

EXECUTIVE SUMMARY - STAKEHOLDER SURVEY 2018

Listening to our stakeholders

The New Zealand Film Commission / Te Tumu Whakaata Taonga (NZFC) works with a diverse range of stakeholders – from emerging filmmakers, to experienced New Zealand professionals, to international productions, to Government agencies.

We are committed to working positively with our stakeholders to generate excellence in productive partnerships. To assist this, the NZFC has researched stakeholder views every two years, to get their feedback on what is working well, and what can be improved.

This year we are publishing the survey results in order to improve transparency, and in response to our stakeholders asking for us to do this.

It is encouraging to find that our stakeholders are generally positive about our relationship with them, and that satisfaction levels have increased since our 2016 survey. We are well regarded for supporting industry collaboration, for industry diversity, and for our integrity.

There is, of course, more to do. This report has shown that in particular, we need to prioritise improving effective working relationships with stakeholders, being supportive, encouraging and collaborative, identifying, supporting and developing exceptional Aotearoa New Zealand screen talent, and seeking the views of stakeholders when appropriate.

The NZFC looks forward to continuing our work with all our stakeholders. We thank everyone who gave their views in this survey. We are committed to responding to the feedback and will carefully consider it as a part of our short and long term planning.

The next stakeholder survey will be taken in mid-2020.

Key findings

Overall, **70 percent** of respondents say they are **satisfied** with the NZFC, up from 64% in 2016. 79% of these were based in Aotearoa New Zealand and 21% were internationally based.

A key difference between the groups is that 92% of internationally based respondents were satisfied with NZFC – up from 77% in 2016.

In contrast, 65% of Aotearoa New Zealand based respondents were satisfied (up from 62% in 2016). While still a pleasing result, this shows there is more to do to increase the satisfaction of our New Zealand based stakeholders.

“NZFC has established a strong international reputation in multiple territories. I am especially impressed with the Commission’s understanding of the Chinese market. I think most foreign industry members who have dealt with NZFC and the NZ industry feel a strong sense of confidence in what the country has to offer.” - Female, 20+ years in industry, International based

As the internationally based stakeholders come from diverse roles, it is difficult to determine the exact reasons for their views. Potential explanations include:

- the increased activity in the international marketplace after Film New Zealand was brought into the NZFC
- increased and more diversified connections between New Zealand and China
- new programs in overseas markets now that the NZFC is no longer acting as a sales agent
- they are comparing the NZFC favourably against similar international organisations

Industry collaboration

The NZFC is viewed **especially positively for helping NZ films get made** (77%) and is seen to have **strength in expertise and industry knowledge** (69% agree). This latter area is another with a significant difference between New Zealand and international stakeholders. 84% of international stakeholders agree the NZFC has strong experience and knowledge, compared to 65% of New Zealand stakeholders.

"It is a much better organisation to deal with than it has been previously. It is open, considered, consistent, more reliable, fair. They are pro-active, much more communicative. ... it makes a massive difference to film makers. Thank you!" - Female, 16-20 years in industry, NZ based.

"They need to be less swayed by monotonous expectations of what a film 'should' be. More flexibility and imagination would lead to a stronger industry." - Gender diverse, 6-10 years in industry, NZ based

Industry diversity

Very encouragingly, around **seven in ten view the NZFC positively for supporting and developing diversity**, including Māori and female filmmakers. This is a key focus for the NZFC. In the past year several funding opportunities for groups traditionally under-represented in the screen industry have been launched, including funds specifically for women, Māori and Pacific Island people.

"Certainly feels like staff are more empowered to support filmmakers. Good to see funding being allocated to support diverse voices i.e. Māori and women." - Female, 11-15 years in industry, NZ based.

The wider diversity policy includes opportunities for those living with disabilities and people from New Zealand's Asian and LGTBQI+ communities. A new staff position, Pou Whakahaere, has been established to ensure the aims of Te Rautaki Māori are met, and to establish bespoke funding initiatives, training and support for Māori screen practitioners.

