



NZ ON AIR

PUBLIC AWARENESS AND
ATTITUDES SURVEY

2020

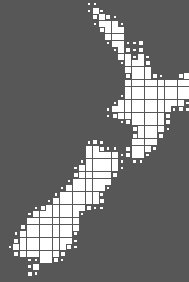
Objectives and Methodology



294 + 308

LANDLINE INTERVIEWS MOBILE INTERVIEWS

9 minutes



FIELDWORK DATES:
4 – 30 JUNE 2020

OBJECTIVES

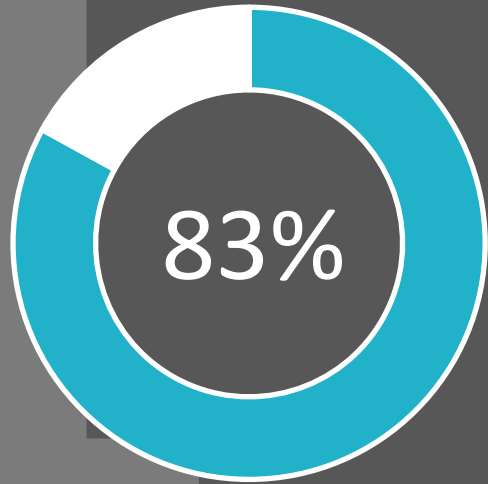
NZ On Air commissioned Colmar Brunton to research and track New Zealanders' understanding of:

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

METHODOLOGY

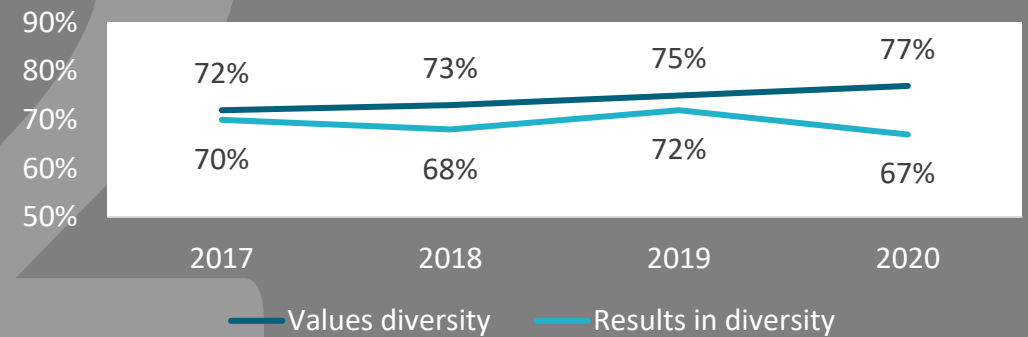
- Colmar Brunton completed a telephone survey of randomly generated mobile and landline numbers. This method is seen as the gold standard in terms of interviewing; 294 interviews were conducted by landline, and 308 completed via mobile to ensure that those without a landline were also included in the research. This is consistent with 2019, when the survey moved from a mix of landline and online sampling.
- 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 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 continued to trend downwards; **83% of New Zealanders are aware of NZ On Air** compared to 87% in 2019, and 92% in 2018. This decline is evident across the board.

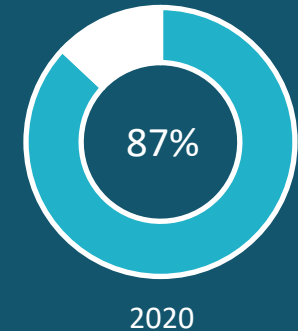
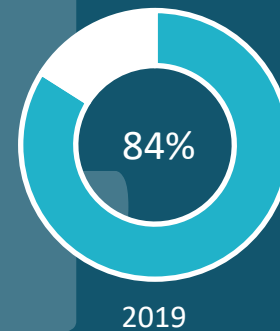
Most New Zealanders continue to say NZ On Air funding is providing diverse content, although agreement is at its lowest level since 2016. At the same time, New Zealanders place greater value than ever before on the diversity of content that NZ On Air funds.



The majority of New Zealanders recognise that NZ On Air supports content that is important to New Zealanders – however this has plateaued since 2018



And finally, almost all New Zealanders feel that it is important to have free-to-air, publicly funded television content – this is the highest level to date.



