



NZ ON AIR

PUBLIC AWARENESS AND
ATTITUDES SURVEY

2019

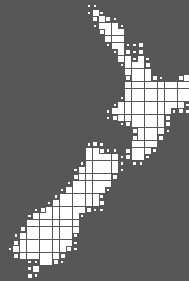
Objectives and Methodology



293 + 307

LANDLINE INTERVIEWS MOBILE INTERVIEWS

9 minutes



FIELDWORK DATES:
26 MARCH – 14 APRIL 2019

OBJECTIVES

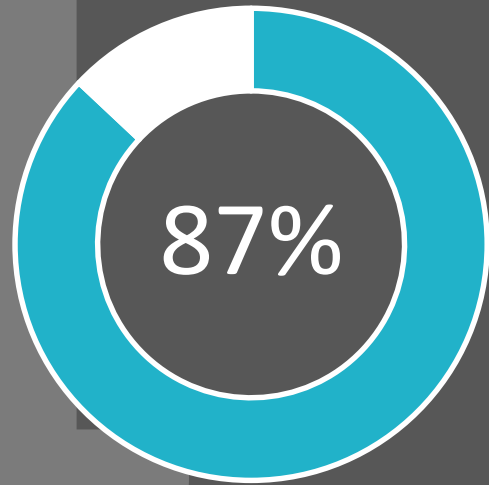
NZ On Air commissioned Colmar Brunton to research and track New Zealanders' understanding of:

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

METHODOLOGY

- A telephone survey with a dual frame sample was undertaken. This method is seen as the gold standard in terms of interviewing; 293 interviews were conducted by landline, and 307 completed via mobile to ensure that those without a landline were also included in the research. This represents a change from previous years, when a mix of landline and online sampling was used. The introduction of mobile sampling has resulted in greater representation of harder-to-reach audiences, such as younger people and ethnic minorities, and we believe has improved the overall accuracy of the survey findings.
- Random Digital Dialling was used to obtain both landline and mobile telephone numbers. For landline numbers, a random adult in the household was selected by asking to speak with the person with the next birthday. For mobile numbers, the main adult user of the phone was interviewed.
- Interviewers used Computer Assisted Telephone Interviewing (CATI) to assist with question routing and data entry.
- Post-weighting was applied to strike the correct balance in terms of access to landline and / or mobile phones. Weighting was also applied to ensure that the sample was representative of the New Zealand adult population (based on 2013 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 decreased over the last year; **87% of New Zealanders are aware of NZ On Air** compared to 92% in 2018. Part of this decline is due to the increased representation of harder-to-reach audiences in the research in 2019 (due to the change in method). In addition, our analysis shows the decline in awareness also reflects a change on the ground.

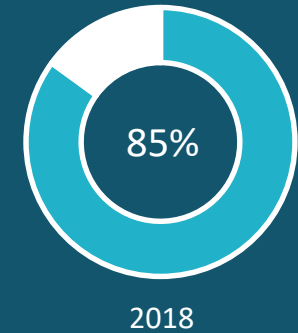
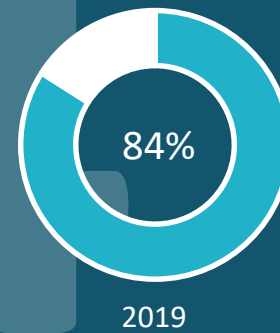
Despite this dip in awareness, New Zealanders are more likely than ever before to say that NZ On Air funding is providing diverse content, and they place ever more importance on this diversity.



In addition, there is an increased recognition that NZ On Air supports content that is important to New Zealanders.



And finally, the majority of New Zealanders continue to feel it is important to have free-to-air, publicly funded television content.



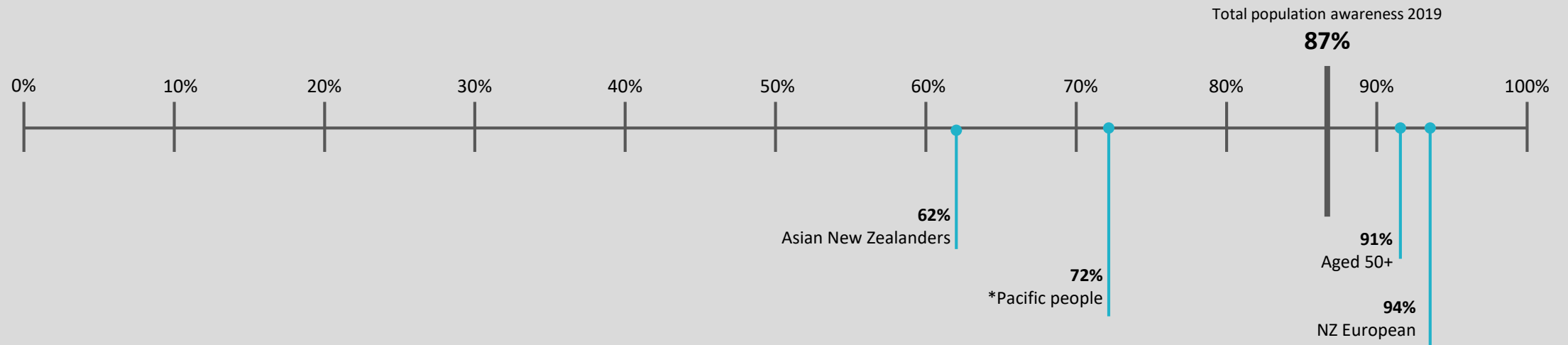
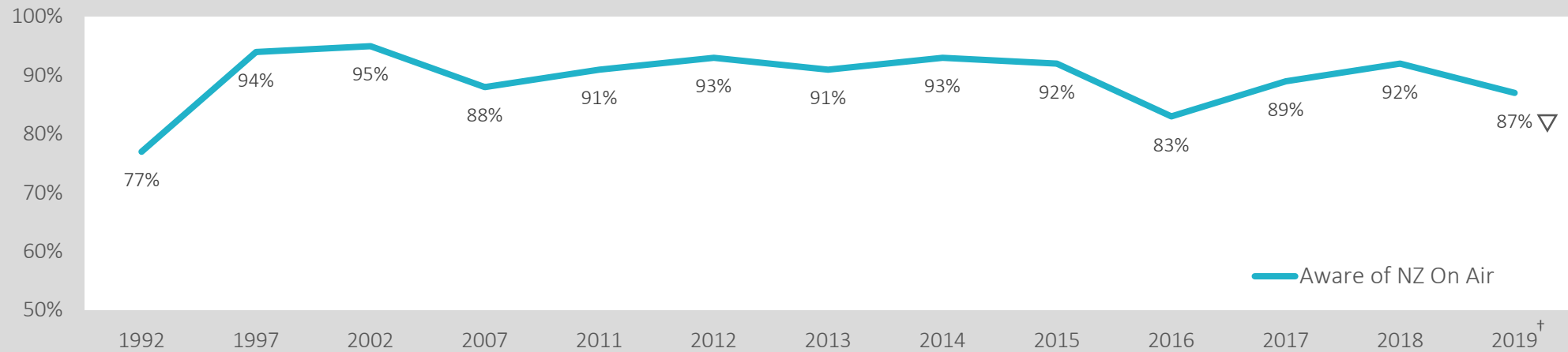


