



NZ ON AIR

PUBLIC AWARENESS AND
ATTITUDES SURVEY

2016

Executive Summary

Objectives and method

- NZ On Air commissioned Colmar Brunton 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.
- Between 11 April and 8 May 2016 Colmar Brunton conducted a survey of 606 New Zealanders aged 15 years or over. Of the 606 interviews, 505 were conducted by telephone, and 101 were conducted online so that New Zealanders who do not have a landline could also be included in the research.
- The sample was structured and weighted to be representative of the New Zealand adult population as a whole.

Most New Zealanders remain aware of NZ On Air, but awareness has decreased since last year

- Eighty three percent of New Zealanders are aware of NZ On Air (down from 92% in 2015).

NZ On Air continues to be most well known for its funding of local television content, however the misconception NZ On Air broadcasts local content is still widespread. These results are consistent with 2015

New Zealanders think NZ On Air supports:

- Television – 92%
- Radio – 76%
- Community broadcasting – 72%
- Music – 61%
- Digital media – 27%

New Zealanders think NZ On Air supports local content by:

- Broadcasting it – 80%
- Funding it – 77%
- Promoting it – 66%
- Producing it – 62%

Executive Summary continued

There is continued support for NZ On Air's Mission

- 75% of New Zealanders agree NZ On Air supports television programmes and activities that are important to New Zealanders (similar to the 73% in 2015).
- 70% agree NZ On Air supports local content for radio that is important to New Zealanders (similar to the 68% in 2015).
- 78% New Zealanders believe it is important for NZ On Air to support community broadcasting (similar to the 75% in 2015).
- 73% believe it is important for NZ On Air to support local music and artists (similar to the 70% in 2015).
- 51% believe it is important for NZ On Air to support digital media (similar to the 52% in 2015).

Perceptions of content supported by NZ On Air are stable

- 69% of those who are aware of NZ On Air's support for TV content like that content i.e. they like the TV content supported by NZ On Air (similar to the 71% in 2015).
- 70% of those aware of NZ On Air's support for music like the music and artists supported by NZ On Air (the same proportion as 2015).
- 67% of those who are aware of NZ On Air's support for community broadcasting like the supported community broadcasting content (similar to the 62% in 2015).
- 63% of those who are aware of NZ On Air's support for digital media like the digital media content supported by NZ On Air (similar to the 59% in 2015).
- 56% of those who are aware of NZ On Air's support for radio like that content (similar to the 55% in 2015).
- 69% of New Zealanders believe NZ On Air funding results in a greater depth and quality of local content than would otherwise exist (similar to the 66% in 2015).

Other questions

- 85% of New Zealanders believe it is important to have publicly funded television that is free to air (similar to the 84% in 2015).
- 73% believe it is important to have a broad range of diverse local content (similar to the 77% in 2015).
- 39% of New Zealanders are aware NZ On Air sponsors the New Zealand Music Awards (similar to the 45% in 2015).



OBJECTIVES AND METHOD

Objectives and methodology

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- NZ On Air commissioned Colmar Brunton to research and track New Zealanders' understanding of:
 - NZ On Air,
 - NZ On Air's role in funding local content,
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Methodology

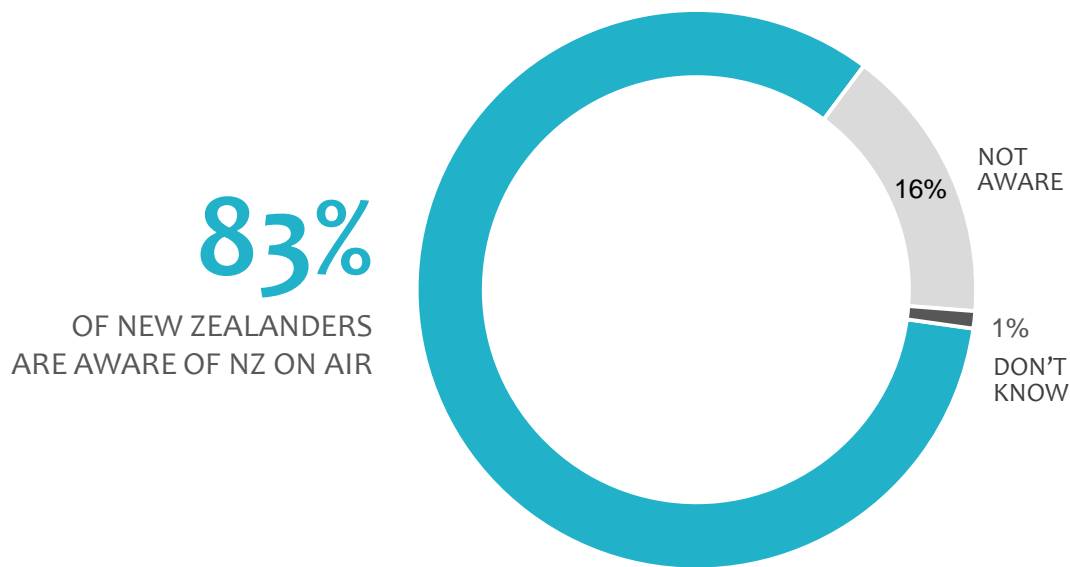
- Colmar Brunton conducted a survey with 606 respondents between 11 April and 8 May 2016. A mixed method approach was undertaken, with 505 interviews being conducted by telephone, and 101 completed online to ensure that those without a landline were also included in the research.
- Random Digital Dialling was used to obtain landline telephone numbers. A random adult in the household was selected by asking to speak with the person with the next birthday. The Colmar Brunton online consumer panel was used to source New Zealanders without a landline.
- Interviewers used Computer Assisted Telephone Interviewing (CATI) to assist with question routing and data entry. Those who completed the survey online were sent a link to the questionnaire via email.
- The sample was structured and weighted to be representative of the New Zealand adult population as a whole (using 2013 Census data).
- Whenever differences are reported (for example an increase or decrease since last year) these are statistically significant at the 95% confidence level or greater.



