



NZ On Air, Public Perceptions Research, 2008/2009

Executive Summary

Prepared by Jude Varcoe and Karin Curran

1.0 Introduction

In the second half of 2008, NZ On Air commissioned Premium Research to undertake research to understand the public's perceptions of local content and the role NZ On Air plays in delivering local content. The first stage of the research was a quantitative survey to *measure* current perceptions; this was followed by qualitative focus groups to *understand* the perceptions and reasons for the perceptions.

The objectives of the Public Perceptions Research were as follows:

- To meet SOI reporting needs:
 - The percentage of respondents that agree NZ On Air supports television programmes that are important to New Zealanders;
 - The percentage of regular Access Radio listeners that agree Access radio delivers programmes and activities that are important to them;
 - The percentage of respondents that support encouraging radio stations to play more New Zealand music.
- To assess New Zealanders' perceptions of whether there is sufficient local content on radio and television.
- To determine **how important** New Zealanders perceive having local content on radio and television to be, and to determine why they think having local content is important (determining the perceived value of local content).
- To determine whether New Zealanders think there should be more local content on air.
- To determine which NZ On Air funded television programmes New Zealanders watch and enjoy the most.
- To determine how New Zealanders think NZ On Air funding should be spent.

- To determine the extent to which New Zealanders currently use new media (internet and mobile phone) to view local content. To determine the extent to which New Zealanders think NZ On Air should fund local content that would be shown exclusively on new media.
- To determine the extent to which New Zealanders think NZ on Air should fund local content shown on Pay to View television.
- To determine the extent to which New Zealanders watch, value and enjoy regional television.
- To determine the extent to which New Zealanders believe it is important to have programming for general audiences from a Māori perspective on mainstream television.
- To determine the extent to which New Zealanders perceive Access Radio is important (include an explanation of Access Radio).
- To determine where New Zealanders find out about new music and where they get their music fix from. Also, to determine the extent to which New Zealanders listen to radio on the internet.

2.0 Methodology

The quantitative survey used a Computer Assisted Telephone Interview (CATI) methodology. The population of interest for the research was all adult (18 years plus) New Zealanders. The sample was drawn randomly from throughout New Zealand using random digit dialling. The sample size was n=500. The margin of error for a value of 50% at the 95% confidence interval for a sample size of n=500 is +/- 4.4%. The survey was undertaken in December 2008.

The qualitative research used a focus group methodology. Each of the eight focus groups had six participants. The focus groups were undertaken in March 2009. The sample for the focus groups was as follows:

	Ethnicity	Age	Gender	Location
Group One	Mixed	18-24 years	Mixed	Wellington
Group Two	Mixed	25-34 years	Female	Wellington
Group Three	Mixed	35-44 years	Mixed	Rangiora
Group Four	Mixed	45-60 years	Mixed	Christchurch
Group Five	Mixed	18-24 years	Mixed	Auckland
Group Six	Mixed	25-34 years	Male	Auckland
Group Seven	Samoan	Open	Mixed	Auckland
Group Eight	Māori	Open	Mixed	Auckland

In this report some comparisons are made with quantitative research undertaken in previous years. Caution should be applied when considering these comparisons because of differences in approach, sample profile and timing between the 2008 research and research undertaken in previous years. The key differences follow:

- In 2008, interviewing was undertaken in November/December. From 1997-2007, interviewing was undertaken in May/June.
- In 2008, the average interview was around 15 minutes long and respondents were given an explanation of the role of NZ On Air. From 1997-2007 interviews were around 25 minutes and respondents were not told about the role of NZ On Air.
- In 2008, a small number of questions were asked in a follow up interview, undertaken about 10 days after the initial interview. Comparisons are not made with previous years (because of the differences in survey approach).
- In 2007, between 14% and 15% of the sample were aged 65 years plus. In 2008, 27% of the sample were aged 65 years plus.

3.0 Local content

The quantitative research found that the majority of New Zealanders think it is important to have New Zealand programmes on TV and New Zealand music on radio:

- 70% of New Zealanders said it is important to have New Zealand programmes on TV; and
- 63% of New Zealanders said it is important to have New Zealand made music on radio.

The high importance of having New Zealand made content on air (local content) was even more apparent in the qualitative research. Respondents expressed strong personal and cultural associations with local content. Local content is perceived as being 'ours' and unique to us as New Zealanders. Local content evokes emotions of pride and nostalgia. Local content is credited with playing a role in representing New Zealand culture and identity to ourselves and the rest of the world.

