

NZ On Air
Irirangi Te Motu

NZ On Air Stakeholder Survey

NOVEMBER 2020

A Colmar Brunton Report



COLMAR BRUNTON

A Kantar Company



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Summary Insights, Objectives & Methodology



SUMMARY INSIGHTS

Perceptions & Advocacy



73%


of stakeholders would advocate for NZ On Air. Main reasons for this continue to be the quality of staff and positive interactions.




Stakeholders understand NZ On Air's purpose to include funding local content, that caters to diverse audiences and reflects New Zealand society.

83% feel that NZ On Air fulfils this purpose.

Views on interactions & funding




87% are satisfied with their most recent interaction with NZ On Air.




Most stakeholders feel they understand what is required when:

- applying for funding (100%)
- delivering a project (96%)
- entering into a contract (89%).



- 88% understand the funding criteria.
- 70% find it easy to understand the decision-making process.
- 65% feel the criteria are appropriate.

Positively, the **depth of agreement** (those who say strongly agree) has increased on all three measures vs. 2018.




62%

feel that NZ On Air funds what they should.


Those who feel otherwise, suggest more funding should go on a broader selection of content, as well as greater funding of interactive and digital content.

Working relationship




90%

trust NZ On Air




Most continue to be happy with how NZ On Air communicates with them, with few suggesting improvements.



There continues to be very high satisfaction with staff

Looking forward



Main suggestions for how NZ On Air could further assist the industry include funding more (12%), funding more digital content (8%), and industry development (7%).

NZ Media Fund

Stakeholders perceive the NZ Media Fund positively:

- 72% agree it supports diverse content
- 71% agree it supports quality content
- 54% agree it supports content that is discoverable
- 65% agree it has demonstrated its ability to respond to the changing media environment

The main reasons for agreeing with this include a perception of increased investment in digital content and platforms, and funding new / different content

CHANGES SINCE 2018 & SUB-GROUP DIFFERENCES



In 2018, a number of key areas were highlighted by stakeholders as ways for NZ On Air to further assist the industry:

1

Industry
development

2

Opportunities for
new talent

3

Funding a wider
range of content

By-and-large, stakeholders appear to be happy with NZ On Air's progress, with fewer mentioning these as areas for improvement.

However, despite the acknowledgement that NZ On Air has made good progress, particularly in the areas of increased funding for diverse, digital content across a number of platforms (particularly through the NZ Media Fund), there remains a hunger amongst stakeholders to push this even further.

There is also an increased appetite for simply funding **more** (whether this is giving funding out to a higher number of applicants, or trying to get more money for funding).

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)

Scripted & Factual funded content applicants are less likely to be advocates of NZ On Air

They are also less likely to be very 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.

They are also less likely to agree that the NZMF supports discoverable content, and are more likely than average to say NZ On Air is complicated and distant

However, as in 2018, Scripted & Factual funding applicants are less likely than average to have received all of the funding they applied for (34% vs. 43%), which partly explains this greater negativity.

That being said, they are more likely to agree that NZ On Air's input is valuable.



100

ONLINE INTERVIEWS
WITH STAKEHOLDERS

15 minutes



FIELDWORK DATES:

12 – 28 OCTOBER 2020

Method



Sample source

Respondents were sourced from NZ On Air’s database of stakeholders. Based on a total sample of 289 stakeholders, the response rate was 34.6%. 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%.

Objectives

The primary objective is to undertake research to better understand how stakeholders perceive NZ On Air and their strategy.

This research was last completed in 2018, and as such this latest wave is used to compare back to 2018, and to highlight areas of improvement or decline.

Sample

The sample was comprised of stakeholders who had interacted with NZ On Air for various reasons (contract types, government stakeholder etc.). Post-weighting was used to ensure this was representative of the overall population of stakeholders in 2020, and to meet the targets below. The profile is largely in line with 2018:

Funded content (scripted & factual)	61	Music - singles	16
Platform – operational	5	Industry Development	4
Platform – content	3	Government sector	3
Music - projects	7		

Where possible, comparisons are made to the 2018 findings of this research. Any significant differences noted are statistically significant at the 90% confidence level.

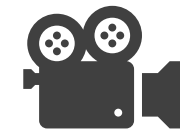
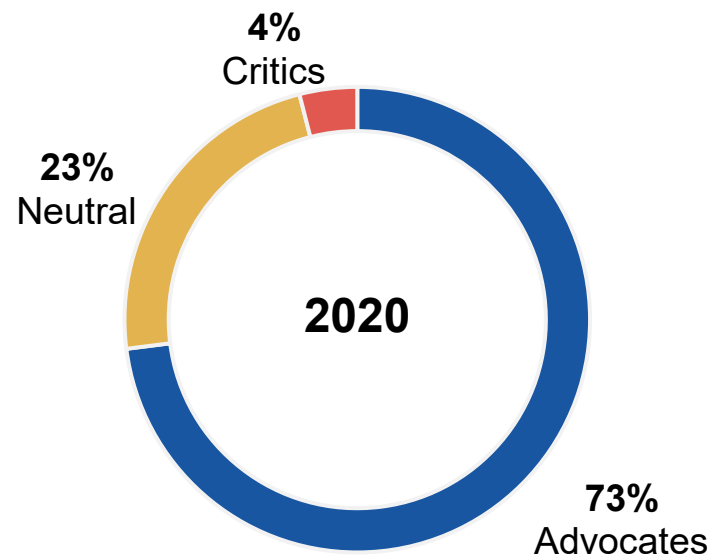
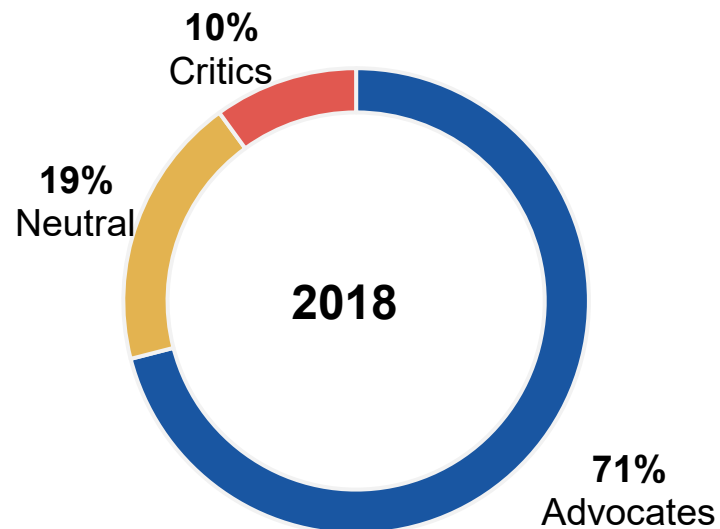


PERCEPTIONS & ADVOCACY



ADVOCACY:

NZ On Air's stakeholders continue to be strong advocates for the agency, with seven in ten saying they speak highly of them. This is in line with the 2018 research. Additionally, the proportion of critics has declined since 2018, albeit this is not statistically significant.



Scripted & Factual applicants had lower levels of advocacy (66%) than other groups. This is in line with 2018 (65%).

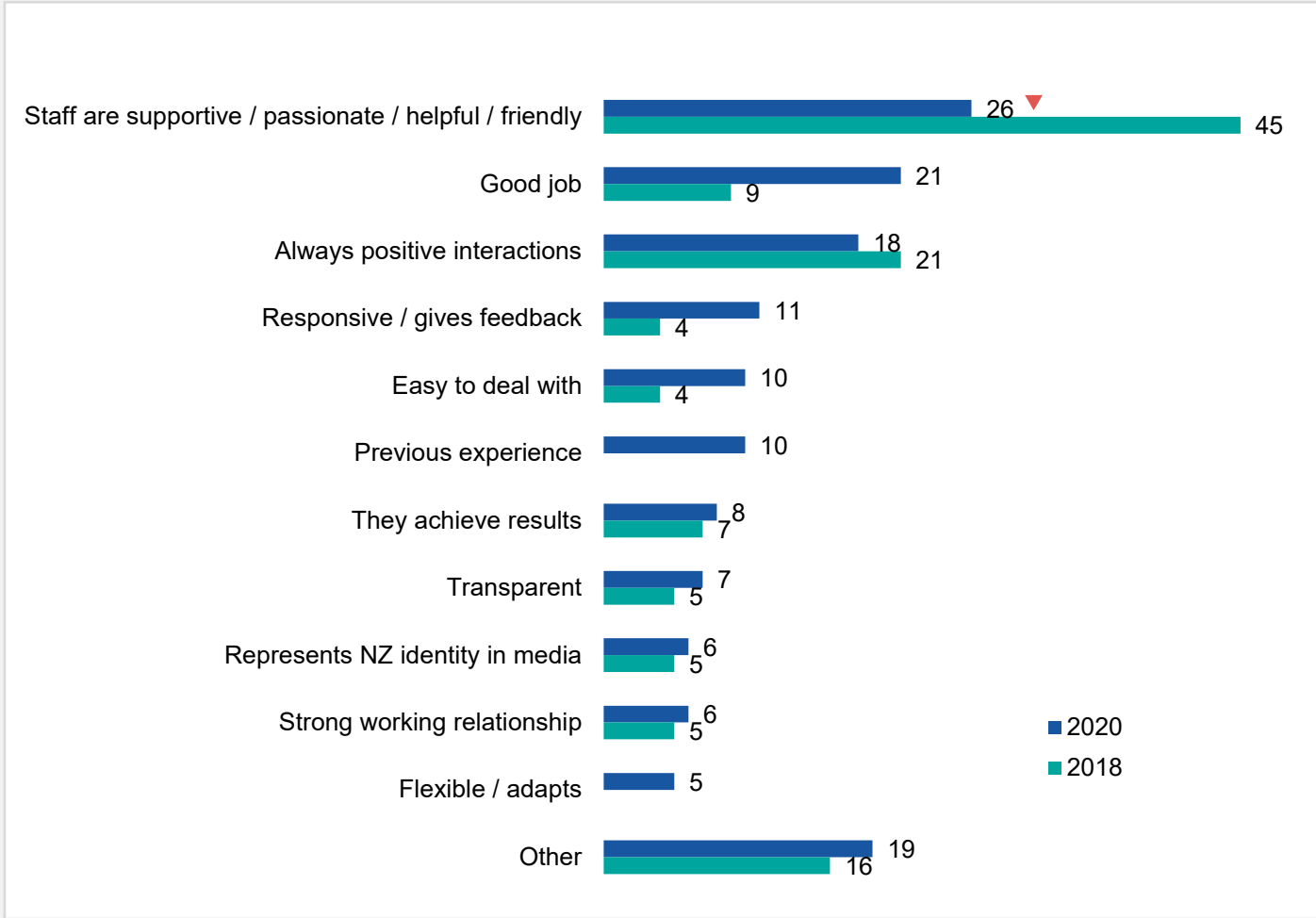
This group, as in 2018, contains comparably more stakeholders who received little or no funding in their most recent application.

