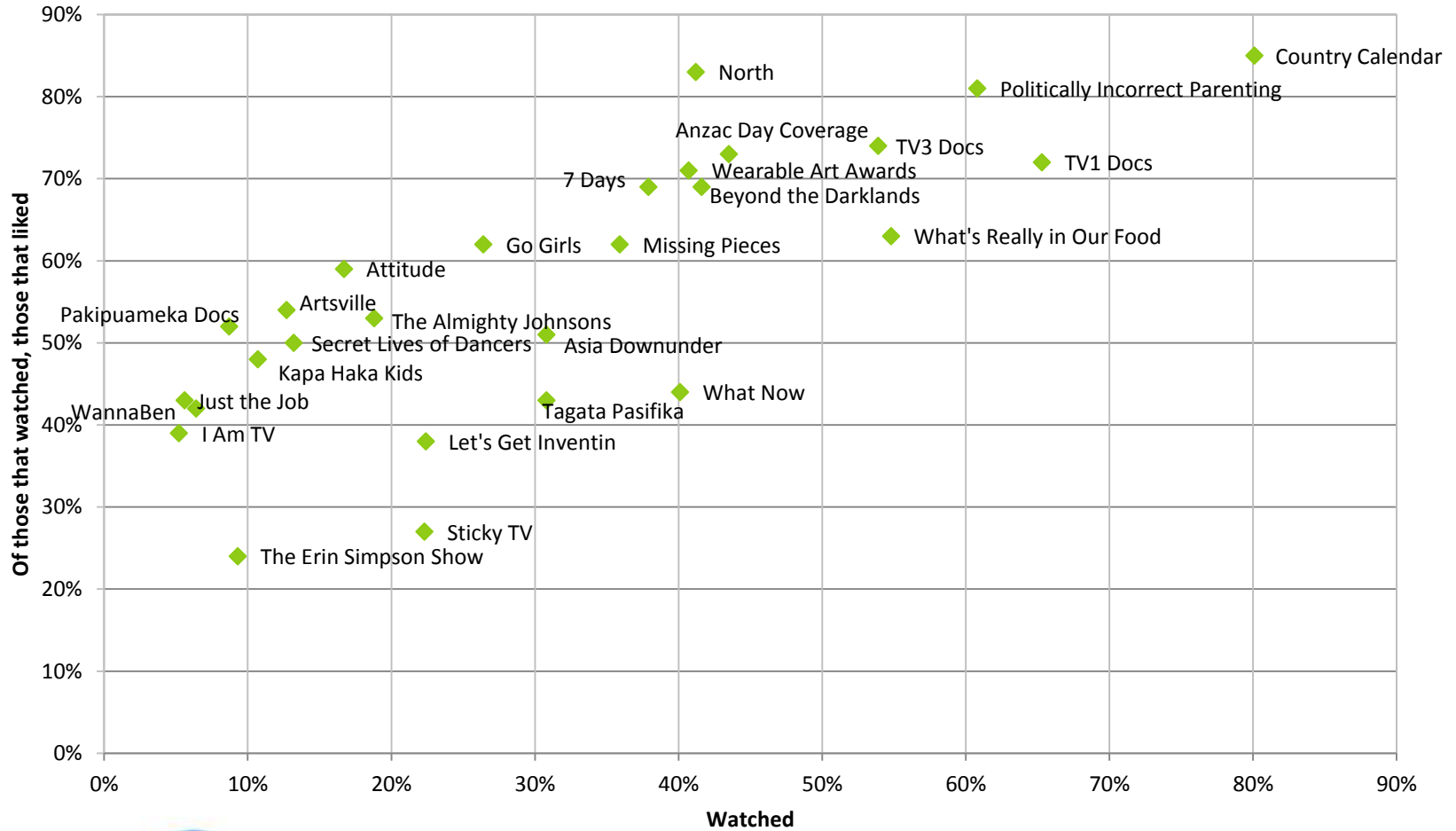


Which of the following programmes, made with the help of NZ On Air, have you watched?

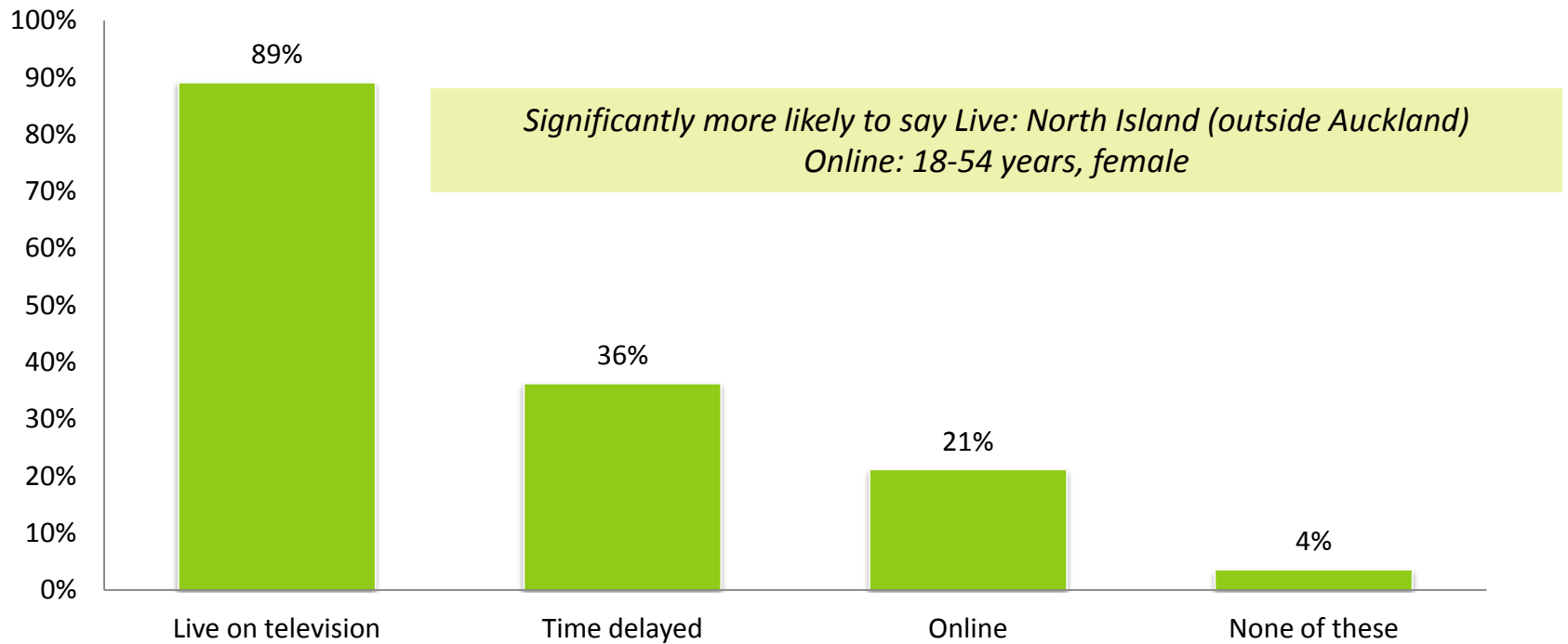
Country Calendar	80%
TV1 Documentaries	65%
Politically Incorrect Parenting	61%
What's Really In Our Food?	55%
TV3 Inside NZ Documentaries	54%
ANZAC day coverage	44%
Beyond the Darklands	42%
North	41%
Wearable Art Awards	41%
What Now	40%
7 Days	38%
Missing Pieces	36%
Asia Downunder	31%
Tagata Pasifika	31%
Go Girls	26%

