

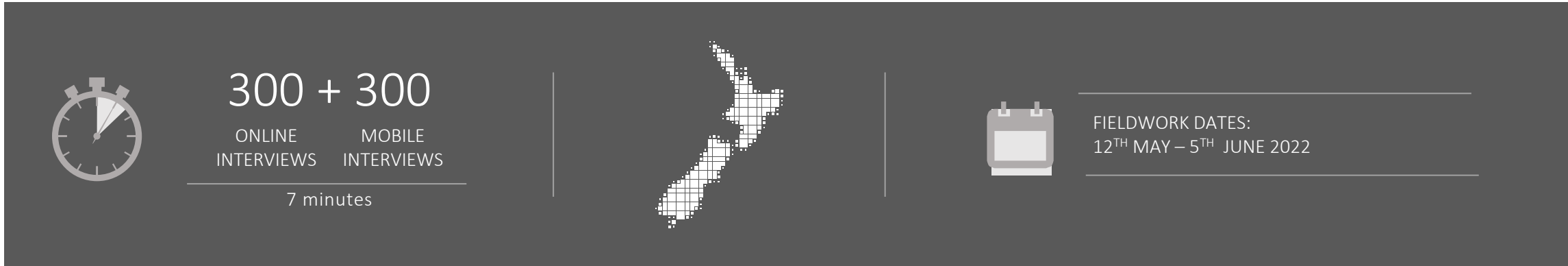
KANTAR PUBLIC



NZ ON AIR

PUBLIC AWARENESS AND
ATTITUDES SURVEY
2022

Objectives and Methodology



OBJECTIVES

NZ On Air commissioned Kantar Public to research and track New Zealanders' understanding of:

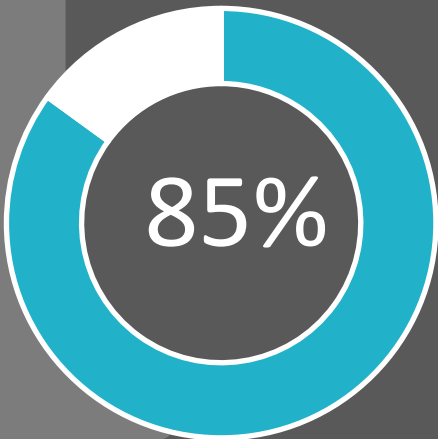
- NZ On Air,
- NZ On Air's role in funding local content, and
- their views on that content.

METHODOLOGY

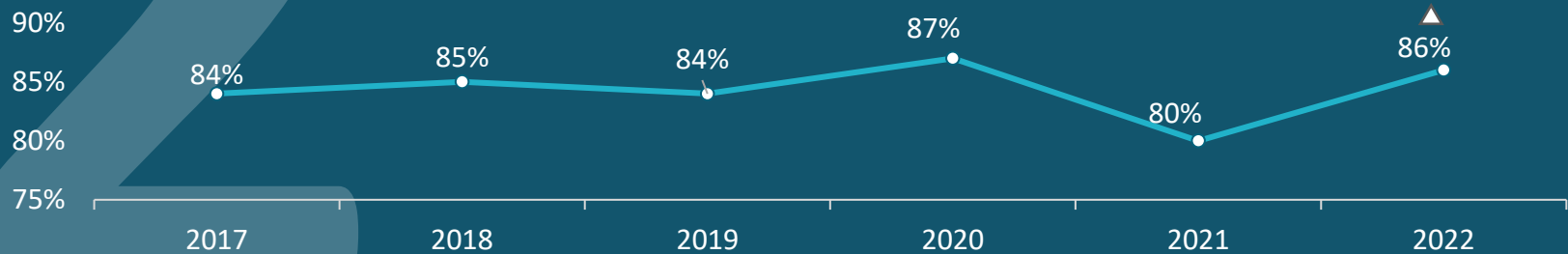
- 300 interviews were conducted online, and 300 completed via mobile phone. The online sample was sourced through the Kantar online panel, while the mobile sample used randomly generated mobile phone numbers. Previously, the survey used a mix of landline and mobile sampling. The change in method was agreed to place the survey on a more sustainable footing moving forward.
- For mobile numbers, the main user of the phone (over 15 years old) was interviewed. For the online interview, if the respondent had any children aged 15-17 in their household, the respondent had the option of inviting the 15-17 year old to complete the survey. All those aged 15-17 who completed the survey were given a \$10 e-gift voucher, while online panellists (aged 18+) receive loyalty points.
- Both the telephone and online scripts used automated question routing to help support the quality of the data.
- Weighting was applied to ensure that the sample was representative of the New Zealand adult population (based on 2018 Census data).
- Whenever differences are reported (for example an increase or decrease since last year, or previous years) these are statistically significant at the 95% confidence level or greater unless otherwise stated.