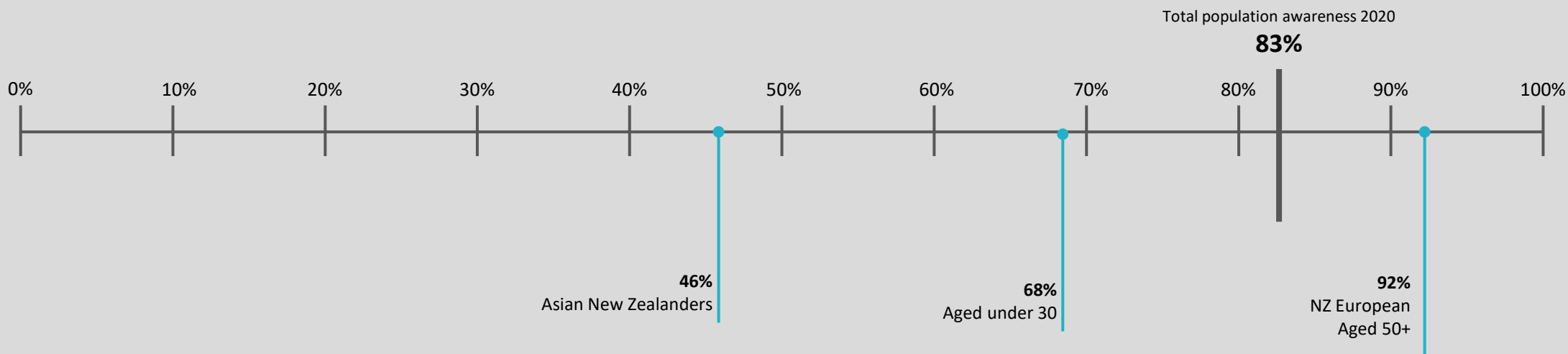
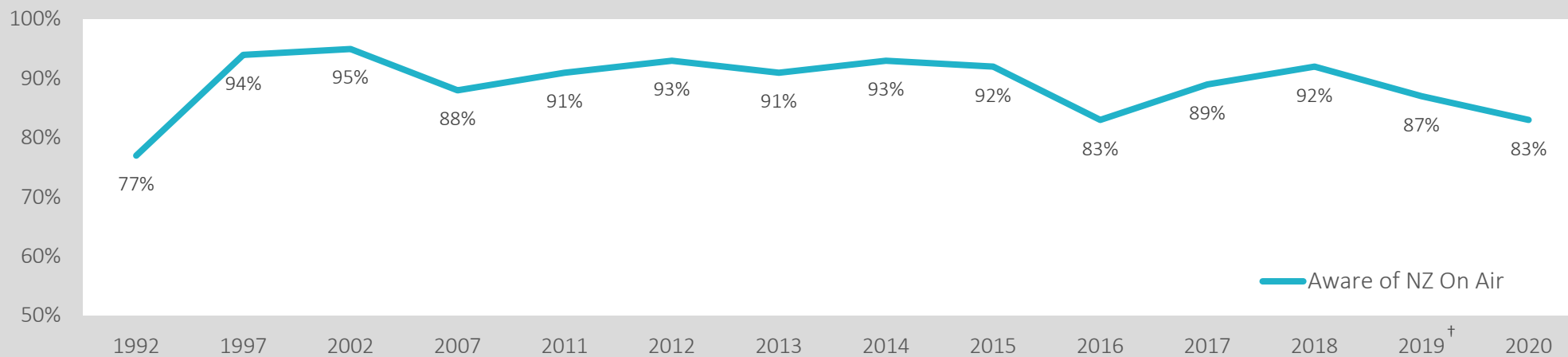


HIGH LEVEL AWARENESS AND PERCEPTIONS

AWARENESS OF NZ ON AIR:

The majority of New Zealanders continue to be aware of NZ On Air (83%), although this has been trending downwards since 2018. Asian New Zealanders, Pacific Peoples, and younger New Zealanders are less likely than average to be aware of NZ On Air. NZ Europeans and older New Zealanders are more likely than average to be aware.

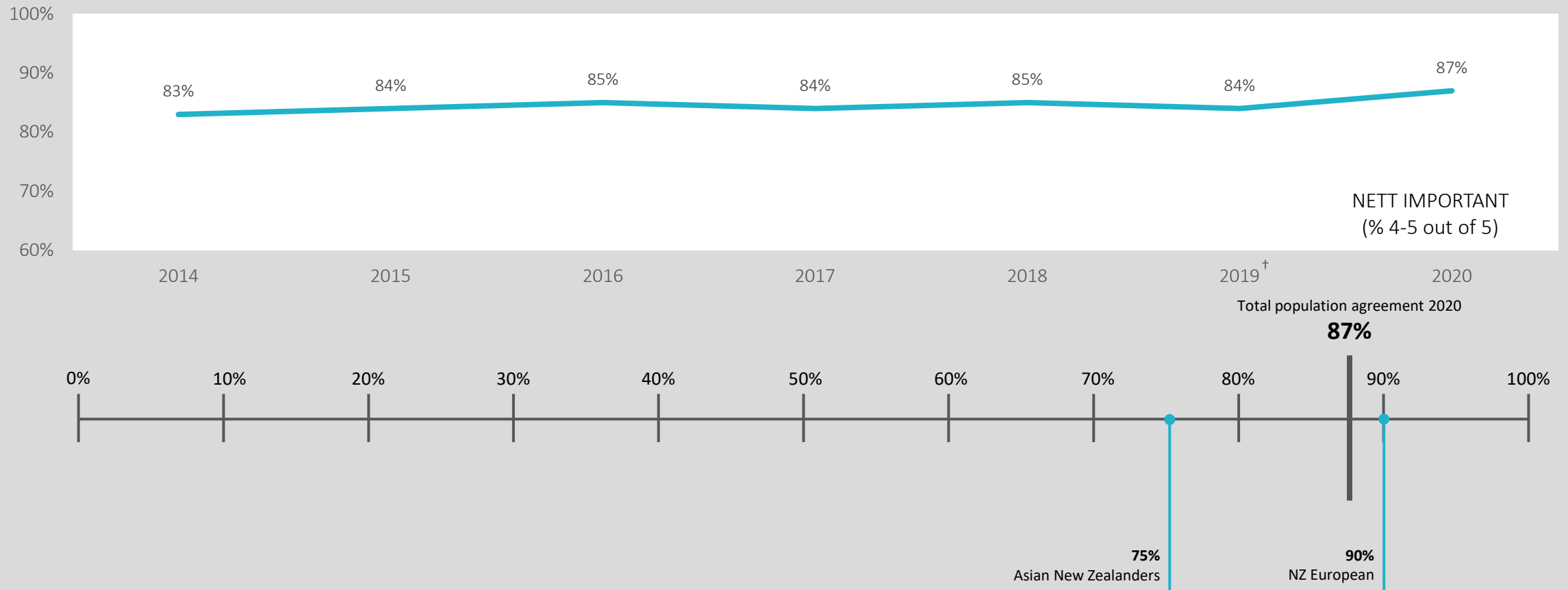
Q: 'Do you know that there is an organisation called NZ On Air?'



