



NZ On Air Stakeholder Survey November 2018

A Colmar Brunton Report



99

ONLINE INTERVIEWS
WITH STAKEHOLDERS

12 minutes



FIELDWORK DATES:

15 – 29 OCTOBER 2018

Objectives

Undertake research to better understand how stakeholders perceive NZ On Air and their strategy.

Method



Sample source

Respondents were sourced from NZ On Air’s database of stakeholders. Based on a total sample of 283 stakeholders, the response rate was 34.9%. This is in line with expectations.



Accuracy

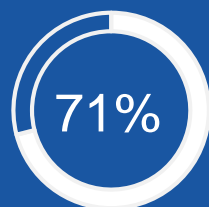
At a total sample level the results have a maximum margin of error (at the 95% confidence interval) of +/-7.9%.

Sample

The sample was comprised of stakeholders who had interacted with NZOA for various reasons (contract types, government stakeholder etc.). Post-weighting was used to ensure this was representative of the overall population of stakeholders, and to meet the following targets:

Funded content (scripted & factual)	55	Music - singles	12
Platform – operational	6	Music - features	2
Platform – content	10	Industry Development	4
Music - projects	6	Government sector	5

Perceptions & Advocacy



of stakeholders would advocate for NZ On Air. Main reasons for this include quality of staff and positive interactions.



Stakeholders understand NZ On Air's purpose to include funding diverse media, and reflecting New Zealand society.

87% feel that NZ On Air fulfils this purpose.

Views on interactions & funding



93% are satisfied with their most recent interaction with NZ On Air.

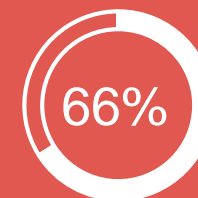


Most stakeholders feel they understand what is required when:

- applying for funding (**99%**)
- delivering a project (**98%**)
- entering into a contract (**93%**).



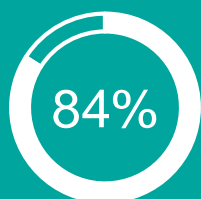
89% understand the funding criteria. **66%** feel the criteria are appropriate.



feel that NZ On Air funds what they should.

Those who feel otherwise, suggest more funding should go to newer creators, as well as greater funding of digital content.

Working relationship



trust NZ On Air



Most are happy with how NZ On Air communicate with them, with few suggesting improvements.



There is very high satisfaction with staff, and relatively strong satisfaction with the website, but with some room for improvement on the website.

Looking forward



Main suggestions for how NZ On Air could further assist the industry include industry development (**10%**), more opportunities for new talent (**7%**), and funding a wider range of content (**6%**).

Sub-group differences

Due to the small base sizes of stakeholders from within each contract type, it is not possible to test for statistically significant differences. However, there are some broad themes that emerge that influence some results. These differences are highlighted on this slide.

Funded Content (Scripted & Factual)



Broadly, stakeholders who applied for funding for scripted & factual content rate lower on most measures within the survey.

While having similar levels of trust to other groups, Funded Content applicants have a higher level of distrust.

They are also generally less satisfied with the service they received during their most recent interaction, less satisfied with staff, and generally feel that NZ On Air is not funding what they should be.

Funding Success

Overall, stakeholders who were less successful in their funding applications – either receiving less funding than they applied for, or none at all – were less satisfied with NZ On Air and with the service they received. Amongst those surveyed, Scripted & Factual applicants were less likely to have received all or some of the funding they applied for, as shown below

	Total	Scripted & Factual
Received all funding applied for	42%	37%
Received most of the funding applied for	17%	14%
Received some of the funding applied for	19%	20%
Did not receive any funding	17%	24%
Not yet heard outcome	5%	5%

This lower success rate, provides an explanation as to why Funded Content applicants feel less positively towards NZ On Air than the rest of the stakeholders.

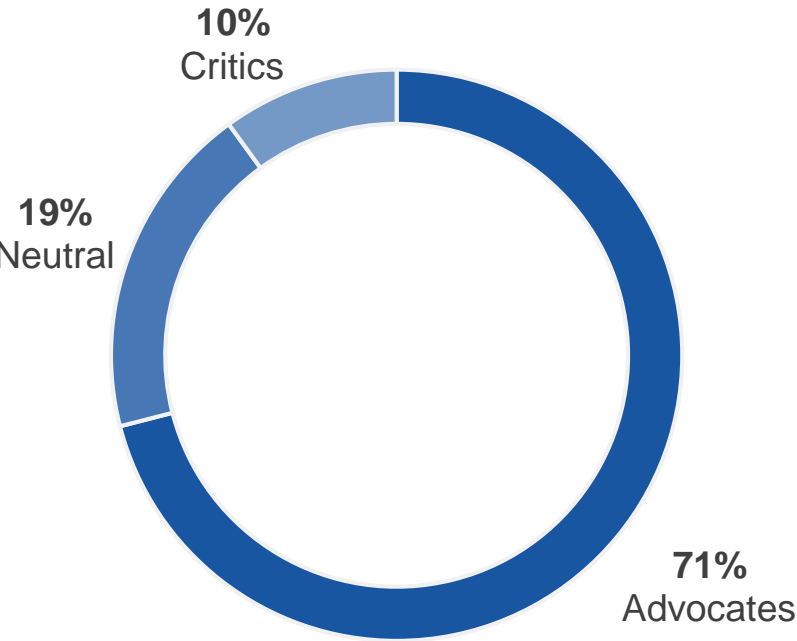


Perceptions & Advocacy



NZ On Air’s stakeholders are strong advocates for the organisation, with seven in ten stating they would speak highly of them.

Levels of advocacy amongst stakeholders



While sub-group analysis is not possible due to base sizes, some general themes emerge:



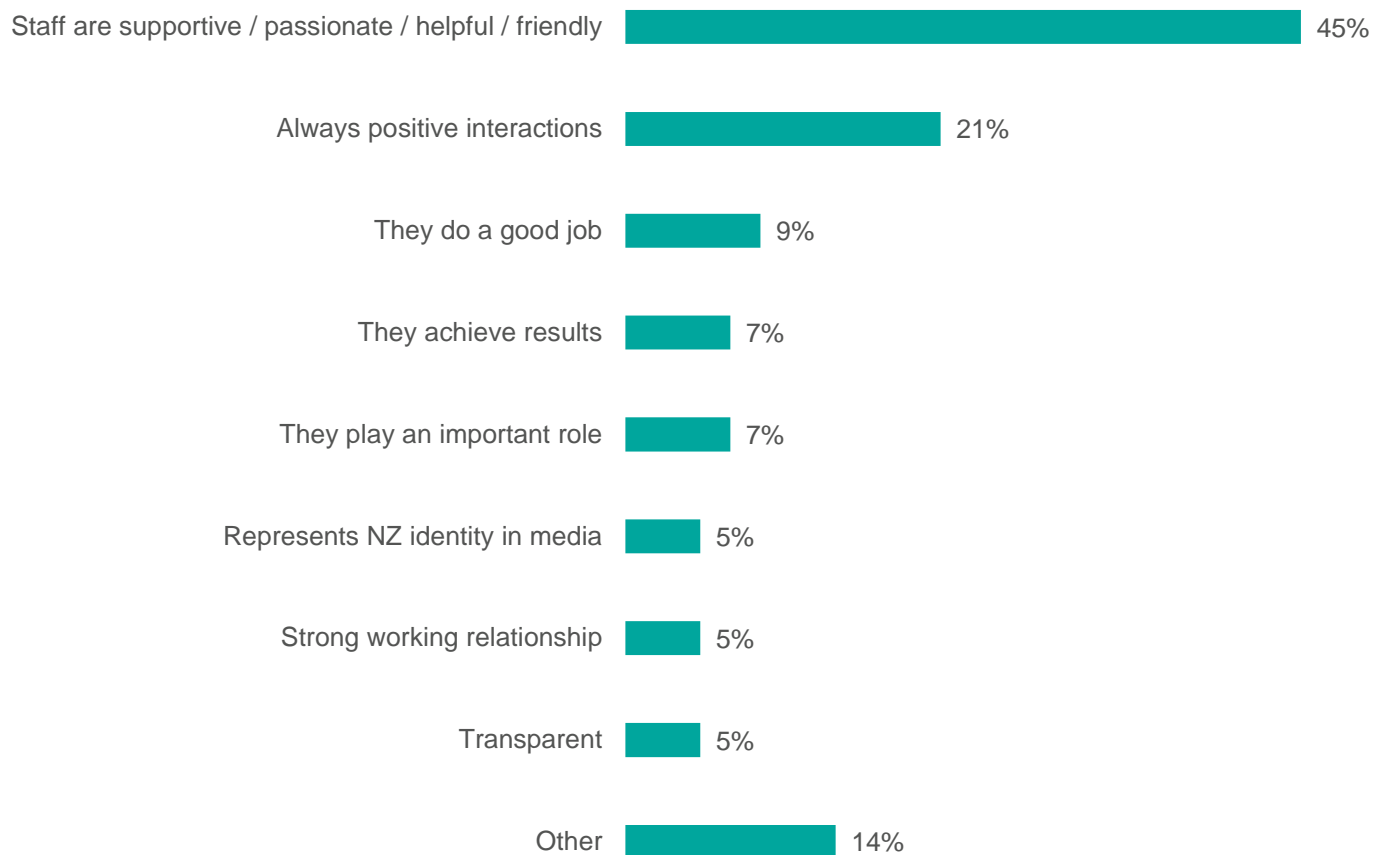
Scripted & Factual applicants had lower levels of advocacy (65%) than other groups. This group, however, contains comparably more stakeholders who received little or no funding in their most recent application.