Executive Summary

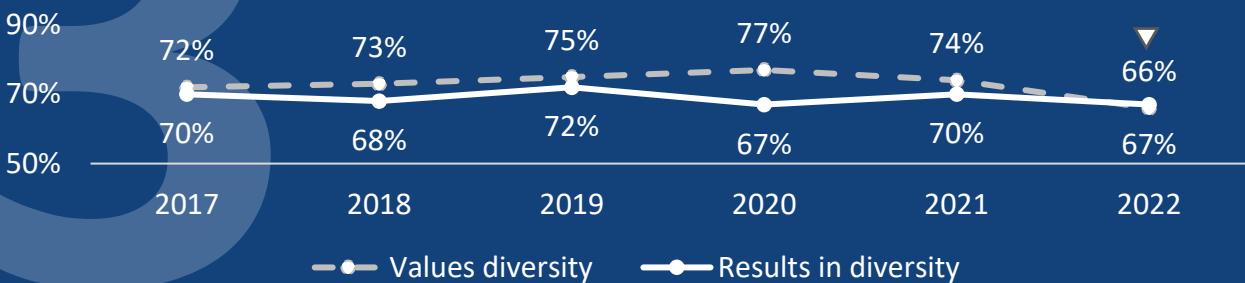
Awareness of NZ On Air has remained stable;
85% of New Zealanders, vs. 83% in 2021.



Support for free-to-air, publicly funded television content has bounced back to the longer term trend.
This reversal could have been prompted by fresh concerns around the cost of living.



Most New Zealanders continue to say NZ On Air funding results in greater diversity of content but the value they place on diverse local content is at its lowest level to date.



Most New Zealanders continue to recognise that NZ On Air supports content that is important to New Zealanders.



KANTAR PUBLIC

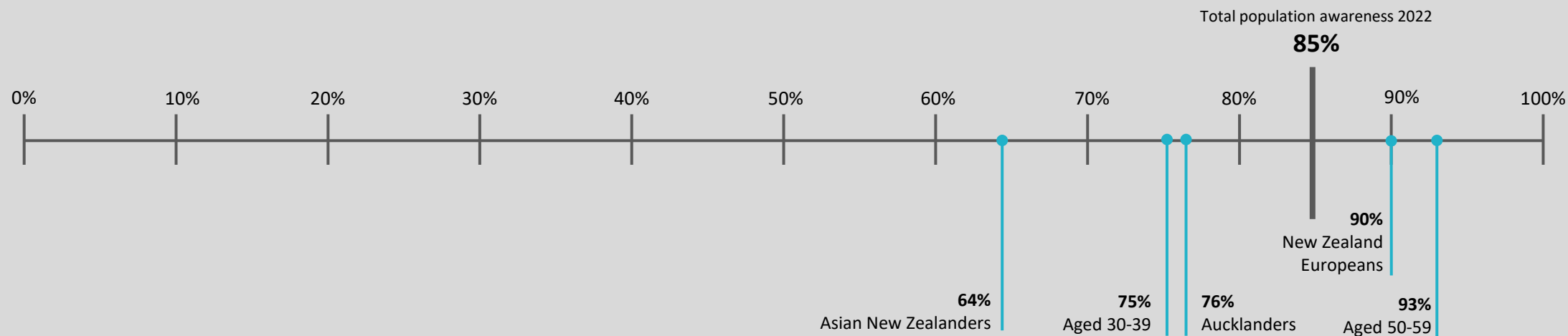
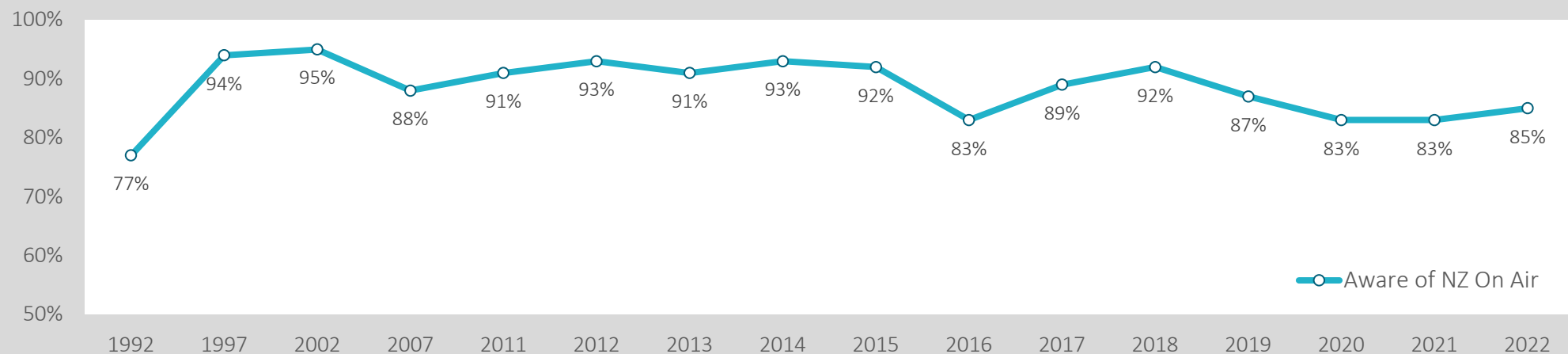


HIGH LEVEL AWARENESS
AND PERCEPTIONS

AWARENESS OF NZ ON AIR:

The majority of New Zealanders continue to be aware of NZ On Air (85%). This result has stemmed the gradual decline in awareness since 2018. New Zealand Europeans and those aged 50-59 are more likely than average to be aware of NZ On Air. Meanwhile Asian New Zealanders, those aged 30-39 and Aucklanders are less likely than average to be aware of NZ On Air.