IMPORTANCE OF PUBLICLY FUNDED CONTENT:

Almost nine in ten New Zealanders think it's important to have publicly funded television content that is free to view, which is the highest level to date. This potentially is reflective of people putting more focus on their household budgets as we move into a recession and economic uncertainty. NZ Europeans are more likely than average to think it is important (90% vs. 87%), while Asian New Zealanders are less likely than average to think so (75%).

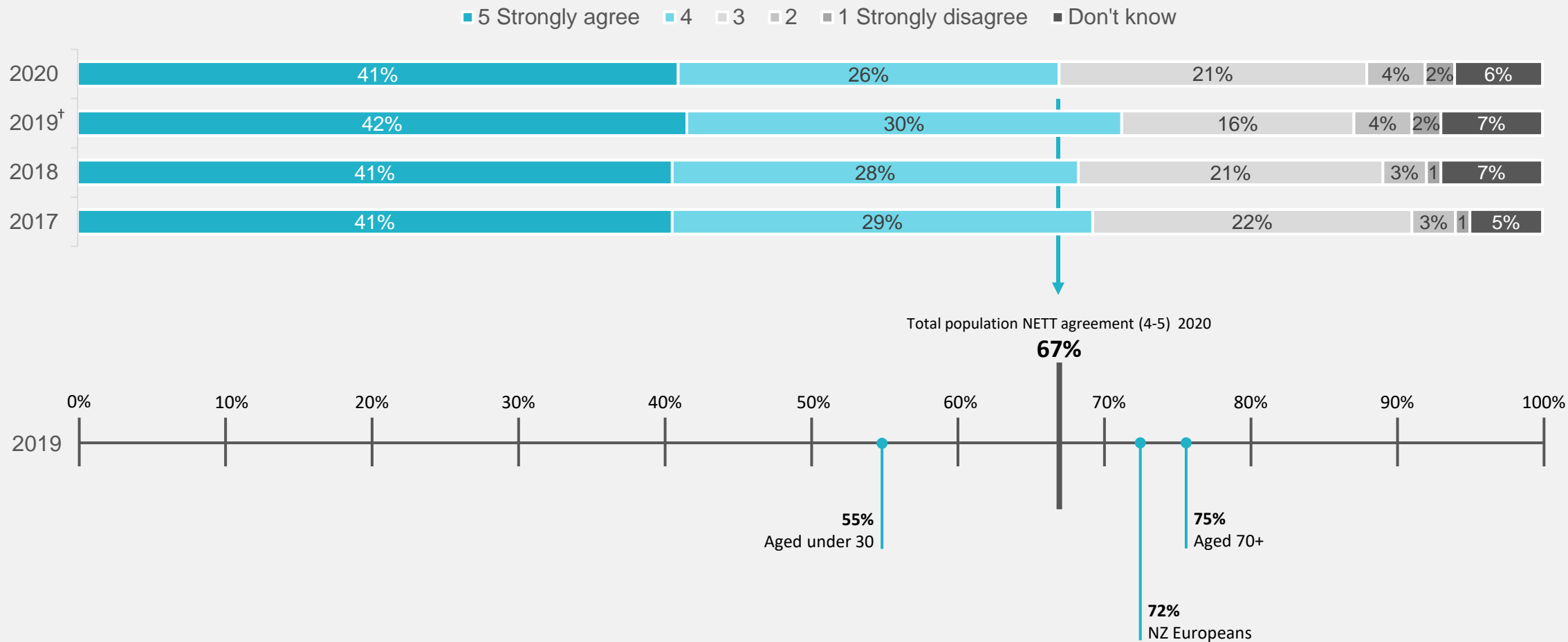
Q: 'How important is it that publicly funded television content is free to view meaning you don't have to pay a SKY, Netflix or other subscription?'



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

Two-thirds of New Zealanders feel that NZ On Air provides a diversity of content that would otherwise not exist (67%). This is slightly lower than in 2019, albeit this is not statistically significant. New Zealanders aged 70 and over are more likely than average to agree with this (75%), as are NZ Europeans (72%). New Zealanders aged under 30 are less likely than average to agree with this (55%).