AWARENESS AND UNDERSTANDING

The vast majority of New Zealanders are aware of NZ On Air (83%), however, this level of awareness is lower than the level recorded during the previous five years (see the next slide for the historical trend).

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



Decreased awareness of NZ On Air appears to have come from Māori and the under 40 year old age group.

Awareness of NZ On Air among Maori has decreased from 100% in 2015 down to 85% in 2016. Awareness among all other ethnic groups is stable.

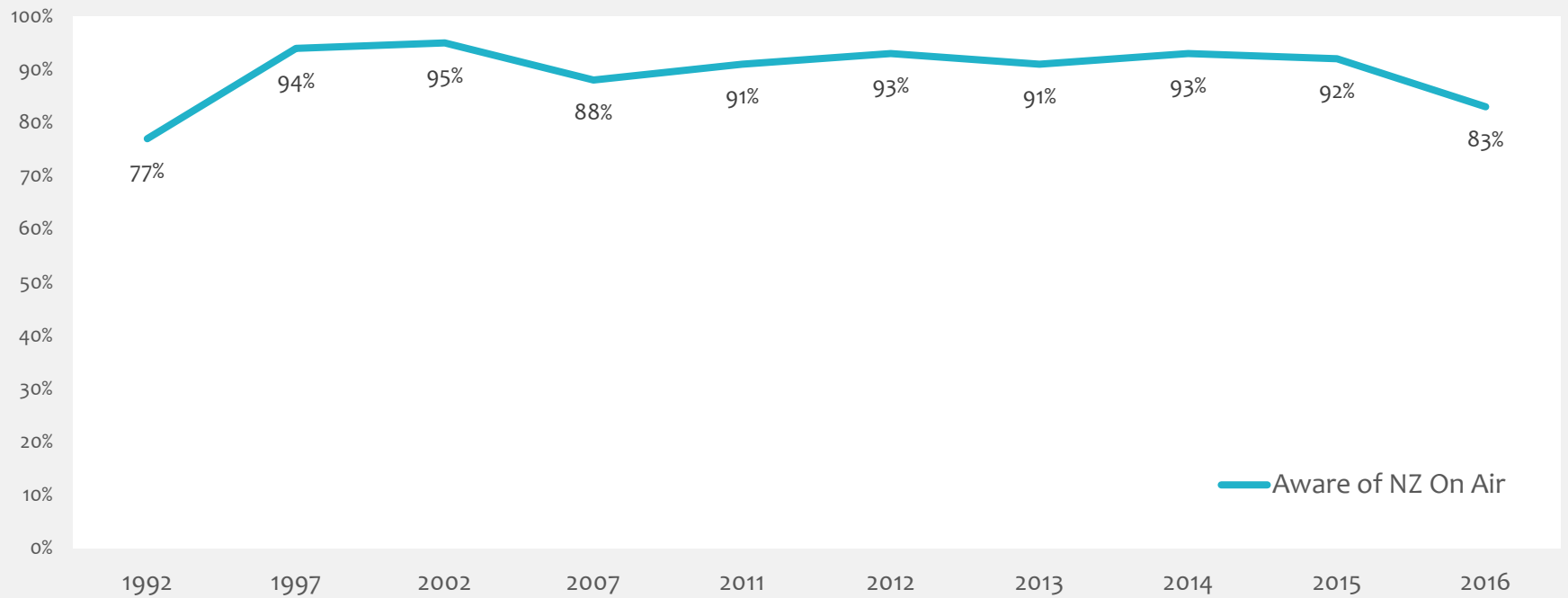
Awareness of NZ On Air among under 40 year olds has decreased from 91% in 2015 down to 74% in 2016. Whereas awareness among 40+ year olds has not changed since last year.

CERTAIN DEMOGRAPHIC GROUPS HAVE ABOVE OR BELOW AVERAGE AWARENESS OF NZ ON AIR IN 2016:

- NZ Europeans have above average awareness (95%)
- Asian ethnic groups have below average awareness (38%)

Awareness of NZ On Air over time

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



Unprompted, the main activity New Zealanders say NZ On Air undertakes continues to be funding NZ made TV programmes or content (28%). Some continue to think the organisation has production, regulatory and broadcasting roles.

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

| | 2014 | 2015 | 2016 |
|---|------|------|-------|
| *Funds NZ made TV programmes/content | 18% | 30% | 28% |
| *Broadcasts TV | 14% | 10% | 12% |
| Produces/creates programmes/local programmes | 8% | 7% | 10% |
| *Funds NZ made radio programmes/content | 7% | 8% | 9% |
| *Broadcasts TV and radio | 8% | 3% | 8% ↑ |
| Promotes NZ made programmes/media | 6% | 7% | 8% |
| *Broadcasting company/authority | 4% | 5% | 8% |
| *Funds Media/NZ media | 2% | 2% | 7% ↑ |
| Regulates/screens/monitors content that is broadcast on air | 9% | 7% | 6% |
| *Provide funding for NZ musicians/artists | 5% | 6% | 6% |
| *Funds NZ movies/films | 3% | 7% | 6% |
| Often see NZ On Air/NZ On Air logo | - | 4% | 6% |
| Government backed/funded/run system | 5% | 6% | 5% |
| Receives/deals with TV complaints | 7% | 3% | 3% |
| Radio/radio station/governs radio | 5% | 8% | 3% ↓ |
| Provides up to date information/news/current affairs | 2% | 3% | 3% |
| Provides content for NZ programmes/local programming | 6% | 3% | 1% ↓ |
| Provides free to air TV | 1% | 1% | 1% |
| Used to be a part of broadcasting licensing fee | 2% | 1% | - |
| *Funds production of NZ made programmes/content | 16% | 20% | - ↓ |
| Nothing | 1% | 1% | - |
| Other | 6% | 7% | 3% ↓ |
| Don't know | 9% | 6% | 13% ↑ |

In total, 37% of those aware of NZ On Air mention 'funding' when describing its role, this is a significant **decrease** since last year when 52% mentioned 'funding'. Note these are 'Nett %'s i.e. the proportion of respondents who mentioned at least one of the 'funding related' roles (see those tagged with a blue asterisk *).