Local content is also perceived as informative, both in terms of informing us about ourselves and informing others about us. It profiles our people, our place, our diversity and Tangata Whenua. The value New Zealanders attribute to local content is demonstrated in the quotes from respondents below:

"That's how we form our culture and our identity basically by sharing it."

"TV sort of celebrates who we are as a nation."

"Shows the rest of the world who we are."

"Kiwis talking about Kiwis and we sort of like to hear about ourselves a bit I think."

"I like to know what's going on in my backyard."

Asked to imagine a mediascape without local content, respondents said they would feel sad and disappointed. Respondents said a mediascape void of local content would leave us only looking outward at other countries, instead of identifying with and celebrating New Zealand. We would lose an important element of cultural cohesion and common social expression. We would be left looking at 'their values', 'their identity', and 'their culture'. We would hear 'their lingo' and 'their humour'. It would be all about 'their places' and 'their people'. And of serious concern would be 'their' influence on 'our' children.

4.0 Local content on television

4.1 Quantity of local content on television

We know that the amount of local content on television has increased significantly in recent years, more than doubling from 5,361 hours in 2000 to 11,600 hours in 2008. In the qualitative research we found that this increase had been noticed by most people (most respondents said they think the amount of New Zealand made programming on television has increased over the last five years).

The quantity of local content has now increased to the point where both the qualitative and the quantitative research found that the majority of New Zealanders perceive that the proportion of local content on television does not need to continue to increase. In the qualitative research, most respondents said they think the amount of New Zealand programming is at about the right quantity level now. Likewise, the quantitative research found that there has been a statistically significant decrease over time in the proportion of New Zealanders who think the proportion of New Zealand made programmes shown on television should increase (down from 53% in 2006 to 39% in 2007 and 38% in 2008).

It is important to note that this is a comment about New Zealand made programming, rather than specifically NZ On Air **funded** programming. NZ On Air **funded** programming is a subset of the programming perceived as being New Zealand made and very few (if any) distinguish between NZ On Air and other New Zealand made programmes.

In the quantitative research, perceptions did change once respondents were told how much more local content there is in other countries. In the survey, respondents were told that 'local content in Australia is around 55%, in England over 75% and in the United States it is over 90%'. (Respondents were asked whether, given this information, they felt the amount of New Zealand made programmes on television should increase, remain the same or decrease. The proportion of respondents who said the proportion of New Zealand made programmes on television should increase rose to 52% (up from 38% before they were told about the proportion of locally made television programmes in other countries). In the qualitative groups this effect was minimal.

It is important to note that the current lack of a strong call for the quantity of New Zealand made programming to increase does not mean that there is a desire for the quantity to revert to a lower level

– it should more accurately be seen as an expression of goal achievement. In the quantitative research just 4% of respondents said the quantity of New Zealand made programming on television should decrease. This was reinforced in the qualitative research when respondents were asked to how they would feel about a mediascape where there was no New Zealand made television on air. Asked to imagine this scenario respondents expressed strong concerns and emotions. They said they would feel disappointed and stolen from. They were concerned that there would be reduced opportunities for our local talent, no example of culture for our children, no examples of our success for our children to aspire to, no uniquely New Zealand (particularly Māori) stories, and loss of our language and humour. Respondents felt that losing New Zealand content from television could result in changing our cultural references from internal to external and even a risk that we may adopt other cultures and have our cultural cohesion and sense of self undermined. The strength of response to the loss of New Zealand content on television is expressed in the quotes from respondents below:

“Culture and identity will be lost, New Zealanders will not be able to define themselves.”

“We would lose part of our culture and run the risk of becoming homogenised into American or British identities.”

“Community spirit or NZ culture might not be as strong.”

“Not being able to relate to anything our own. Having NZ TV helps us relate.”

“Our language would change and there could be more violence or issues in society as kids copy what is occurring on TV from other countries.”

“We would pick up the traits of the other countries.”

“It would change and reshape our unique culture, thinking and views.”

“NZ wouldn’t have an identity on screen that we could recite to the world and we wouldn’t be able to show off our talents.”

“A lack of identity and uniqueness. We would lose the ability to compel, humour and entertain and if you can’t do that to yourself you have lost a huge tool of self-affirmation and public pleasure.”

“We would sink out of the world’s limelight – New Zealand who?!”

“I would feel deprived... lonely, bored, disappointed, unpatriotic, out of touch.”