Let's Get Inventin'	22%
Sticky TV	22%
The Almighty Johnsons	19%
Attitude	17%
The Secret Lives of Dancers	13%
Artsville	13%
Kapa Haka Kids	11%
The Erin Simpson Show	9%
Pakipumeka Documentaries	9%
WannaBen	6%
Just the Job	6%
I Am TV	5%

Now I would like you to tell me how much you like each of the programmes you have watched

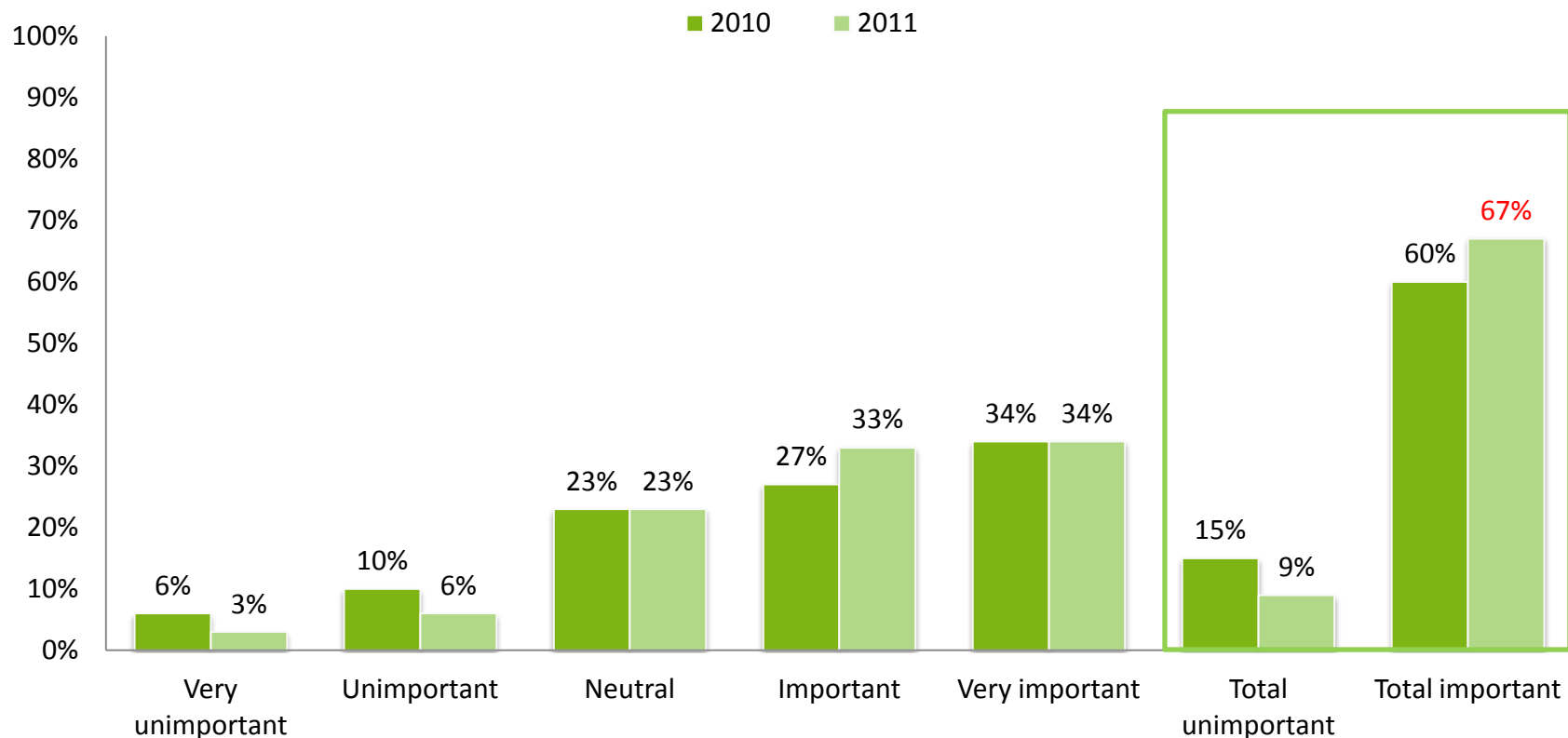


Which of the following ways have you watched television in the last three months?