REASONS FOR ADVOCACY:

While advocacy was very much driven by the staff in 2018, in 2020 there are a wider set of reasons. Staff are still at the heart of this but advocates are more likely to reference the idea that NZ On Air is doing a good job, is responsive or easy to deal with. One interpretation for the decline in explicit mentions of staff is that stakeholders have come to expect a high level of service, so it serves as almost a hygiene factor for strong stakeholder relationships.



%



“

The team are easy and very pleasant to work with, the content being funded is being seen, and we're so privileged to have the arts funded by them in the first place. They are imperative to the survival and quality of the arts in NZ.

- Music (singles)

I am impressed by the key NZ On Air people we work with. This year there seems to be an organisational shift in appreciation of the mahi of the Access Media Sector and we are very grateful to be awarded increased funding. There is also a new willingness to back the potential that CAMA has as stations embrace technology to increase connectivity of diverse communities.

- Platform (operational)

A standout for me is their communication. They are very responsive with email and they are open to conversation. They are forthcoming with advice and opinions, and they all seem well versed in why a decision has been made and they're happy to have an open dialogue about it. For a team that seems to be extremely busy they are very giving with their time, and they all seem to be super passionate about their work ... I'd love to be a fly on the wall for their lunch time convo's, it seems like they live and breathe the industry and the content they fund.

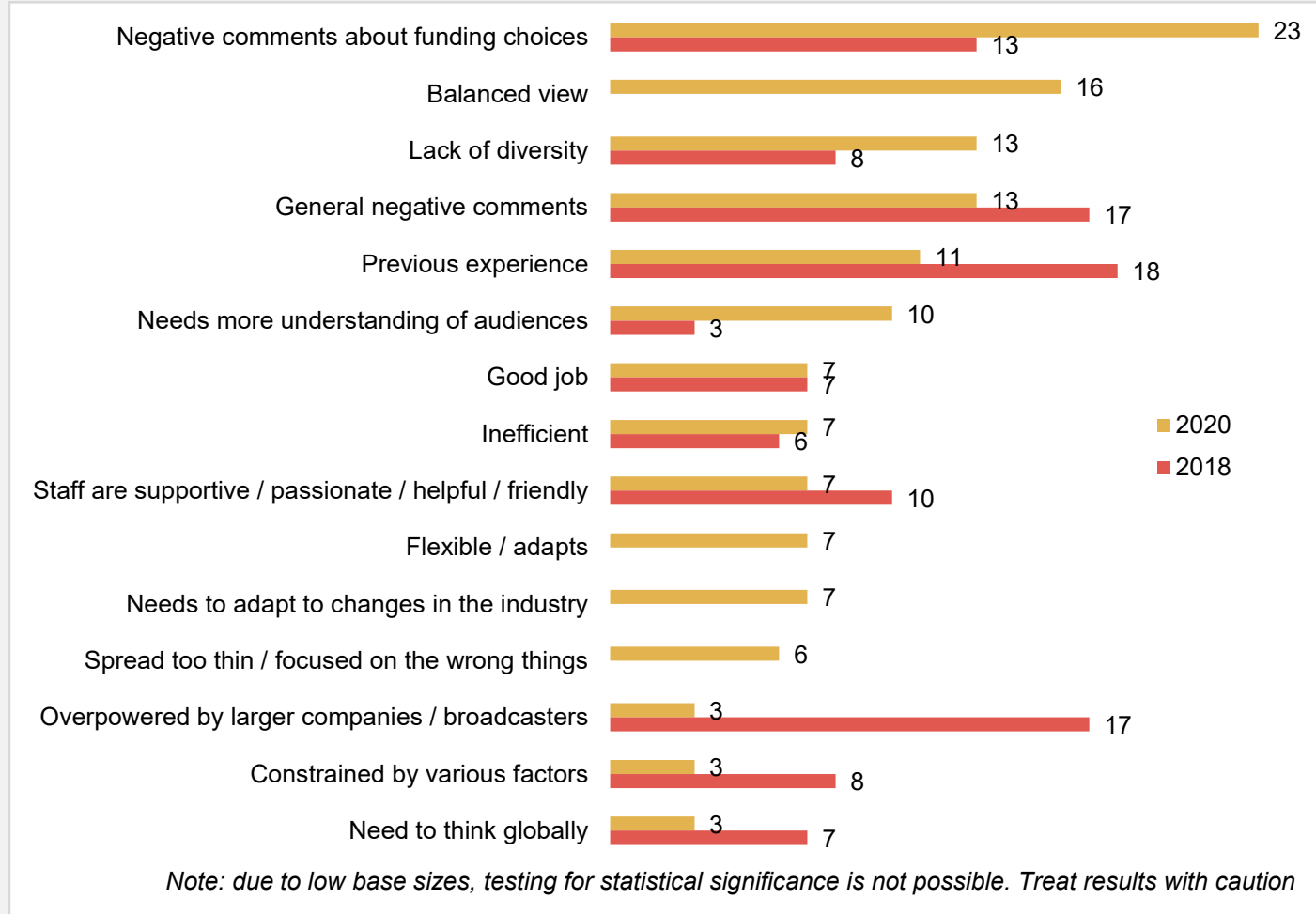
- Scripted & Factual content ”

REASONS FOR BEING A CRITIC / NEUTRAL:

Stakeholders who hold a more neutral or critical view of NZ On Air are in the minority (only 27 respondents in 2020). These critics most often mention negative comments about funding choices, holding a balanced view of the organisation, or cite a lack of diversity (in both funded content, and people / companies funded).



%



“

There are enormous charges happening in media, NZ On Air has commissioned mountains of research proving this and yet it remains slaved to the ratings driven Free-to-Air paradigm all their indicators tell them is on the way out.

- Scripted & Factual content

As a professional in the industry working at the highest standards it is incredible that NZ On Air does not engage with the professional community better or engage with the professional community (and I mean industry / companies and not freelance professionals) for a greater understanding and collaboration about how to best serve New Zealand audiences.

- Scripted & Factual content, Platform (content)

They are fantastic in most areas but need to increase funding toward Indigenous projects / productions.

- Government

I think they do a great job and have amazing intentions but I think they themselves have tried to diversify so much they are no longer focussed on the audience or the industry and that is critical.

- Music (projects, singles)

”

NZ ON AIR'S PERSONALITY:

Seven in ten stakeholders think of NZ On Air as being professional. Other key adjectives which stand out are supportive, approachable, and helpful. Only 8% see it as ambitious, again reflecting calls for innovation within the industry.



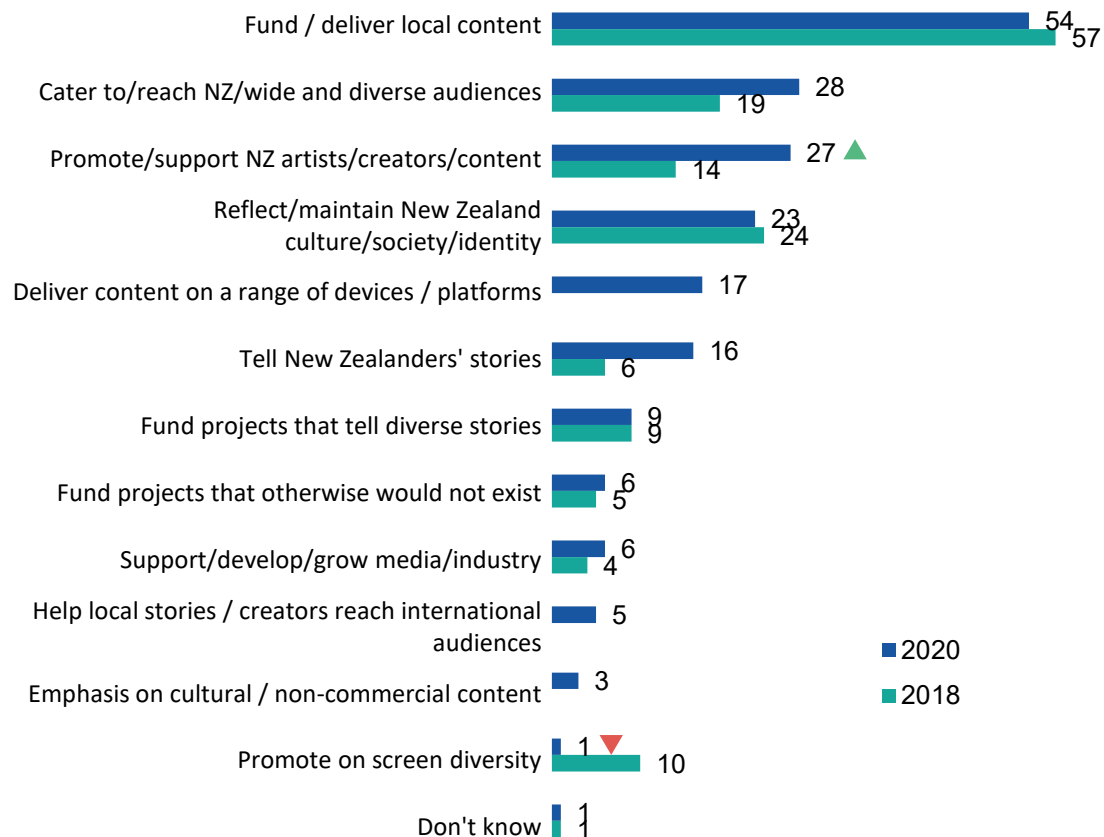
NZ ON AIR'S PURPOSE:

Stakeholders continue to have a strong understanding of NZ On Air's purpose. Half mention the funding of local content, while over a quarter mention catering to New Zealand audiences. In the year of COVID-19, significantly more stakeholders see NZ On Air's purpose as promoting and supporting New Zealand artists, creators, and content.