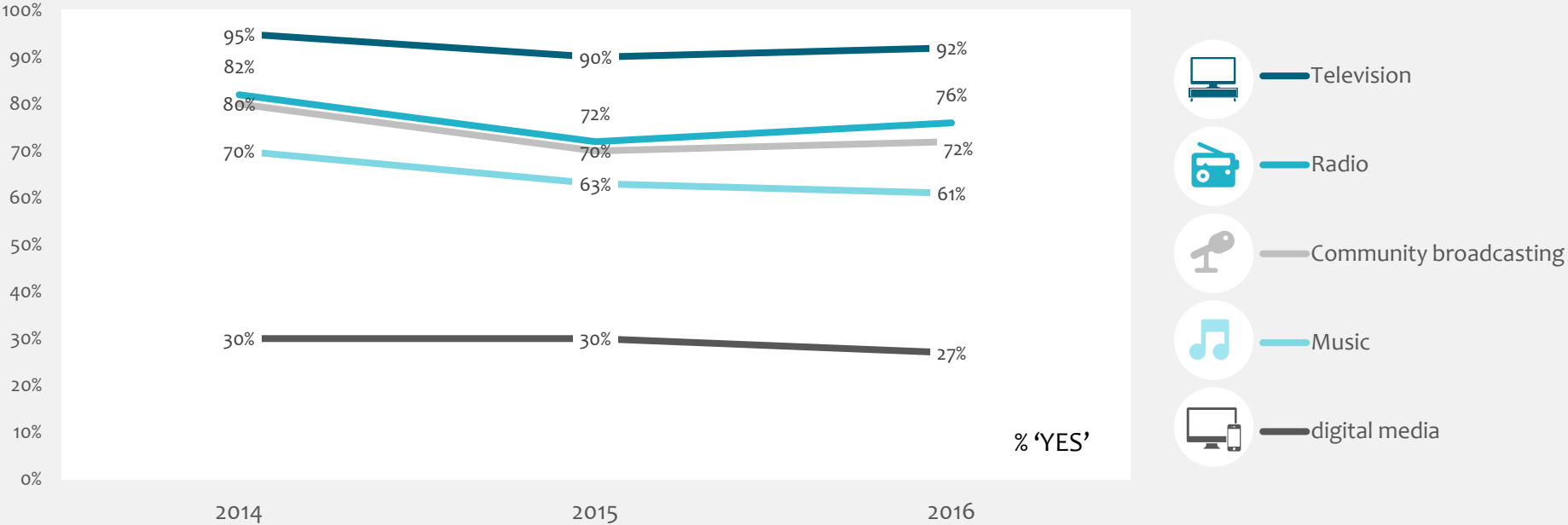
Total mention of a 'broadcasting role' has **increased** significantly since last year (from 17% in 2015 up to 28% in 2016). Note these are 'Nett %'s i.e. the proportion of respondents who mentioned at least one 'broadcasting related' role (see those tagged with a black asterisk *).

↑ ↓ Significant increase or decrease since 2015.



As in previous measures, once prompted, the majority of New Zealanders are aware NZ On Air supports TV, radio, community broadcasting and music. The role of supporting digital media remains relatively less well known.