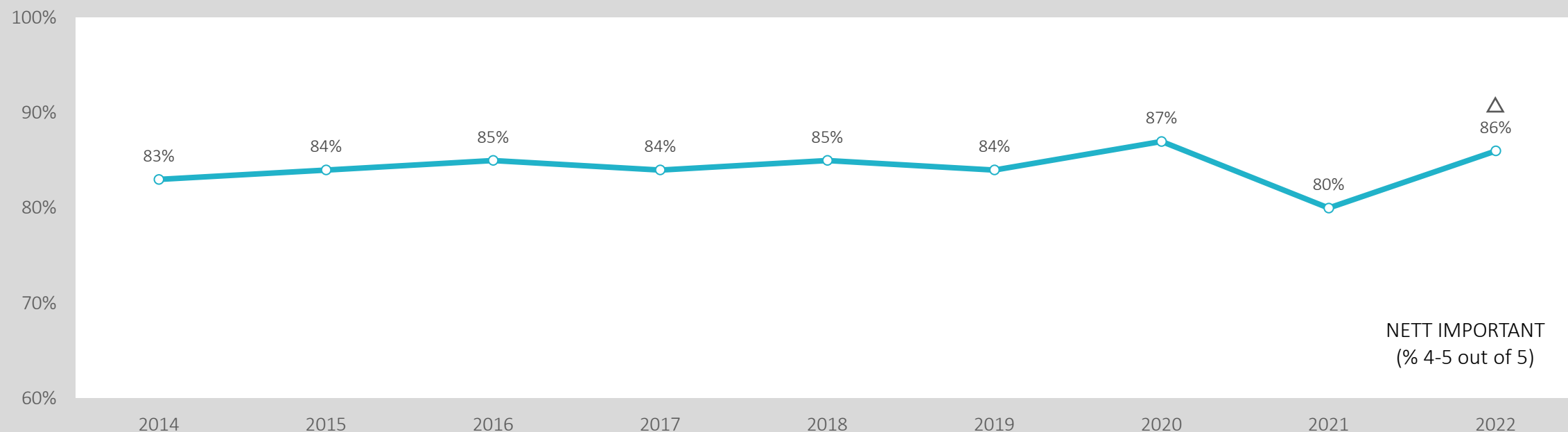
Q: 'Do you know that there is an organisation called NZ On Air?'



IMPORTANCE OF PUBLICLY FUNDED CONTENT:

A majority of New Zealanders think it's important to have publicly funded television content that is free to consume (86%). The result shows an increase in the importance of free to consume content for New Zealanders compared to 2021 and the result is now in line with the long term trend. The reversal from 2021 might be a reflection of the emergence of the cost of living crisis, or it could be that 2021 was simply an outlier, and in 2022 attitudes have reverted to the norm.

Q: 'How important is it that publicly funded television content is free to consume, means you don't have to pay a SKY, Netflix or paywall subscription?'¹

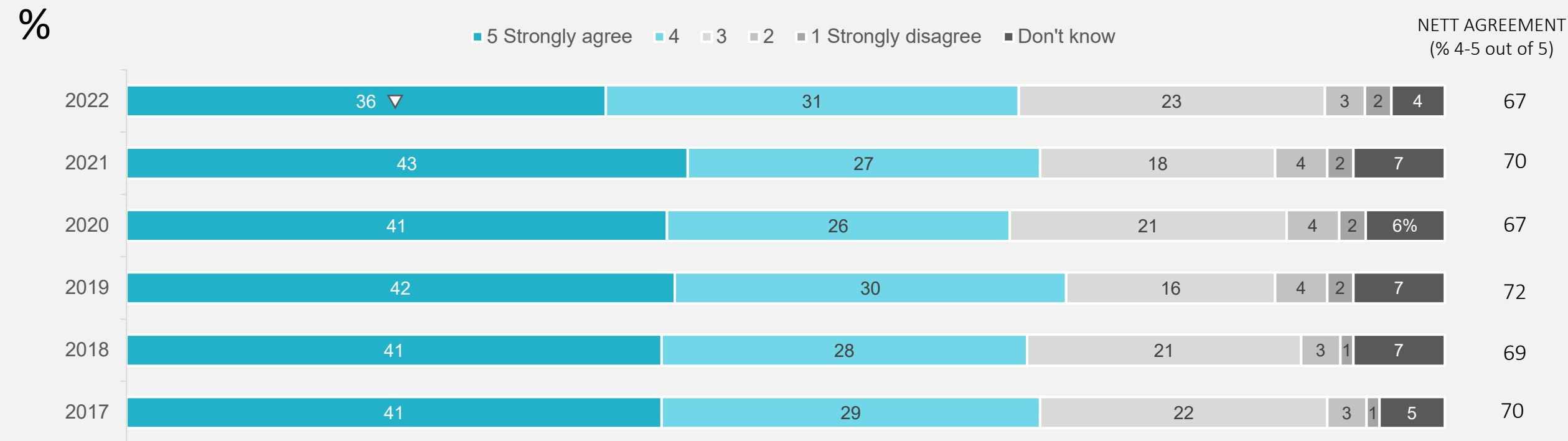


There are no demographic differences of note for this question

RECOGNITION OF THE IMPACT NZ ON AIR FUNDING MAKES IN TERMS OF LOCAL CONTENT:

Agreement that NZ On Air funding results in greater diversity of local content remains high and in line with the previous five years. However, sentiment appears to have softened, with the proportion who strongly agree dipping to its lowest level to date.