HIGH LEVEL AWARENESS AND PERCEPTIONS

AWARENESS OF NZ ON AIR:

The majority of New Zealanders continue to be aware of NZ On Air (87%), although awareness has fallen since 2018. This decline reflects the change in method as well as a decline on the ground (which we can determine by comparing the landline samples in 2019 and 2018). This decline is seen across the board, although those aged 60-69 are significantly less aware than in 2018 (86% vs. 96%)[^].

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



Base: All New Zealanders aged 15 and over, 2019 (n=600).

Notes: * differences not statistically significant at the 95% level. ▽ significantly lower than 2018. † change in methodology to include mobile sample

[^] this change is evident when comparing the landline samples, indicating that this is not due to the change in method

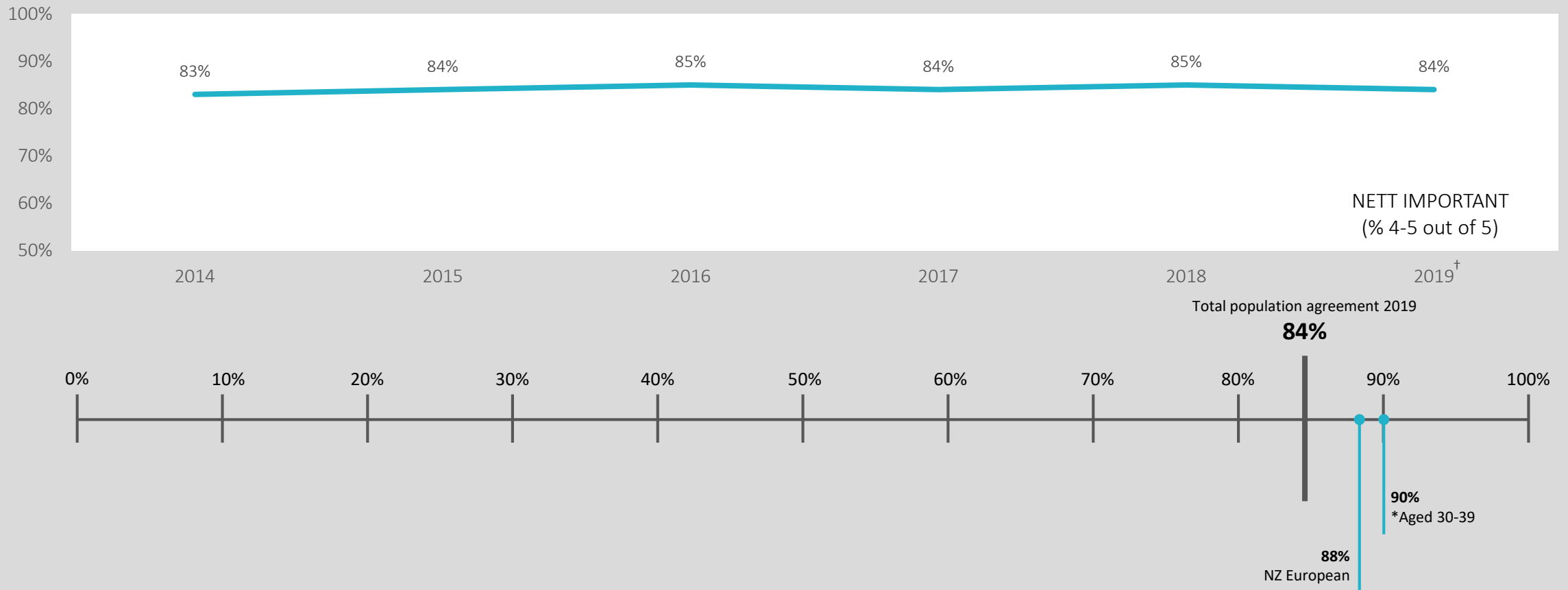
Source: A1.



IMPORTANCE OF PUBLICLY FUNDED CONTENT:

More than eight in ten New Zealanders think it's important to have publicly funded television content that is free to view, which is in line with all previous years. New Zealanders aged between 30 and 39 are more likely to feel it is important (90%), as are NZ Europeans (88%).