%

Understanding of NZ On Air's purpose



NZ On Air exists to 'reflect and develop New Zealand identity.'

Our stories, our voices
Ā tātou kōrero, ō tātou reo

“

To connect and reflect our nation and ensure New Zealanders can experience public media that is authentically New Zealand across many platforms and for many audiences.

To provide local content on New Zealand networks and platforms, as a reflection of New Zealand and New Zealanders.

”

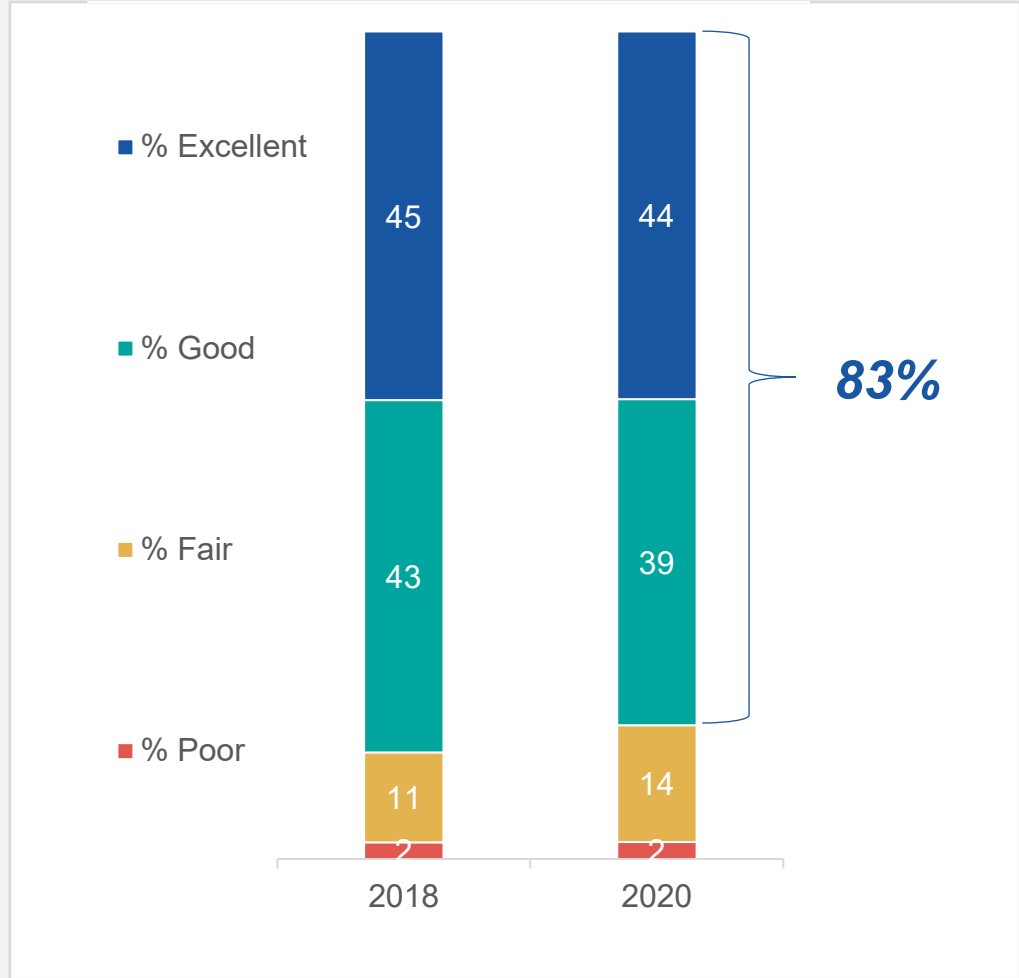
PERFORMANCE ON PURPOSE:

Over eight in ten stakeholders think that NZ On Air performs strongly in fulfilling their purpose. The main reason they think this is because they see NZ On Air funding diverse media. This is in line with 2018.

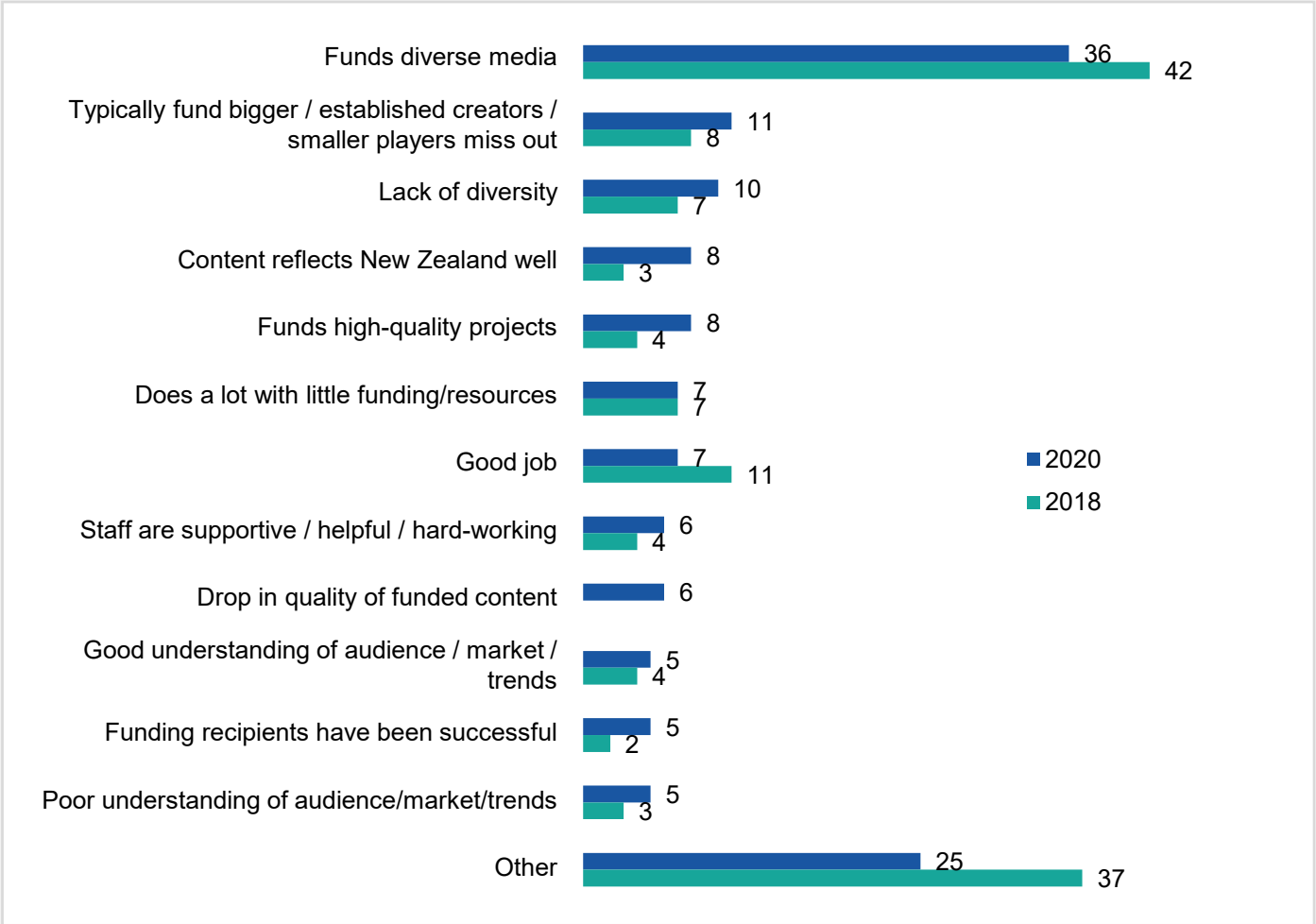


%

Performance Rating



Reasons for performance rating (based on all stakeholders)



PERFORMANCE ON PURPOSE:

Below are some comments illustrating the views of stakeholders on performance

“

The local content is of generally good quality, from a mix of voices and a mix of large traditional productions and smaller more edgy productions.

- **-Scripted & Factual, Platform (content) ; rated 'excellent' at fulfilling purpose**

A lot of content is only made due to NZ On Air funding, and NZ On Air seems to be constantly reviewing and making changes to better fund diverse content. It seems more agile than you'd expect a government funding body to be.

- **Platform (operational); rated 'good' at fulfilling purpose**

There is still a lack of high-end quality TV that represent the diverse [communities in New Zealand]. There is a slow change around this, starting with more Māori content. Lots of reasons behind this - needing to increase capabilities, lots of current gatekeepers perspective on content, lack of risk taking.

- **Scripted & Factual; rated 'fair' at fulfilling purpose**

The dramatic drop in quality over the last 20 years - this is not a money issues but rather the interference and gateway that NZ on Air holds over the network / audience and producers - it is clear that opinion has replaced careful consideration and lack of understanding of how the industry actually works along with poor representation of our voices and our lives.

- **Scripted & Factual, Platform (content) ; rated 'poor' at fulfilling purpose**

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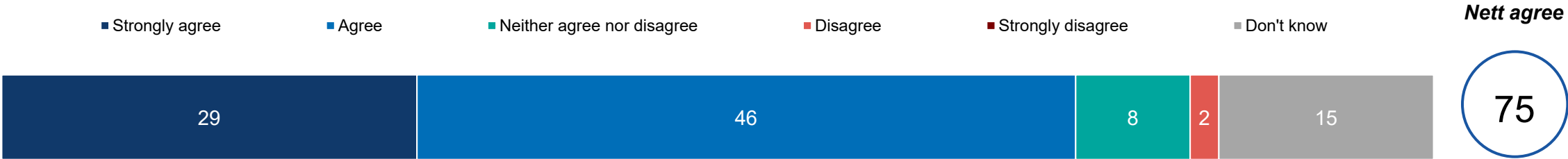


RESEARCH, LEADERSHIP, AND POLICY INPUT:

Three quarters of stakeholders feel that NZ On Air’s research, leadership, and policy input is valuable. Fifteen percent feel unable to provide an opinion, perhaps suggesting a lack of awareness of NZ On Air’s work in this space.