Q: 'How much do you agree or disagree that NZ On Air funding results in a greater diversity of local content than would otherwise exist?'

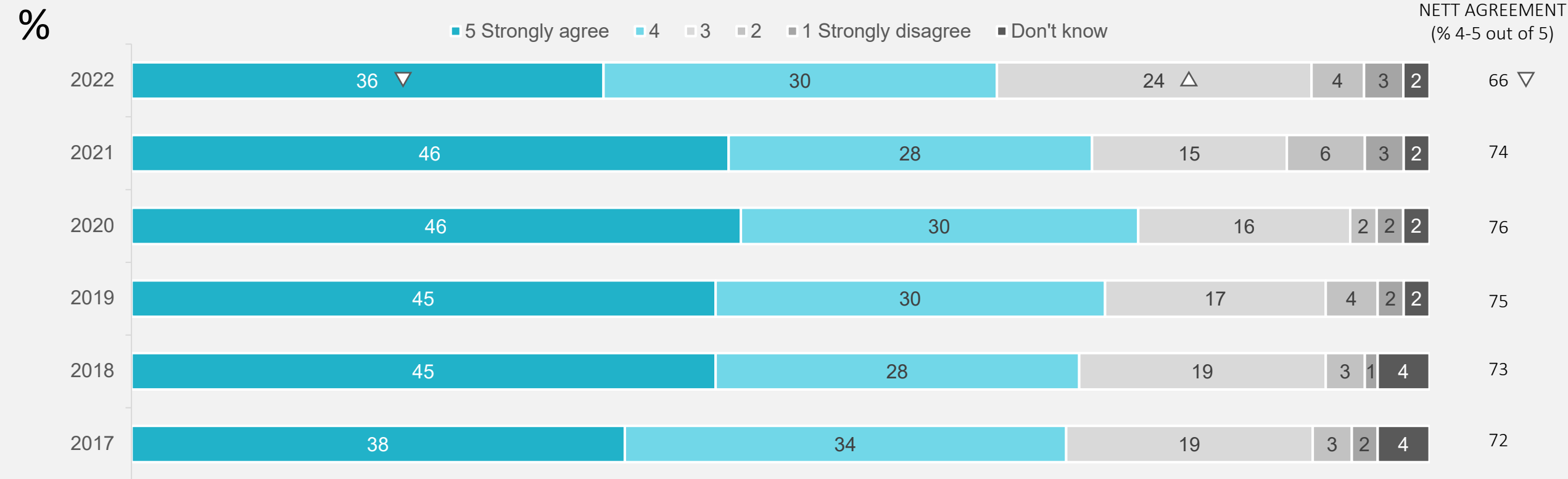


There are no demographic differences of note for this question

VALUE PLACED ON DIVERSE LOCAL CONTENT:

Two thirds of New Zealanders value the diversity of local content funded by NZ On Air. While the majority of New Zealanders value diversity this has decreased to its lowest level to date. There is also a decrease in the proportion who strongly agree that they value the diversity of local content funded by NZ On Air.

Q: 'How much do you agree or disagree with the following statement... you value the diversity of local content funded by NZ on Air?'