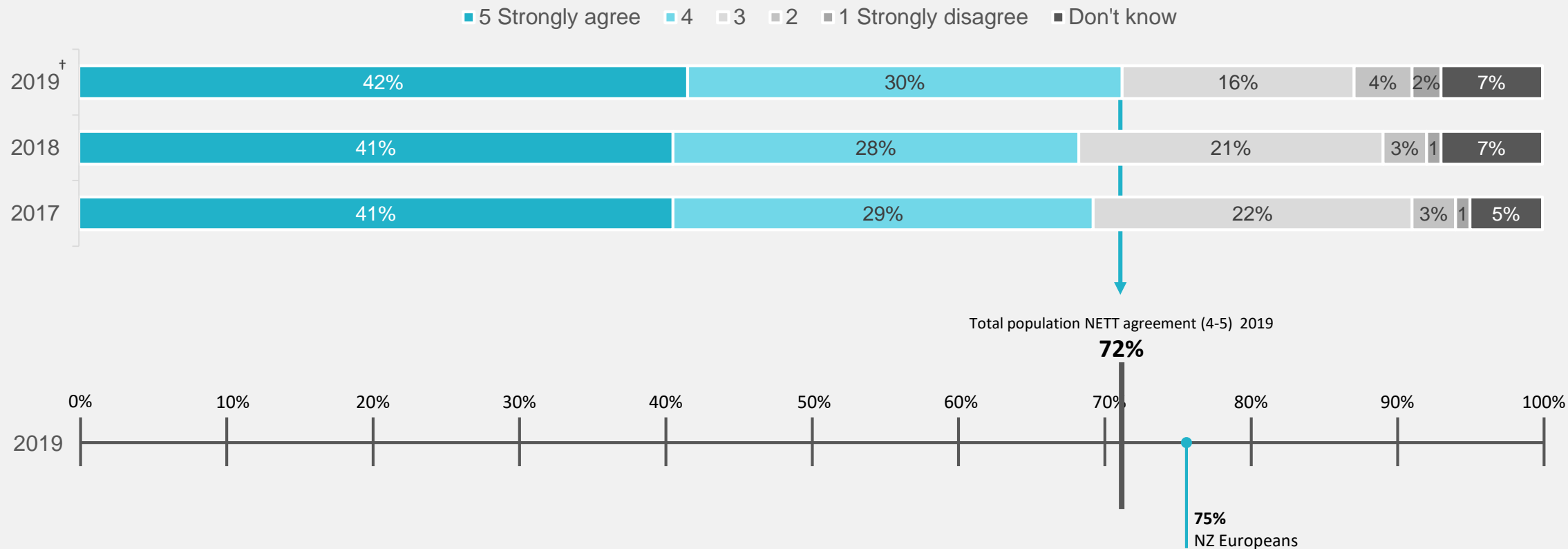
Q: 'How important is it that publicly funded television content is free to view meaning you don't have to pay a SKY, Netflix or other subscription?'



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

The majority of New Zealanders feel that NZ On Air provides a diversity of content that would otherwise not exist (72%). This represents the highest level of agreement to date, albeit the difference is not significantly higher than 2018. NZ Europeans are more likely than average to agree with this (75%).

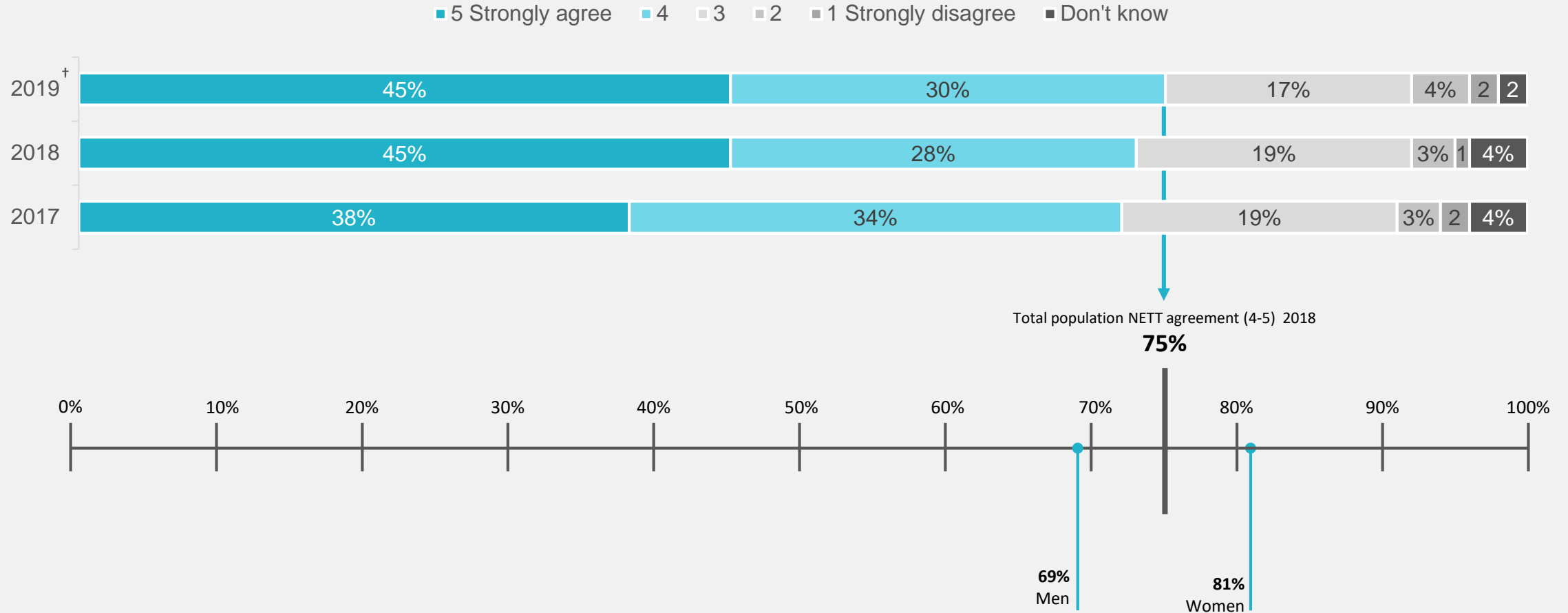
Q: 'How much do you agree or disagree that NZ On Air funding results in a greater diversity of local content than would otherwise exist?'