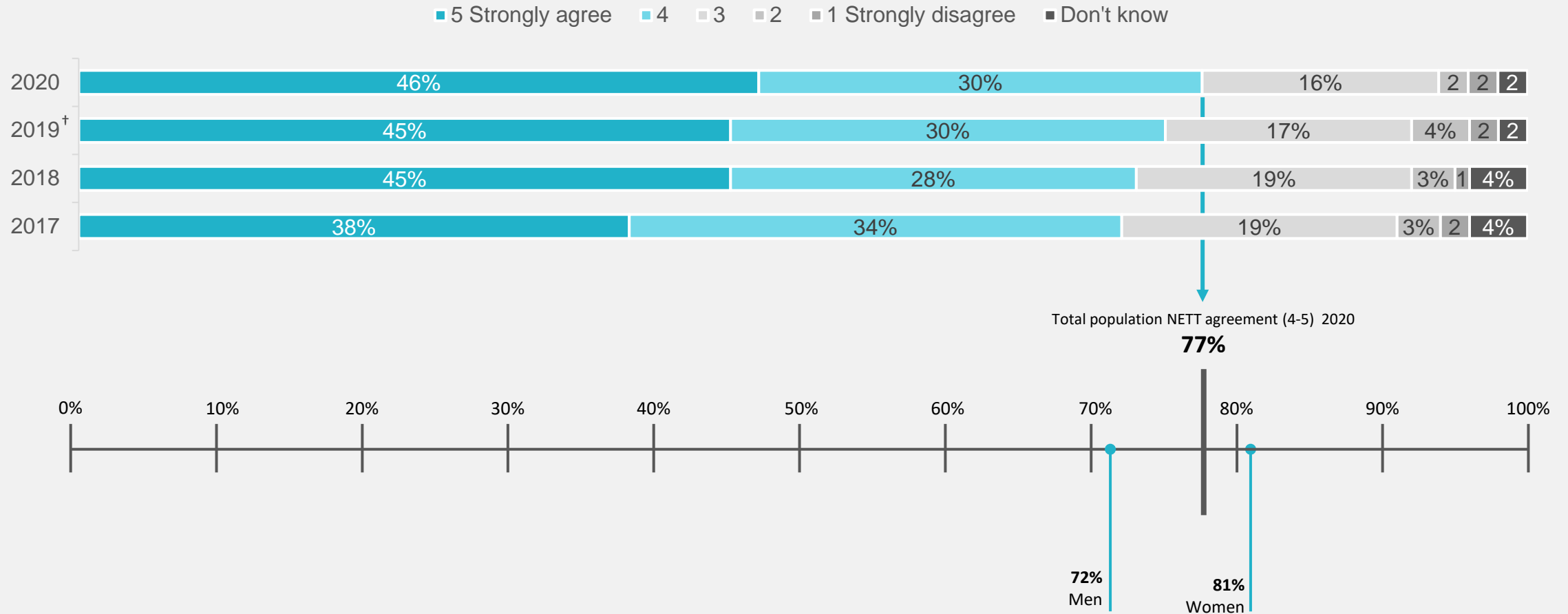
Q: 'How much do you agree or disagree that NZ On Air funding results in a greater diversity of local content than would otherwise exist?'



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 (77%). The continues the trend of higher agreement seen over the past few years, and is significantly higher than 2017.