MUSIC/RADIO

How important do you think it is that radio stations are encouraged to play more New Zealand music



Significantly more likely to say unimportant in 2011: 55 years plus, male

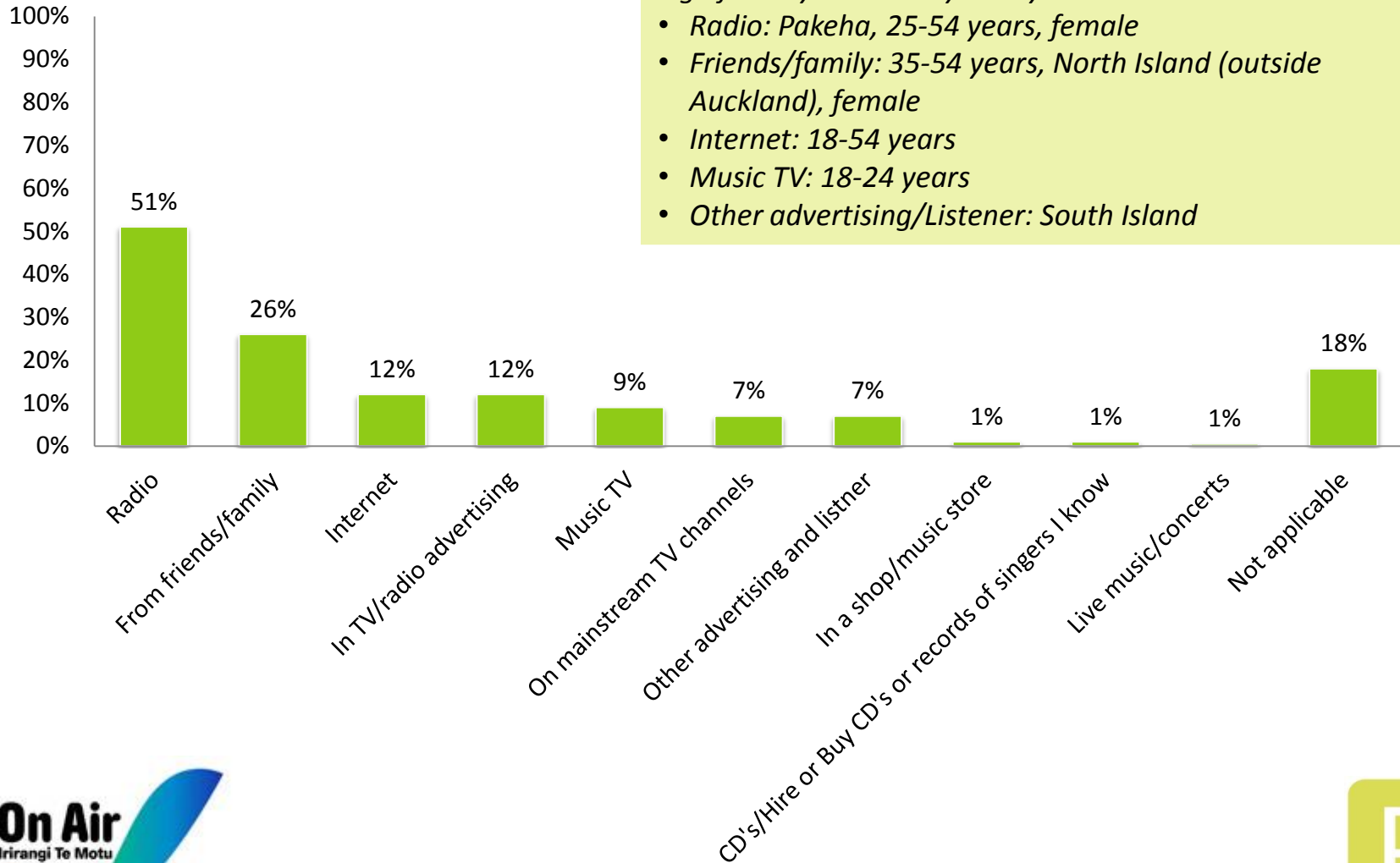
Significantly more likely to say important in 2011: 25-54 years



Base: Main sample n=750



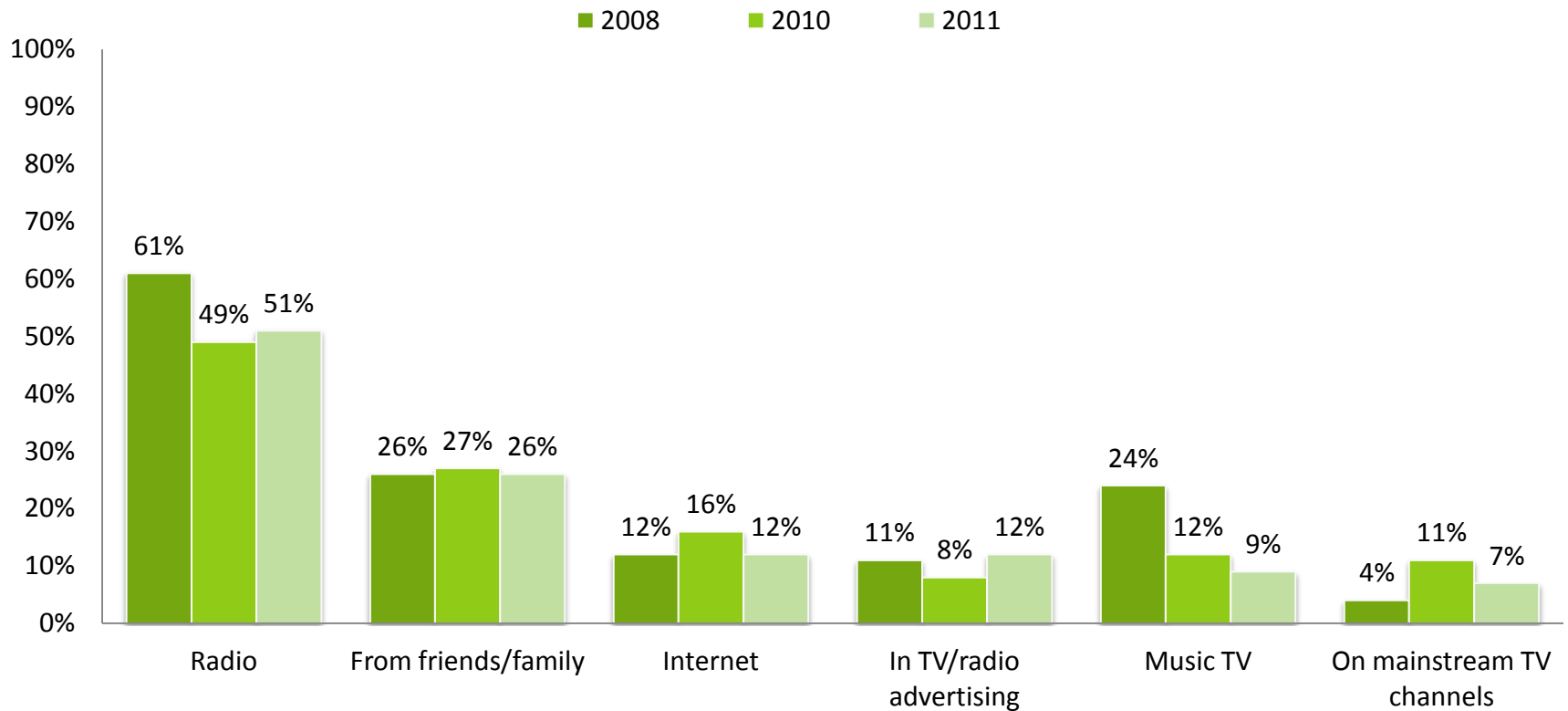
How do you find out about new music?