Music funding applicants (both projects and singles) had higher levels of advocacy (83% and 79%) than other groups. This reflects the high proportion of survey respondents (from these groups) who successfully applied for funding.



Advocates of NZ On Air feel that the staff are one of the agency’s strongest assets, with almost half explicitly mentioning them. Two in ten also say that they consistently have positive interactions.



“

In my experience, all the people I have dealt with inside of NZ On Air have been passionate advocates of NZ-produced content and have done all they could to assist us in profiling more NZ music in what we do, and in what other media platforms are broadcasting. We have found them very supportive and in general excellent to work with.

- Music funding (projects)



New Zealand content makers are incredibly fortunate to have access to a funding body like this, as are the broadcasters who get local content without financial restraints that would otherwise be cost prohibitive for them.

- Industry Development Fund



I have experienced a high level of dialogue ensuring we as producers can work alongside NZOA in the production of valuable content. We reflect on NZOA strategy and can therefore then pitch content accordingly...or merely talk over the challenges we face in the production industry without fear of it damaging anyone's reputation. It feels like there is a generous open door.

- Funded content (Scripted & Factual)

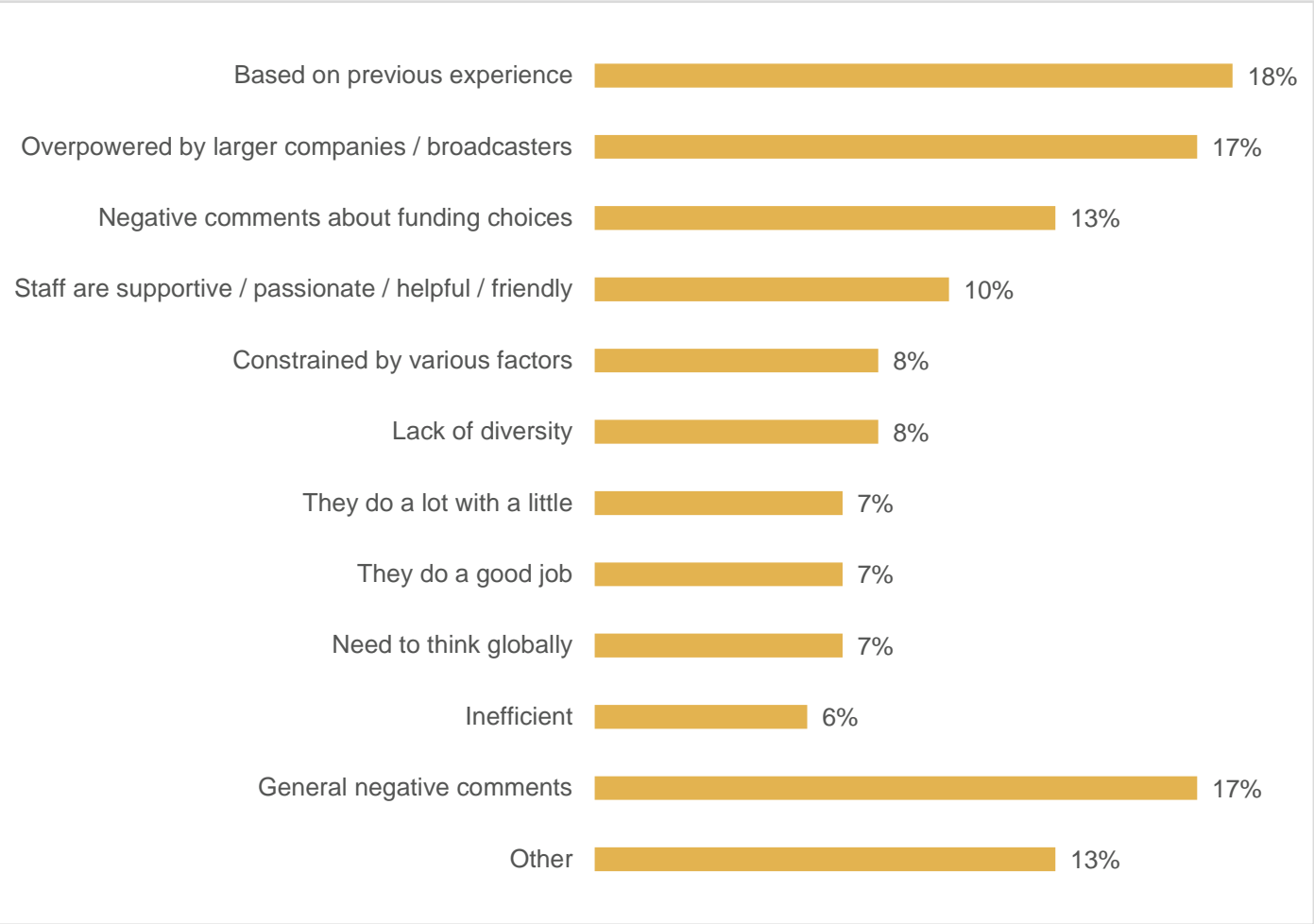


NZ On Air is a well run organisation that meets its objectives well.

- Government

”

For stakeholders who have a more neutral or critical view of NZ On Air, there is less of a consensus as to why. Almost two in ten base their opinion on previous experience with the agency, with a similar amount feeling that large media companies hold power over funding decisions. Critics more often mention a lack of diversity, and a need to think globally, as well as general negative comments.



“

Funding shows that have no audience creates an industry that can only survive on grants. It encourages production companies to think small, it does long-term damage to the local industry as, ultimately to survive, we must learn to compete in a global market place.

● - Funded content (Scripted & Factual)

Projects are not treated on the basis of their ideas but only on the audience of the broadcaster.

● - Funded content (Scripted & Factual)

I'm wondering how NZ on Air could take more creative risks, support more completely new ideas from a pure entertainment perspective. There are two or three too many boxes to tick at the moment. So many partnership hoops to jump through with the current process. Sponsors, networks/platform, cultural. Content risks looking like it was designed to get through the hoops as opposed to a pure entertaining idea designed to capture a large audience. This is essentially a creative industry but right now more time is spent talking about ticking boxes versus genius new ideas that can take on the world. The reason I'm saying this is that if we don't produce very much NZ content that also succeeds on a global scale we will not grow our industry.

- Funded content (Scripted & Factual)