VALUE PLACED ON DIVERSE LOCAL CONTENT:

The diversity in content that NZ On Air is funding is of increasing importance for New Zealanders. Three-quarters value the diversity of local content that NZ On Air funding brings (75%). The level of agreement has been trending higher since 2017, although this change is not significant.

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



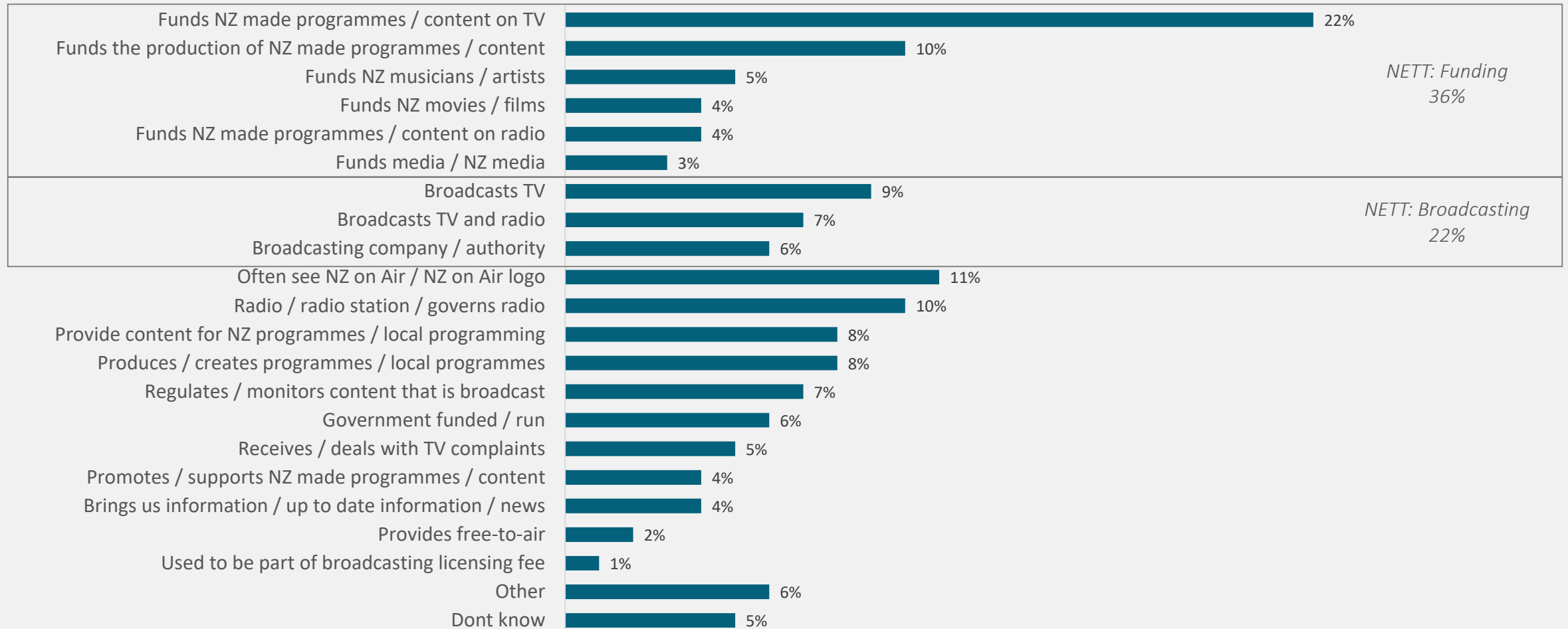


DETAILED AWARENESS FINDINGS

UMPROMPTED AWARENESS OF NZ ON AIR'S ROLES:

Around one-third of those aware of NZ On Air continue to be aware of the agency's funding role. However, one in five believe that the agency plays the role of a broadcaster. These figures are consistent with the findings from 2018.

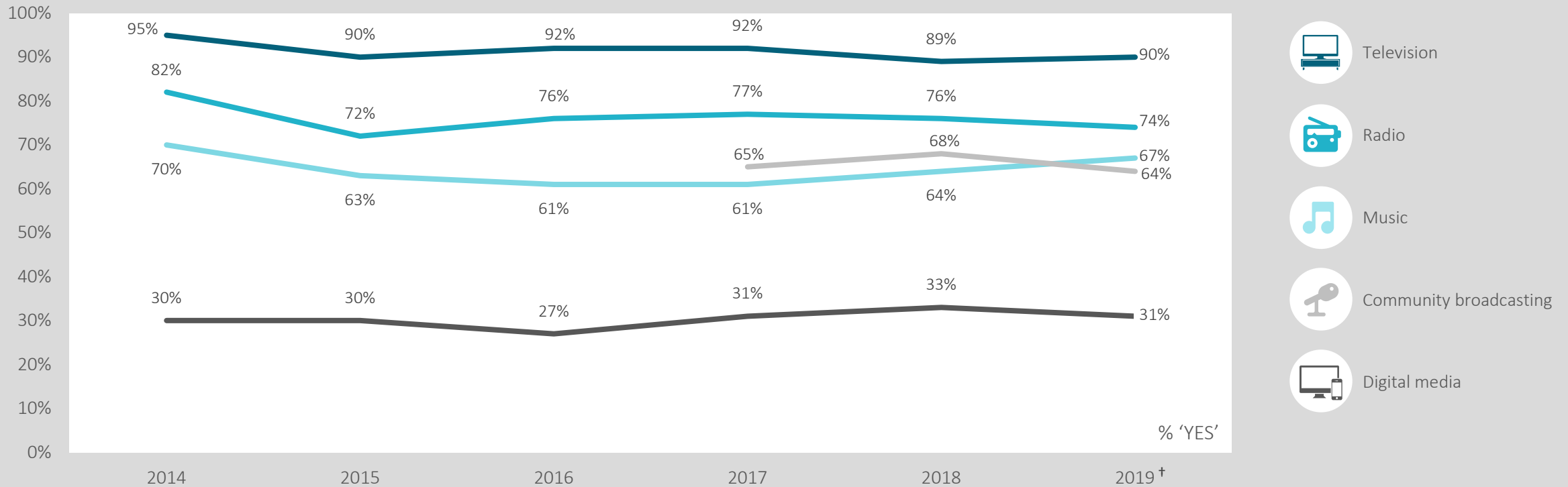
Q: 'Can you please tell me everything you know about what NZ On Air does?' (Open ended question)