Significantly more likely to say:

- Radio: Pakeha, 25-54 years, female
- Friends/family: 35-54 years, North Island (outside Auckland), female
- Internet: 18-54 years
- Music TV: 18-24 years
- Other advertising/Listener: South Island

How do you find out about new music? (Time Series)

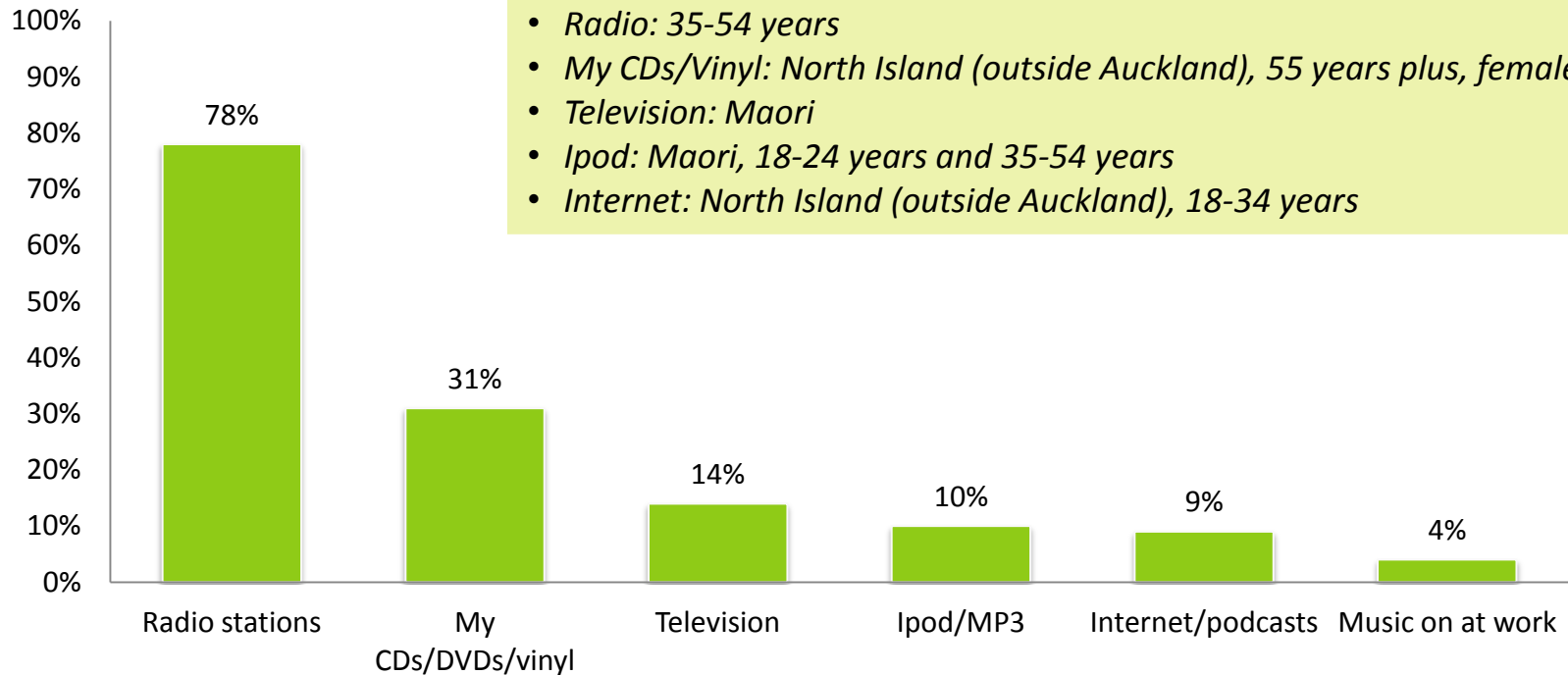


Base: Main sample n=750



Where do you get your daily music fix from?