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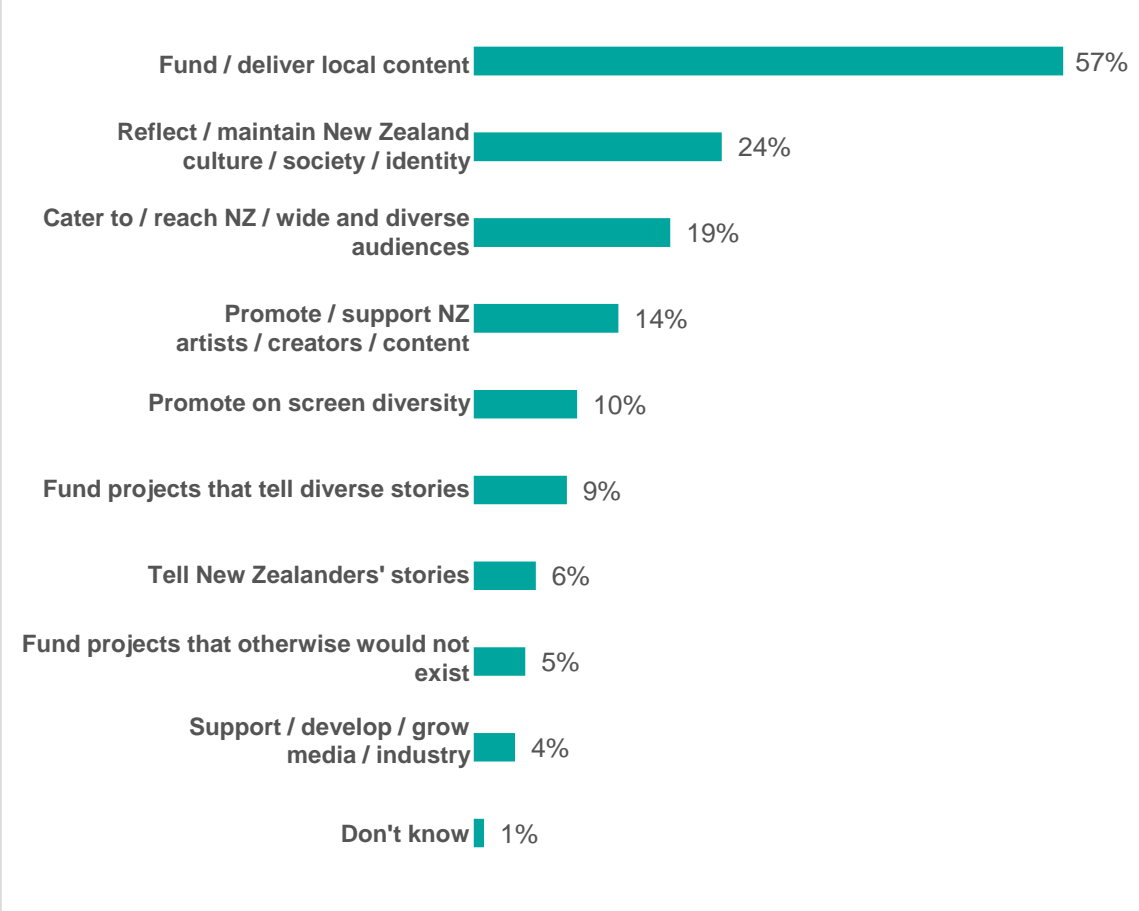
Six in ten stakeholders think of NZ On Air as being approachable, supportive, and professional. Fewer stakeholders feel that NZ On Air is ambitious, reflecting calls for more risk-taking in funding choices.



By and large, stakeholders have a good understanding of NZ On Air’s purpose. Over half mention funding local content, and a quarter mention reflecting NZ culture and identity.



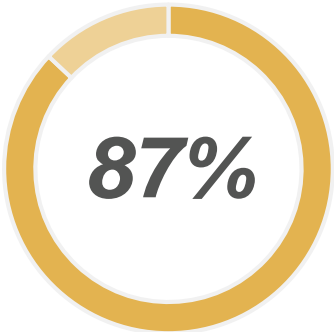
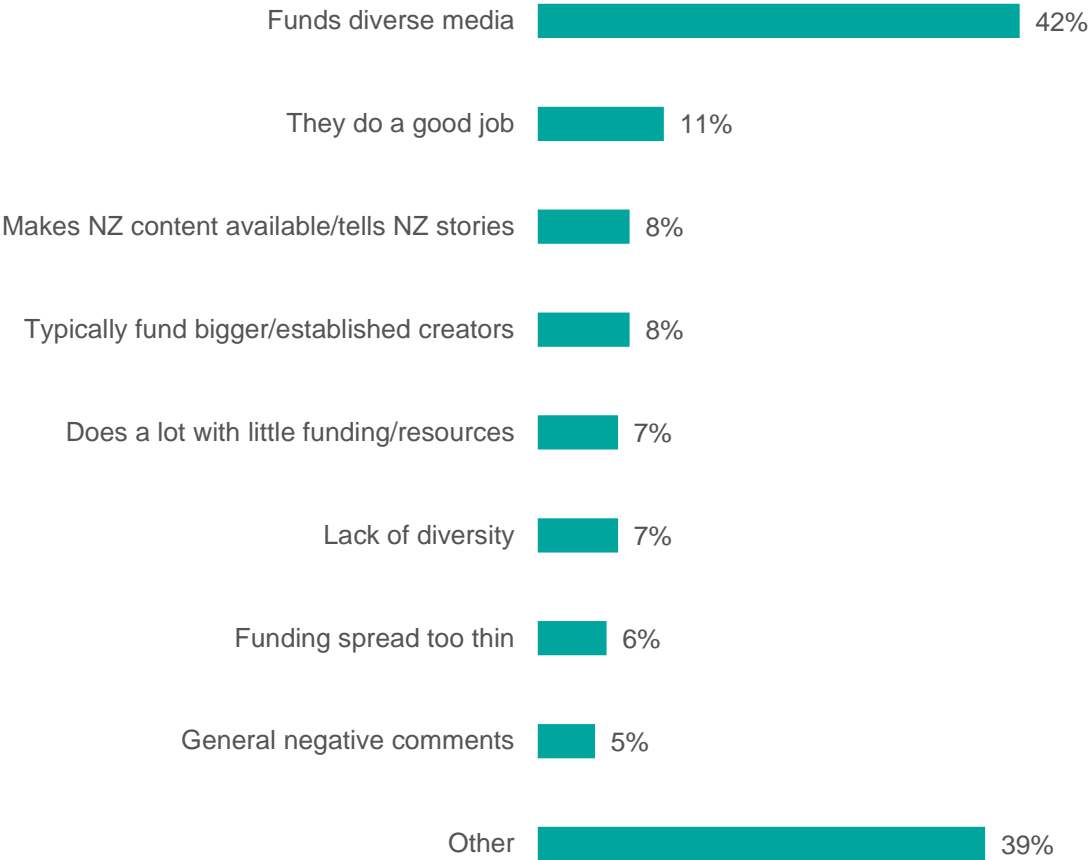
Understanding of NZ On Air’s purpose
(n=99)



NZ On Air’s purpose is to increase the quality and diversity of local content available to a variety of New Zealand audiences, to reflect and develop New Zealand identity and culture.

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To fund diverse storytelling across different and intersecting platforms, through a number of media, representative of New Zealand perspectives.
● - Platforms (operational)
To encourage media operations in New Zealand and in particular to help fund content with a New Zealand focus. It aims to foster a thriving domestic market that can also achieve success internationally.
● - Funded content (Scripted & Factual)
To raise the profile of NZ artists with local audiences wherever they may be, on whichever medium they choose.
● - Music (projects)
”

Almost nine in ten stakeholders feel that NZ On Air is performing strongly in fulfilling their purpose. Four in ten believe this is because they fund diverse media.



of stakeholders rate NZ On Air's performance as either 'good' or 'excellent' in relation to their purpose

"NZ On Air funds a lot of content that wouldn't otherwise be able to be made, because it doesn't have the mainstream appeal to get corporate/commercial funding. This broadens the type of media available in NZ, and reflects different audiences."

- Platform – operational; rated 'excellent' at fulfilling purpose

"They are current, in touch with their audience, mindful, respectful and supportive of the diversity of NZ society."

- Platform – operational; rated 'good' at fulfilling purpose

"Funding doesn't seem to be focused on quality or diversity, but rather perceived commercial viability – and that's a hard thing to predict, and they often get it wrong. As a result they often fund artists who are already successful – essentially subsidising record companies that would do the project anyway."