However only **half agree that NZFC is effective in developing filmmakers' careers and exceptional NZ screen talent** – something we clearly need to improve.

"The Commission is setting a high standard in its talent development schemes. My own experience with the NZFC over the last 3 years has provided me with valuable insight on the industry, (and) given me the tools to look at my craft more critically" - Male, less than 5 years in industry, NZ based

"Identify talent and stick with them longer term in a meaningful way, invest in their growth, take a long-term view." - Male, Less than 5 years in industry, NZ based

Communications

The report also highlights the NZFC has more to do in this area. **Communications** was the most suggested area for the Commission to improve on (11% of respondents), closely followed by **transparency** (10%).

In addition, while **45% agree the NZFC has effective working relationships with stakeholders**, and 43% that the NZFC seeks stakeholder views when appropriate, many felt they didn't know how effective those relationships were (19% and 21% respectively). This suggests we need to not only have the direct working relationships, but also communicate about that to the wider industry.

"it is quite hard to know who exactly you have to speak to in some departments. It's not a very personable organisation. Connection is so important to our culture that it's hard to trust people that aren't the same. It's like business comes first, and I get that, but relationships nurture good business." - Male, 6-10 years in industry, NZ based

To address this, the NZFC is committed to meeting more frequently with industry guilds, ministries and other key stakeholders. A comprehensive review of the NZFC website is underway to help address concerns that the site is difficult to navigate and find relevant information on. It is hoped that the move to online applications and contracting will streamline processes that have, in the past, been complicated, time-consuming and difficult to manage.

Survey method

- The survey was sent to 1,200 stakeholders based in New Zealand and internationally between 27 June and 15 July 2018. **275 (23%)** responded.
- Of New Zealand based respondents made up 79% of the total respondents. 56% were producers, 48% directors, 42% screen writers and 23% actors – with many listing multiple roles illustrating the need for people in the industry to have diverse skills.
- Internationally based respondents made up 21% of the total respondents. They have diverse people roles in the industry - the majority are producers, with the rest made up of film festival leaders, consultants. financiers / investors, studio execs, directors, and sales agents and distributors. Internationally based stakeholders were also more likely to be older.



New Zealand
FILM COMMISSION



Te Tumu Whakaata Taonga

STAKEHOLDER RESEARCH

AUGUST 2018

PREPARED BY COLMAR BRUNTON

OBJECTIVE

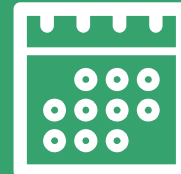
The New Zealand Film Commission commissioned Colmar Brunton to understand how effective stakeholder relationships are in regard to perception, leadership and engagement.

This research provides direction for communication strategy, insight into stakeholders' perceptions and knowledge of the organisation, and helps to provide an understanding of what stakeholders want, what drives their satisfaction, and how the NZFC measures up to this.



METHOD

An invitation to do an online survey was sent to around 1,200 NZFC NZ-based and international stakeholders. 275 completed the survey. This is a 23% response rate.



TIMING

The survey took place from 27 June to 15 July, 2018.

Note that this survey summarises stakeholders' perceptions at this particular point in time.