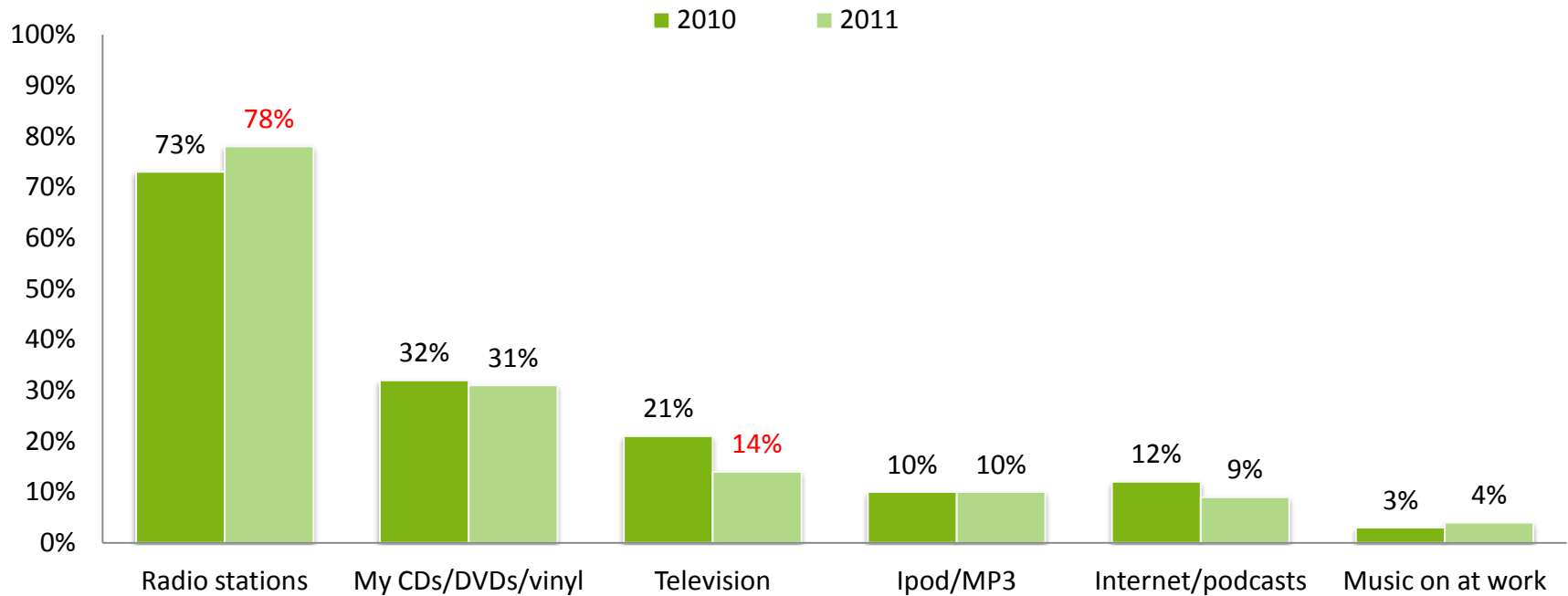
Top mentions



Significantly more likely to say:

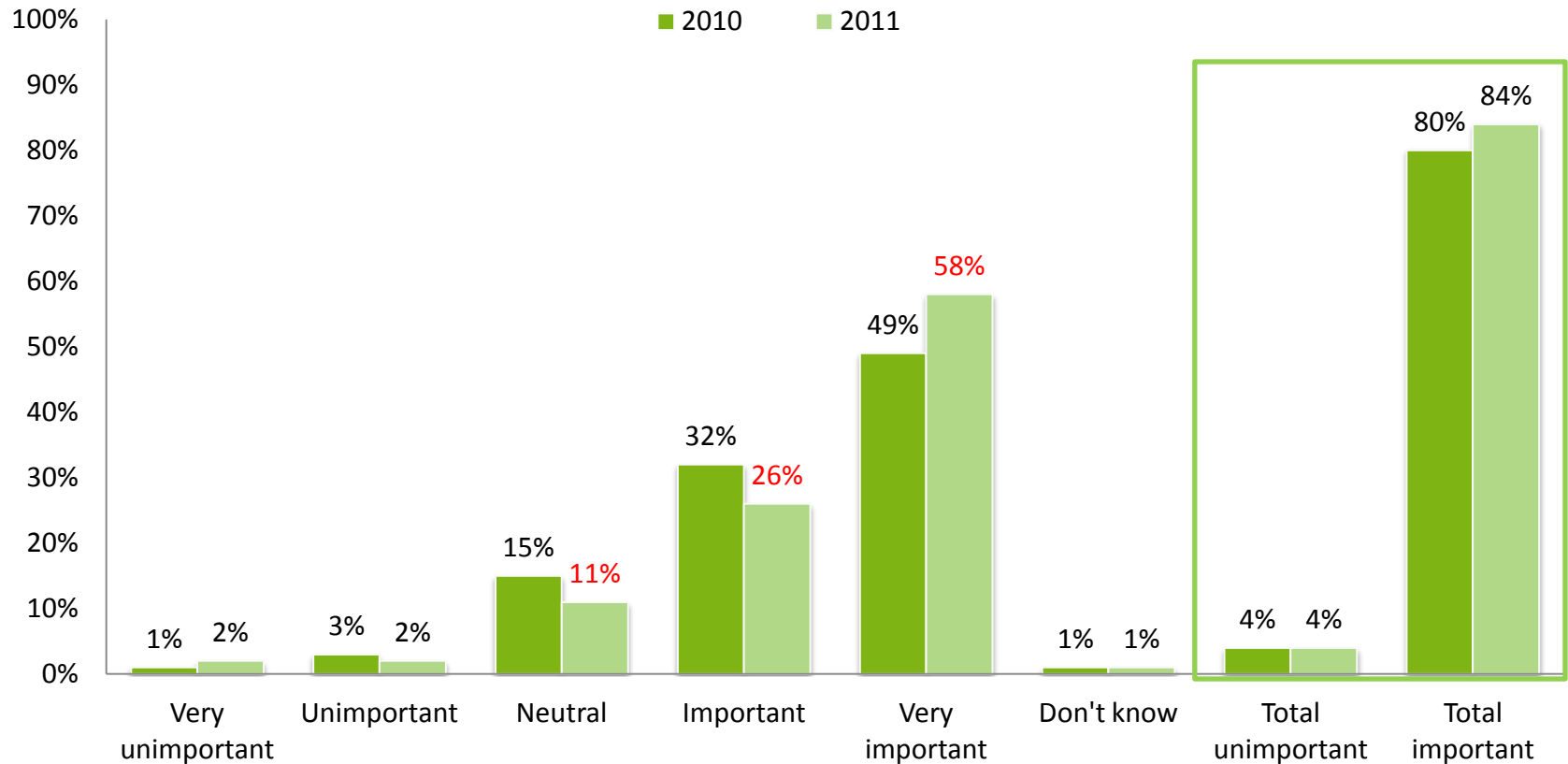
- *Radio: 35-54 years*
- *My CDs/Vinyl: North Island (outside Auckland), 55 years plus, female*
- *Television: Maori*
- *Ipod: Maori, 18-24 years and 35-54 years*
- *Internet: North Island (outside Auckland), 18-34 years*

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



CHILDREN'S TELEVISION

How important do you think it is that there are New Zealand made children's programmes on television?