The fact that pressure to increase New Zealand content has lessened does not mean that New Zealand television is not highly valued or that vigilance about its continued presence can be relaxed.

The high value New Zealanders place on having New Zealand content on air should be tempered with the importance New Zealanders also place on seeing ‘the rest of the world’ on television. Asking respondents to imagine a mediascape where there was considerably more New Zealand content on air than there is currently evoked concerns about losing touch with the rest of the world and losing access

to favourite television programmes. Many respondents perceived that New Zealand could not produce the range of programmes made overseas at similar levels of quality because of a lack of depth of talent and resources. Respondents in the qualitative research said the quality of television programming overall would reduce if there were much more New Zealand made television on air. This sentiment is reflected in the quotes from respondents below:

“The quality of the TV shows that would come over would be better quality.”

“There are some really good programmes out there that have come from overseas and there might be more that we just don’t know about because they are taken up by NZ spaces on TV.”

“Replace those NZ programmes that perhaps aren’t up to scratch.”

“I think the quality might be better.”

The desired balance of local to foreign made television appears to be genuinely different for New Zealand, with its small population base and physical distance from the rest of the world.

4.2 Quality of New Zealand made television programming

The overall perception of the quality of New Zealand made programming was only considered in the qualitative research. (The quantitative research instead focused on NZ On Air funded New Zealand programmes).

The qualitative research found that New Zealand made programming is perceived to be of a mixed level of quality. The uniqueness of ‘our’ television programming and the perception that it is ‘ours’ is perceived to be its strength. *Outrageous Fortune* is widely perceived as the best New Zealand made television **drama** that is currently on air. Some older respondents are more likely to nostalgically recall *Radio With Pictures* (The Karen Hay era only) and to talk fondly about *Country Calendar*.

“Country Calendar – love that, always have, and I still really enjoy it. I was disappointed that I missed it on Saturday.”

“When Karen Hay did it, it was great”

“And I love Outrageous Fortune and America’s Next Top Model and pretty much all of MTV. And E! Yep”

“Those low budget ones like Outrageous Fortune, they just seem quite interesting. There’s no sort of like, no bullshit involved sort of thing. Like it’s just straight to the bone and good”.

Most respondents said the New Zealand television industry would not be capable of producing programmes that could compete with the best of the overseas offerings (especially in the drama field – e.g. *Boston Legal* and the *Sopranos*).

“I think people like to have NZ shows even if they are not amazing, we kind of understand.”

The New Zealand television industry is perceived as producing higher quality programming in some genres. In the qualitative research, the genres respondents tended to speak about most favourably were documentary and comedy. The weaknesses of New Zealand made television identified by respondents in the qualitative research were reality programmes (competition style) and drama.

“Documentaries and things like 20/20, we do all of that really well”

“Documentary..it inspires conversation, places to go, our understanding of the education system, what other people are doing in New Zealand”

“We’ve got our own style of humour. Like it’s a little bit drier you know”

“I just love anything funny, like New Zealand programmes like Outrageous Fortune”

“I do think we have a really good sense of humour. Like I love Jackie Brown Diaries...I think some of our comedies are really good. They’re unique compared to watching the American stuff”

“They’ve come a long way. Like Flight of the Conchords is fantastic and Outrageous Fortune, again fantastic. It’s got that real edge, that kiwi edge to it that makes us stand apart from the rest of the world in our comedies”

4.3 Documentary

The quantitative survey found that if NZ On Air had any additional funding by far the most popular way to spend this funding would be on New Zealand documentaries (this finding is consistent with surveys undertaken in previous years). This finding is also reflected in the qualitative research, in that documentaries were one of the most enjoyed and sought after New Zealand made programming genres. The qualitative research does, however, give this research finding some important context. The qualitative research found that New Zealanders tend to use a broad definition of documentary, a definition that significantly overlaps with News, some reality (not competition style) and factual information genres (note the term ‘factual information’ is not used by the public). This overlap is reflected in the type of programmes that New Zealanders frequently perceive as being documentaries: (20/20, 60 Minutes, Darklands, Brief History of NZ, weight loss programmes, Country Calendar, What’s Really in Our Food, Target, Marcus Lush on the Ice, Target, Real Crime, Police Ten 7, Heartland, and Inside NZ).

Given this context we can now confirm that when New Zealanders say they think New Zealand produces good documentaries and that they want more New Zealand documentaries they are using a broader definition of documentary than the New Zealand television industry may typically use.