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

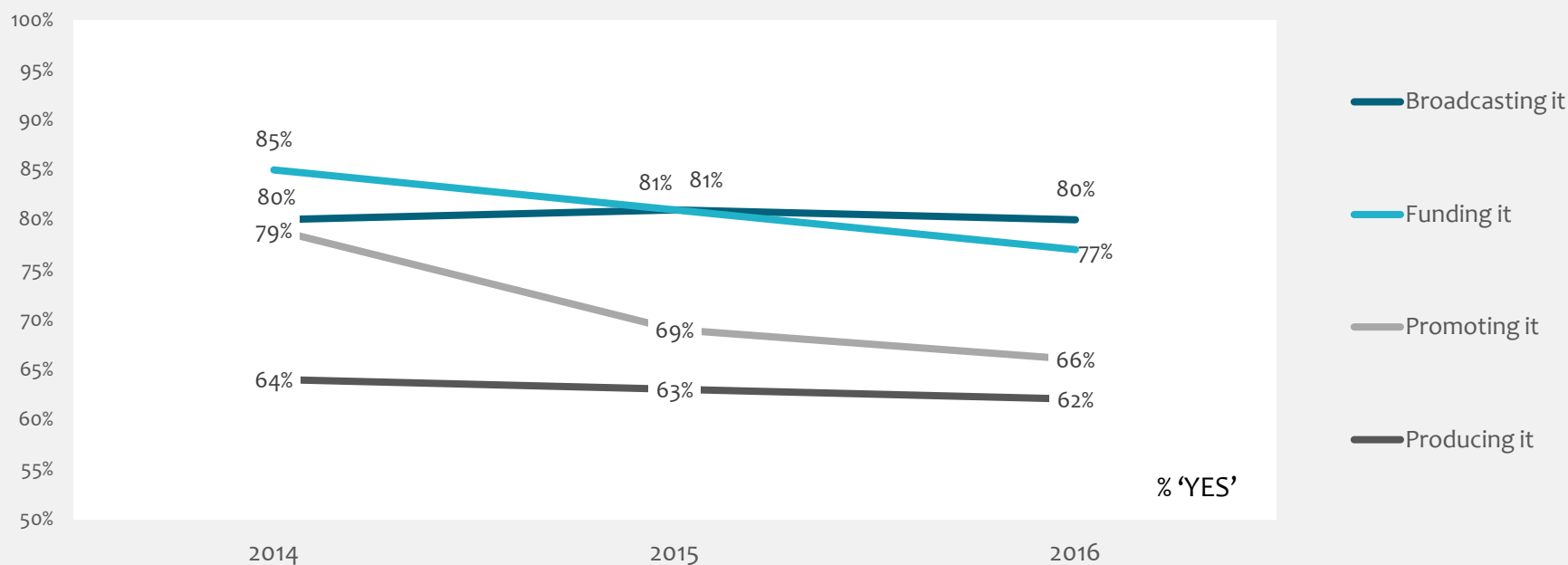


CERTAIN DEMOGRAPHIC GROUPS ARE MORE OR LESS LIKELY THAN AVERAGE TO KNOW THAT NZ ON AIR SUPPORTS:

- Community broadcasting - Females are more aware (76%)
- Television - 60+ year olds are less aware (81%)
- Music - 70+ year olds are less aware (52%)

Once New Zealanders are prompted, about eight in ten say NZ On Air supports local content by broadcasting it or funding it. Two thirds of New Zealanders think NZ On Air supports local content by promoting it, and around six in ten say NZ On Air produces local content. These results are consistent with last year, but awareness of the funding and promoting roles have declined significantly since 2014.

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



CERTAIN DEMOGRAPHIC GROUPS ARE MORE OR LESS LIKELY THAN AVERAGE TO THINK NZ ON AIR SUPPORTS LOCAL CONTENT BY:

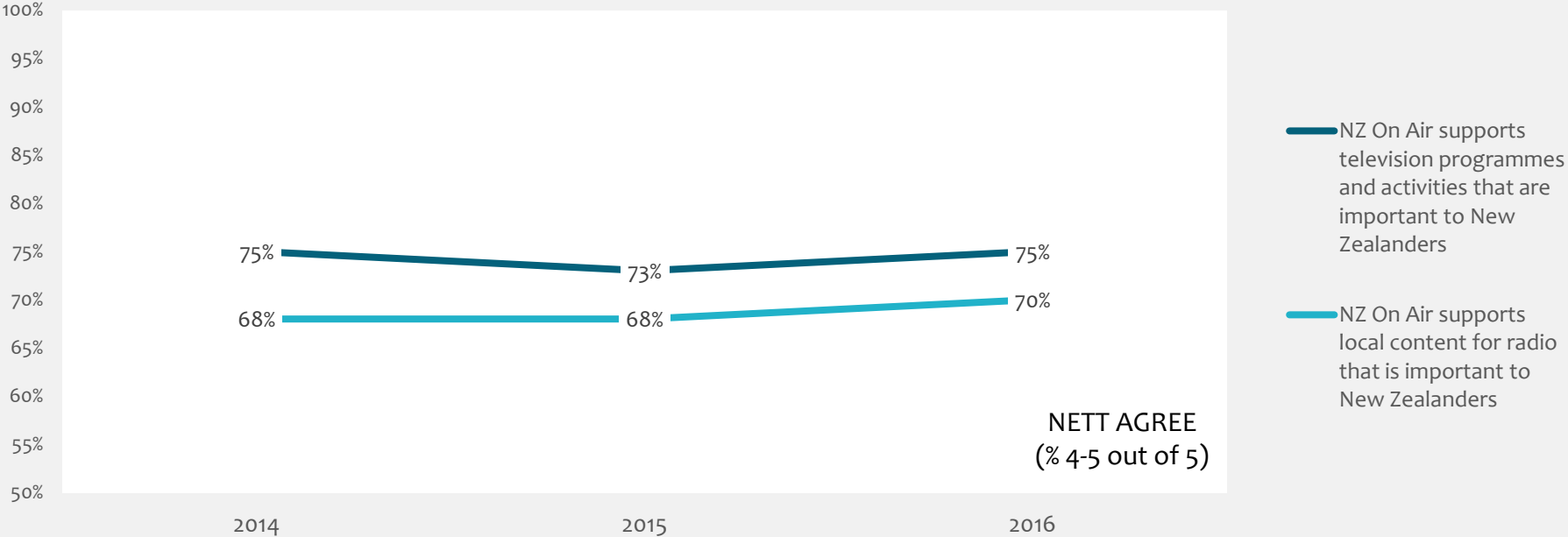
- Broadcasting it - Females are more likely to (85%)
- Funding it - NZ Europeans are more likely to (82%), and 70+ year olds are less likely to (64%)



SUPPORT FOR NZ ON
AIR'S MISSION

Approximately seven in ten New Zealanders think that NZ On Air supports TV programmes and local content for radio that is important to New Zealanders - these results have been consistent over time.