Significantly more likely to say unimportant in 2011: 18-24 years

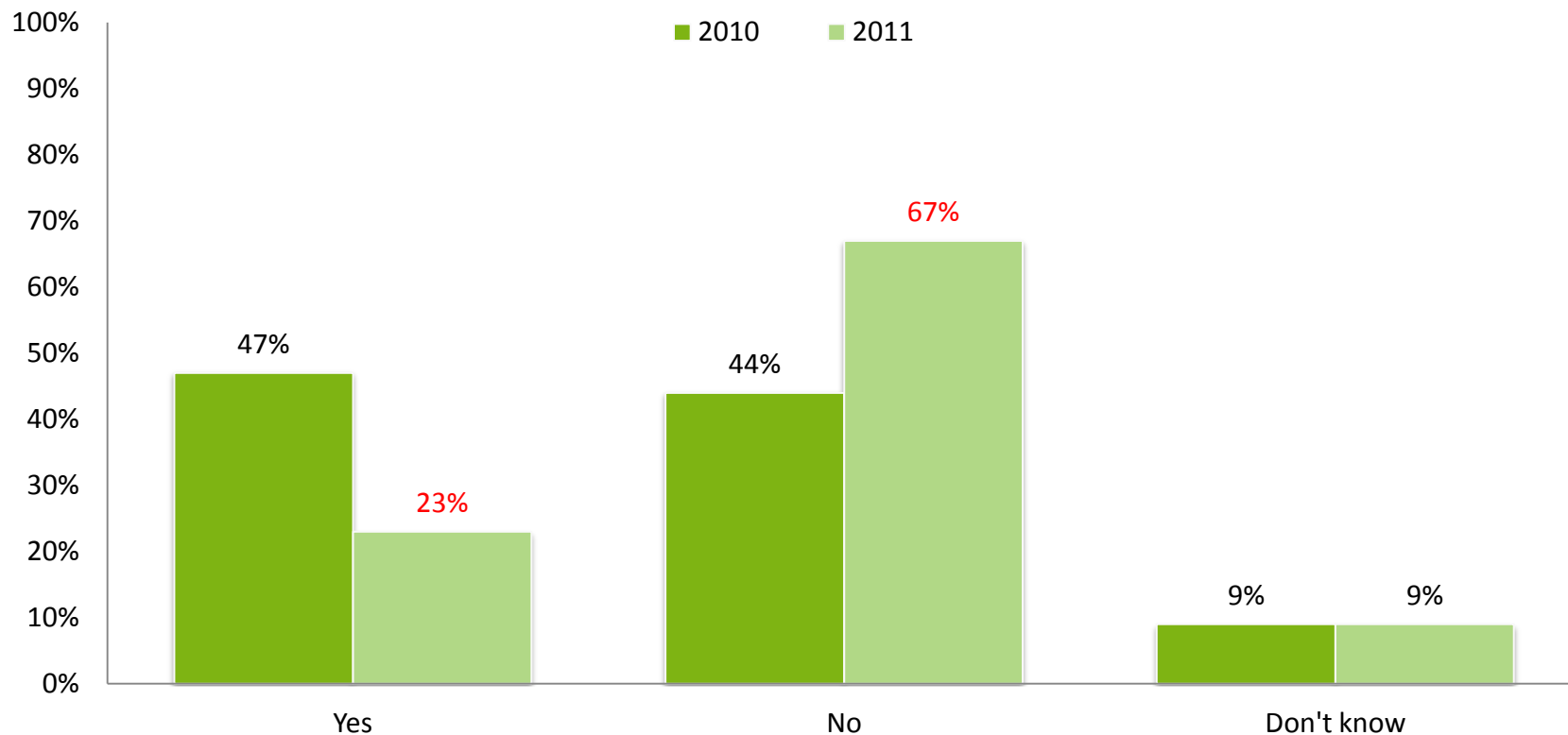
Significantly more likely to say important in 2011: Maori, South Island, 35-54 years



Base: Main sample n=750



Should NZ On Air use public funding for children's programmes that screen only on pay channels like Disney or Nickelodeon?



Significantly more likely to say yes in 2011: Asian

Significantly more likely to say no in 2011: Pakeha, 35-54 years

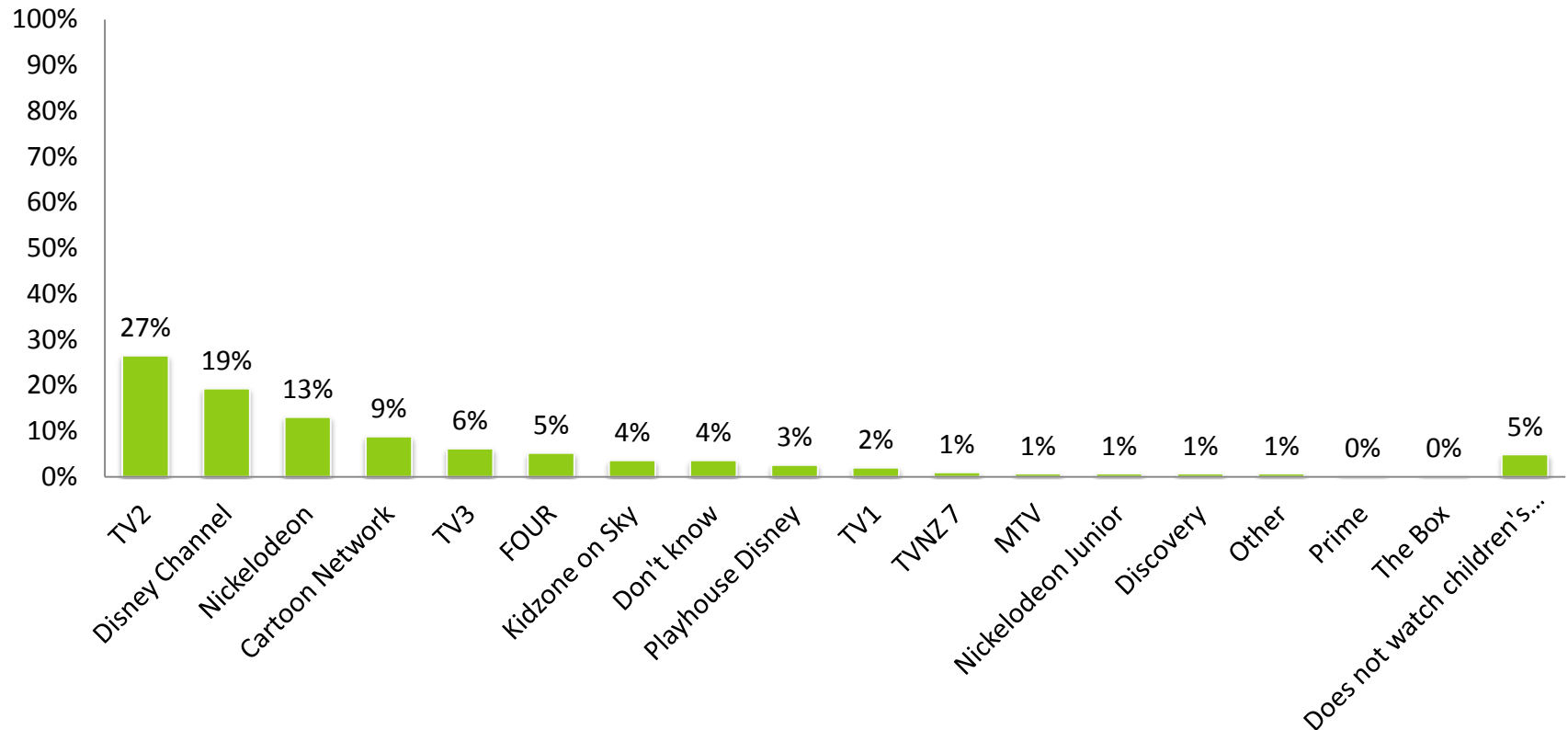
Note: Different wording in 2010: Should NZ On Air use public funding for children's programmes that screen on pay channels?