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



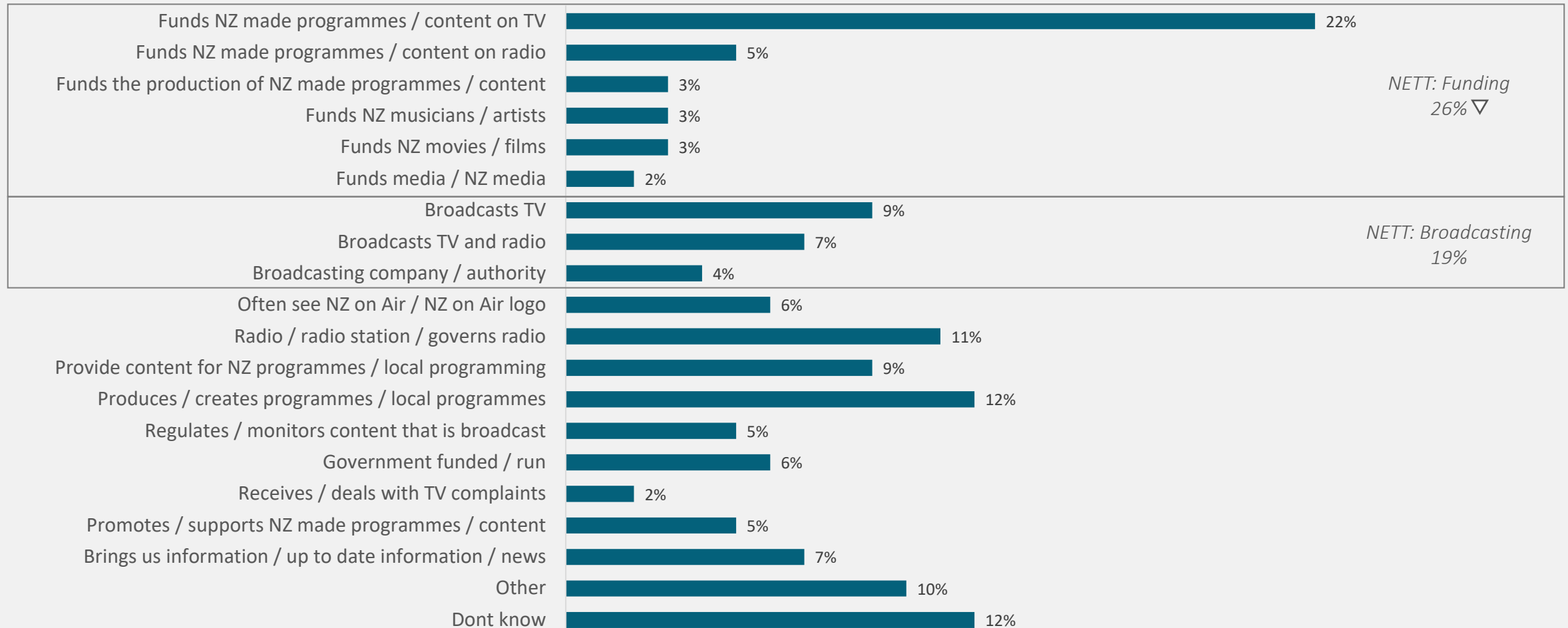


DETAILED AWARENESS FINDINGS

UMPROMPTED AWARENESS OF NZ ON AIR'S ROLES:

One quarter of those aware of NZ On Air are aware of the agency's funding role – however, this has declined from 2019 (36%). Additionally, one in five incorrectly believe that the agency plays the role of a broadcaster. This is consistent with the findings from 2019.

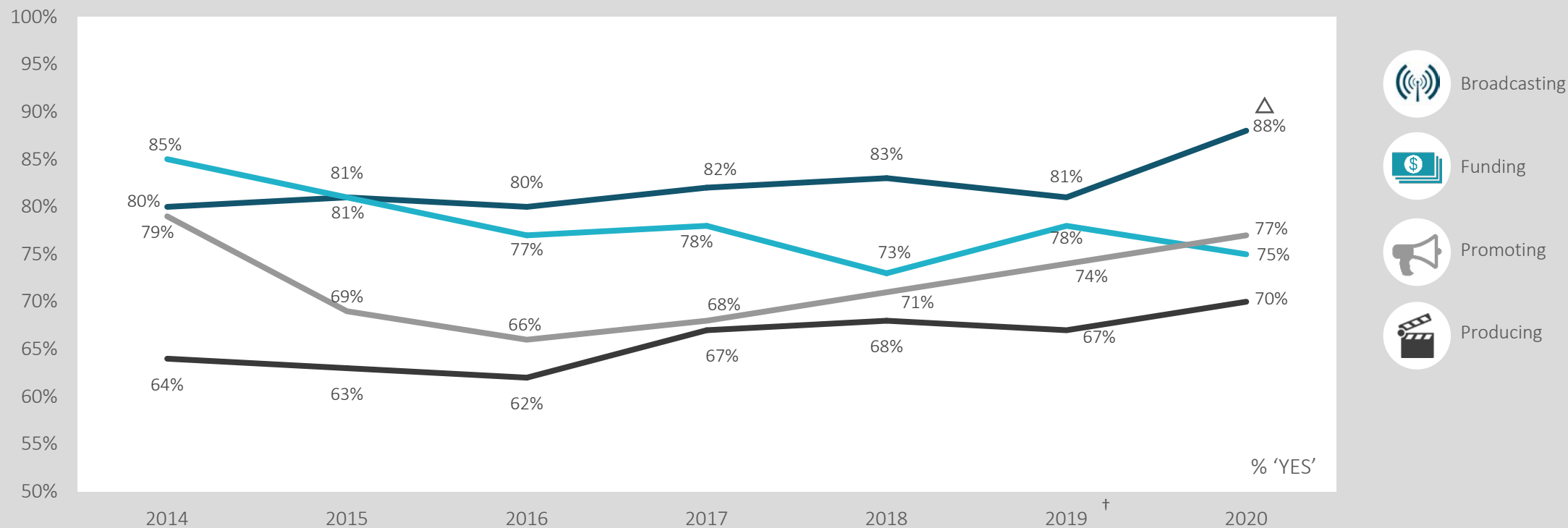
Q: 'Can you please tell me everything you know about what NZ On Air does?' (Open ended question)



PROMPTED AWARENESS OF NZ ON AIR'S ROLES:

There is some confusion over NZ On Air's role. When prompted, more New Zealanders than ever before believe it is a broadcaster, and the proportion who recognise it funds programming is broadly declining over time. On the flip side those who recognise NZ On Air as being involved in the promotion and production of local content are both continuing to increase.