New Zealanders place a high value on New Zealand made documentaries as this genre fulfils many of the functions New Zealanders ask New Zealand programming to fulfil (seeing ourselves, hearing our stories, seeing our culture, learning about our people, place and diversity). Adding reality and factual information elements allows this to be done in a more entertaining, accessible, and less academic way than a “core” documentary.

“I watched that programme and I’d never been to Samoa and it opened my eyes and I thought wow, that’s how my parents lived and I thought I’m over there. And I went. It changed my life.”

“Inside New Zealand...they actually pick something and go completely indepth into it and you learn a side that you don’t really see if you are just watch the news “

The support for documentary found in the qualitative research is also seen in the quantitative research, where 84% of respondents said they think it is important that NZ On Air funds New Zealand made documentaries on television.

4.4 Comedy

Comedy is also perceived as a strength. In the qualitative research, New Zealanders said they enjoy our unique humour, which is seen to be down to earth and irreverent (though there is some division about whether our great humour is consistently captured on television). Everyday comedy, rather than scripted comedy is perceived to be our strength. Most of our respondents defined *Outrageous Fortune* as comedy (the remainder calling it a drama), and this show was generally very well regarded (though less so in the South Island). Other good examples of comedy mentioned by several respondents were: *Flight of the Conchords* (but embarrassed we could not see our own strength), *McPhail and Gadsby, Bro’ town*, *Billy T James*, *Sports Café*, *Eating Media Lunch* and *Skitz*. Respondents said:

“I think we do have a really good sense of humour.”

“I think New Zealand’s quite good at the comedy and everyone needs a good laugh.”

“I think we have such a good sense of humour and unique humour.”

“Our humour is quite unique, we’re a sarcastic bunch of people that play on words and puns.”

“That’s NZ humour, being humble and taking the piss out of someone else but not too harshly.”

The support for comedy found in the qualitative research is not well supported in the quantitative research where just 29% of respondents said they think it is important that NZ On Air funds New Zealand made comedy on television.

4.5 Reality

New Zealanders tended to have a ‘love/hate’ relationship with reality television, with many admitting that it is a guilty pleasure. Extrapolating from the focus group discussions, reality television seems to fall into two broad (and not entirely distinct) camps: celebrity or pre-celebrity people in over-the-top or competitive situations (e.g. *Dancing with the Stars* and *Next Top Model*) and everyday people in more real life (though still scripted) situations (e.g., *Downsize Me*, *Border Patrol* and segments of *Fair Go and Target*). The former (with celebrities) is frequently regarded as the “core” of reality television and believed to be more successfully produced overseas. New Zealand is seen to have an insufficient pool of talent and money to make true reality television of a sufficient standard, especially after the first season. Imitating these kinds of overseas shows with a shallower talent and resource pool, especially in the

second or third season, makes many viewers 'cringe' as they watch. The latter division (with everyday people) of reality show represents the overlap between reality and other genres (e.g. news, factual information and documentary) and is seen as the type that New Zealand does well. This is what is generally meant when respondents admitted they wanted to continue to see New Zealand reality shows.

"Reality is important because it's good to see other Kiwis just being themselves on TV, they're always just themselves on reality shows."

"I saw that NZ Next Top Model and that's a write-off. We shouldn't even have a NZ Idol."

"I am quite excited about NZ's next Top Model, but it'll probably be really cringable, but it will be fun to watch anyway."

"In America they might be able to boost your career [reality TV] but in New Zealand you're just going to drop off the radar ..."

4.6 Drama

New Zealand made drama was also regarded as a weak genre. In the qualitative research most respondents said New Zealand does not seem to have the talent or the money to make good quality drama on a regular basis. Respondents drew comparisons between New Zealand made programming and overseas made programming, such as *Desperate Housewives*, *The Sopranos* and *Grey's Anatomy*. For many respondents programmes in the drama genre are their favourite and fulfil an important role in providing them with something to look forward to and relax with. New Zealand made drama is not perceived as capable of fulfilling this role, for most respondents (it is important to note that most New Zealanders perceive *Outrageous Fortune* as being a comedy, not a drama). Most respondents in the qualitative research had difficulty identifying any New Zealand made drama programmes, aside from *Shortland Street*. While many respondents spoke negatively about the quality of *Shortland Street*, many also admitted watching it. Regardless of opinions about its quality, most people acknowledged that *Shortland Street* brings up issues that are current and relevant to everyday New Zealanders and provides a place for NZ actors and writers and others to start.

"We just don't do drama well. We don't have the writers, or maybe we just haven't found them or aren't paying them or something."