Base: Main sample n=750



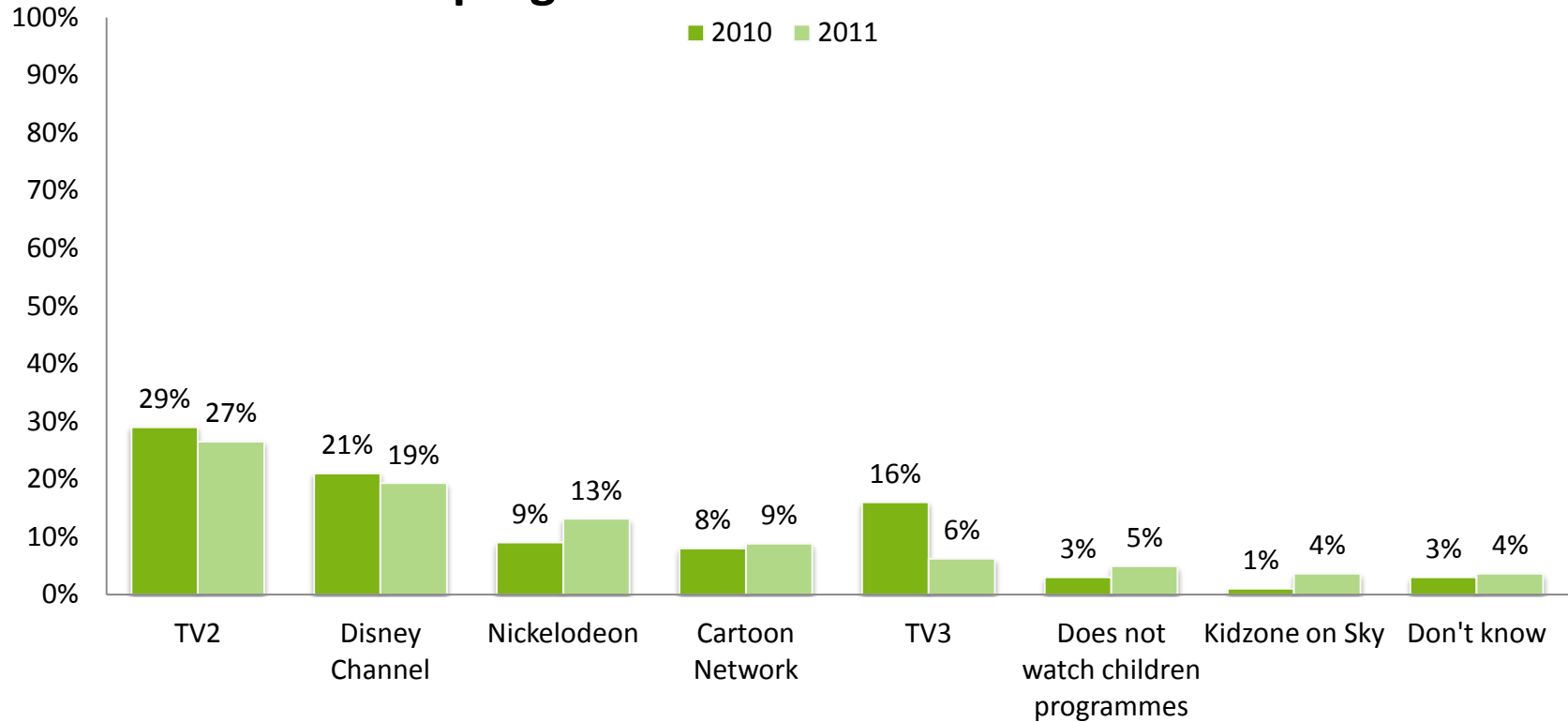
PARENT INTERVIEW

Which channel does your child (5-14 years) watch children's television programmes on most often?



PARENT INTERVIEW

Which channel does your child watch children's television programmes on most often?