AWARENESS OF MEDIA SUPPORTED BY NZ ON AIR:

Awareness of the media that NZ On Air supports is consistent with 2018. Levels of awareness have remained consistent with previous years, after a decline for most media in 2015. Awareness that music is supported has now mostly recovered from this fall.

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

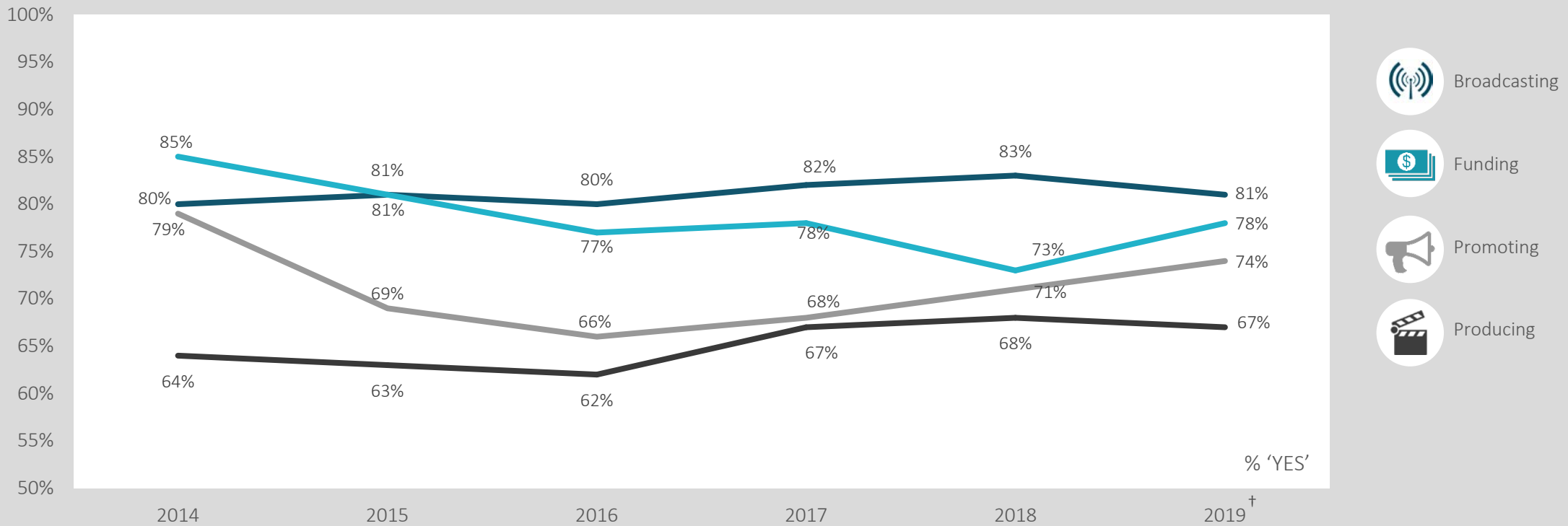


Māori are more likely than average to be aware that NZ On Air supports digital media (53% vs. 31%), while NZ Europeans are less likely than average to be aware of this (24% vs. 31%).

PROMPTED AWARENESS OF NZ ON AIR'S ROLES:

When prompted, four in five New Zealanders incorrectly believe that NZ On Air plays the role of a broadcaster. Fewer correctly say that NZ On Air plays a funding or promoting role. However, awareness of the funding role that the agency plays has begun to recover, following a gradual decline over recent years.

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



NZ Europeans appear to be somewhat more aware of the roles that NZ On Air plays. They are more likely than average to believe that the agency supports local content through funding (81% vs. 78%), and less likely than average to think that they are a broadcaster (77% vs. 81%).