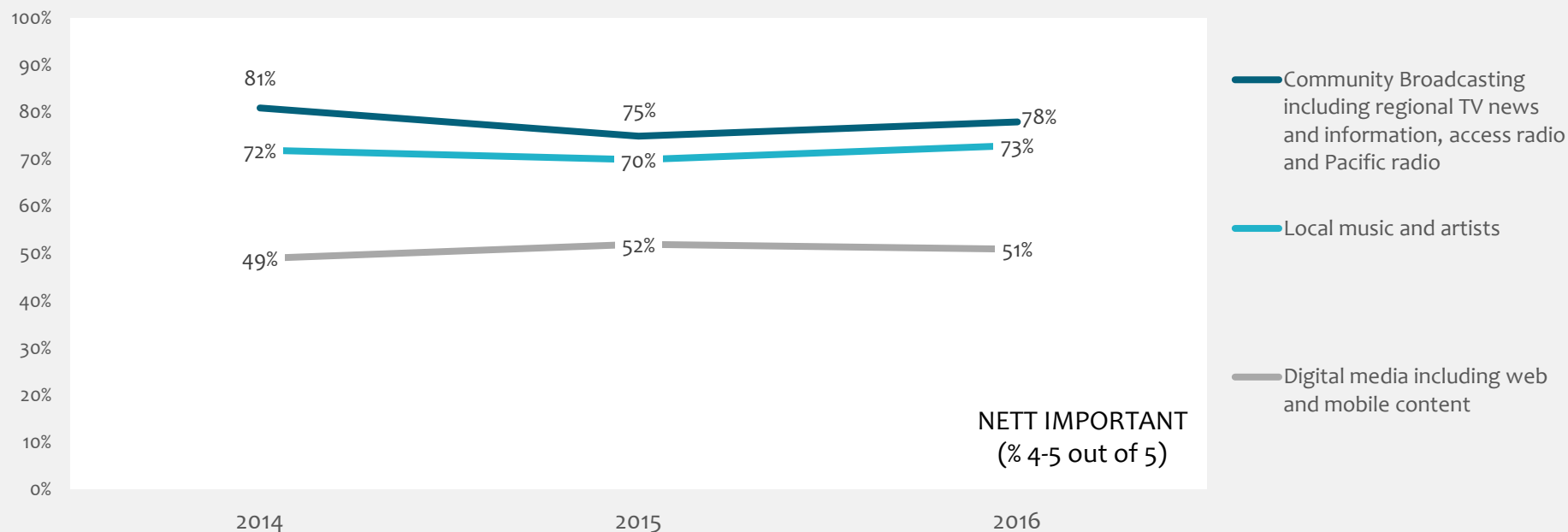
Q: 'To what extent do you agree with each of the following statements?'



There are no significant demographic trends

Around three quarters of New Zealanders believe it is important for NZ On Air to support community broadcasting, around seven in ten think it is important for NZ On Air to support local music and artists, and approximately half feel it is important to support digital media. These results have been stable since 2014.

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



CERTAIN DEMOGRAPHIC GROUPS ARE MORE LIKELY THAN AVERAGE TO THINK IT IS IMPORTANT FOR NZ ON AIR TO SUPPORT:

- Community broadcasting - 70+ year olds (89%)
- Local music and artists - 40 to 59 year olds (83%)

Informed New Zealanders remain more supportive of NZ On Air's mission. Those aware that NZ On Air supports a particular media type are more likely than average to think the support it provides that media type is important.

% THAT THINK NZ ON AIR'S SUPPORT IS IMPORTANT

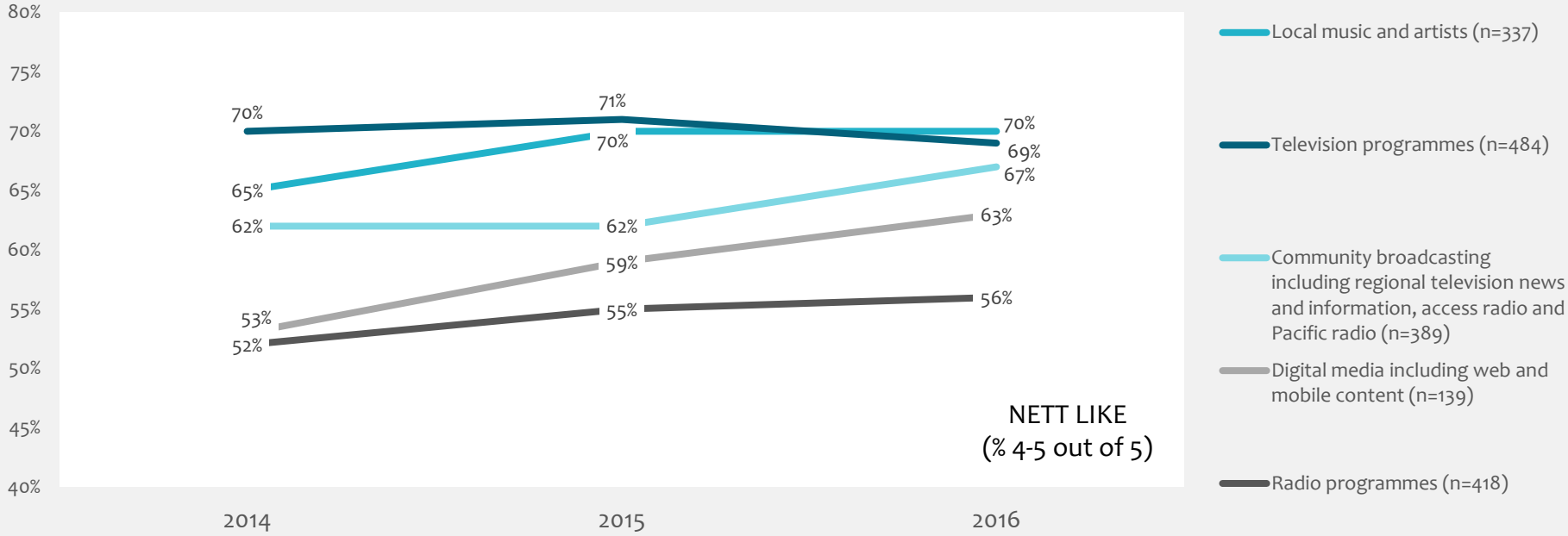
| | Those aware NZ On Air supports that media type | Those unaware NZ On Air supports that media type |
|--|--|--|
| Television | 77% | 54% |
| Radio | 76% | 60% |
| Local music and artists | 84% | 74% |
| Community broadcasting including regional news and information, access radio and Pacific radio | 82% | 58% |
| Digital media including web and mobile content | 73% | 31% |



VIEWS ON CONTENT
SUPPORTED BY
NZ ON AIR

Around seven in ten of those who are aware that NZ On Air funds TV content, local music and artists, and community broadcasting, like that content. Approximately six in ten of those who are aware NZ On Air funds digital media and radio content, like the content. These results have not changed significantly since last year.