%





VIEWS ON FUNDING

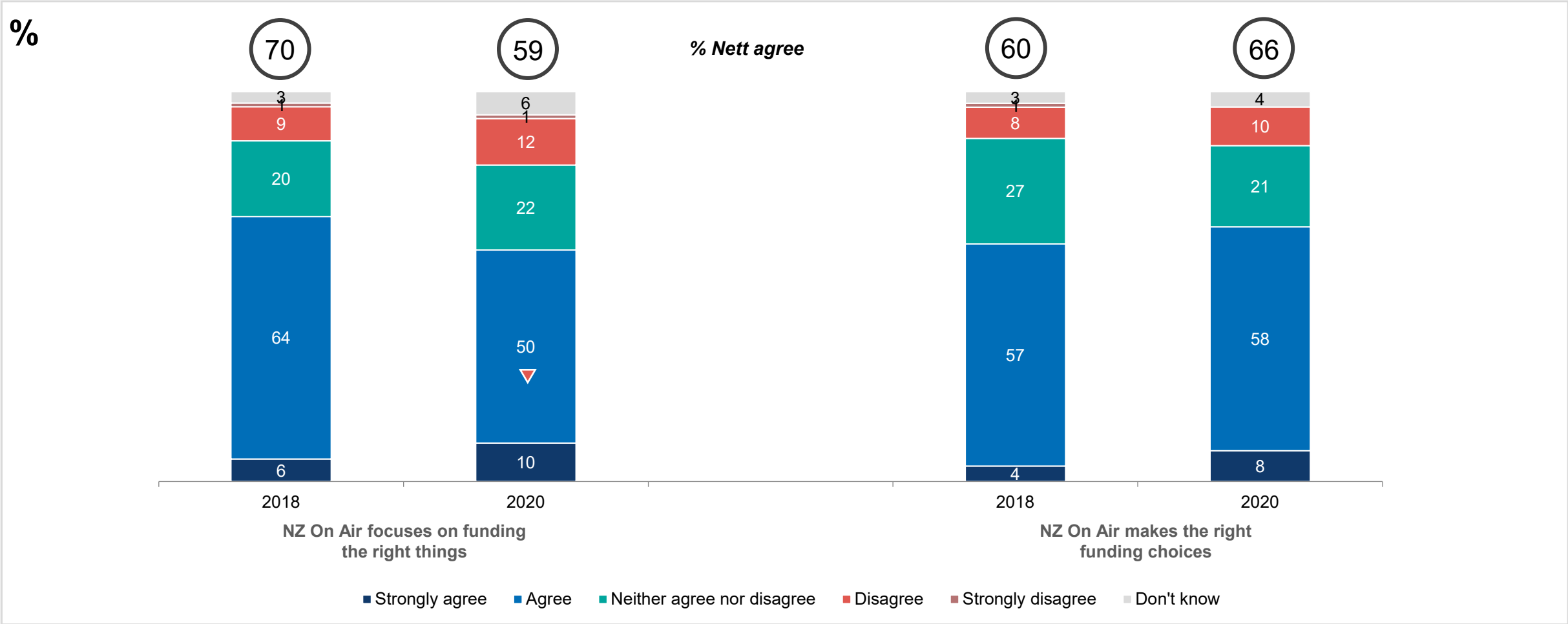


FUNDING FOCUS:

Compared to 2018, fewer stakeholders feel that NZ On Air focuses on funding the right things. That being said, slightly more agree that the agency makes the right funding choices than in 2018, albeit neither of these are statistically significant. One interpretation is that stakeholders do not see NZ On Air as being bold enough around the broader categories of what they fund (referenced by stakeholder comments around wanting the agency to adapt to the new media environment), but feel that within its current parameters, it makes the right decisions.



%

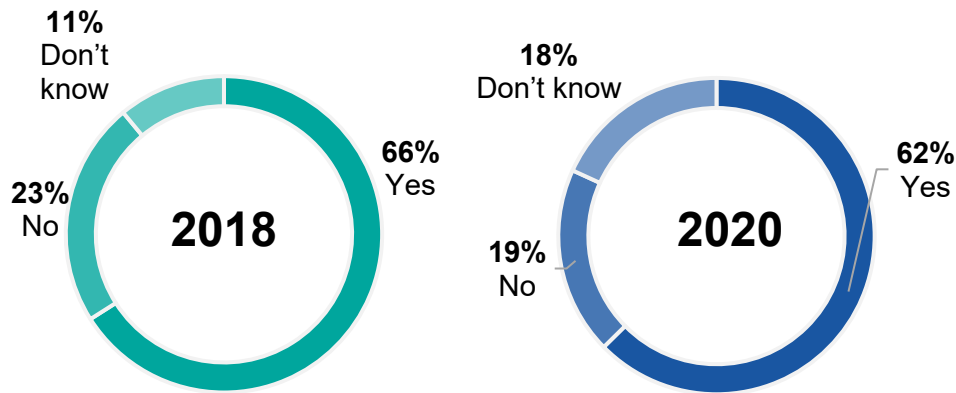


WHAT SHOULD BE FUNDED INSTEAD:

Six in ten stakeholders feel that NZ On Air is funding what they should be, and this is in line with 2018. Of those who think something else should be funded, one quarter mention a broader selection of funded content, and increased investment in interactive and digital content.

%

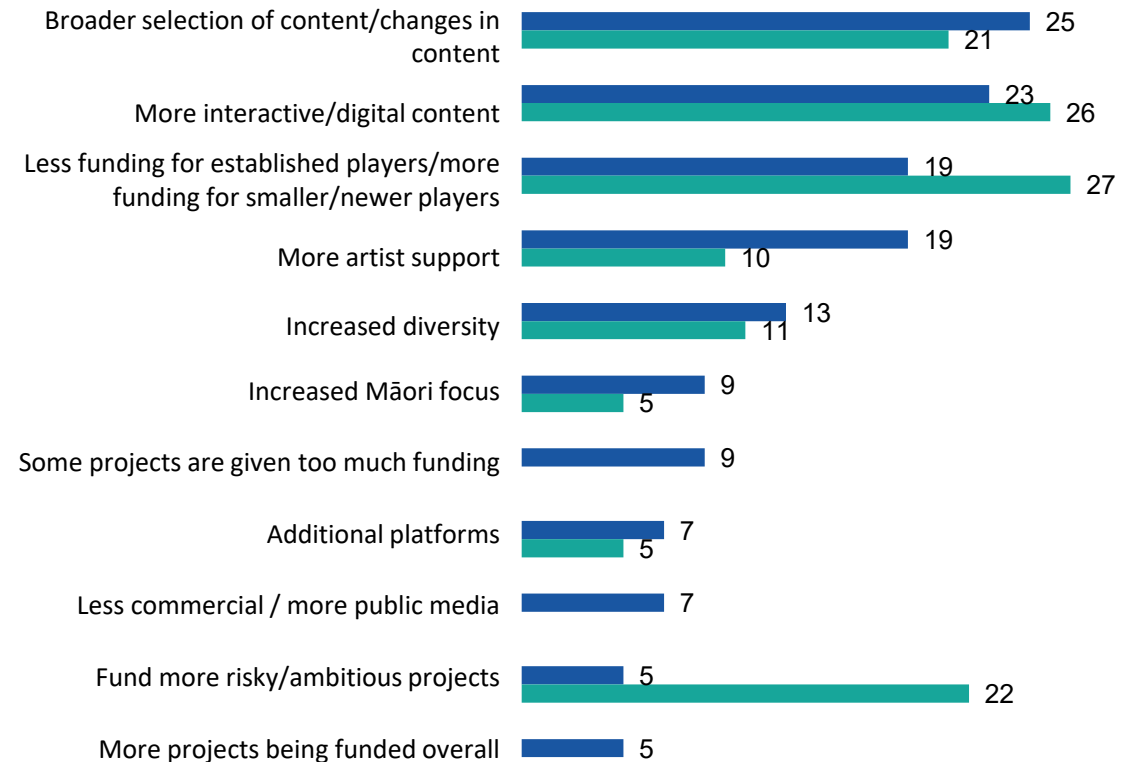
Does NZ On Air fund what you think they should fund?



Keep increasing digital, interactive, games, VR / AR, social media, e-sports, hyperlocal, student media - or we will lose a generation of viewers. This may require changing commissioning policies or platform policies. However, these might provide larger audience figures than you expect - or would have gotten a few years ago.

-Scripted & Factual, Industry Development Fund

What should they fund instead?