Note: Change in age group of child referred to: from 8-14 years in 2010 to 5-14 years in 2011

PARENT INTERVIEW

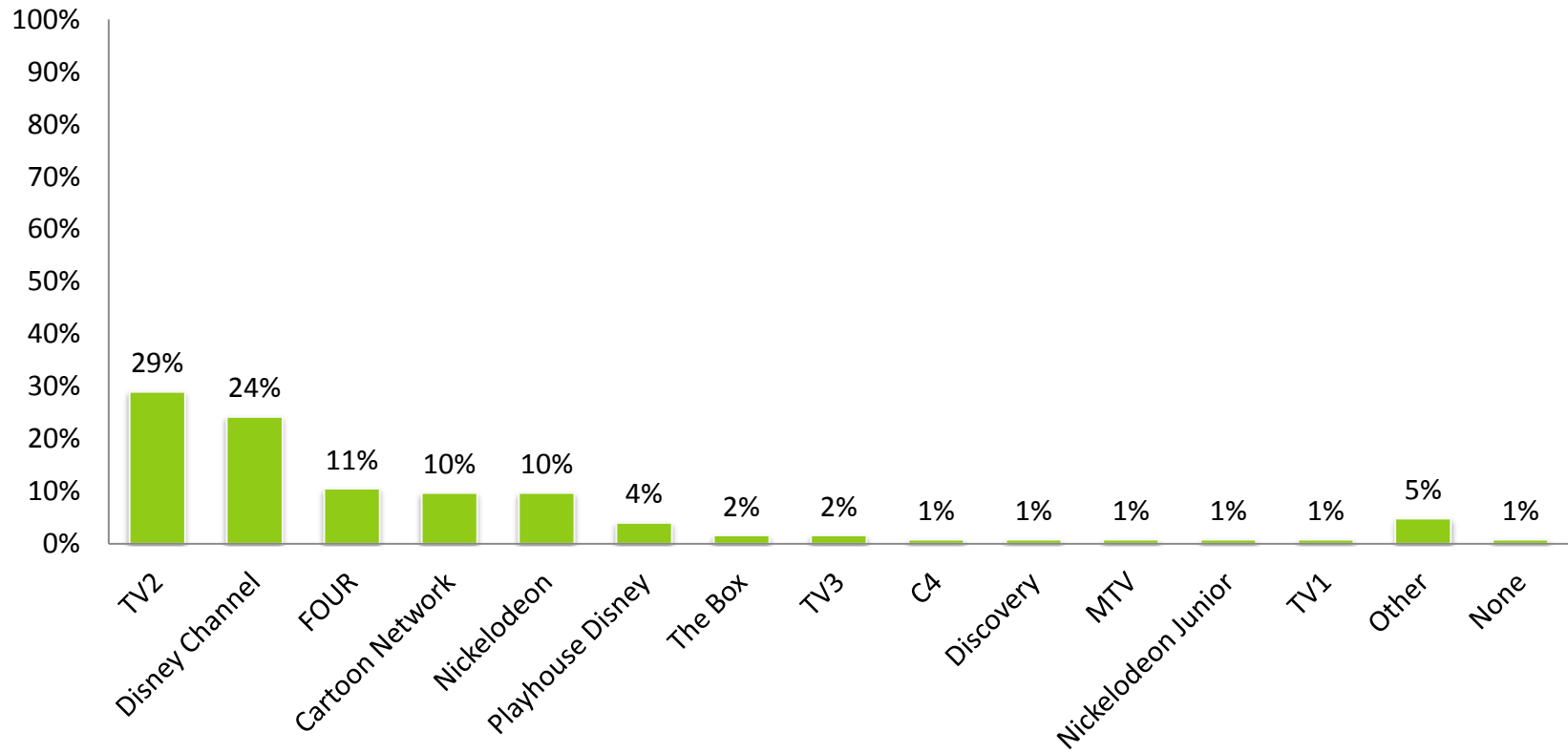
Preferred Channel by Age of Child

	5	6	7	8	9	10	11	12	13	14
TV1					1		1		2	2
TV2	12	5	4	12	9	10	5	8	5	11
TV3	3		1	2	2	1		3	5	2
FOUR	1	3	1		2	1		3	4	1
Prime									1	
The Box								1		
Kidzone on Sky	1	2	2		1	2			2	1
MTV									2	
Disney Channel	6	7	5	7	9	5	7	8	3	2
Playhouse Disney	5	1	1		1					
Cartoon Network	4	4	2	4	3	1	2	2	1	4
Nickelodeon	5	3	2	5	5	7	3	5	1	4
Nickelodeon Junior		1			1					
TVNZ 7		2		1						
Does not watch children programmes	2	3	4					1	2	3
Don't know	1	1	1		1		1	1	3	2
Other							1	1		
Base	40	32	23	31	35	27	21	33	32	32

Note: Numbers shown, rather than percentages, because of small base sizes

CHILD INTERVIEW

Which channel do you like watching children's television programmes on best?



CHILD INTERVIEW

Favourite Kids TV Programme

		2011
1	Sponge Bob	15%
2	Ben 10	9%
3	Simpsons	6%
4	Phineas and Ferb	5%
5	Wizards of Waverly place	5%
6	The Suite Life of Zack and Cody on Deck	4%
7	Dora	3%
8	Scooby Doo	3%
9	Sticky TV	3%
10	What Now	3%
	Other	32%
	Don't know	12%

CHILD INTERVIEW

Have you ever watched?

	Watched	Significantly more likely to say yes
What Now	69%	8-12 years
Erin Simpson Show	52%	
Sticky TV	73%	8-12 years

CHILD INTERVIEW

Do you like?

	Don't like	Like a bit	A favourite	Base
What Now	9%	64%	26%	85
Erin Simpson Show	14%	54%	25%	65
Sticky TV	18%	66%	16%	90

Do you watch a lot?

	Watch a lot	Base
What Now	49%	85
Erin Simpson Show	45%	65
Sticky TV	29%	90

APPENDIX: SAMPLE PROFILE

Sample Profile

Gender & Area

	2005	2006	2007	2008	2010	2011
Gender						
Male	39%	40%	37%	32%	36%	32%
Female	61%	60%	63%	68%	64%	68%
Area						
Auckland	33%	31%	30%	28%	33%	33%
Other North Is.	43%	45%	46%	48%	43%	43%
South Island	24%	24%	24%	25%	24%	24%

Sample Profile

Age & Ethnicity

	2005	2006	2007	2008	2010	2011
Age						
18-24	12%	9%	7%	7%	8%	5%
25-34	17%	16%	17%	11%	12%	9%
35-44	24%	24%	21%	17%	22%	23%
45-54	21%	20%	23%	19%	20%	21%
55-64	13%	15%	16%	19%	17%	19%
65 plus	14%	15%	15%	27%	22%	24%
Ethnicity						
NZ European	Data not comparable			83%	76%	85%
Maori	Data not comparable			9%	14%	6%
Other	Data not comparable			8%	10%	9%

Red text indicates significant difference between 2010 and 2011