- Music funding (singles); rated 'poor' at fulfilling purpose

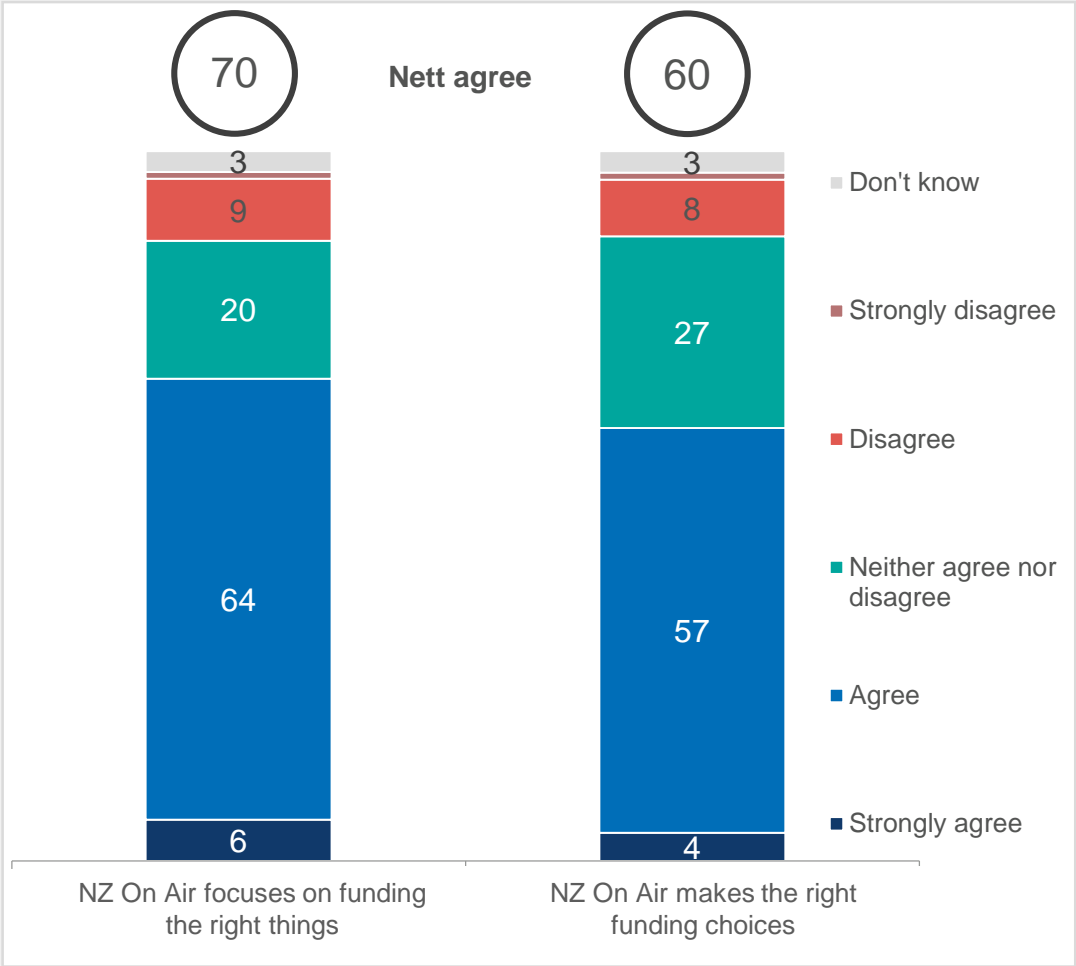


Views on funding



Most stakeholders feel that NZ On Air is focusing on funding the right things, and making the right funding choices.

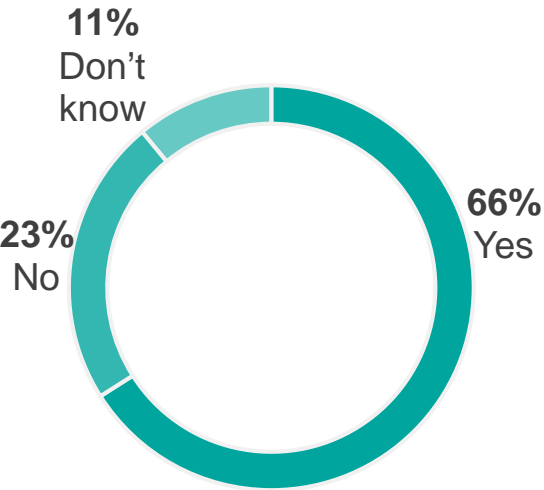
% *To what extent do you agree or disagree with the following?*



Two thirds of stakeholders think that NZ On Air is funding what they should be. Those who think otherwise feel that funding should go to less established creators, as well as more digital content.



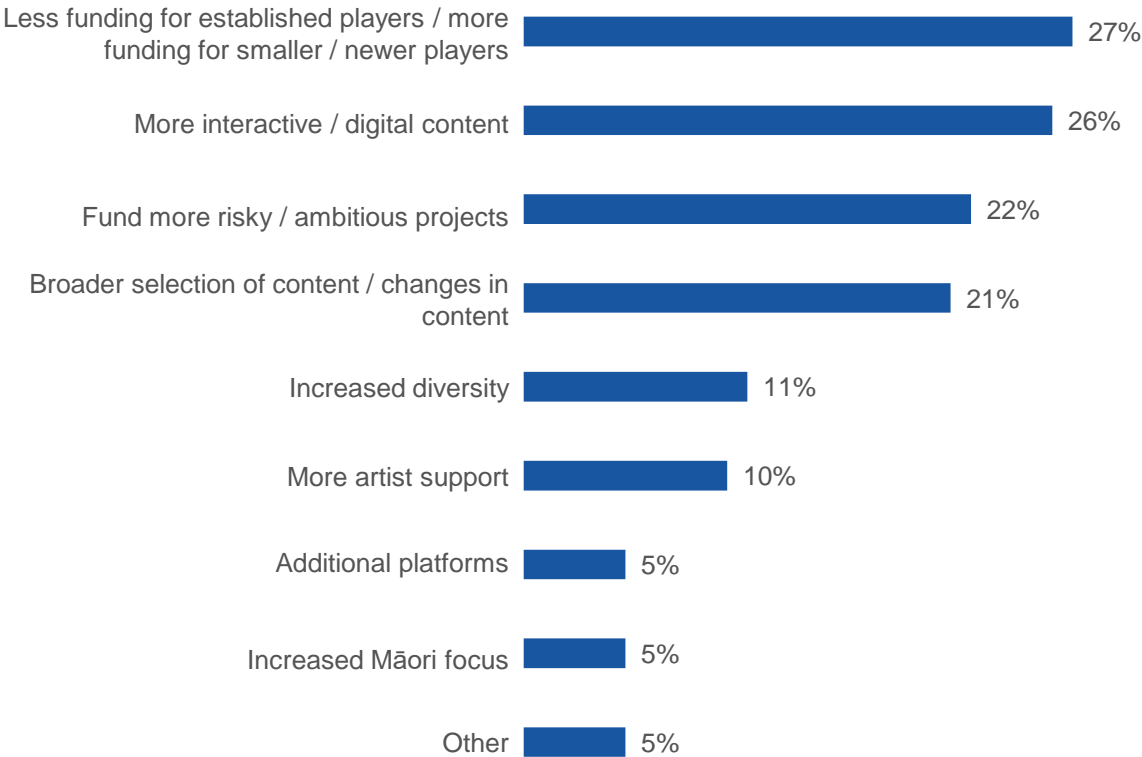
Does NZ On Air fund what you think they should fund?



"I'd like to see NZ On Air fund far more riskier content. The likes of Netflix has proven that high risk produces amazing results. The environment has changed so much and NZ On Air still seems extremely wedded to the traditional networks model. They are thus bound by the stale old network rules. Thus NZ On Air seems to be overly cautious and living in fear of offending, whilst globally some the riskiest content is leading the way.

- Funded content (Scripted & Factual)

What should they fund instead?

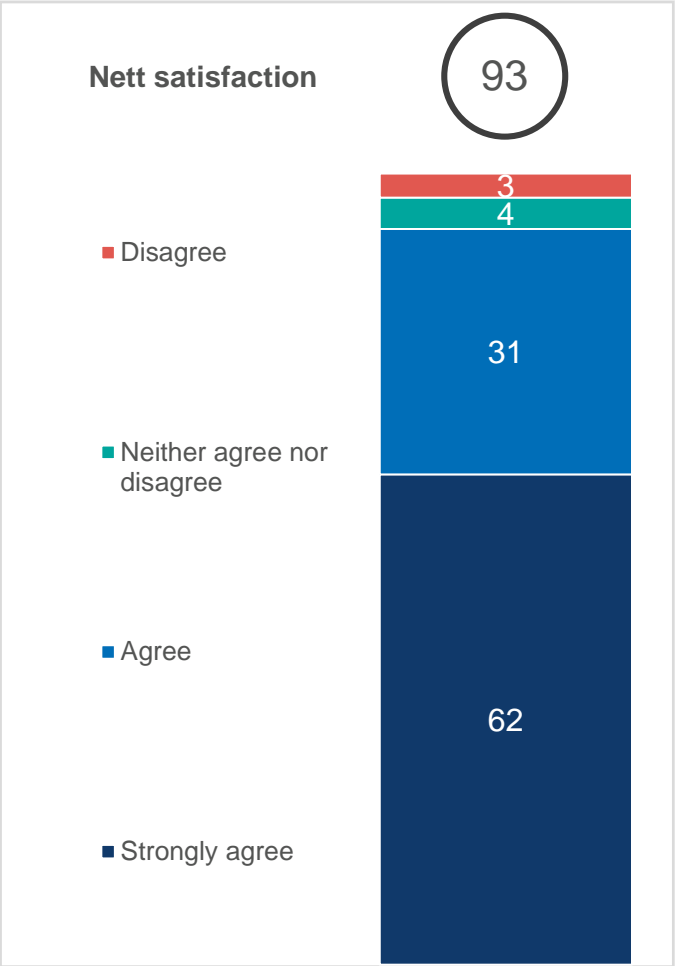


Those who applied for funding understand the funding criteria. They are more hesitant in their understanding of how the funding decision process works, and whether NZ On Air uses appropriate criteria to make funding decisions.