There are no demographic differences of note for this question

KANTAR PUBLIC

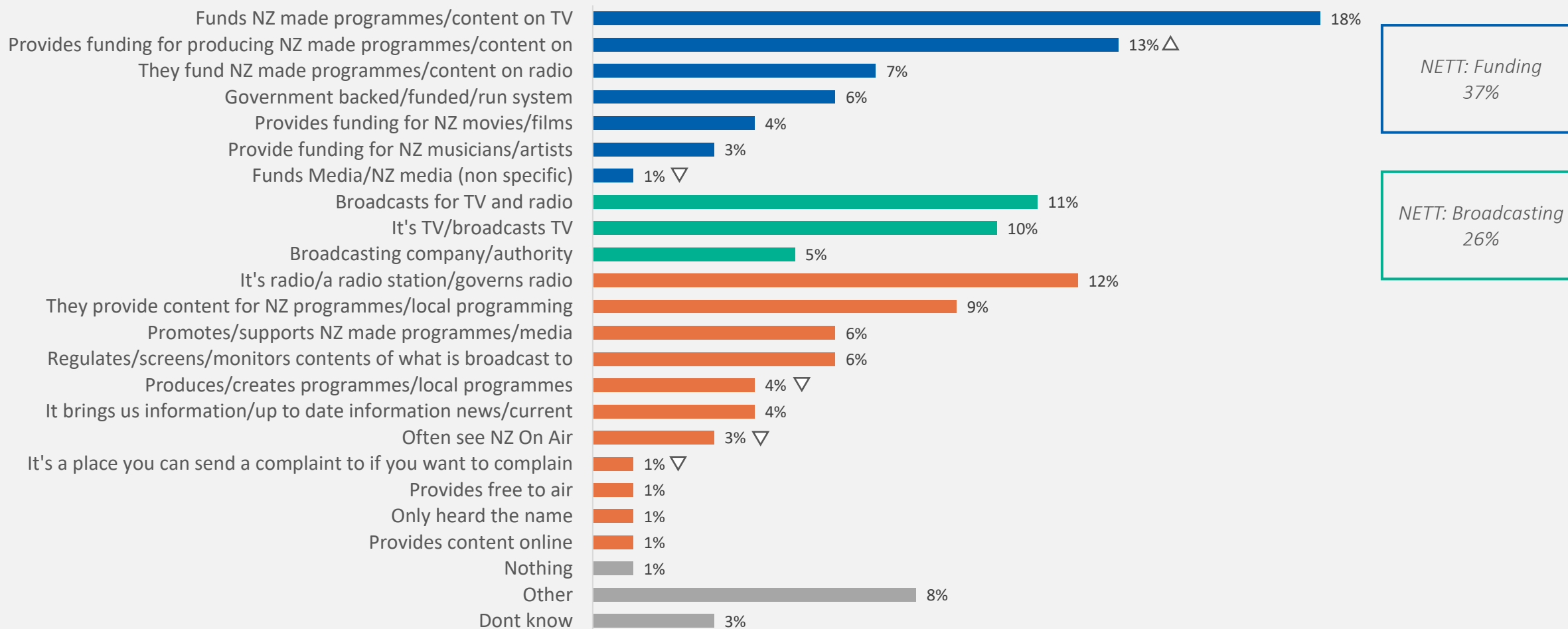


DETAILED AWARENESS FINDINGS

UMPROMPTED AWARENESS OF NZ ON AIR'S ROLES:

Over one third of those who are aware of NZ On Air are aware of the agency's funding role. However, one quarter of New Zealanders incorrectly believe that the agency is a broadcaster, a similar proportion compared to 2021 (25%).

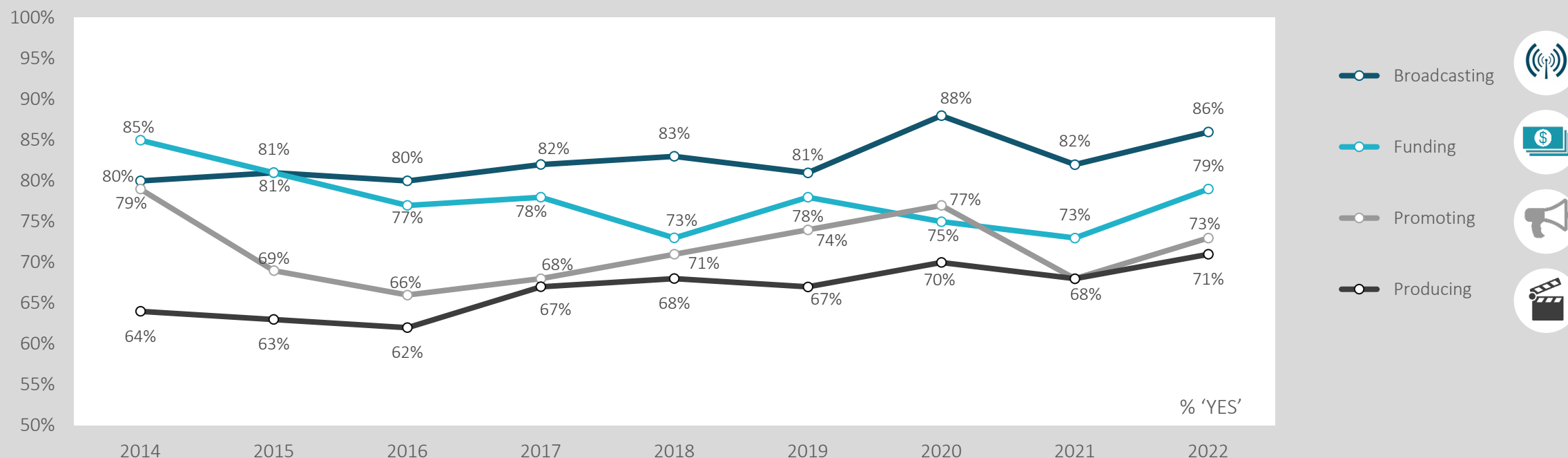
Q: 'Can you please tell me everything you know about what NZ On Air does?' (Open ended question)



PROMPTED AWARENESS OF NZ ON AIR'S ROLES:

There is confusion about NZ on Air's role. The majority of New Zealanders continue to falsely believe NZ On Air is a broadcaster (86%). At the same time the proportion who believe NZ On Air is supports local content by funding it is at highest level since 2015, at 79%.