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

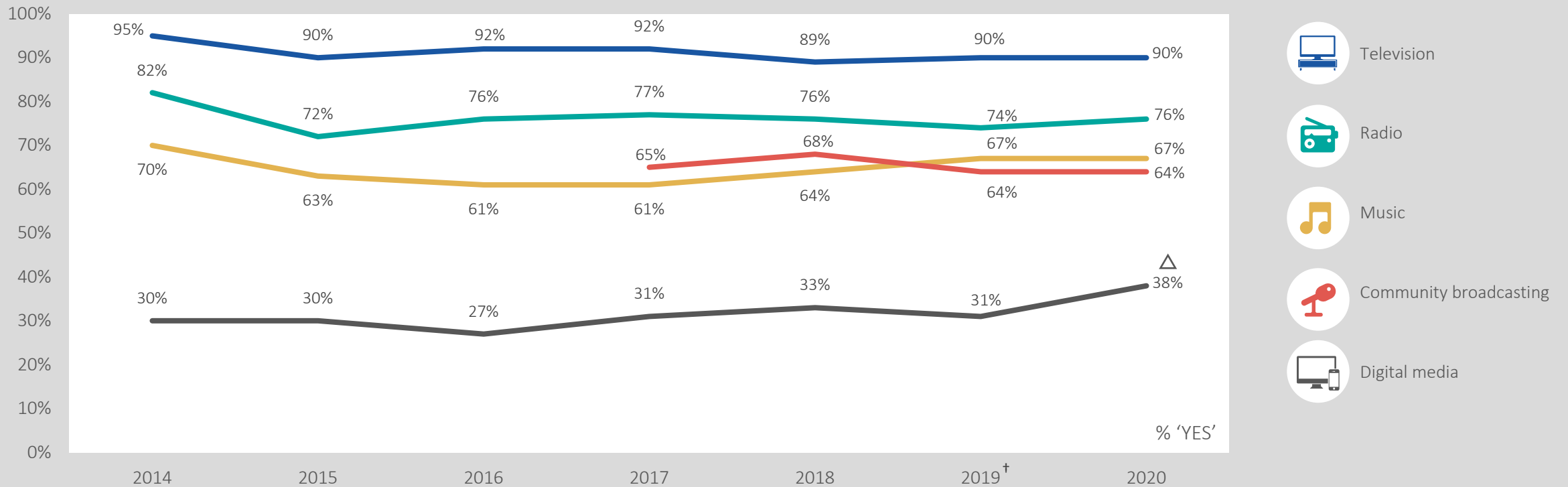


NZ Europeans are more likely than average to believe that NZ On Air supports local content through funding (78% vs. 75%), while people aged 70+ are less likely to believe this (61% vs. 75%). Women are more likely than average to incorrectly believe that the agency broadcasts content (92% vs. 88%), while men are less likely than average to think this (83% vs. 88%).

AWARENESS OF MEDIA SUPPORTED BY NZ ON AIR:

Awareness of the media that NZ On Air supports is largely consistent with 2019. Awareness that NZ On Air supports digital media has increased to its highest level to date, with almost four in ten New Zealanders aware.

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



People aged 70+ are less likely than average to be aware that NZ On Air supports television (83% vs. 90%), or digital media (28% vs. 38%). Men are also less likely than average to be aware that NZ On Air supports television (85% vs. 90%), while women are more likely than average to be aware of this (94% vs. 90%).

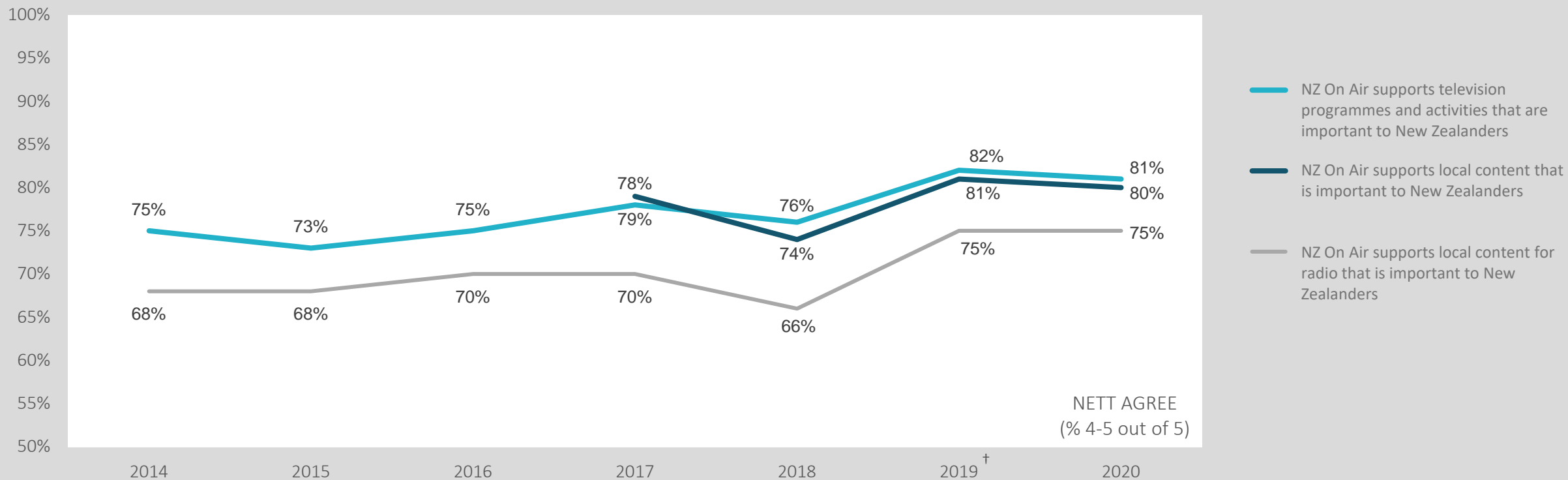


SUPPORT FOR
NZ ON AIR'S MISSION

AGREEMENT THAT NZ ON AIR SUPPORTS IMPORTANT CONTENT:

The majority of New Zealanders agree that NZ On Air supports content that is important to them, but this agreement has plateaued in 2020.