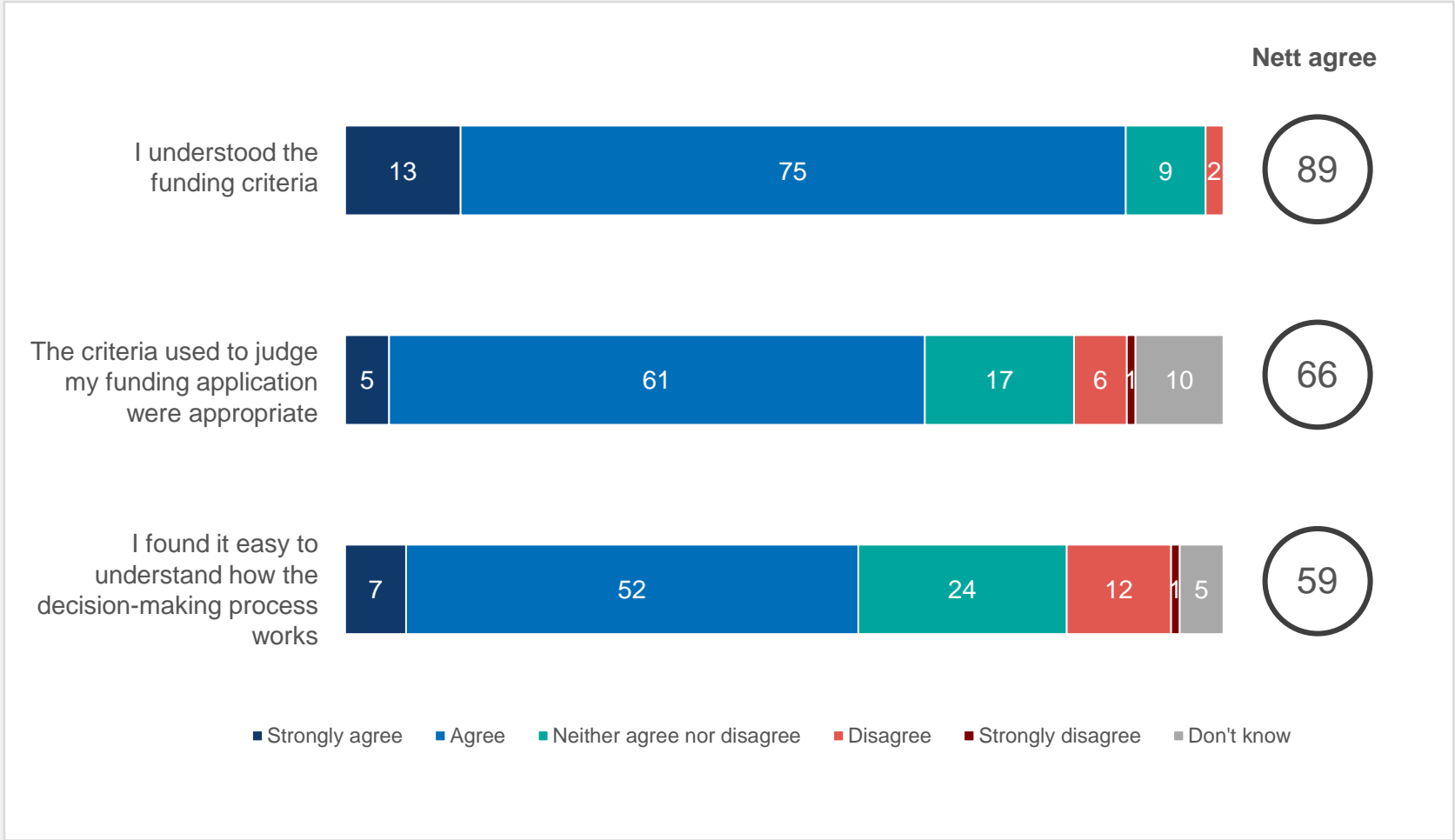


%

Overall satisfaction



Understanding of criteria

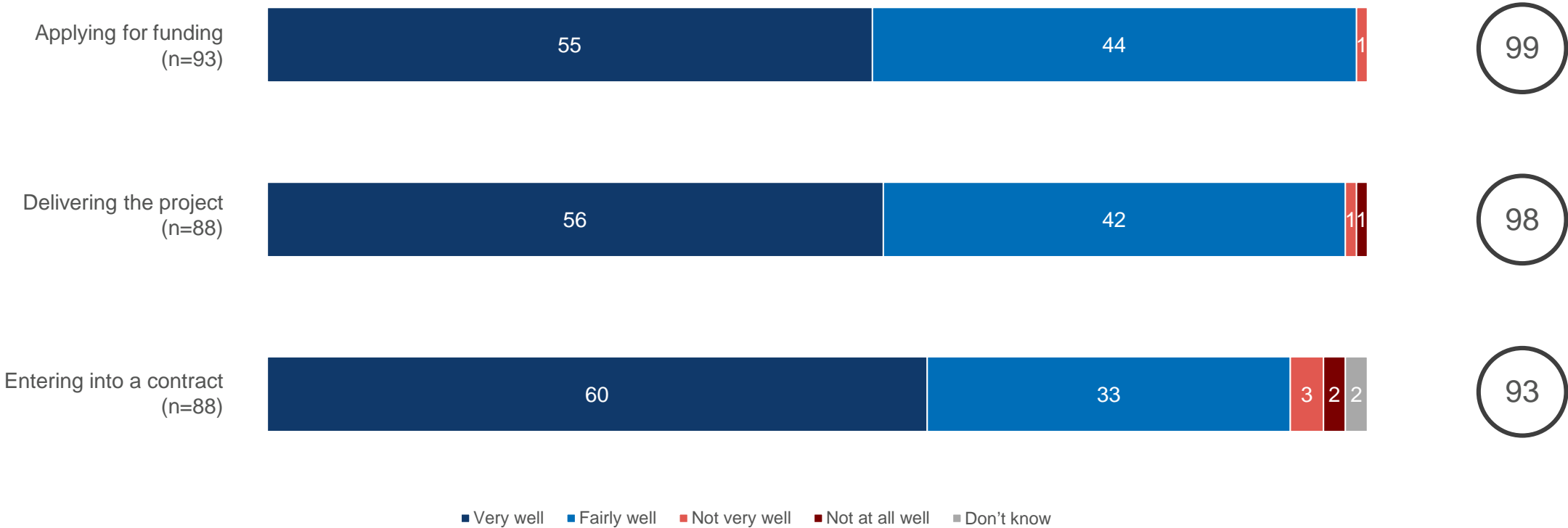


Almost all stakeholders feel that they understand what NZ On Air requires of them when applying for funding, delivering a project, or entering into a contract.



% *Understanding of requirements from NZ On Air on the following:*

Nett Very/Fairly well





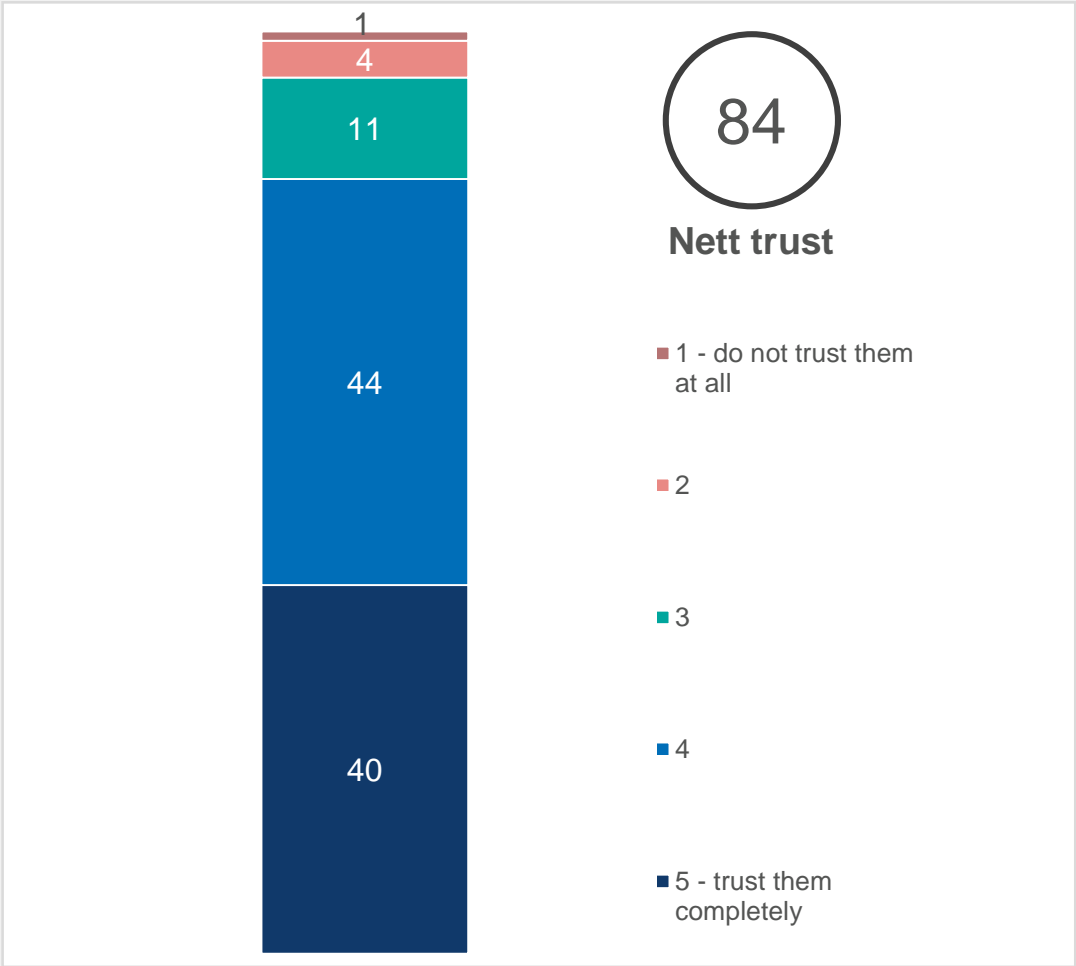
Working relationships



Four in five stakeholders have a high level of trust in NZ On Air. As evidenced by our Public Sector Reputation Index, trust is a key component of an organisation's reputation.