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

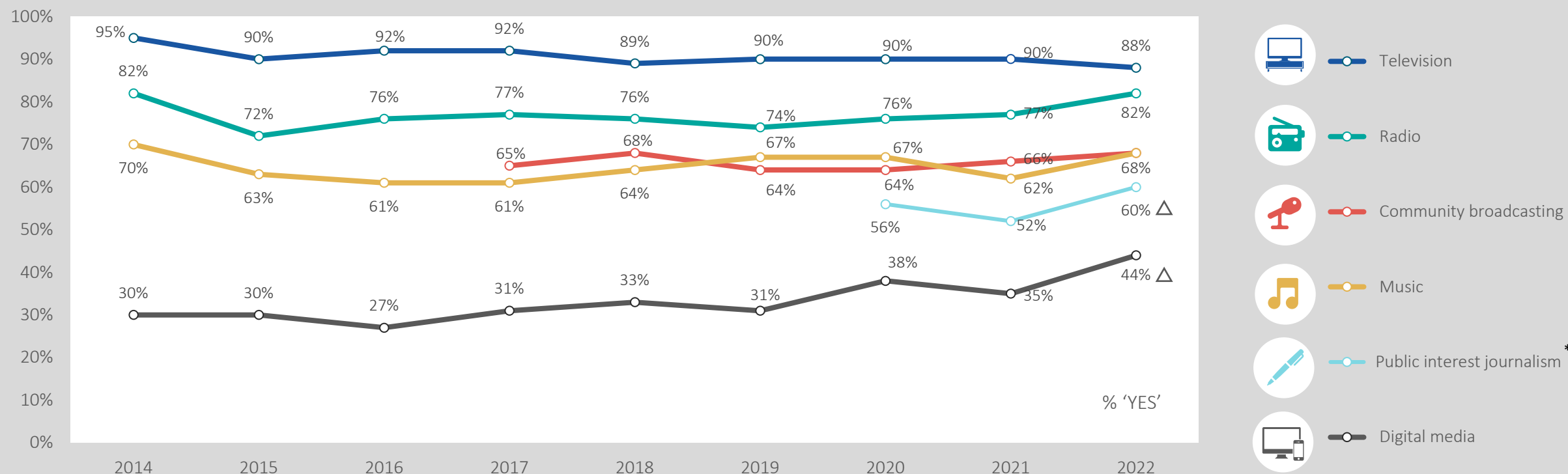


- Women (90%) and those aged 15-29 (94%) are more likely than average (86%) to incorrectly believe that NZ On Air **broadcasts** content, while men (80%) and those 50-69 (78%) are less likely to.
- Those aged 70 plus (65%) are less likely than average (79%) to believe that NZ On Air **funds** local content.
- Those aged 50-59 (63%) are less likely than average (73%) to believe NZ On Air **promotes** local content.
- Those aged 15 to 29 (80%) are more likely than average (71%) to believe NZ On Air **produces** local content, while those aged 60 to 69 (60%) are less likely to.

AWARENESS OF MEDIA SUPPORTED BY NZ ON AIR:

The public's recognition that NZ On Air supports public interest journalism and digital media have reached all time highs. Public awareness of support for other media by NZ On Air remains relatively stable.

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



- Asian New Zealanders (77%) are less likely than average (88%) to be aware that NZ On Air supports **television**.
- Men (87%) are more likely than average (82%) to be aware that NZ On Air supports **radio**, while women (78%) are less likely to.
- Those aged 15-29 (58%) and Asian New Zealanders (56%) are more likely than average (44%) to be aware that NZ On Air supports **digital media**, while those aged 50-59 (31%) are less likely to.

KANTAR PUBLIC

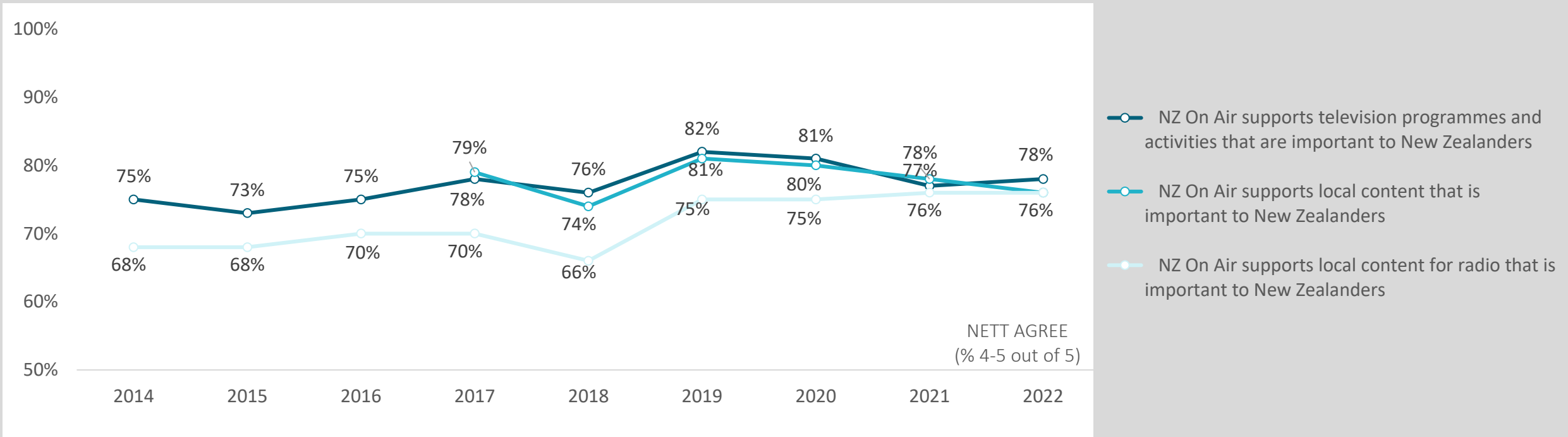


SUPPORT FOR
NZ ON AIR'S MISSION

AGREEMENT THAT NZ ON AIR SUPPORTS IMPORTANT CONTENT:

The majority of New Zealanders continue to agree that NZ On Air supports content that is important to them, whether that be television, radio, or other forms of local content.