"I'm embarrassed at some of the less good things that are popular simply because they are NZ-made."

The lack of support for drama found in the qualitative research is not so apparent in the quantitative research where 56% of respondents said they think it is important that NZ On Air funds New Zealand made drama on television. This could be due to sampling differences or different classifications of programmes (e.g. *Outrageous Fortune* as drama or comedy).

4.7 Other genres

Other New Zealand made television genres (Special Interest, Māori and ethnic minorities) have a considerably lower profile and were regarded by most New Zealanders in the qualitative research as being a lower priority. For some respondents, however (those from the relevant communities) the programming was highly valued and often viewed.

Despite most New Zealanders having relatively little interest in Special Interest programming there is general acceptance that there is value in having programming for special audiences. Respondents commented that everyone needs a voice and it reflects well on a country if that opportunity is given. Respondents in the qualitative research said:

“There’s the disabilities one as well and I make the kids sit down and watch it so they appreciate... you see that it’s normal to them to be in the wheelchair, just making them aware there are people with differences out there.”

“I’d rather see the money spent on something that’s gonna cater for the whole population rather than a minority of people”

“I think we have to. I think it’s our duty [to have Special Interest programmes].”

Not enough ethnic programming, Auckland is the biggest Polynesian centre and we’ve only got a half hour slot.”

“I think they’re important if you are from a different culture. Not for me they’re not really [important] because I am not going to watch them but I think they are important.”

Programmes for and/or about Māori were also perceived as having an inherent value, even though most people did not watch these programmes. In the quantitative research 55% of respondents said it is important that there is programming on television giving a Māori perspective on mainstream television channels.

In the qualitative research respondents were polarised about whether the quantity of such programmes should be increased. Unsurprisingly, Māori and Pacific people are much more likely to watch these programmes and call for an increase in the quantity shown. In the quantitative research, 63% of respondents said the amount of programming that included a Māori perspective on mainstream television currently is about right.

“Not enough ethnic programming, Auckland is the biggest Polynesian centre and we’ve only got a half hour slot.”

“NZ is multicultural. It’s not just Maori and European, we’re so diverse.”

“Helps you understand traditions, understand why they do different things.”

"I do watch Tagata Pasifika because obviously I'm of the Pacific...it's got the talents of you know all the Pacific fests we've got going on up and down New Zealand. It is a culture which New Zealand is known for. I mean not every country and state has a haka you know, it's just real good to see."

"We need a voice"

"We need our own shows or we'll be culturally lost. Lose our NZ culture, our Maori ancestral culture and our culture from our peers."

"I want to be proud to be a Maori New Zealander, to be part of a well-produced TV/film country."

"No other country in the world can give the Maori voice."

New Zealand made Arts and Performance programmes also have a low profile and are regarded as a lower priority. Most respondents in the qualitative research struggled to identify any Arts and Performance programmes. Examples that were identified were: *Wearable Art Awards*, *Style Pasifika* and Comedy Festival coverage. Most respondents said they are not drawn to watching this type of programming.

4.8 Priorities

When asked in the qualitative research to choose just three genres to prioritise for further investment, respondents' priorities are in the following order: documentary, factual information, comedy, drama and reality (no other genre is prioritised generally, except for ethnic among Māori and Pacific people). A similar, though not identical, ranking is found in the quantitative survey, the priorities are: documentary, factual information and drama. Comedy was considerably more highly regarded in the qualitative research than in the quantitative research and the inverse applies to drama. (Note: New Zealand made programming for children has been excluded from this analysis as it was not considered within the qualitative research)

4.9 Regional television

In the quantitative research respondents were asked how important it is that NZ On Air provides funding for Regional Television stations. 43% of respondents said it is important. 45% said they had watched regional television and 10% said they watch it regularly. There was little spontaneous mention of regional television in the qualitative research and this was limited to South Island respondents. The Rangiora respondents were the keenest on regional television (CTV specifically) and called for very localised programmes.

"I'd like to see more localised shows put on TV, where you have West Coast against Christchurch"

*"On CTV **they** have Dunedin news and that's a local thing and I watch it because I don't know anything about it but it's really localised content for them...to the rest of the country it's nothing but it's obviously an issue in what **they** are doing"*

5.0 New Zealand music

In the qualitative research a strong community based connection to New Zealand made television was evident. Respondents perceived that locally made television represented New Zealand culturally, socially and geographically. It was all about connection to 'us' as a nation. Music emerged as having an even stronger connection to the respondents, but the nature of the connection was different. The connection that emerged was an individual one, a connection to 'me'. Respondents linked New Zealand music with their personality, their memories and their sense of self. The music I like makes a strong statement about who I am.