Note: due to low base sizes, testing for statistical significance is not possible. Treat results with caution

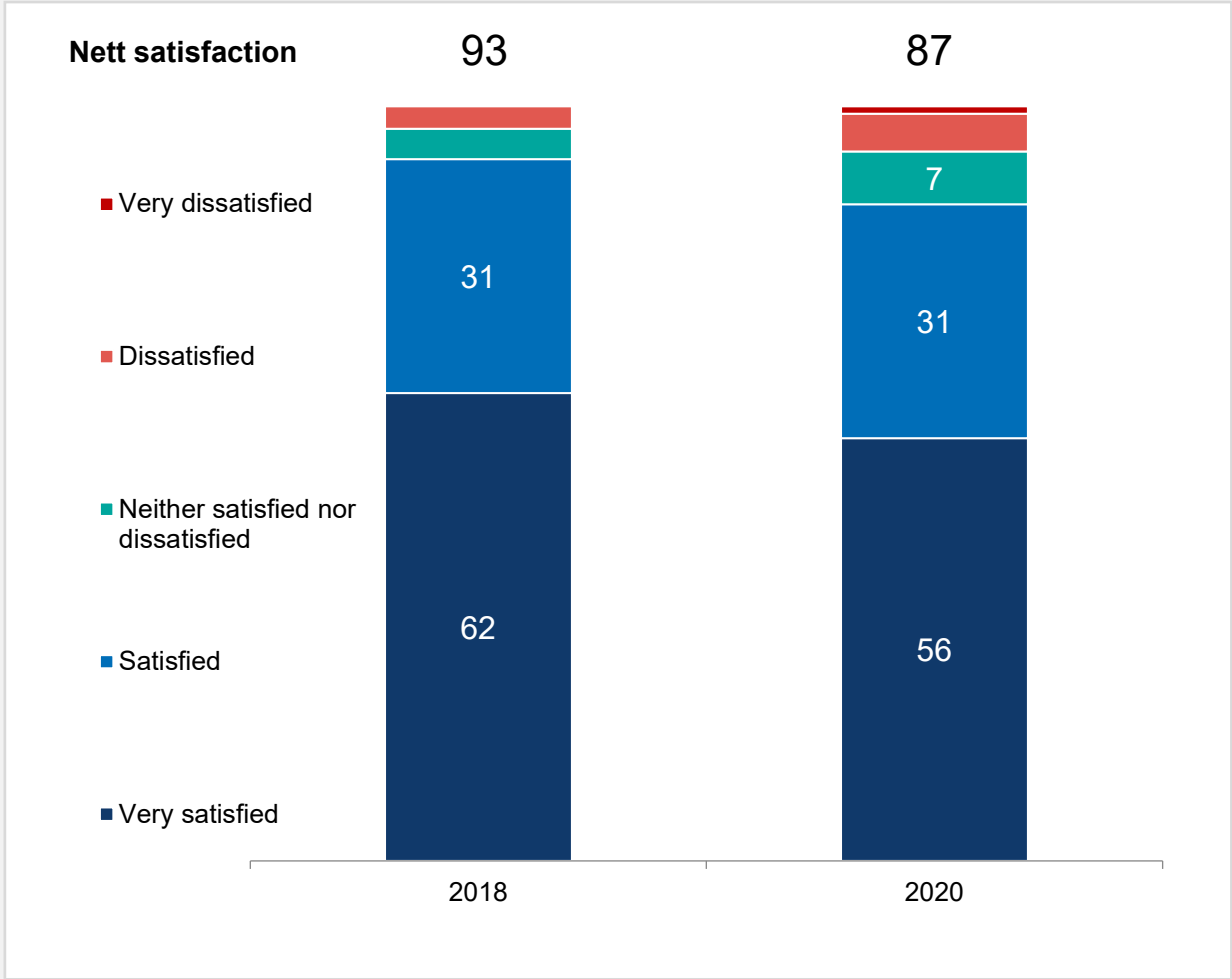
SATISFACTION AND UNDERSTANDING OF CRITERIA:

Stakeholders continue to be exceptionally satisfied with NZ On Air, although this has declined slightly from 2018. Most stakeholders by-and-large feel they understand the funding criteria and decision process. Notably, the proportion who strongly agree has significantly increased on all measures.

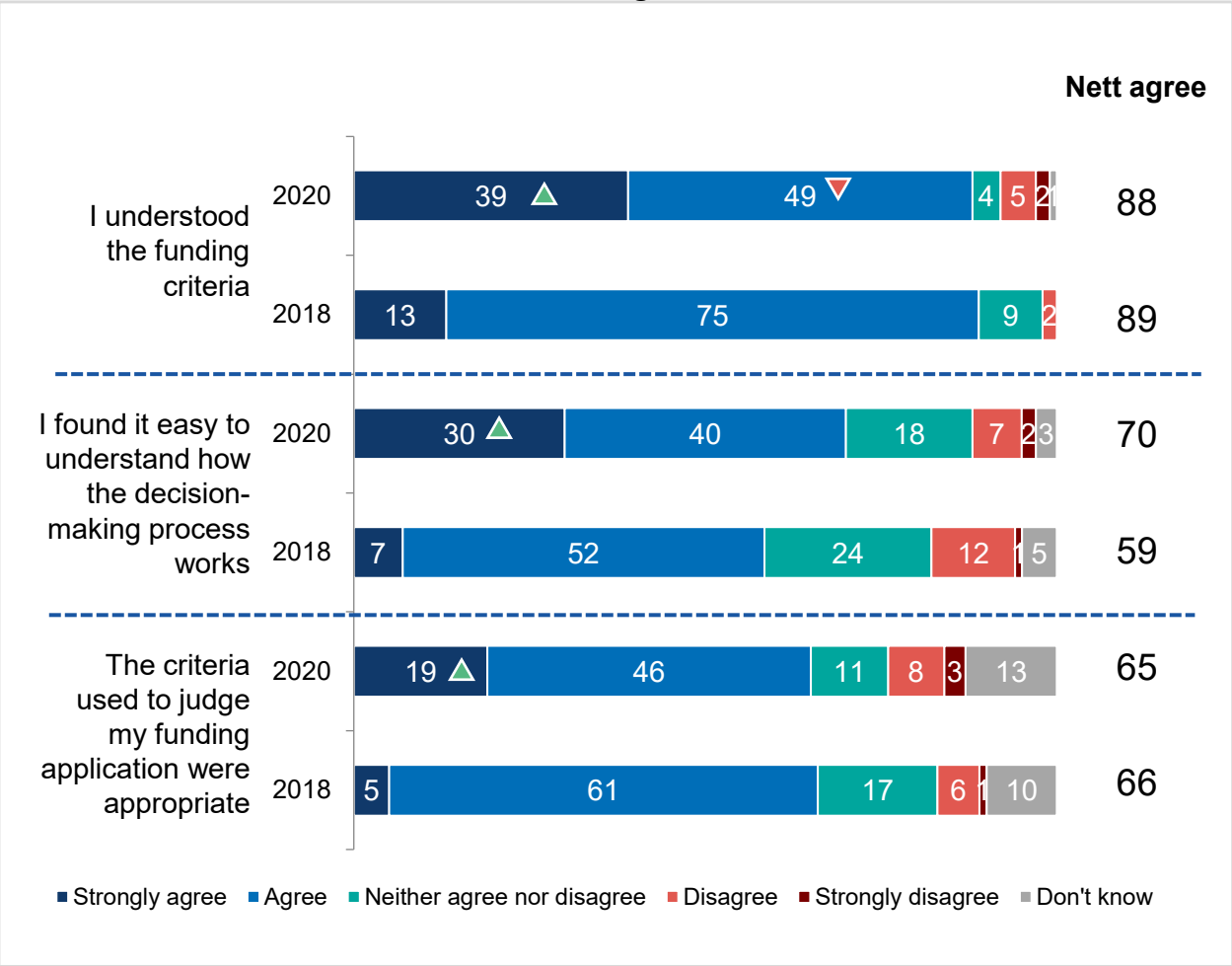


%

Overall satisfaction



Understanding of criteria



Q19. Overall how satisfied or dissatisfied are you with the service you received during your most recent funding application / interaction with them? Base: n=99
Q17. To what extent do you agree or disagree with the following statements about the application process for your most recent funding application? Base: Those who applied for funding (n=88)

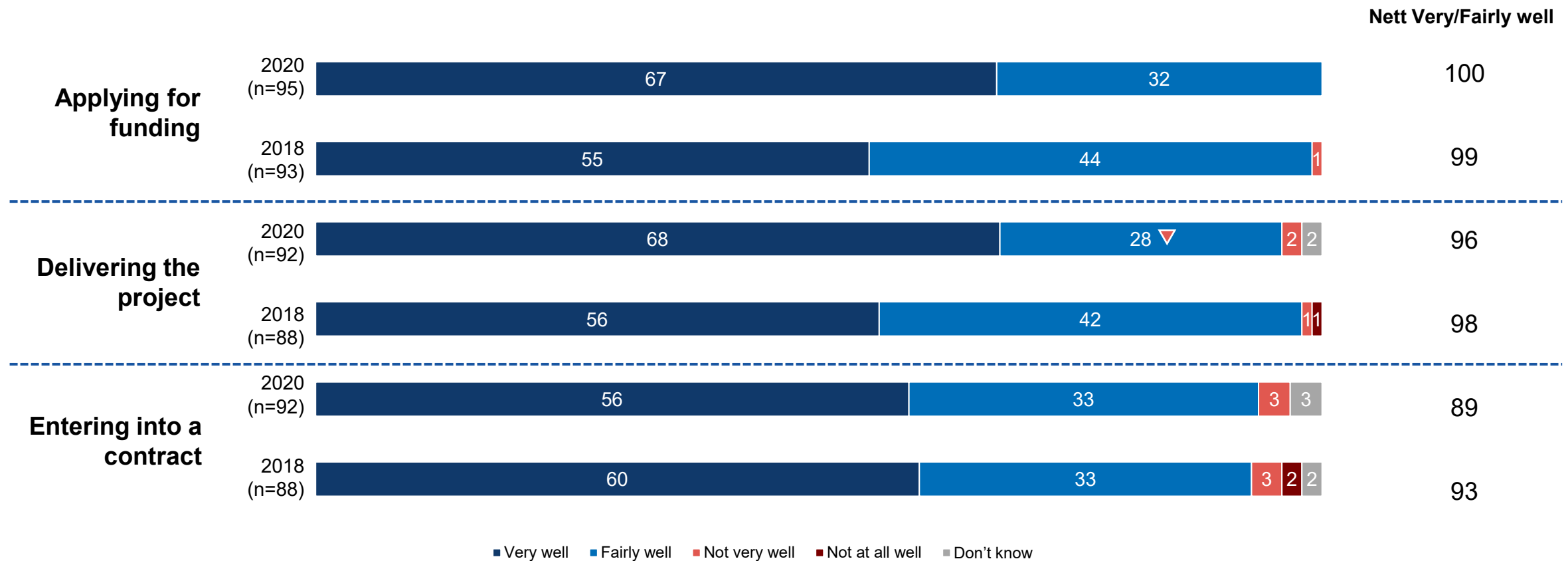
Significantly higher / lower than 2018

UNDERSTANDING OF REQUIREMENTS:

In line with 2018, most, if not all, of stakeholders feel that they understand what it required of them in terms of applying for funding, delivering projects, and entering into a contract. Both 'applying for funding' and 'delivering the project' have seen increases in the proportion who say 'very well', however these shifts are not statistically significant.