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)



There are no significant demographic differences in Nett 'like' ratings among those aware NZ On Air supports each type of content



TELEVISION

“Because it's New Zealand based. There's a lot of overseas programmes that come to New Zealand and we need some New Zealand content and we need some funding for those. Enjoy watching the kiwi movies and films and programmes.”

“Because it's good to see local TV programmes not all overseas content.”

“Otherwise the TV is very expensive to produce so without New Zealand On Air funding it's very unlikely we will get any New Zealand programmes produced.”

“I think it is important that we have our own New Zealand people making NZ programmes.”

“I love Country Calendar!!!”

“I like the comedy shows they support like 7 days and Jono and Ben these are some of the few shows that I actually watch on TV e.g. not using a streaming service like Netflix.”



RADIO

“I do listen to National Radio a wee bit and I know that some of those programmes are funded by NZ On Air.”

“Because I listen to the news and national programme.”

“...Main reason for liking the radio content is the variation in topics and programmes.”

“I believe that NZ On Air supports radio sport and obviously all other radio stations which I listen to.”

“As we listen to the radio and [like] listening to interesting items.”



ARTS AND MUSIC

“I feel that New Zealand artists and music has been badly neglected and it needs all the support it can get.”

“Think they should be supported when they are starting out in the music industry.”

“NZ music rocks!”

“NZ has a lot of good artists rising through the system now.”

“I love most NZ music and think it is great that [the artists] get support and help them make it in the business that may not have been able to do it themselves.”

“Helps develop grassroots artists and promote them.”



COMMUNITY BROADCASTING

“I think it is important for every community to have its own local broadcaster for news and content.”

“Because [there's] too much news [that] talks about Auckland and not local areas. I'd like to see more local region news rather than Auckland news. It's not all about Auckland.”

“Just keeps us in touch in the community, local talk back's very good.”

“I don't think communities get enough local assistance, like the small communities to produce something just to bring the community together.”

It is important for other cultures to have the availability to hear their own news and current affairs.”



DIGITAL MEDIA

“So that I can access podcasts and access programmes on Radio NZ that I missed that I may want to hear again...”

“Because that is your 'on the go' access. We don't tend to watch TV at home, we tend to go online for information and watch what is free. We have a toddler and we feel that most TV viewing is not appropriate.”

“It is just that it is the way things are going, you can use your phone and things, and it is just the way it is going.”



TELEVISION

“Because I very rarely watch TV at all.”

“I don't know, just the examples you've given are just shows that I normally don't watch or not my thing, 7 days maybe, but the rest is not.”

“TV is absolutely rubbish and I rarely turn it on.”



RADIO

“I don't listen to radio. I don't have a radio.”

“I don't know, I never listen to the radio, only watch TV.”

“I listen to Life FM and my understanding is that they don't fund that. It's funded purely through donations from listeners.”

“I don't listen to radio content.”



ARTS AND MUSIC

“It is tax payers money and if they are going to be successful they should do it on their own. If they are suddenly going to become millionaires they are not going to be giving money back to the government are they.”

“I don't like the local music.”

“Why should the tax payer have to support local artists, if they are good enough they can sell their produce or services. An example is music, did the Beatles receive a grant? No they got their by the quality of their product.”



COMMUNITY BROADCASTING

"I don't think that there is a need because we are a small country and there is enough news out there without that. I don't think there should be specialty broadcasting, but for different cultures, yes."



DIGITAL MEDIA

"Cause I'm not even online, meaning I've never seen any digital media they fund as I do not use internet."

"Because I just don't see that it's important, I think there's too much emphasis on digital and mobile media."

"I just don't see what the real point of it is when there is YouTube which is free."



LIKE

The main reasons for **'liking'** content funded by NZ On Air include liking local content created for New Zealanders (15%), wanting to support New Zealand and local artists (16%), and the belief that it is important to know what is happening in our communities and country (16%).