+/-%

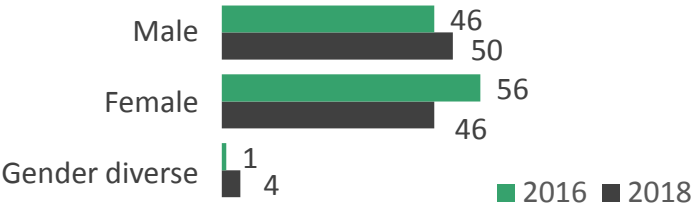
MARGIN OF ERROR

The maximum margin of error on the total sample of 275 is +/-5.2%

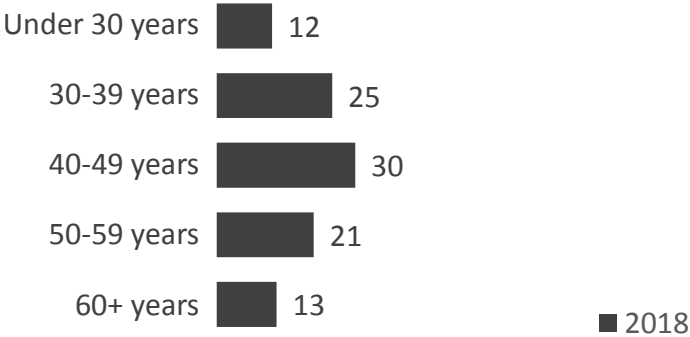
Note that changes were made to the survey in 2018. Comparisons have been made with 2016 results where possible (i.e. where the same attributes were asked and where sample sizes are equal to or greater than 30). Where there has been a statistically significant increase/decrease since 2016 (at the 95% confidence level), this is denoted using upwards or downwards triangles.

Demographic profile

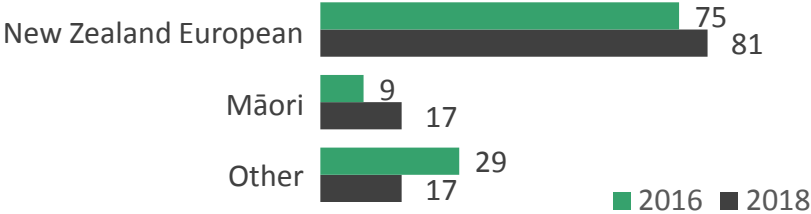
GENDER



AGE



ETHNICITY¹



NZ BASED

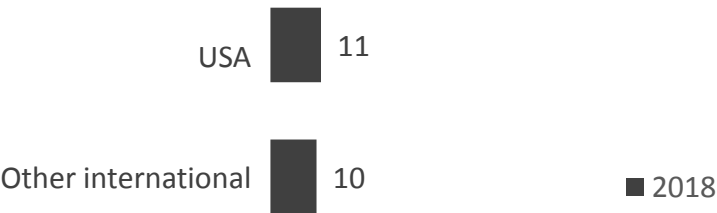
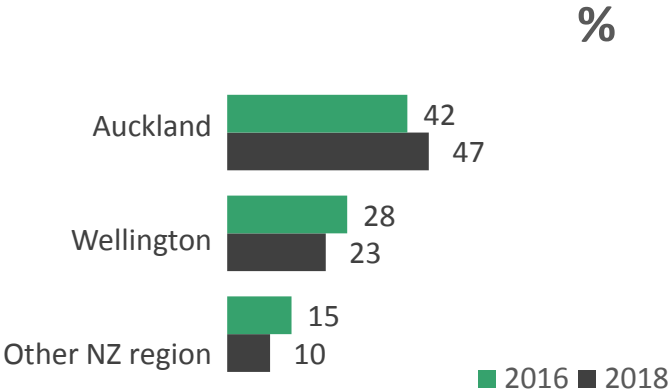


79%
(vs 85% in 2016)

INTERNATIONALLY BASED



21%
(vs 15% in 2016)

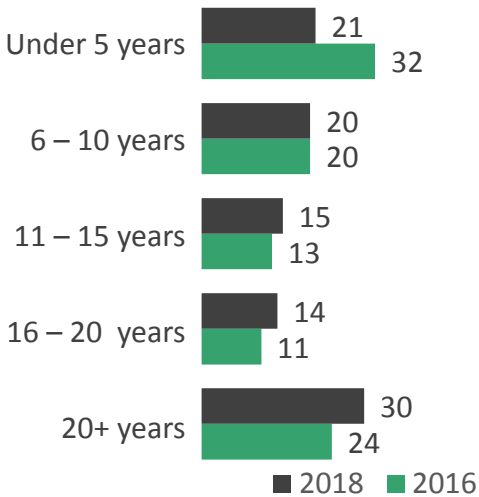


NOTE: ¹Percentages add to more than 100% as participants were able to select multiple ethnicities. | BASE: All Stakeholders (n=275)