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

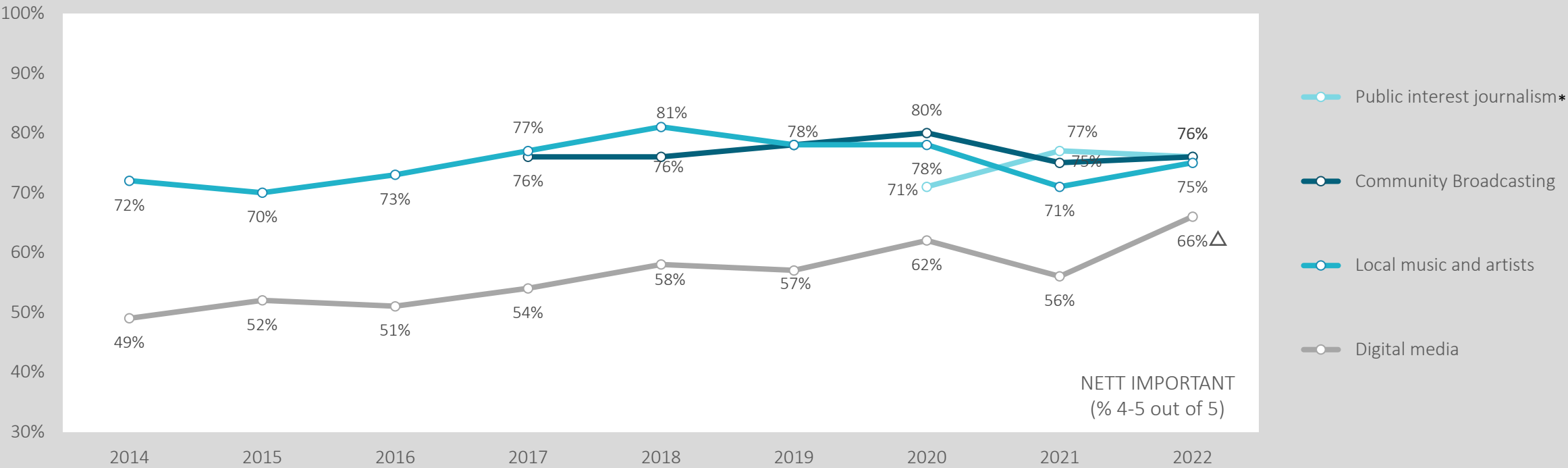


New Zealanders aged 50-59 (87%) are more likely than average (76%) to agree it is important that NZ On Air supports local content for **radio**.

IMPORTANCE OF SUPPORTING DIFFERENT TYPES OF CONTENT:

More New Zealanders than ever believe that it is important that NZ On Air supports digital media (66%). This demonstrates that digital platforms are becoming increasingly important to people, and are certainly ‘mainstream’. Around three quarters of New Zealanders continue to believe it is important that NZ On Air supports the other forms of media listed.