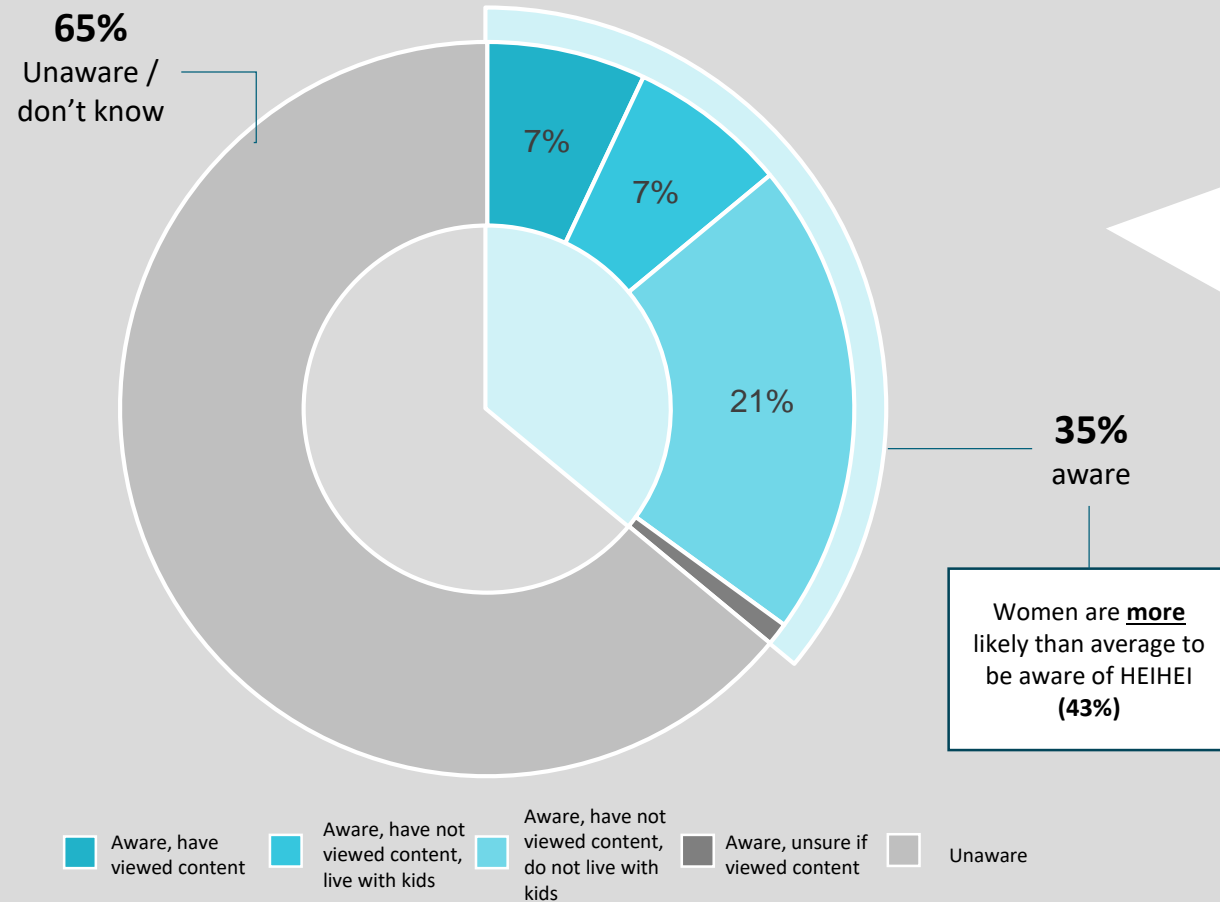


AWARENESS AND USAGE OF HEIHEI

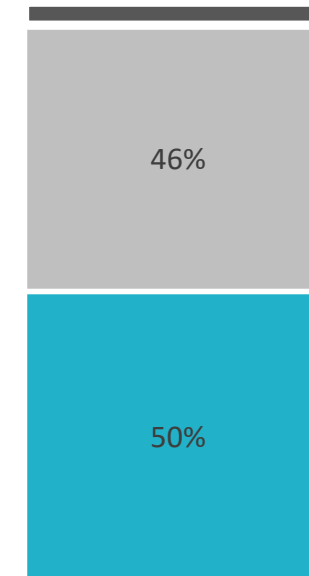
AWARENESS AND USAGE OF HEIHEI:

One-third of New Zealanders are aware of HEIHEI. Of the 40% that could be considered part of the core market for the platform (households with children under 10), half have previously viewed content on HEIHEI.

Q: 'Had you heard of HEIHEI before today?' / 'Have you, or anyone in your household, viewed content on HEIHEI before today?'



40%
of those aware of HEIHEI would be considered part of the target market:



Target market (households with children under 10) aware of HEIHEI (n=88)*

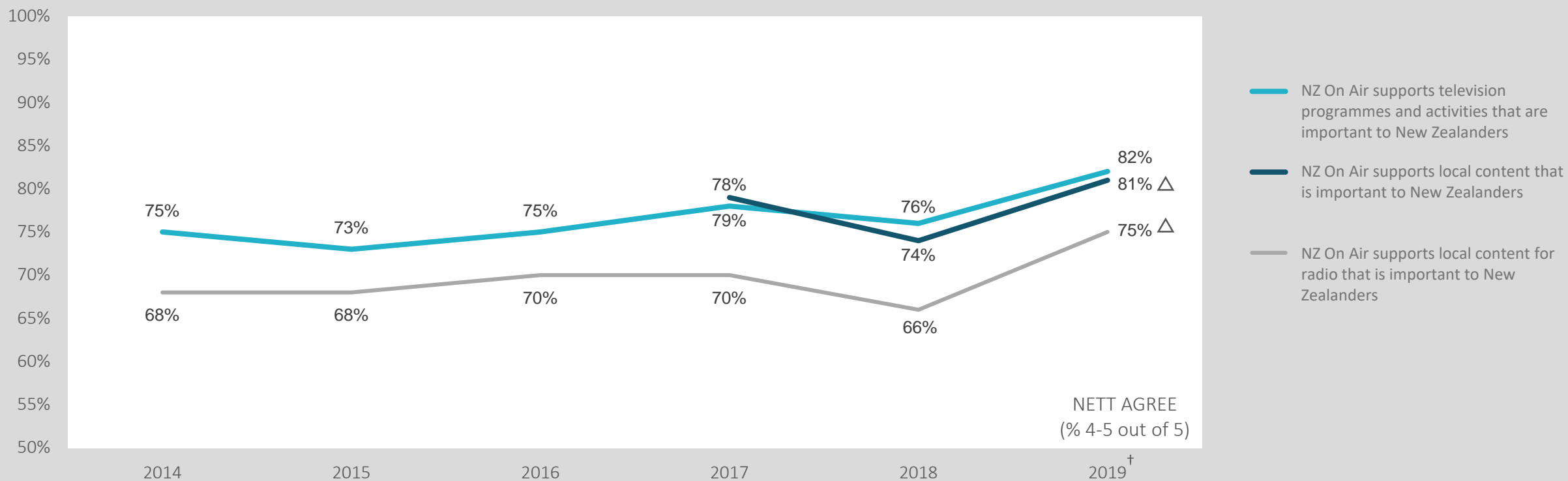


SUPPORT FOR
NZ ON AIR'S MISSION

AGREEMENT THAT NZ ON AIR SUPPORTS IMPORTANT CONTENT:

Increasing numbers of New Zealanders agree that NZ On Air supports content that is important to them. There have been significant increases in agreement for both local content in general, and local radio content, since 2018. Agreement that NZ On Air supports important television programmes and activities has also increased, albeit not significantly.