%

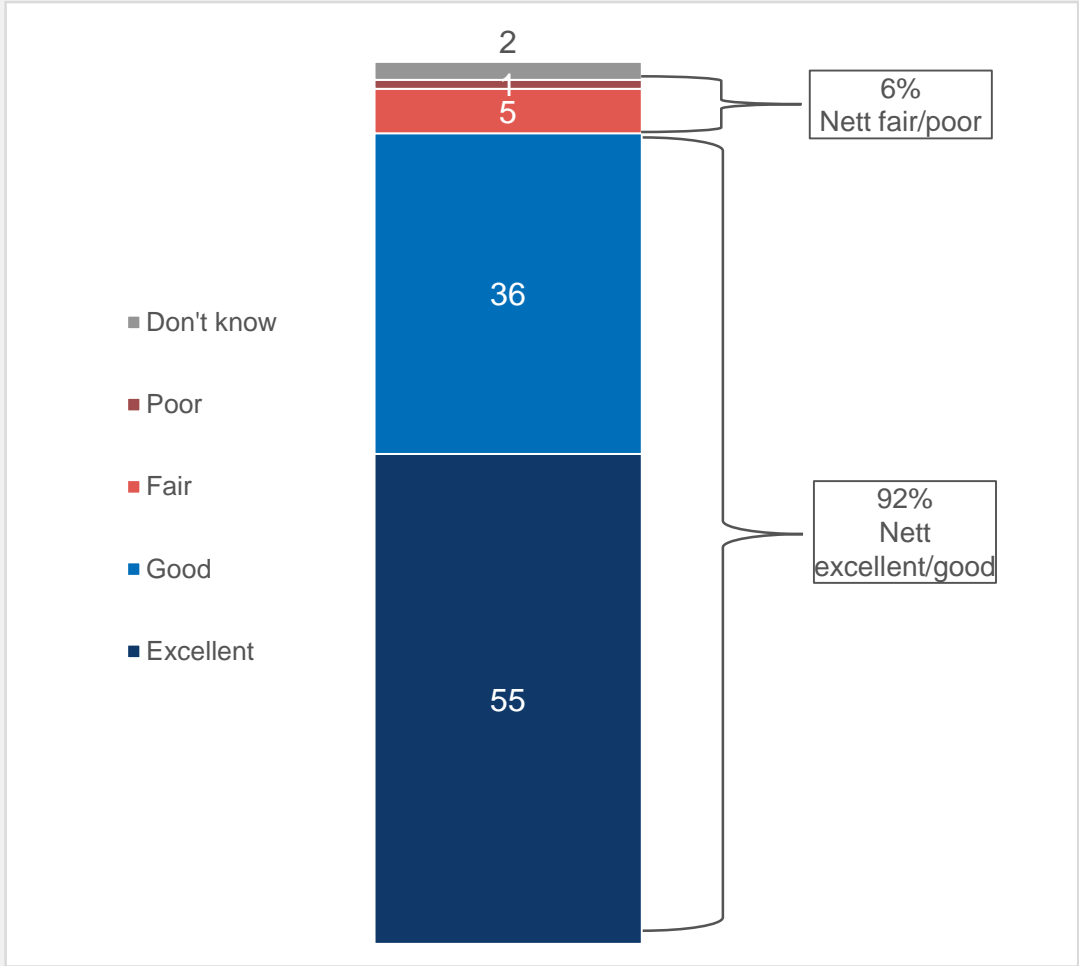


Nine in ten stakeholders feel that NZ On Air does a good job with their communications, with eight in ten saying that there is nothing they want them to do differently. More regular personal contact and increased feedback are the main suggestions given for improvement.

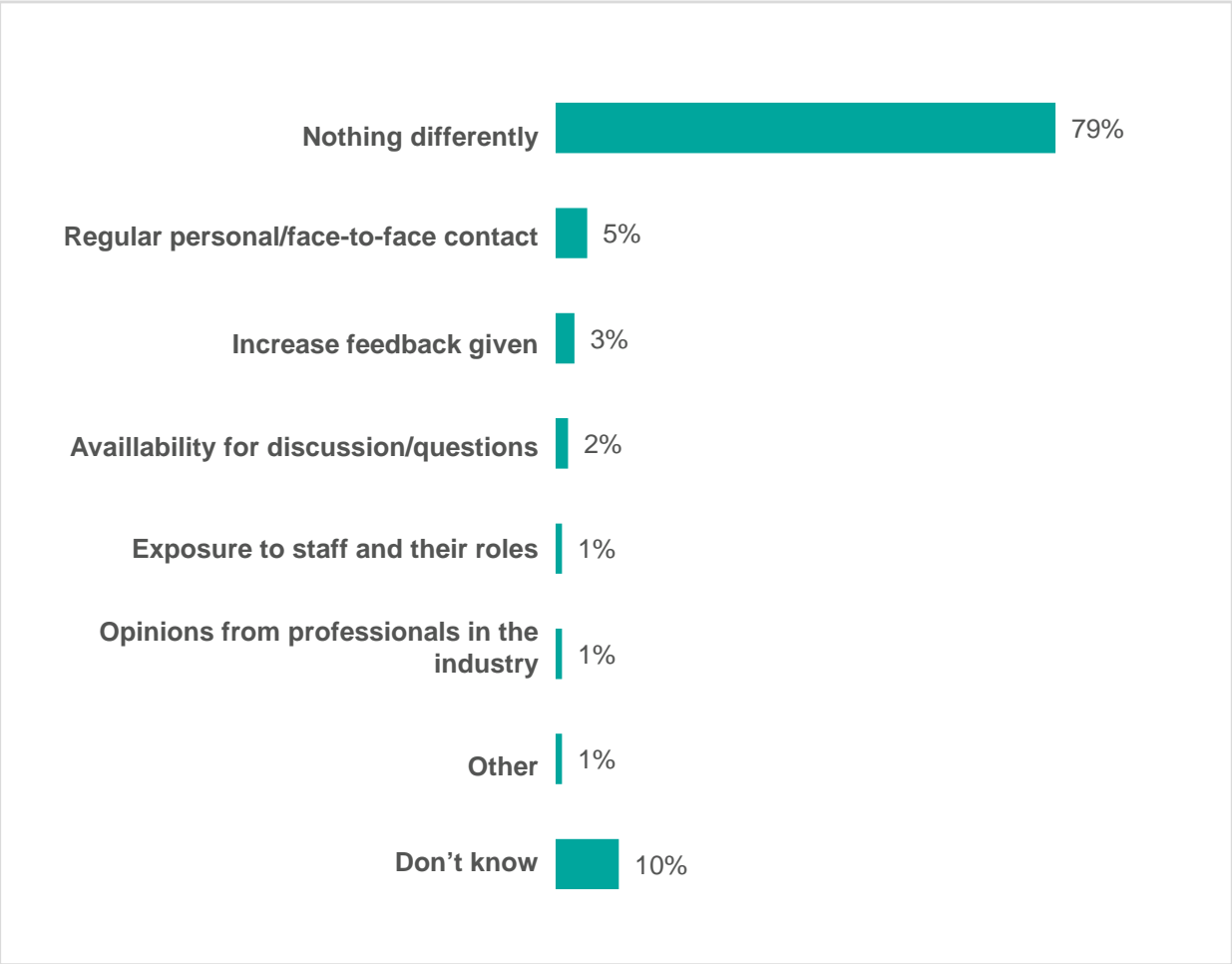


%

Effectiveness of communications



Things to do differently



Some comments illustrating the main suggestions for improvement.