%





NEW ZEALAND MEDIA FUND

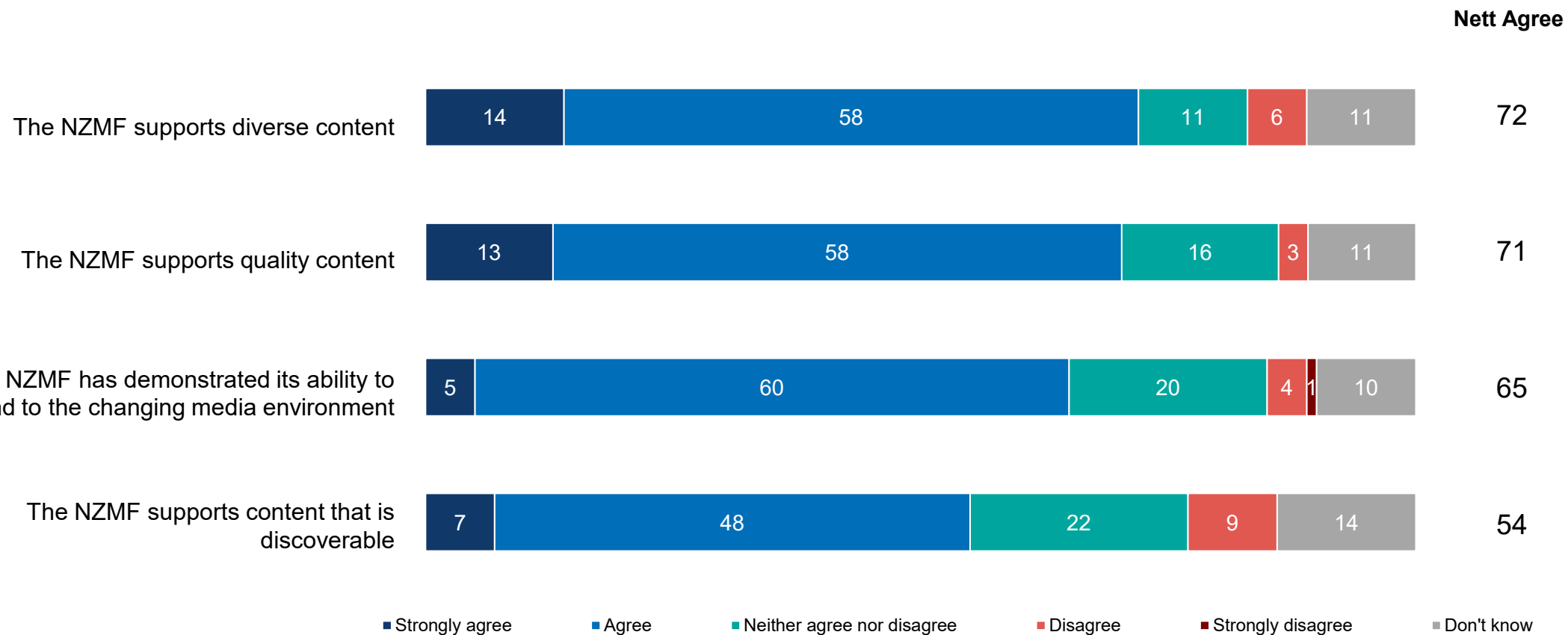


PERCEPTIONS OF THE NZ MEDIA FUND:

The majority of stakeholders feel positively about the NZ Media Fund. Around seven in ten agree that the Fund supports diverse content, quality content, and has demonstrated its ability to respond to the changing environment. Just over half agree that it supports content that is discoverable.



%

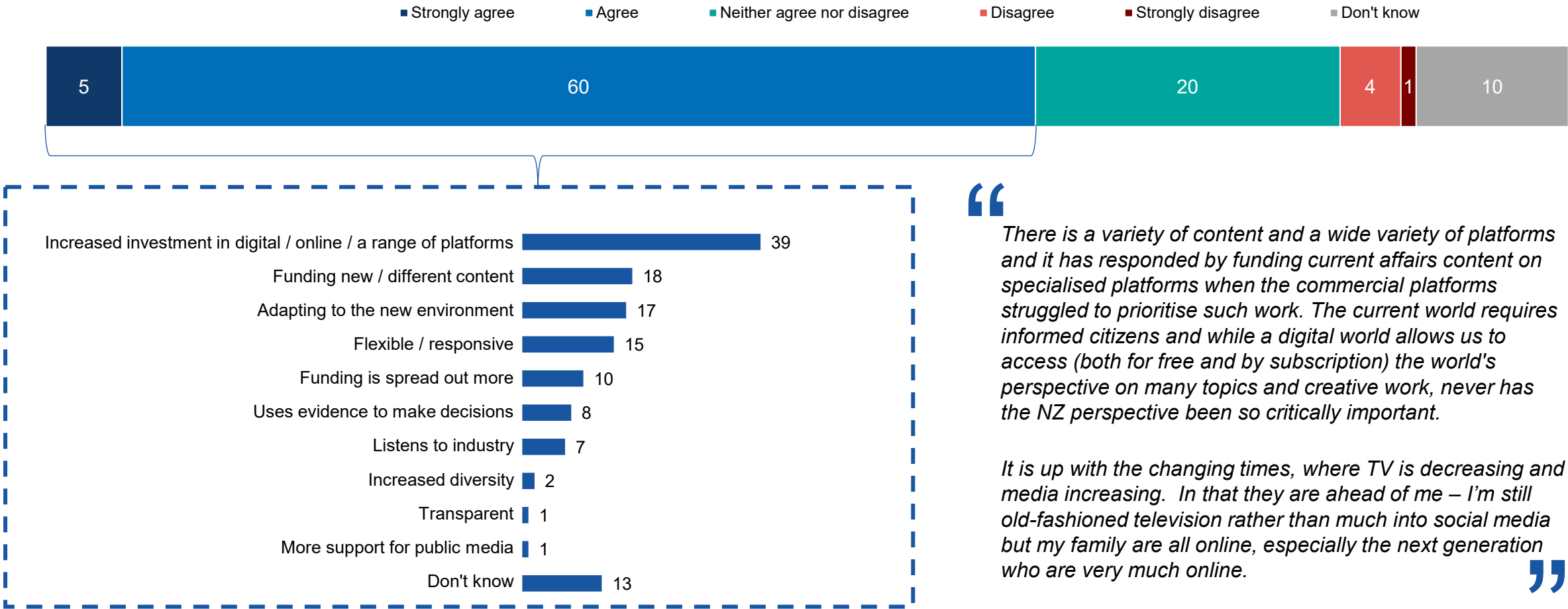


AGREEMENT THAT THE NZMF HAS DEMONSTRATED ABILITY:

Stakeholders who see the Fund as demonstrating its ability to respond to the changing media environment largely feel this is due to an increased investment in digital content (or a larger spread of content across a range of platforms).



%

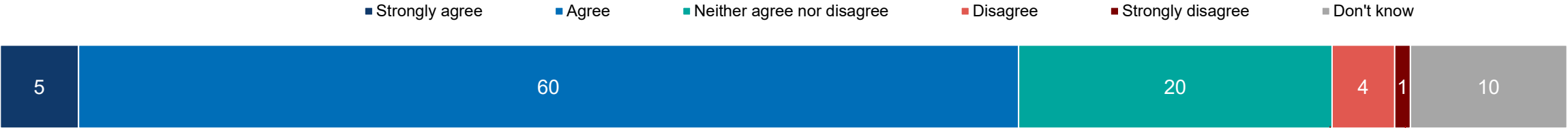


DISAGREEMENT THAT THE NZMF HAS DEMONSTRATED ABILITY:

Positively, only six stakeholders actively disagree that the Fund has demonstrated its ability to respond to the changing media environment. These stakeholders have a range of criticisms of the Fund.



%



“

The incentives and descriptions of the environment does not reflect what is actually happening. It is an outdated view with little understanding of the impact of new technologies, audience or viewing habits.

Simply not enough funding available for interactive and game related content for various platforms.

NZMF is the way forward but while it remains invested in the current ratings driven, free-to-air paradigm it will never be able to embrace the future.

I'm not sure anyone has got this figured out yet.

It still ain't flexible enough - digital, interactive, new platforms are still missing out.

The NZMF has been the cause of a changing media environment. The NZMF has fractured the funding across so many platforms and producers that now producers with overheads are struggling to be sustainable. The NZMF has caused a change in the industry which is having a detrimental affect on many established producers.

”