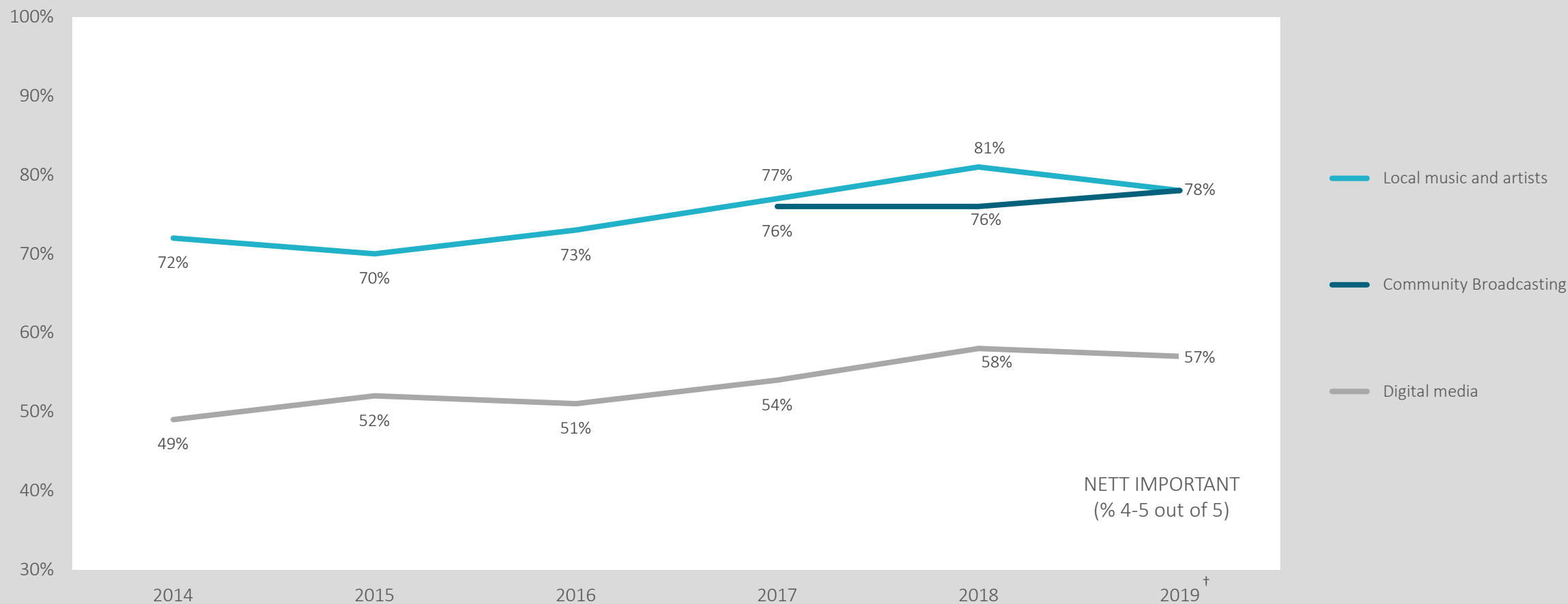
Q: 'To what extent do you agree with each of the following statements?'



IMPORTANCE OF SUPPORTING DIFFERENT TYPES OF CONTENT:

The upwards trend seen in the importance New Zealanders place on NZ On Air supporting both digital media and music has faltered. The importance placed on supporting community broadcasting has seen a small, but not significant, increase.

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



IMPORTANCE OF SUPPORTING DIFFERENT TYPES OF CONTENT – DEMOGRAPHIC ANALYSIS:

Older people and NZ Europeans, are less likely than average to agree that it is important that NZ On Air supports less traditional media, such as digital. Those aged under 40, and Asian New Zealanders however, are more likely than average to agree that this is important.



AGED 70+

Less likely to agree that it is important that NZ On Air supports local music and artists (71% vs. 78%)

Less likely to agree that it is important that NZ On Air supports digital media (48% vs. 57%)



MALE

Less likely to agree that it is important that NZ On Air supports community broadcasting (72% vs. 78%)



NZ EUROPEANS

Less likely to agree that it is important that NZ On Air supports community broadcasting (74% vs. 78%)

Less likely to agree that it is important that NZ On Air supports digital media (51% vs. 57%)



AGED UNDER 40

More likely to agree that it is important that NZ On Air supports digital media (68% vs. 57%)



FEMALE

More likely to agree that it is important that NZ On Air supports community broadcasting (83% vs. 78%)