Regular personal / face-to-face contact

“

More regular personal contact would be good as we're outside of Auckland and not able to drop into the office for a chat.

- Music funding (projects)

I prefer meeting face-to-face and always appreciate this from the staff – I know it is much easier for funders to email!

- Funded content (Scripted & Factual)

Increase feedback given

“

More feedback on unsuccessful funding rounds.

- Funded content (Scripted & Factual)

Explain their reasons for not funding something (if you are a medium to large sized company) by phone. NZOA shows no interest in our company's business but maybe they could ask us how we're going occasionally.

- Funded content (Scripted & Factual)

Availability for discussion/questions

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Listening, asking questions, explaining what's going on and who does what, when, and how.

- Funded content (Scripted & Factual)

With the new RFPs and funding rounds, clearer explanations with chances for questions could also be helpful.

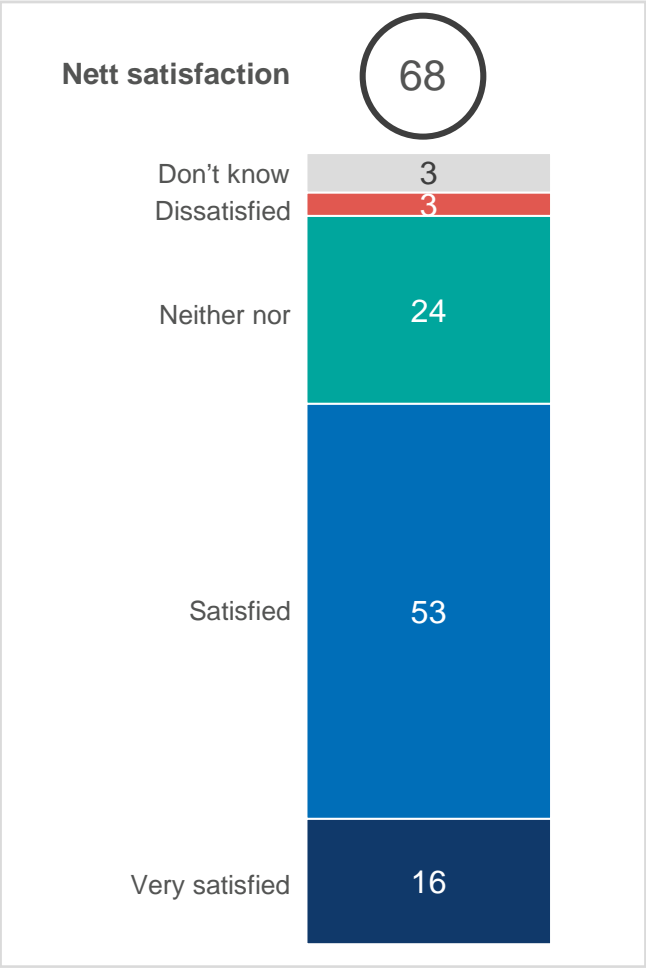
- Funded content (Scripted & Factual)

Stakeholders are mostly satisfied with the website; seven in ten say so. Overall, they are also able to find and do what they want on the website, and understand the information presented. There is the greatest scope to improve navigation on the website.

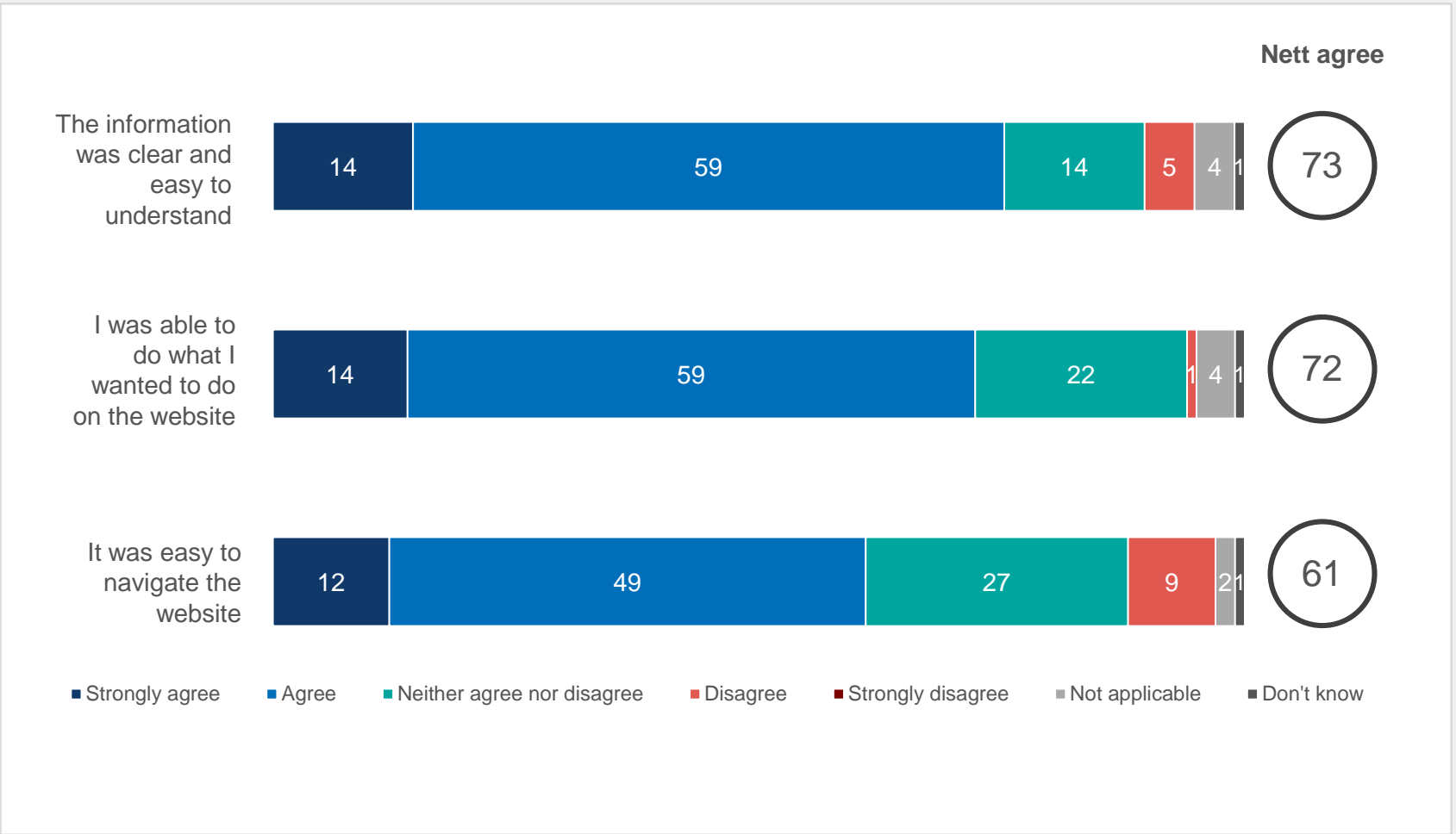


%

Website satisfaction



Website functions



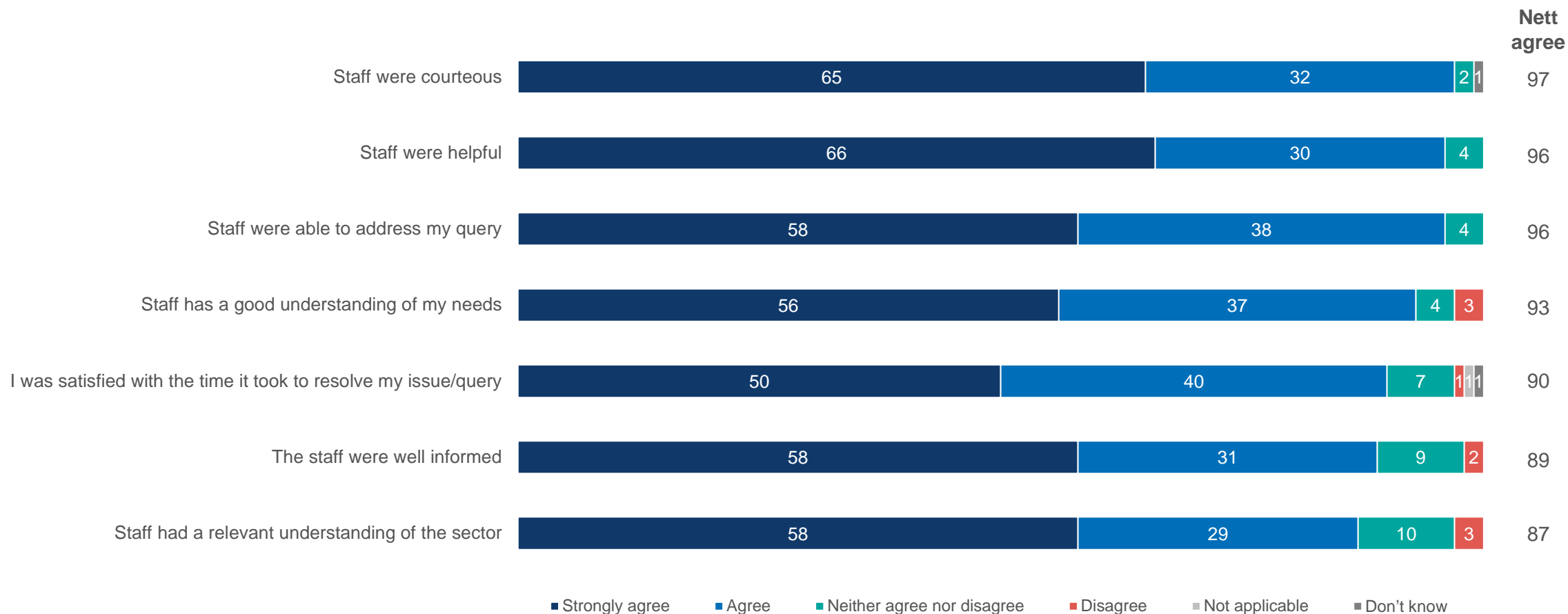
Q15. Overall how satisfied or dissatisfied are you with the NZ On Air website based on your most recent visit? Base: All who have visited the website (n=98).
Q14. Thinking about your most recent visit to the NZ On Air website, please indicate how much you agree or disagree with the following. Base: All who have visited the website (n=98).