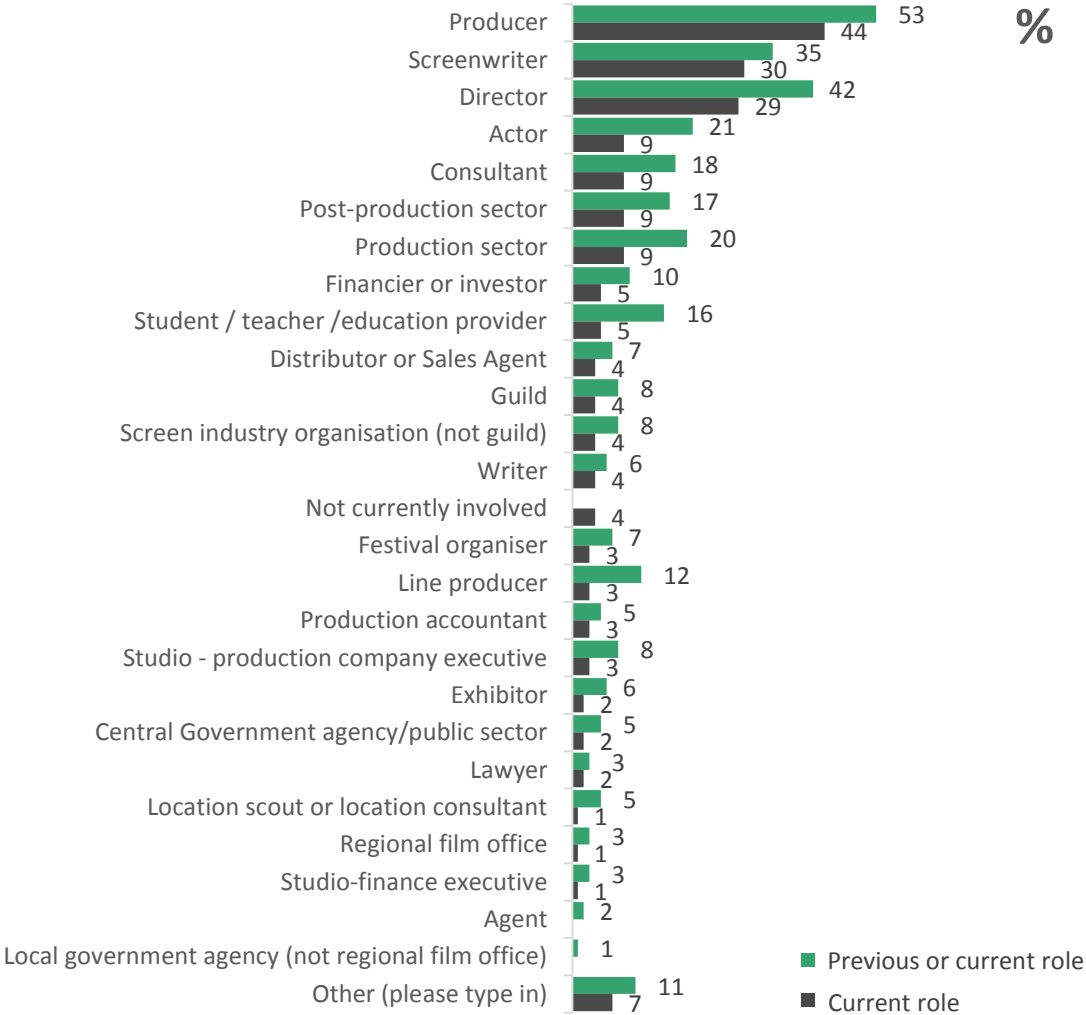
Demographic profile



LENGTH OF TIME IN INDUSTRY

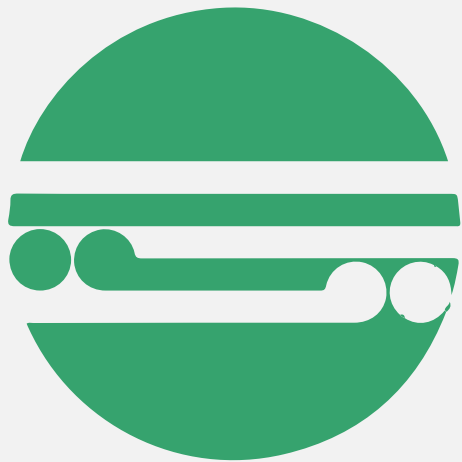


ROLE IN INDUSTRY¹