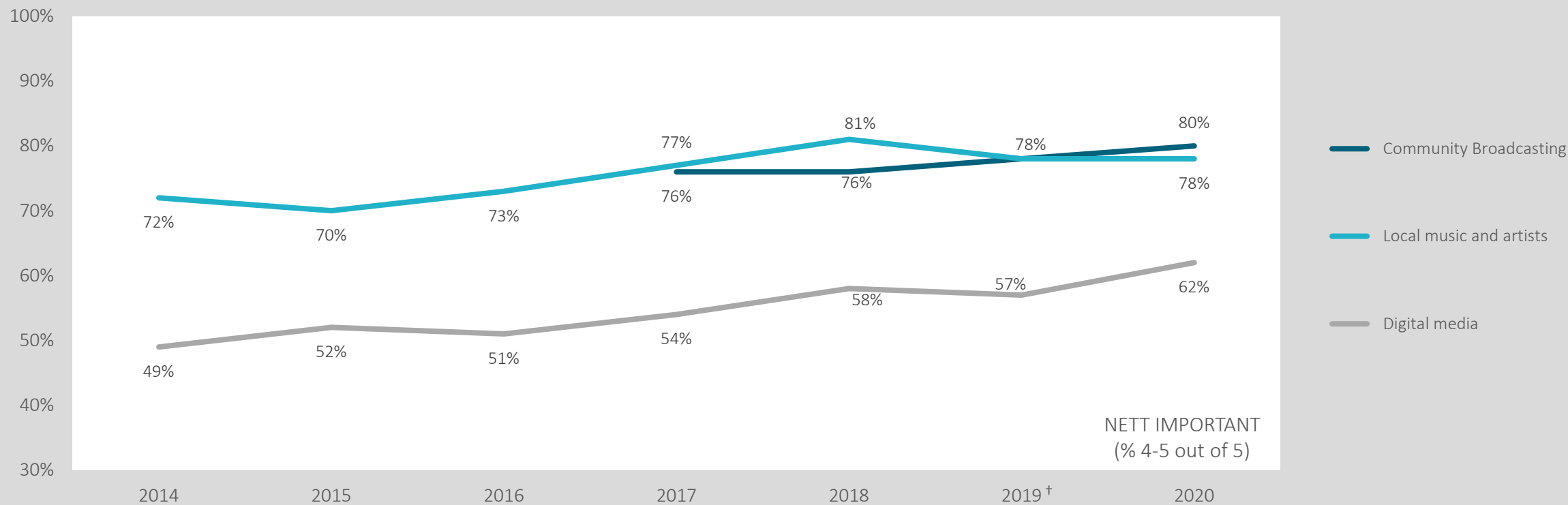
Q: 'To what extent do you agree with each of the following statements?'



IMPORTANCE OF SUPPORTING DIFFERENT TYPES OF CONTENT:

The importance New Zealanders place on NZ On Air supporting both community broadcasting and digital media have both increased (albeit not significantly) to reach their highest levels to date. The majority of New Zealanders also continue to place importance on supporting local music and artists.

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



60-69 year olds are less likely than average to think that it is important that NZ On Air supports community broadcasting (70% vs. 80%).

40-49 year olds are more likely than average to think that it is important that NZ On Air supports local music and artists (91% vs. 78%), as are women (82% vs. 78%).

Women are more likely than average to think that it is important that NZ On Air supports digital media (70% vs. 62%, while men and 50+ year olds are less likely to think so (both are 54% vs. 62%).

IMPORTANCE OF SUPPORTING DIFFERENT TYPES OF CONTENT – DEMOGRAPHIC ANALYSIS:

Older New Zealanders, and men are less likely than average to agree that it is important that NZ On Air supports less traditional media, such as digital. Women, however, are more likely than average to agree that this is important.



AGED 40-49

More likely to agree that it is important that NZ On Air supports local music and artists (91% vs. 78%)



AGED 50+

Less likely to agree that it is important that NZ On Air supports digital media (54% vs. 62%)

Less likely to agree that it is important that NZ On Air supports local music and artists (73% vs. 78%)



AGED 60+

Less likely to agree that it is important that NZ On Air supports community broadcasting (73% vs. 80%)



MALE

Less likely to agree that it is important that NZ On Air supports digital media (54% vs. 62%)