Stakeholders think very highly of NZ On Air staff, feeling that they are courteous, helpful, knowledgeable, and able to address queries in an appropriate timeframe to resolve issues.



%

Staff Interactions

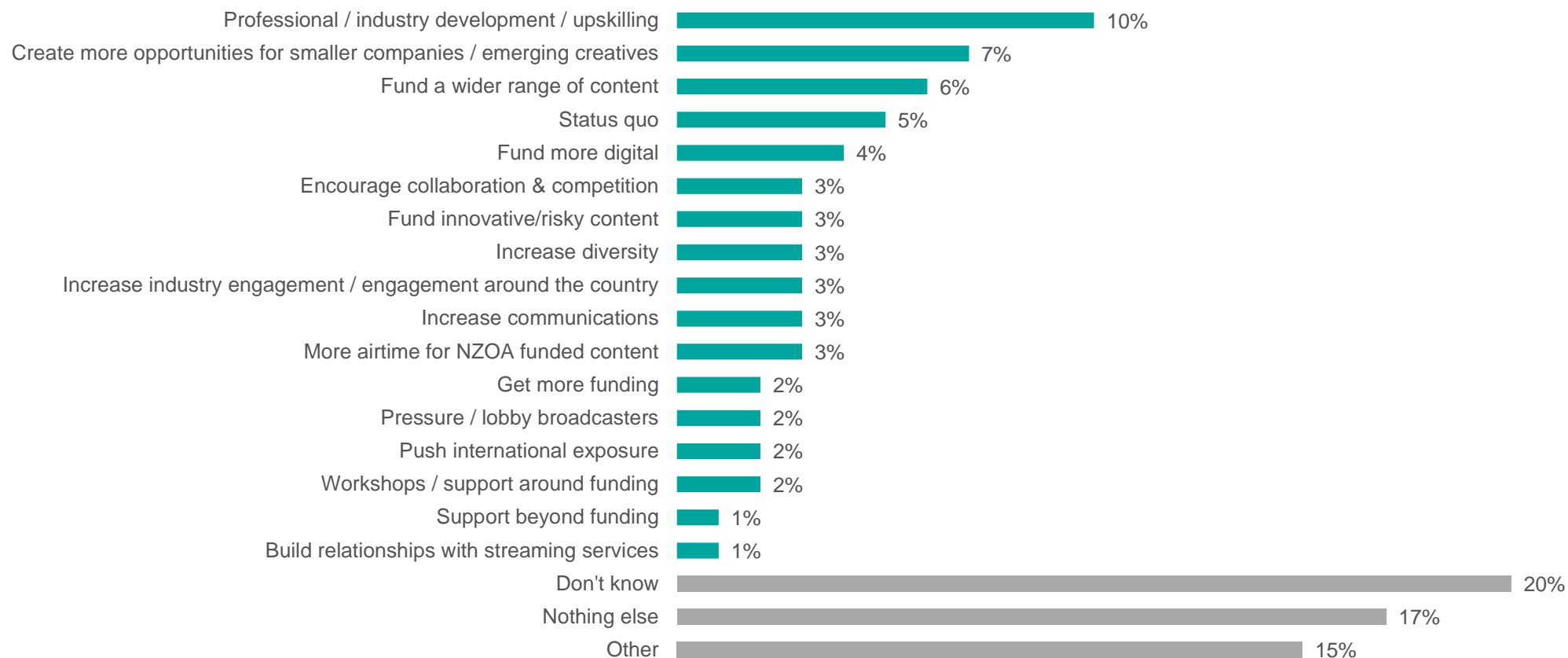




Looking forward



Stakeholders say the key ways in which NZ On Air can assist the industry is through professional development, and ensuring opportunity for new and emerging creatives. Almost two in five stakeholders either don't know what NZ On Air can do, or do not think there is anything further it should do.



Some comments illustrating the key suggestions.

Professional / industry development / upskilling

“

More money and time for development of projects is always going to be beneficial, and there isn't much space for it currently. There is a lack of skill in the development process outside a tiny handful of people, so looking at solutions for both upskilling and doing more development without tight time and financial constraints would be very useful for the overall health of the industry, and would help in investing long-term in how our industry needs to survive with the changing industry world internationally and locally.

- Funded content (Scripted & Factual)

Professional development, clear pathways for new content creators.

- Funded content (Scripted & Factual)

Professional development to assist producers and build understanding of international market.

- Funded content (Scripted & Factual)

Create opportunities for smaller companies / emerging creatives

“

Creating more opportunities for smaller production companies who are competing with the bigger ones for funding.

- Funded content (Scripted & Factual)

There is a feeling (perhaps a fallacy) that the big TV 'dumb' dramas (e.g. Westside, Filthy Rich etc.) still get all the money. That needs to be addressed head-on, although I appreciate some people will never be happy unless they are the ones receiving the funds.

- Funded content (Scripted & Factual)

Giving emerging creatives a chance to succeed through workshops and pitching events, allowing them to see and learn from others. NZ On Air should be moulding and mentoring those entering Film & TV, not simply throwing money to those already succeeding.

- Funded content (Scripted & Factual)

Fund a wider range of content

“

Looking for more opportunities to fund a range of different content within its existing criteria e.g. I think it would be great if they helped fund or promote the use of NZ compositions in Funded TV / Online Series.

- Music funding (projects)

I would love to see support of more content centred around the arts.

- Funded content (Scripted & Factual)

Higher \$\$ level and targeted commitment to partner with Te Mangai Pāho and Māori owned production companies who are making te reo Māori content.

- Government

Stakeholders ultimately hold NZ On Air in high regard. By-and-large they feel that they are doing their best to improve the industry in New Zealand by championing on-screen diversity and bringing to life projects that would otherwise not reach our screens. However, a minority feel they work at the behest of large media companies, and that smaller, edgier projects and companies often miss out. There is also the desire for funding to move away from traditional media, towards digital and interactive content.

“

NZ On Air has created fantastic opportunities for the industry to create exciting content, it is at the front line with us, demanding better content for our people. They are an organisation well deserving of a funding boost, and one which could use said funding to create a pathway for content creators to keep telling our stories and taking those stories to the world.

- Funded content (Scripted & Factual)



I think NZ on Air is a great organisation, and the new staff it has brought on lately are frankly extraordinary. In the past I detected an aloofness, but I feel like that's changing. What I think it really needs to do is start being more demanding of the major media companies. They are not owed tens of millions of dollars of content a year as a right. If they continue to bury funded content they should be seen as irresponsible stewards of public money, and alternative platforms sought. I also think continued accessibility of content beyond its run should be mandated. And that some kind of major effort to engage with the streaming platforms needs to happen. But overall I think NZ on Air's heart is in the right place, and that its efforts to modernise have lately been pretty impressive. At least that's what I think now. Try me after the next funding round is decided.

- Funded content (Scripted & Factual)

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FOR FURTHER INFORMATION PLEASE CONTACT:

Edward Langley & Daniel Brownie

Colmar Brunton, a Kantar Millward Brown
Company
Level 9, Legal House,
101 Lambton Quay,
Wellington
Phone (04) 913 3000
www.colmarbrunton.co.nz