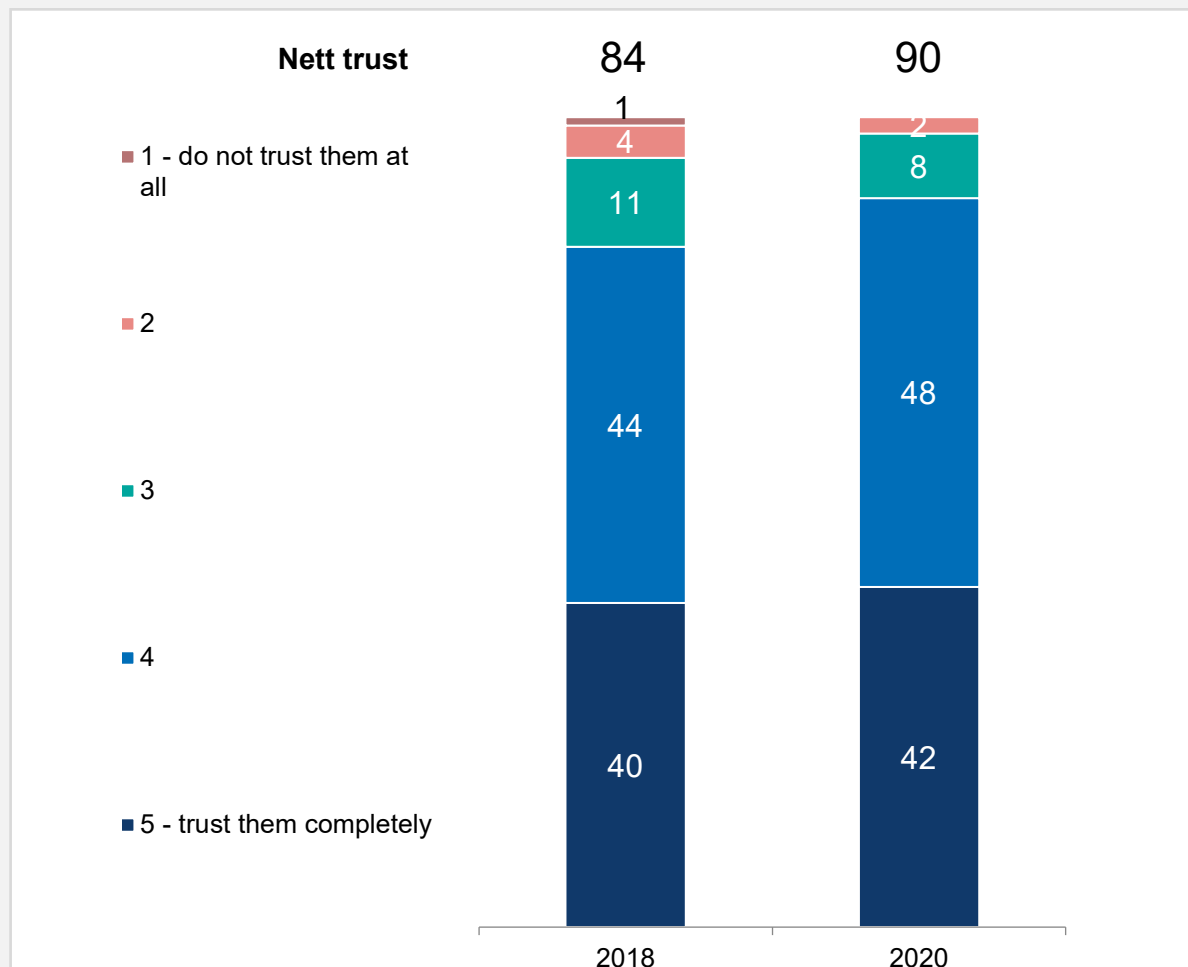
WORKING RELATIONSHIPS



TRUST:

The overwhelming majority of stakeholders trust NZ On Air. Ninety percent say that they trust the agency, compared to 84% in 2018 (please note this shift is not statistically significant).

%



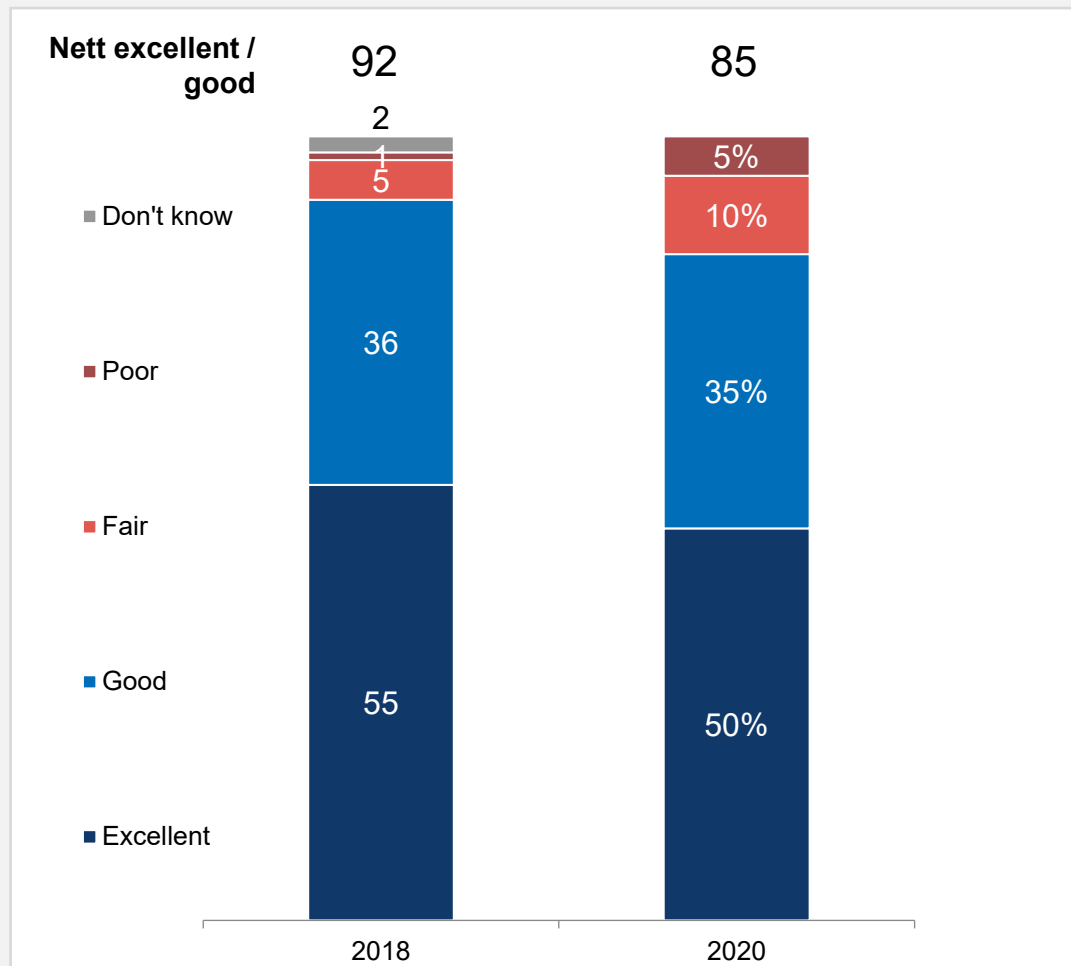
COMMUNICATIONS:

The majority of stakeholders (85%) see NZ On Air as effective communicators. This is slightly lower than in 2018 (albeit this is not statistically significant). Six in ten say that there is nothing they want NZ On Air to do differently. The most common suggestion is for regular personal contact.

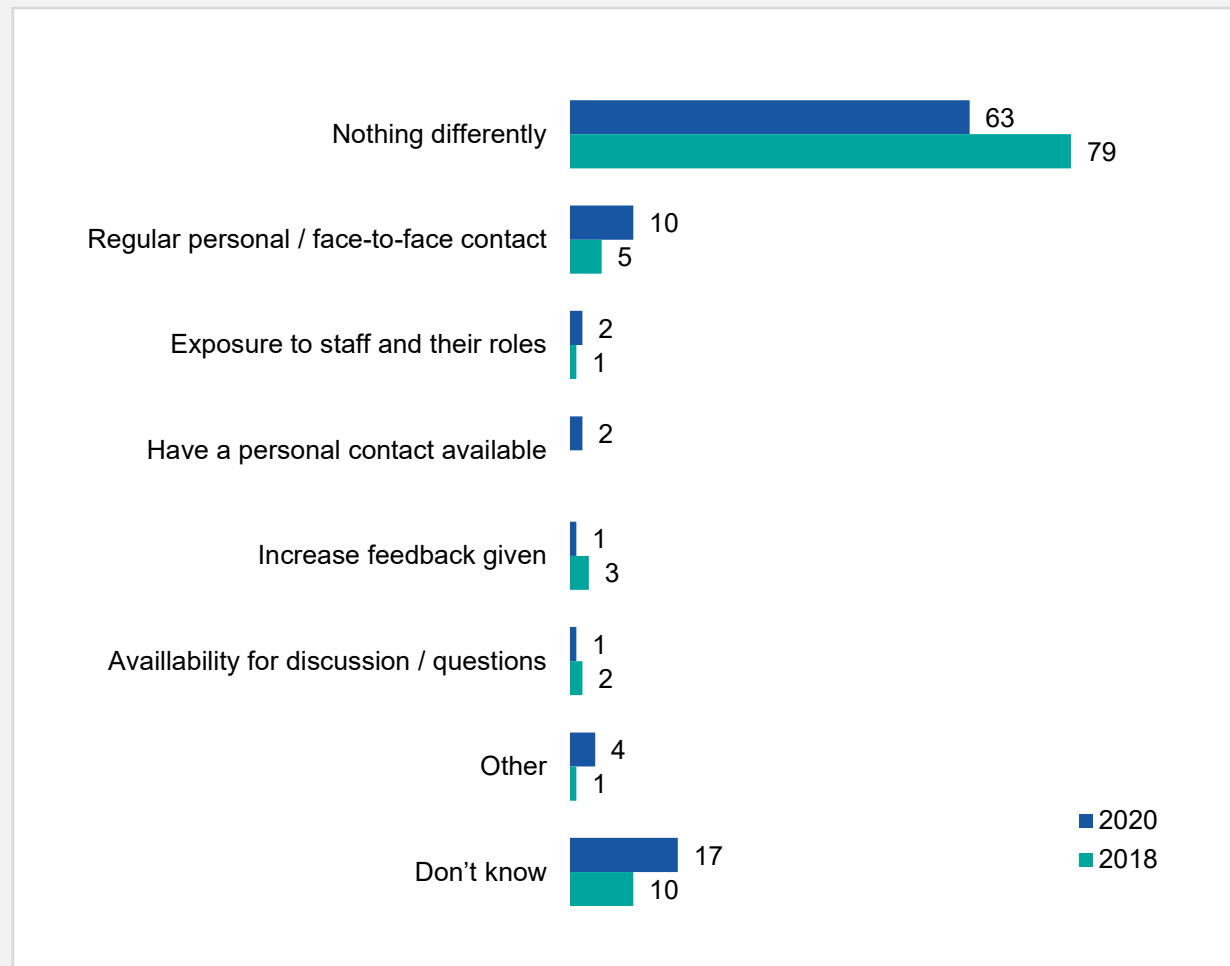


%

Effectiveness of communications



Things to do differently



COMMUNICATIONS:

Some comments illustrating the main suggestions for improvement.

Regular personal / face-to-face contact

“

Try to make some outgoing phone calls. A once a month or every other month courtesy phone call (for example) is a great way to build relationships.

-Scripted & Factual

More personal contact, targeted communication, more feedback on unsuccessful proposals.

-Scripted & Factual, Platform (content)

We've been receiving funding for many years and we have not met the new CEO even via zoom nor Amie Mills. There's an Auckland and Wellington divide - while most production companies are Auckland based there should be staff accessible here to meet with.