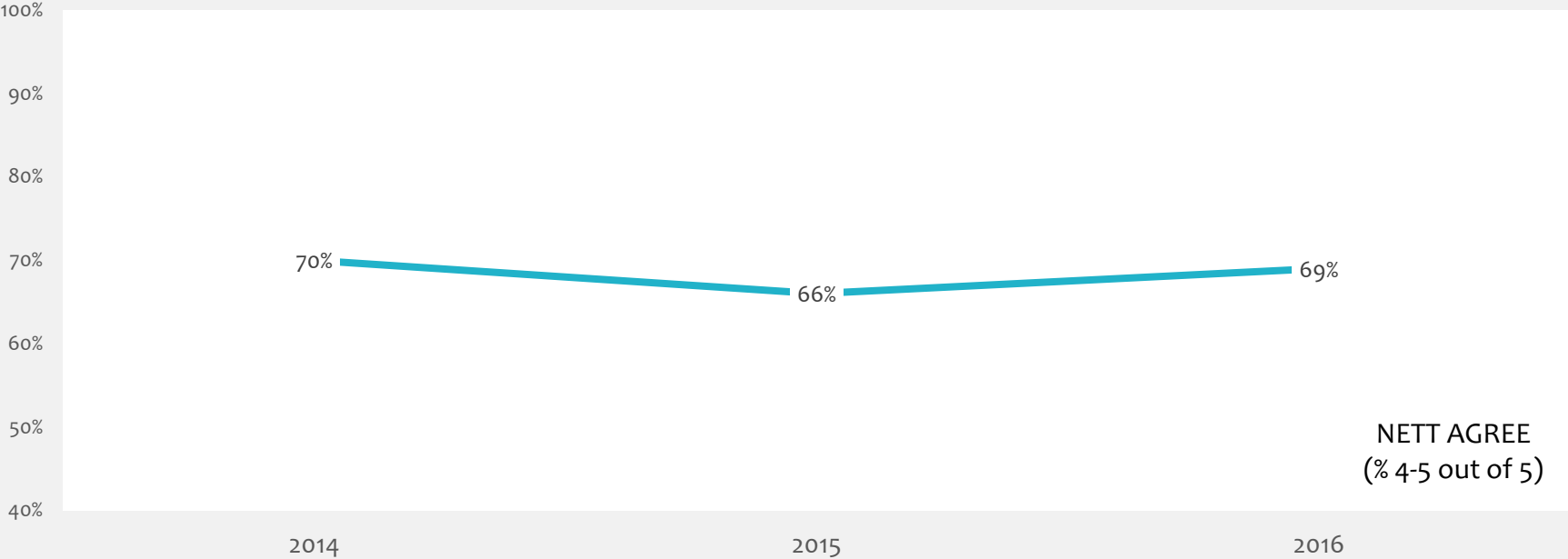


DISLIKE

The main reasons for **'disliking'** content funded by NZ On Air include disinterest in the content (55%), and the belief that the content should be **'self-supported'** rather than government funded (11%).

Around seven in ten New Zealanders think NZ On Air funding results in a greater depth and quality of local content than would otherwise exist - this result has been consistent over time.

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



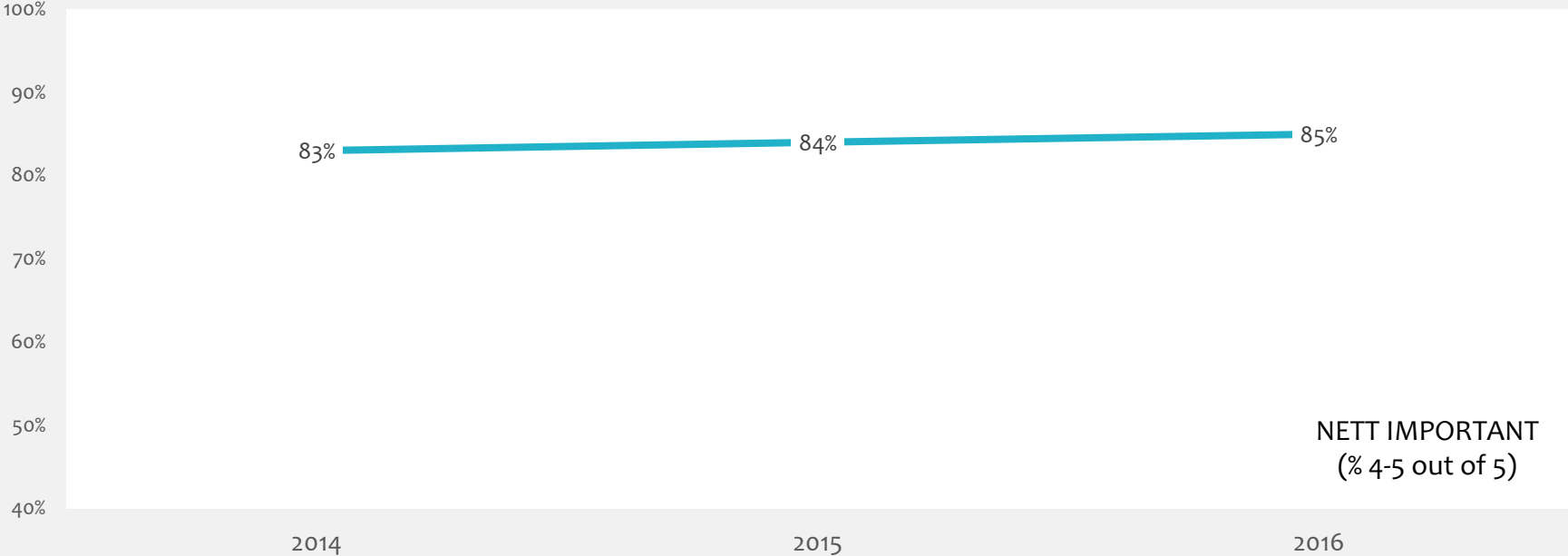
There are no significant demographic trends



OTHER QUESTIONS

Over eight in ten New Zealanders think it is important to have publically funded television content that is free to view - this proportion has not changed significantly over time.

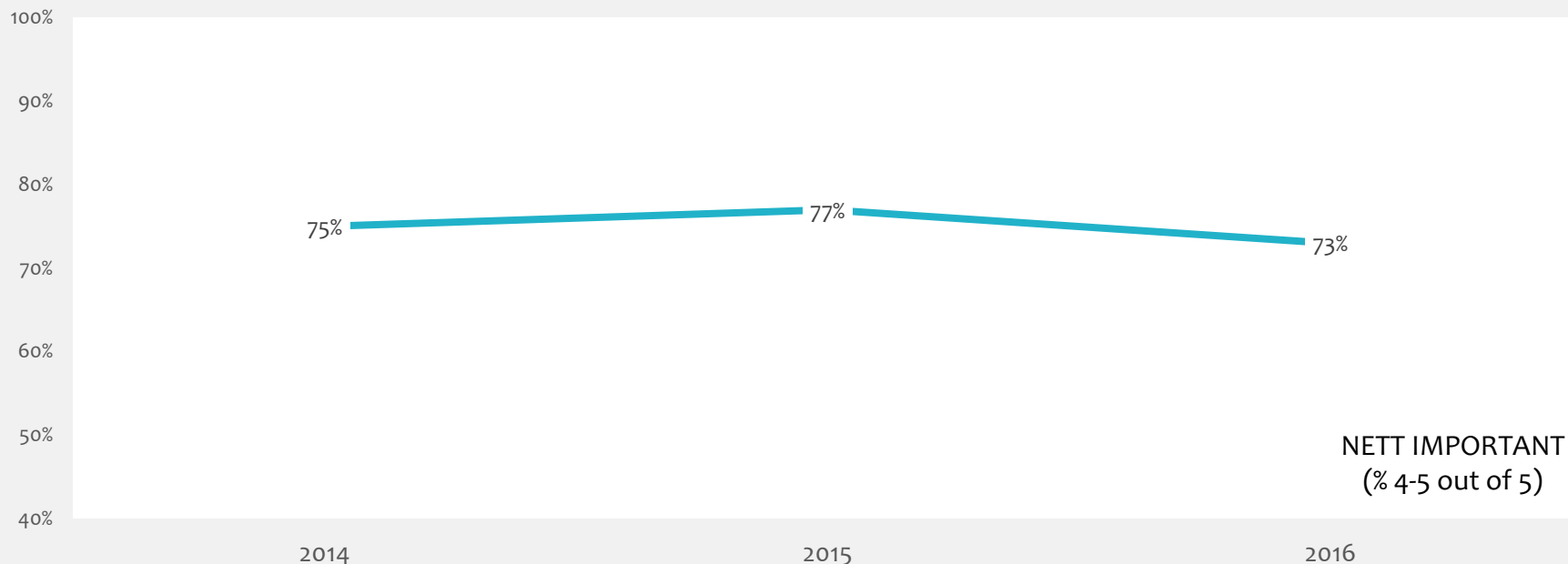
Q: 'How important is it that publically funded television content is free to view meaning you don't have to pay a SKY or other subscription?'