This deep personal connection means that music can elicit a strong emotional response. Connection to New Zealand music seems therefore to be even more powerful than the connection to New Zealand television programming.

Part of the reason for the strong connection with music is the relative portability of this medium, and the ability to customise the music to mood, place and time. Also, there are far fewer steps and restrictions between the creator and the viewer/listener which can make it more intimate and believable.

"You always feel proud you know, listening to your own New Zealand music."

"Listening to Four Seasons in One Day on the other side of the world, you know, it's like yeah, Four Seasons, that's what links me to home."

5.1 Quantity of New Zealand music on radio

Similar to local content on television, we know that the amount of local content on radio has increased significantly in recent years, up from 15% of music played on New Zealand radio in 2002 to 19% of music played on New Zealand radio in 2008. In the qualitative research, most respondents said the amount of New Zealand made music had increased over the last five years. Some people had difficulty responding to this question either because they could not recall how much New Zealand made music was played in the past or because they could not tell which music was New Zealand made.

Like local content on television, local content on radio seems to have reached near optimum levels. In the qualitative research most respondents think there is the right amount of New Zealand made music on air now. A few respondents are seeking an increase in the amount of New Zealand music on air (Māori and 18-24 year olds). In the quantitative research:

- 45% of respondents said the amount of New Zealand music played on radio stations should increase.
- 59% of New Zealanders said it is important that radio stations are encouraged to play more New Zealand music. This is a significant decrease from the 2007 survey (66% said it was important).
- 60% of New Zealanders said it is important that NZ On Air funds New Zealand music. This is a significant decrease from the 2007 survey where 75% of respondents said this is important.

In the qualitative research most respondents said it is important to have New Zealand music to give our artists exposure and to ensure we have 'our own sounds'. But, many respondents said that because we only have a limited pool of musical talent we would risk adding poor quality music into the mix if we were to substantially increase the volume of New Zealand made music.

5.2 Quality of New Zealand made music

Perceptions of the quality of New Zealand made music are highly age dependent: music from 'their' era is largely regarded as the best music. It is therefore difficult to separate 'enjoyment' from 'quality'. The younger respondents tended to think today's music is best and the older respondents that yesterday's music was the best.

The perception respondents voiced about New Zealand music in the qualitative research tended to be a statement of self, or inspirational self. The young and edgy tended to say that the New Zealand music that gets funded is too mainstream and the hit songs are played too often. The thirty-somethings either loved New Zealand music (off to *Homegrown* or cooking with C4) or did not know which music was New Zealand made. The older and rural respondents were nostalgic for the New Zealand music of old and asked where the classical music or jazz was (show us *Sparks in the Park* on television). Overall there was some undercurrent of a desire to see a wider diversity of music – not just rock/pop/hip-hop/R&B and other types aimed at a younger, urban demographic.

It is important to continue to emphasise though that whether respondents were young or old, hip or not, New Zealand music is important to them. Most respondents can identify New Zealand music they can personally emotionally connect too. Many respondents talked about hearing New Zealand music overseas and feeling strong emotions – nostalgia, identity and pride. This respect leads to a wide reluctance to download New Zealand music illegally and an openness to listening to a wider range of music if it is New Zealand made.

"I'm more likely to listen and appreciate a NZ musician than maybe one from overseas – drum and bass is not my thing but I will listen if I know it's a NZ band like Rhombus or Nesian."

For some respondents in the qualitative research New Zealand music is perceived as having a unique style that stands out. Just what that style is lacks clarity and differs across the generations. Respondents said it is important that New Zealand music has a unique New Zealand sound. Younger people in particular tended to feel negative about New Zealand music that lacked a New Zealand sound, commenting that these artists were not being true to their heritage and perhaps were selling out.

"Some of our mainstream pop, unless you knew it was NZ you wouldn't know. It sounds generic... could come from anywhere."

5.3 Music videos

The importance of making New Zealand music uniquely New Zealand is demonstrated even more strongly in perceptions of New Zealand made music videos. Some respondents expressed concern about how generic some of the New Zealand music videos were that respondents were shown. These

respondents questioned why NZ On Air was funding music videos that looked like they could have been made anywhere in the world – there was not perceived to be anything uniquely local about them.