-Scripted & Factual, Platform (content)

Exposure to staff and their roles

“

The constraints on greater communication don't come from NZ On Air. They come from within my organisation. So perhaps greater clarity around the responsibilities and rights of individuals amongst organisations they support around reporting lines for individuals within NZ On Air.

-Platform (operational)

I'm never sure who is the main person to address communication to.

- Scripted and Factual

I'm not entirely sure who does what.

- Scripted and Factual

Have a personal contact available

“


Be more consistent. Advice depends on who you talk to and can have serious consequences. Establish clear lines of comms so we know who to talk to about what, at the moment it could be one of four people and they all have a different answer.

- Scripted & Factual, Platform (content)

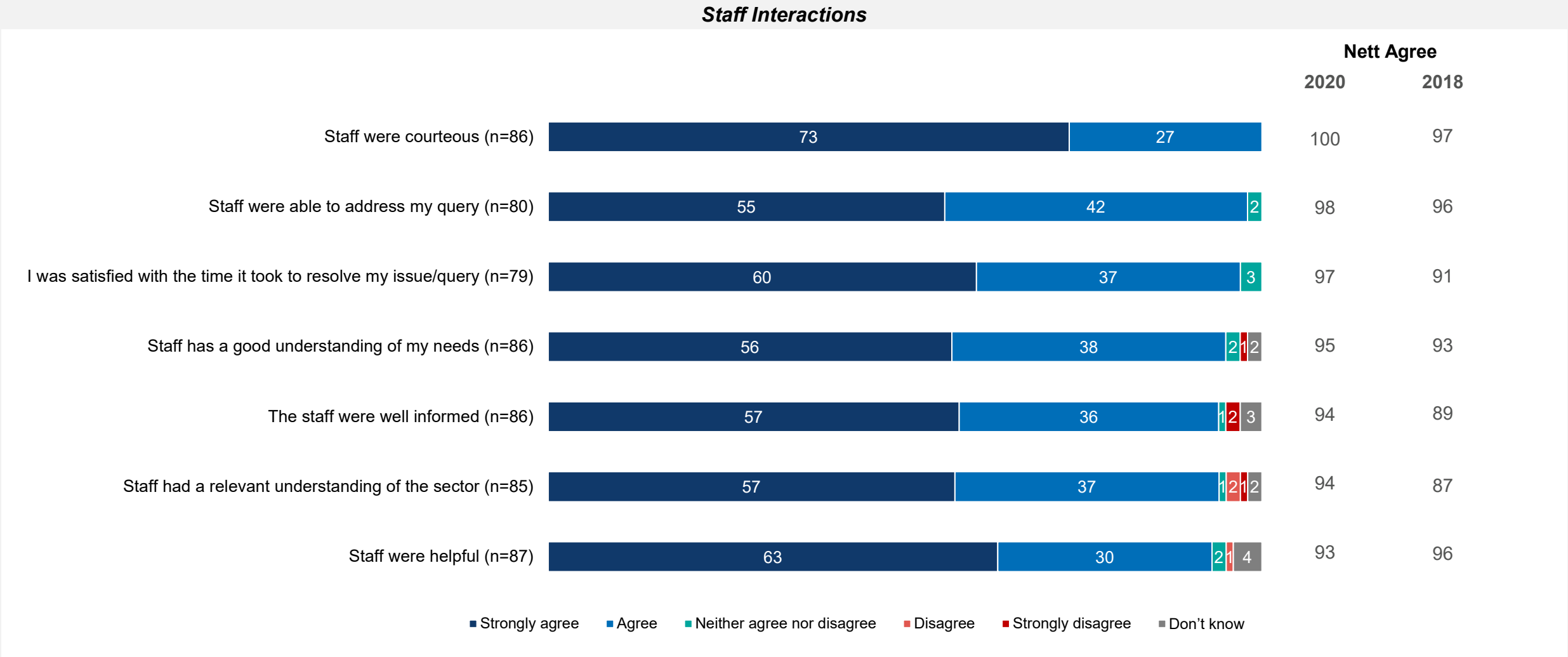
Make a personal contact available.

- Scripted and Factual

PERCEPTIONS OF STAFF:
 Staff continue to be a strong asset for NZ On Air in the minds of stakeholders, with around nine in ten seeing them as courteous, understanding, well informed, helpful and with a strong understanding of the sector. Staff also continue to do a good job in effectively addressing queries in a timely manner. There are some shifts in nett agreement from 2018 (for example, staff having a relevant understanding of the sector), however none of these are statistically significant.



%





LOOKING FORWARD

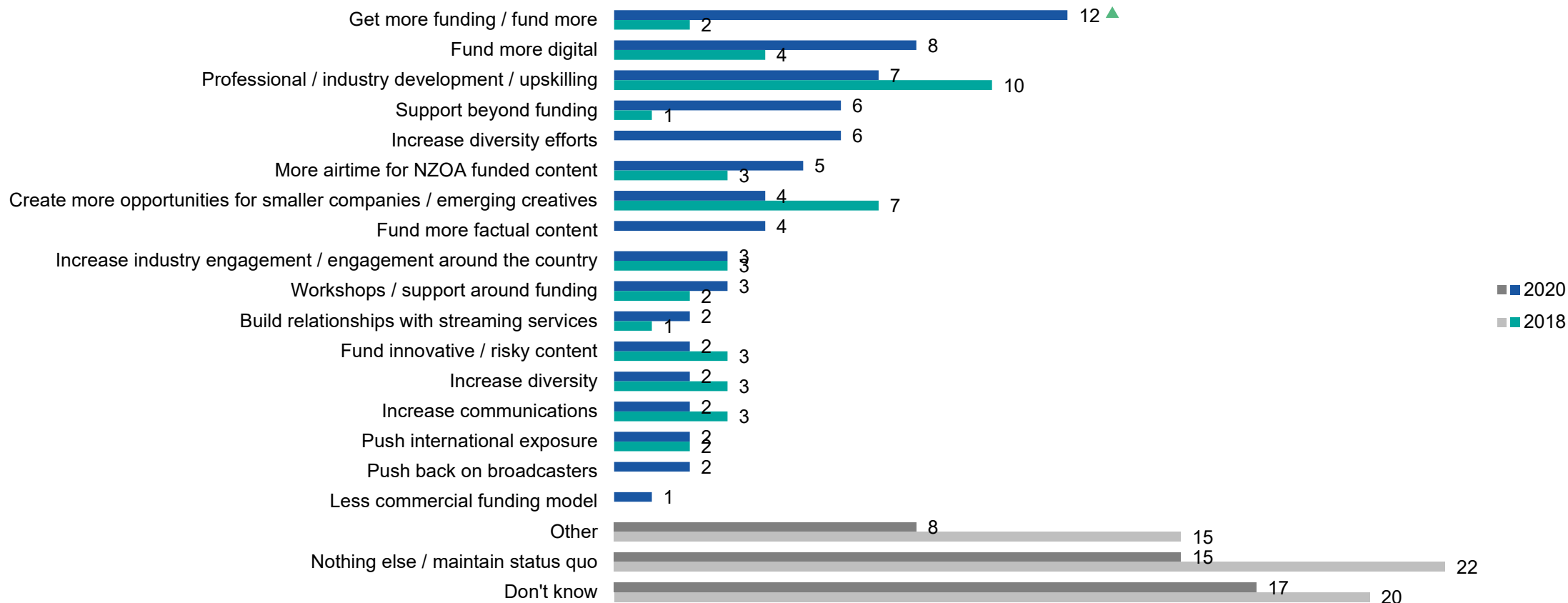


WHAT DO PEOPLE WANT MOVING FORWARD?

Stakeholders feel that the key ways NZ On Air can continue to assist the industry is by funding more projects, and in particular continuing to increase their funding of digital content. Fifteen percent of stakeholders say that there is nothing else that NZ On Air should do, and that they should maintain the status quo.



%



SUGGESTIONS FOR CHANGE:

Some comments illustrating the key suggestions.

Get more funding / fund more

“

Having more funding rounds for children's funding. One a year is not appropriate with new platforms and content required by those platforms.

-Scripted & Factual

Lobby for more funding for current styles music (i.e. originally composed) in particular (so that it has a fairer representation per person compared to classical music (which is funded way more than the audience for other music styles is).

-Music (projects)

Fund more digital

“

Look beyond the conventional in terms of delivery platforms i.e. fish where the fish are on places like Facebook where some pages have huge audience followings that are significantly larger than conventional TV and radio broadcasting

-Scripted & Factual

Higher levels of funding for interactive and gaming content plus a wider variety of culturally linked funds.

-Scripted & Factual

Professional / industry development / upskilling

“

More targeted professional development and internships for emerging screen talent.

-Scripted & Factual

Maybe offer access to / workshops with Executive Producers to assist with producers or even just a storyteller who has an amazing story and the potential to become a Director/Producer to still be fully involved with their project, instead of a storyteller handing over their story to a production company that doesn't have the same vision.

-Scripted & Factual

SUMMARY: Overall, stakeholders remain exceptionally happy with their relationship with NZ On Air. The few who are more negative generally are so due to being declined funding, yet even they acknowledge the good work that NZ On Air do. There is acknowledgement of the greater investment in interactive and digital content, particularly through the NZ Media Fund. However, stakeholders are still pushing for NZ On Air to adapt to the changing environment, with some perceiving the agency as being stuck in the past, working to an outdated system. Continued calls are being made to focus on innovative, ground-breaking content and investments.

“

I think we should take more risks in the way we make programmes and the content of the programming. TV is changing, we should be trying new things. It's OK to fail. Let's not make the same stuff over and over again. There should be cross-genre programs. Let's encourage not just diversity, but diverse ways of telling stories. Let's give directors more power and let's take away the editorial licenses of the producers and network executives. Let's experiment a bit. Our audiences expect it. They get it through Netflix and Neon etc. We have the programme makers who can make this content. Let's give them a bit more free reign.

-Scripted & Factual

Embracing new platforms and content types has been a good journey for NZ On Air, but it isn't over. Media continues to change rapidly and I would encourage NZ On Air to continue experimenting with new media opportunities, particularly those from new sectors and technologies while continuing to fund traditional media.

-Scripted & Factual, Platform (content)

”





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- b. Publish the appropriate details of the project
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