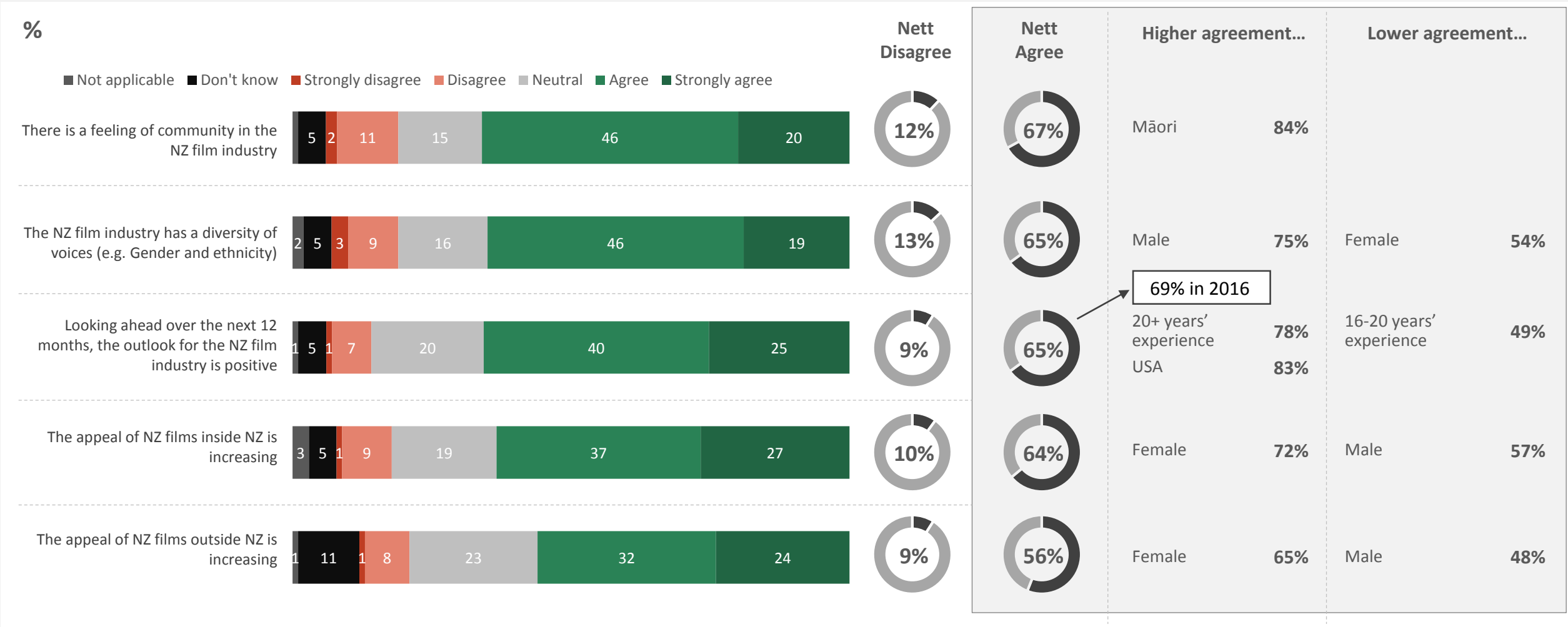
NOTE: ¹Percentages add to more than 100% as participants were able to select multiple roles in industry. | BASE: All stakeholders (n=275)