“They’re trying to blend in, I know they’re wanting to go for the overseas market, but you’re taking Kiwi music overseas, not make American music and say you’re Kiwi.”

Also common to both New Zealand music and the videos that promote them is a concern that NZ On Air funds musicians beyond ‘giving them a leg up’. Respondents in the qualitative research said they thought NZ On Air should fund musicians to get started but should not continue to fund them once they were established. The respondents perceived that the market should determine if the musician is good enough and the good ones would therefore become financially self-sustaining.

The majority of respondents however expressed delight in the quality of the NZ made music videos they were shown. Those with fewer inhibitions danced in their seats.

5.4 New digital media

The quantitative research found that the use of new digital media to listen to music is fairly limited in New Zealand – although the high proportion (over 1 in 4) of over 65s included in the survey could be a factor. Half of New Zealanders in the quantitative sample have used one or more of the following new mediums to listen to music (MP3 player, iPod, Internet, and mobile phone).

The quantitative research also asked respondents how they find out about new music. By far the most common source of new music continues to be radio (61%), followed by friends and family (26%) and music TV (24%). The respondents in the qualitative research reinforced the finding that radio remains the paramount source of new music, but there was also widespread use of other sources (and not always linked to younger people). In the qualitative research a spread of respondents used iTunes and genre specific websites, 30 something Mums liked cooking with C4 and older parents tended to learn about new music from their children.

6.0 NZ On Air

Most New Zealanders do enjoy NZ On Air funded programming and believe it is important to have New Zealand programming on air. There is, however, limited association between NZ On Air (the organisation) and NZ On Air funded programmes. This suggests NZ On Air (the organisation) has a relatively low profile with the New Zealand public (although Aucklanders have higher spontaneous awareness).

Previous quantitative surveys have demonstrated that most New Zealanders were aware of NZ On Air (brand awareness was not measured in the 2008 research as it was unlikely to have changed). The previous surveys have, however, demonstrated that New Zealanders did not have a clear understanding of the breadth of roles fulfilled by NZ On Air, although most knew that NZ On Air funds music and television.

In the 2008 survey, measures of the relative importance of NZ On Air again demonstrate a weak understanding of the services it provides. 53% of New Zealanders agree 'NZ On Air supports programmes and activities that are important to New Zealanders'. 52% of New Zealanders agreed 'NZ On Air provides good quality and interesting programmes and services'. That said, the quantitative research finding that 93% of New Zealanders both watched and enjoyed at least one programme made with the help of NZ On Air.

The qualitative research found that understanding of the role of NZ On Air was weaker the further south the respondents lived. The Auckland-based respondents tended to quickly identify NZ On Air as the primary organisation responsible for making sure there is New Zealand television and music on air, although there was some confusion and several other names were in the mix. The Wellington-based respondents were slower to identify NZ On Air and were confused about contributing organisations, quota, charter and the Broadcasting Standards Authority. The South Island-based respondents were very slow (if at all to identify NZ On Air) and expressed similar confusion as the Wellington-based respondents.

In the qualitative research respondents were shown some examples of programming and music made with the help of NZ On Air (Kiwi Hit Clips 2008 and NZ On Air Anniversary Compilation). After playing the clips many respondents said seeing the clips reminded them of how much high quality music and television has been produced in New Zealand (This was primarily in the groups outside Auckland).

6.1 NZ On Air funded television

While watching the television clips the respondents often smiled or laughed as they recognized shows or people (they responded particularly strongly to Suzy Cato, *Once Were Warriors* and *Shortland Street*). Many respondents remarked that the show reels reminded them of programmes they had forgotten about.

Many respondents said the television clips reminded them of times in their lives when the programmes were on air and prompted them to feel nostalgic. The respondents aged 30 years and older said they could remember most of the programmes they were shown. There was some difference in the responses according to geography. The Auckland-based respondents had a mixed response to the programmes, while fond memories were evoked some were disappointed by how lightweight the "best of" compilation seemed. The Wellington-based respondents remembered most of the programmes fondly. The thirty-something respondents had a strong positive emotional response but the twenty-somethings were more indifferent about what they had seen. The South Island respondents had the strongest positive response to the clips; the respondents became animated and excited on seeing them.

"It felt good that they were made in NZ by NZers. It's great watching something that I can relate to and understand."

"Gave me like a homely feeling, brought back memories. You don't really think about it but that brings it all back."

"I was bored with the boring video clips – the drama ones. I just don't get drama."