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

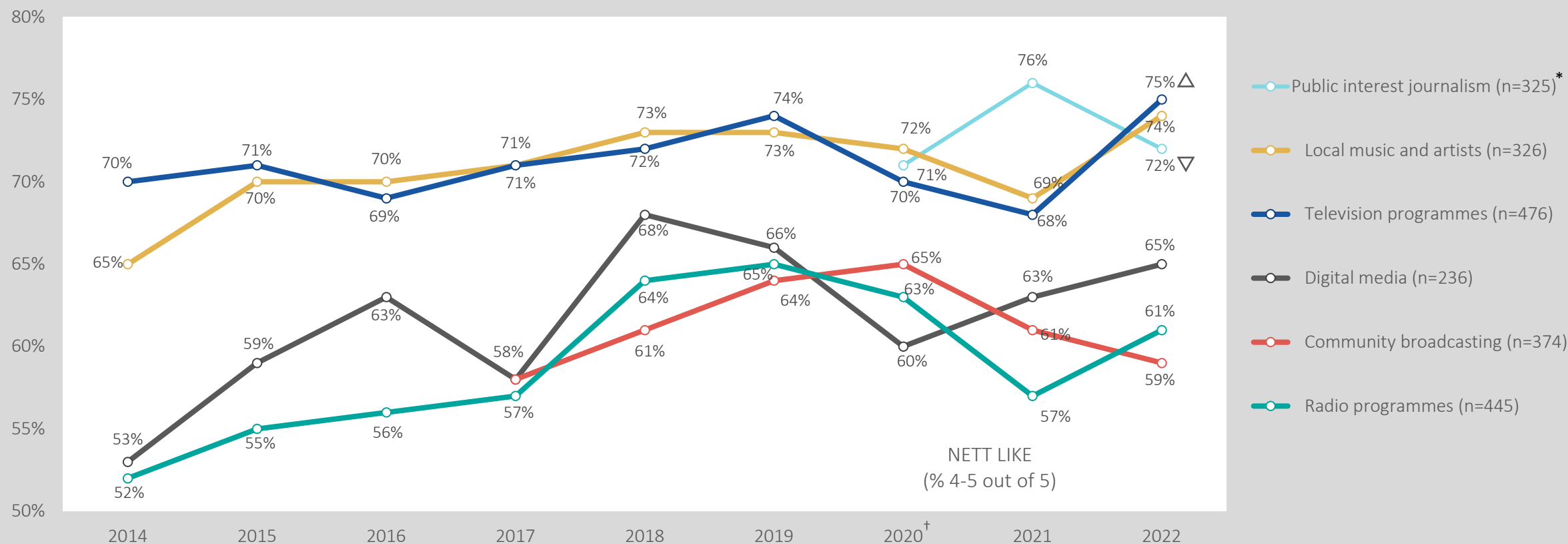


- Women (82%) are more likely than average (75%) to think it is important to support **local music and artists**, while men (67%) are less likely to.
- Those aged 30-39 (86%), 50-59 (85%) and women (80%) are more likely than average (76%) to think it is important NZ On Air supports **public interest journalism** whereas men (72%) are less likely to.
- Women (70%) are more likely than average (66%) to think it is important NZ On Air supports **digital media** whereas Men (61%) are less likely to.

LIKEABILITY OF CONTENT:

Overall, likeability of content is broadly in line with 2021. New Zealanders rate television programmes the most favourably out of all content, currently peaking at 75%. This has overtaken public interest journalism, which has fallen slightly, but remains high at 72%.

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



Pacific peoples (87%) and those aged over 70 (76%) are more likely than average (61%) to like NZ On Air funded radio whereas younger audiences aged 15 to 29 (51%) are less likely to.



TELEVISION

"I prefer to watch locally made shows to overseas ones as I find I relate to them more."

"It means we see good local shows and content that otherwise wouldn't be made."

"Because it is pertinent to local issues in some cases or it is local stories it is usually very well done. I usually enjoy it for the local information and learning something new about our country and people."



RADIO

"RNZ provides more in depth commentary and analysis than commercial radio, and covers topics that may get missed by commercial radio."

"I feel it's important for the big number of people that can't see (impaired vision, workers & builders that only have a radio, people who are older & things like that)."

"It is probably a local company so it is better for the national market and good for the people of New Zealand and much better for us."



COMMUNITY BROADCASTING

"It tells you a lot about people in your area. We listen to a local country and western channel."

"It gives a voice to the average Kiwi who does not have the funding to do so otherwise. Might introduce people to a potential career."



DIGITAL MEDIA

"I think it's important that we have stuff that relates to New Zealand freely accessible to New Zealanders, it's not user pays. A lot of people can't afford content so it's good to have content that is freely available to all New Zealand - at least a baseline provision."

"Otherwise I will miss lot of quality stuff on internet which speaks about New Zealand and its culture."



MUSIC AND ARTISTS

"New Zealand local music is amazing and they work hard to gain recognition in New Zealand and overseas. They deserve all the help they can get."

"Great to support New Zealand artists, and I like Bennee and Six 60 and it was mentioned earlier that [NZ On Air] supported both."

"I am supporting New Zealand's music industry and encouraging local musicians to the world level."



PUBLIC INTEREST JOURNALISM

"Public interest journalists are less biased, they report facts and information that we need to know without an agenda."

"Balanced independent news reporting is a way to inform and hold to account"

"Because these stories need to be told. Informative and NZ based. Without them we would be fed a diet of overseas information. Our people, our stories."



TELEVISION

"Most stuff funded by the government on TV is government propaganda, is warped and I disagree with that stuff, it is dodgy and marginal/that includes grants to papers like the Herald, much as they swear black & blue to the contrary, nobody trusts that stuff anymore, media organisations accept government funding with conditions attached."



PUBLIC INTEREST JOURNALISM

"Some of the news shows that are funded are not in best public interest and spread misinformation in way that they are "just asking questions."

"This is the NZ Government using a Government agency to promote and support their political agenda and in my opinion it's a complete rort and misuse of public money. [...]"



RADIO

"I don't listen to the radio. Don't like the topics they sometimes put on."

"I do NOT like State Funded TV & Radio, in general. I think Government is well outside of its remit."



COMMUNITY BROADCASTING

"Community radio should be funded by a revenue etc. Limited budget to spend."

"I don't relate to any of it. It doesn't appeal to me and I don't see my interests represented in it. It is boring to me."

"I'm sorry, but it's boring in my honest opinion."



MUSIC AND ARTISTS

"They should get funding from somewhere else."

"Can be funded by other sources. Not as important and news and media."



DIGITAL MEDIA

"I don't think we need funded support for digital stuff."

"It is really poorly designed and hard to read."

"Like I said I have lost so much memory so I do not use my computer anymore as it would drive me crazy, that is why it is of no value to me, but radio and TV is vital for me."

KANTAR PUBLIC



FOR FURTHER INFORMATION
PLEASE CONTACT:

Edward Langley or Conor Bryant

Kantar Public Level 9, 101
Lambton Quay,
Wellington 6011
PO Box 3622, Wellington 6011
Phone (04) 913 3000
www.kantarpublic.com/nz