Younger New Zealanders aged 15 to 29 years are less likely than average to consider it important have publically funded TV content that is free to view (75%)

More than seven in ten New Zealanders feel it is important to have a broad range of diverse local NZ content. There has been no significant change over time.

Q: 'How important is having a broad range of diverse local New Zealand content to you?'

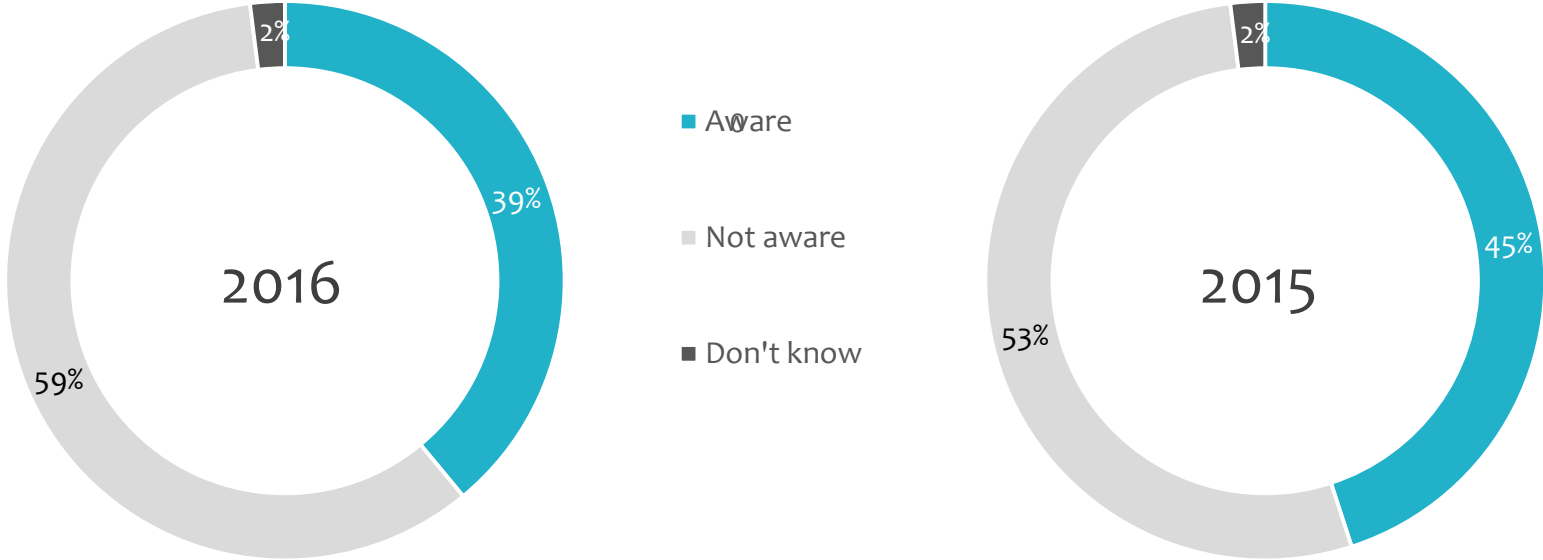


CERTAIN DEMOGRAPHIC GROUPS ARE MORE OR LESS LIKELY THAN AVERAGE TO BELIEVE IT IS IMPORTANT TO HAVE A BROAD RANGE OF DIVERSE LOCAL NZ CONTENT:

- NZ Europeans and New Zealanders aged 40 to 59 years are more likely to think it is important (75% and 85% respectively)
- Younger New Zealanders aged 15 to 29 years are less likely to consider it important (53%)

Almost four in ten New Zealanders are aware NZ On Air sponsors the New Zealand Music Awards (39%), the level of awareness has not changed significantly since last year.

Q: 'Before today, were you aware NZ On Air sponsors the New Zealand Music Awards?'



CERTAIN DEMOGRAPHIC GROUPS HAVE ABOVE OR BELOW AVERAGE AWARENESS NZ ON AIR SPONSORS THE NEW ZEALAND MUSIC AWARDS:

- NZ Europeans and New Zealanders aged 40 to 69 years are more likely to be aware (45% and 52% respectively)
- Younger New Zealanders aged 15 to 29 years, older New Zealanders aged 70 years or more, and Asian ethnic groups are all less likely to be aware (25%, 29% and 13% respectively)