The quantitative research found that the most watched NZ On Air funded programmes on television (from a short list) were: *Country Calendar, TV One Documentaries, TV3 Inside NZ Documentaries, What's Really in Our Food, Anzac Day coverage, Off the Radar* and *Outrageous Fortune*. Programmes that were most enjoyed by their viewers were: *Country Calendar, Anzac Day programmes, TV3 Inside New Zealand Documentaries, Outrageous Fortune, What's Really in Our Food, Wearable Art Awards, TV One Documentaries, Aftershock, Off the Radar, NZ Festival Documentaries* and *My God*.

6.2 NZ On Air funded music

The responses to the music clips were tempered by age. The twenty-somethings tended to look on knowingly and told the researchers they were familiar with the music but criticised the playing of the hit songs only.

"So much ambient feeling feel-good music. While I feel this can identify with the larger audience, it is restrictive to minorities. I like more alternative music."

The younger respondents had a considerably more animated response to the music clips than they did to the television clips. Most felt that the music demonstrated an enjoyable unique New Zealand sound.

Some of the thirty-somethings danced in their seats, it was clearly 'their' music and they were not afraid to show they enjoyed it. Others said it was not music they were familiar with.

"I felt like dancing along."

The older respondents were clearly interested in what they were watching but tended not to be familiar with the music. Several expressed surprise at the high quality of the music videos. The older and rural respondents were less enthusiastic about the music clips than they were about the television clips. They tended to express concern that the music videos were not uniquely New Zealand (with some exceptions) and could have been filmed anywhere. However, this probably should be taken with some caution, as encouraging only obvious NZ music and places runs the risk of becoming overly parochial and thus creating an industry that is unable to compete on the world stage.

"Prioritise New Zealanders singing about New Zealand"

6.3 Spending public money on putting New Zealand on air

In the qualitative research respondents were asked to weigh up all the information they had heard about NZ On Air in the focus group (including the programmes and music they had viewed) and give their opinion on whether spending taxpayers' money on funding New Zealand made music and television was important. Almost all respondents were emphatic that this was a good use of taxpayers' money.

“It’s really important – it maintains our own Kiwiana and to understand what’s happening in Godzone!! It’s also important that we fund artists, actors, musicians to bring out the best NZ has to offer.”

“I’m happy that some taxpayer money went to fund these clips because it gives us a chance to see NZ people being creative and helps me to see how creative NZ people can be. It’s inspirational, I guess.”

The final section of the qualitative research asked respondents what the advice would be that they would give to the Chief Executive of NZ On Air if they were in the room. The overwhelming response was that NZ On Air should keep doing what it has done in the past. Respondents urged a re-focus onto quality, not quantity. They said they thought the goal for NZ On Air should now move away from increasing the **amount** of New Zealand made media to increasing the **quality** of New Zealand made media.

“We’re on the right track, doing pretty well with music, TV would increase a little more. If we lost our NZ content we’d lose our NZ identity. Always nice to have something to call your own. If we didn’t have NZ content we’d get lost in the world.”

7.0 Summary

The key findings of this research are as follows:

- Local content
 - The New Zealand public want to continue to have New Zealand made television programming and New Zealand made music on air. The New Zealand public would be very disappointed if New Zealand made television programming and New Zealand made music was not on air.
 - The quantity of New Zealand made television and New Zealand made music is regarded by most New Zealanders as being at or near optimal levels. There would be concern if the quantity was significantly increased or decreased.
 - The New Zealand public want the focus on New Zealand made television and New Zealand made music to be on improving the quality, rather than the quantity, of this content.
- NZ On Air
 - 93% of New Zealanders both watched and enjoyed at least one programme made with the help of NZ On Air.
 - For television, the New Zealand public want NZ On Air to prioritise funding accessible and entertaining documentaries and everyday comedy. The lowest priorities are considered to be reality television (competition style) and drama.

- For music, the New Zealand public want NZ On Air to prioritise funding new musicians playing uniquely New Zealand sounds. The lowest priorities are considered to be funding music from established musicians and music videos (especially music and videos which do not appear to feature uniquely New Zealand images or sound).
 - The New Zealand public want NZ On Air to continue providing the services it currently provides.
- Measuring NZ On Air performance using quantitative surveying
 - The qualitative research has given insight into how to interpret the findings of both the 2008 quantitative survey and surveys undertaken in the past for NZ On Air. Design and interpretation of subsequent surveys, and SOI measurements, should be cognisant of these findings. The questionnaire for the next quantitative survey of the general public should be redesigned using the findings of this research for guidance.