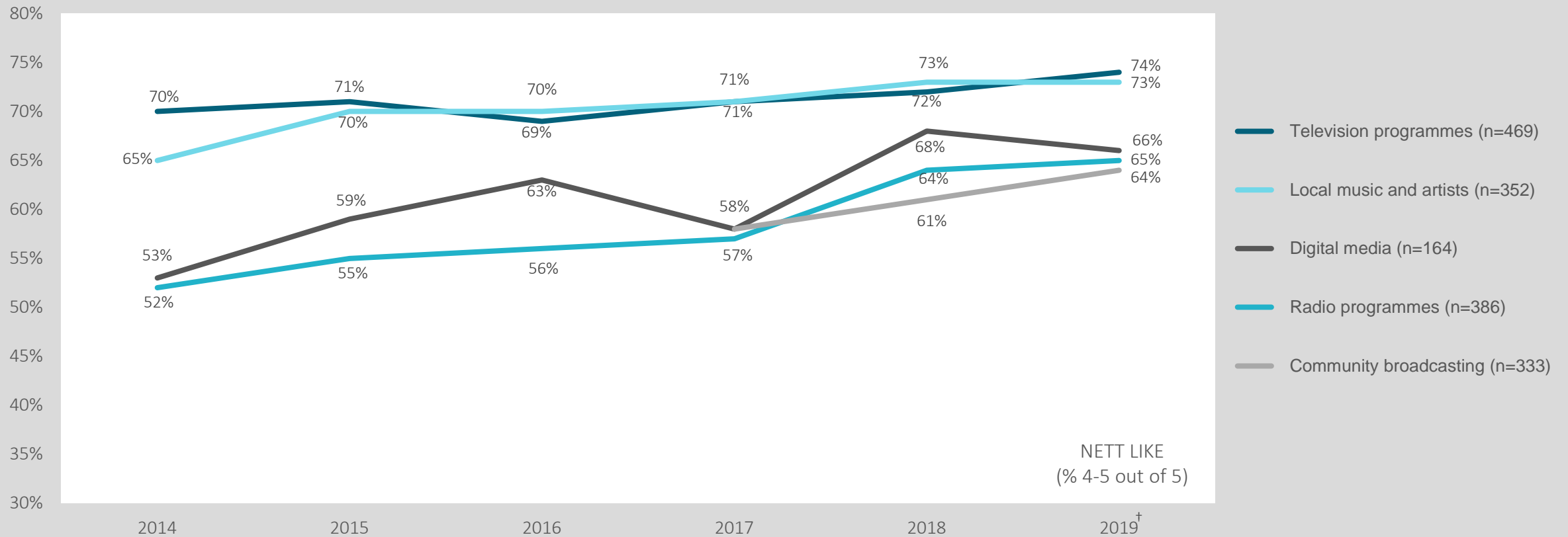
ASIAN NEW ZEALANDERS

More likely to agree that it is important that NZ On Air supports digital media (76% vs. 57%)

LIKEABILITY OF CONTENT:

New Zealanders who are aware of the different types of content NZ On Air funds, continue to like what they see or hear. The upwards trend seen over the past few years continues for television programmes, community broadcasting, and radio (though the latter has begun to plateau). The proportion of New Zealanders who like NZ On Air funded digital content has declined, although this is not significant.

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)



Women are more likely than average to like both NZ On Air funded television programmes (82%), and music (80%).
 Those aged 60-69 are more likely than average to like NZ On Air funded radio content (80%).
 NZ Europeans are less likely than average to like both NZ On Air funded digital media (60%), and community broadcasting (59%).



LIKE



TELEVISION

"I watch more TV than other media, so have seen more. I think NZ has lots of good TV programmes that NZ On Air is involved in."

"It's relevant, on trend, and a sense of humour we understand. It's supporting NZ actors and giving them a platform to launch their careers."

"I like listening to the news and documentaries, historical media."

"I just like watching programmes like Praise Be and 7 Sharp and The News and I watch Breakfast."

"Because I just look at something like this, I think NZ On Air is very important for New Zealand because it is the best way for New Zealand people to show local social culture or something."



RADIO

"Because it's local and it's stuff that involves New Zealanders."

"Because you are guaranteed to get NZ news and information from a NZ perspective."

"I think it is important to older people that like listening to the radio to find out the news and what is happening in the country."

"I listen to Farming Session on Friday nights, and hear what is going on in the rest of the country, and the weather. I like that."

"It detects our local artists and relevant local information."



COMMUNITY BROADCASTING

"I think it is an important service and that they are there to fund community broadcasting."

"Just being that we're a little provincial area, and it's good to have a bit of localness."

"It's important to know what we are doing as a country, like selectively and independently."



MUSIC AND ARTISTS

"Because it's New Zealand talent we're hearing. It gives local artists a chance to be better known, to be known for their skill, and to get funding for that skill."

"I just generally like a broad range of music and I see there is a lot of good local artists in New Zealand. NZ On Air has aided the growth and professionalism of New Zealand music."

"I think for me, personally, seeing homegrown artists, you know, supported by NZ On Air – that's just New Zealanders helping out New Zealanders."

"I think it's because it's hard for New Zealand musicians to get anywhere and it's good for them to be supported."



TELEVISION

“Because I think most of them are not suitable for a general audience.”

“I find the TV superficial and not in-depth.”

“TV is becoming irrelevant – I have stopped watching it.”



RADIO

“I don’t listen to it.”

“Seems to spend a lot on bad programmes.”

“I never listen to it to be quite honest.”



MUSIC AND ARTISTS

“They should get out and pay for themselves as we all do with hobbies and professions.”

“Don’t like it and don’t listen to it. I don’t know whether I like it, because I don’t listen to it.”



COMMUNITY BROADCASTING

“Doesn’t seem to be very well organised.”

“NZ On Air don’t really do anything for local communities. They don’t report anything in local communities, particularly where I come from.”

“I don’t believe it is really relevant anymore.”



DIGITAL MEDIA

“Because the quality is woeful. And the left-leaning bias is unacceptable.”

“I think that digital media can support itself. It’s not that expensive so doesn’t need that much funding.”

“It doesn’t interest me. I don’t like the New Zealand way of speaking, I can’t stand it.”



FOR FURTHER INFORMATION
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