FEMALE

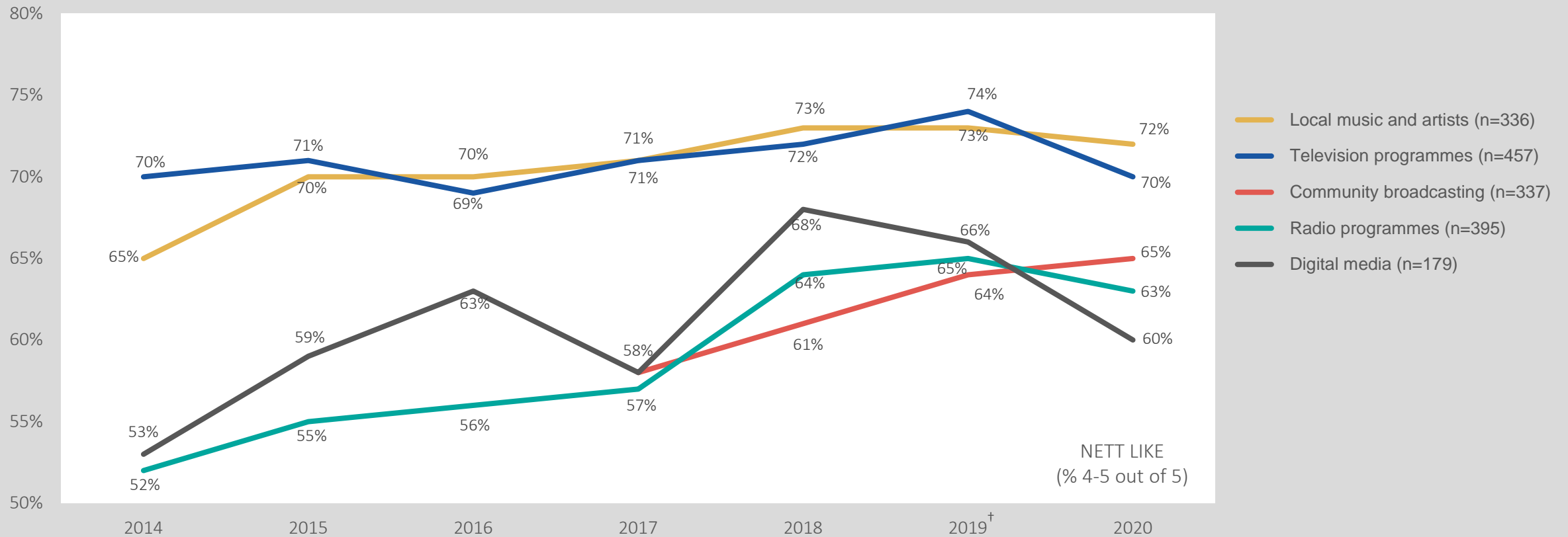
More likely to agree that it is important that NZ On Air supports local music and artists (82% vs. 78%)

More likely to agree that it is important that NZ On Air supports digital media (70% vs. 62%)

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, however this likeability has begun to plateau, or in some cases, decline. This is most noticeable for digital media which has declined in likeability since its peak of 68% in 2018 (down to 60% in 2020, though this is not significant). In contrast the likeability of community broadcasting has reached its highest level to date at 65%.

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 NZ On Air funded community broadcasting (71%).
 NZ Europeans are less likely than average to like NZ On Air funded music (67%).



TELEVISION

"I just like seeing local stories and things like that. Country Calendar, the other one - Rural - it's on in the mornings."

"Well for a while I never really had SKY so just had basic Freeview set up and that was just free to view, cannot remember specific shows but it got me through, so good for those who cannot afford SKY etc."

"It's probably the main thing I would engage in, and I don't have any TV content I pay for personally. So I think it's good to have free options."

"I watch it, turn on TVNZ One for news and watch a lot of programs after that, TVNZ OnDemand - I watch a lot of things on there. It competes well with Netflix."



RADIO

"I am a great listener to National Radio and the Concert programme."

"It's good when someone is driving. The news when someone is working 9-5 they can listen to the news on the way home."

"I like the news and I like the weather and programmes like Country Life and enjoy 9 to Noon and radio programmes, Jessie Mulligan and I also like the Concert programme and the Christian programme and Alison Ballance and Jim Mora."

"It's important in times of crisis, to have a station to tune into for important announcements. Local news and weather is good as well."



COMMUNITY BROADCASTING

"Good to know what is happening in the community especially as those not covered by mainstream media and also private companies for profit."

"The main reason is because the broadcasting is like important because you will learn stuff and know what's happening around your community."



DIGITAL MEDIA

"Because its a modern medium it's up to date."

"I think it could help New Zealanders more, especially now that we are already in the high tech for social media era."



MUSIC AND ARTISTS

"I think it's really important they are supported, not a lot of them make it and they go overseas, we really need local content to be supported as they are part of our culture."

"I like listening to music, and I like it if it helps to promote local artists."

"I work in a school where there are a lot of talented students in music, who don't know where to go with their talents or how to be recognised. I think if NZ On Air were open to acknowledging youth to give them some sort of pathway, it would be beneficial for our community and our region. The main reason is to create pathways for our talented young people so they can be recognized. You know how you get young people who jam in the garage and that's all they do and that's the only pathway for them? If they knew about NZ On Air's help and support, it could give them that hope they could make a career path out of it."



TELEVISION

“Because it’s all rubbish, it’s all repeat stuff repeated year after year after year and we get nothing different.”

“New Zealand sucks at making anything.”



RADIO

“Because the programs are deteriorating by the week, television programs are getting worse and radio not much better. They want a good shake up.”

“Don’t listen to a lot of radio, I only listen to whatever is playing music when I’m in the car.”



MUSIC AND ARTISTS

“Personally I think a lot is self indulgent rubbish, I do not have a lot of time for it, most are commercial bands and I don’t see tax payers subsidizing them.”

“I don’t believe some of the content I have seen, the tax payer should be paying for it.”



COMMUNITY BROADCASTING

“Don’t find it interesting and don’t watch it and don’t get involved in it.”

“I don’t find them very interesting, that is a personal thing.”

“I’m not into it.”



DIGITAL MEDIA

“I think there are enough companies out there doing this without the taxpayers doing it.”

“I just feel that I would prefer to get my online content from other sources.”

“It does not really interest me. There is better quality stuff from overseas.”



FOR FURTHER INFORMATION
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