Overall Satisfaction



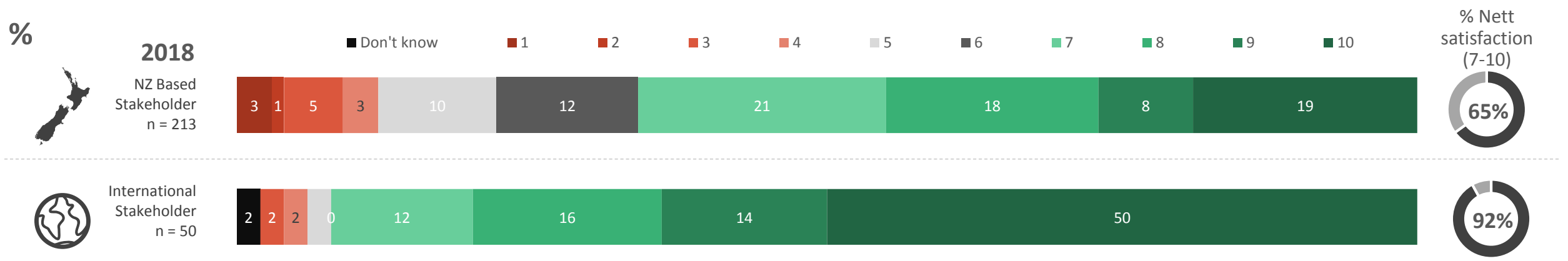
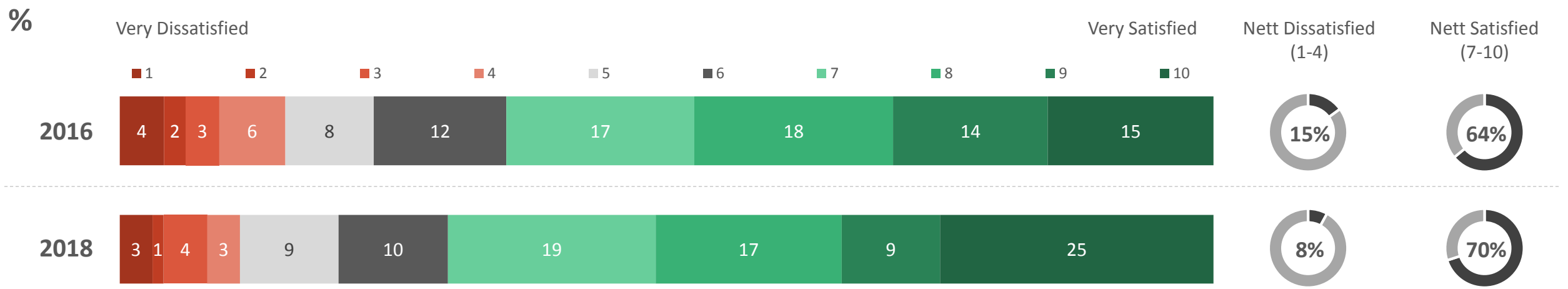
Industry outlook

Around two thirds of stakeholders hold a positive outlook on the film industry, relate to a feeling of community within the industry, and recognise a diversity of voices. While two thirds are also confident that the NZ appeal of NZ films is increasing, confidence that international appeal of NZ films is increasing is somewhat lower.

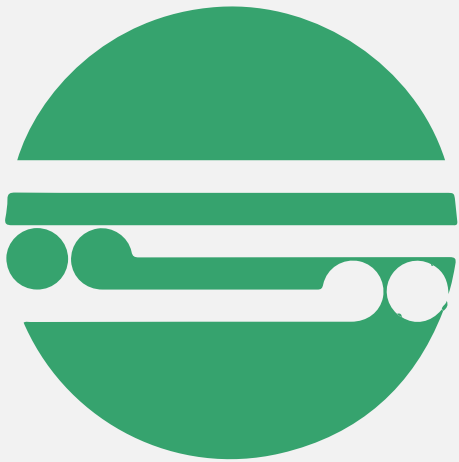


Overall satisfaction

In 2018, overall stakeholder satisfaction sits at 70%. The apparent increase since 2016 is not statistically significant and is due to the higher proportion of international stakeholders in the 2018 sample.¹

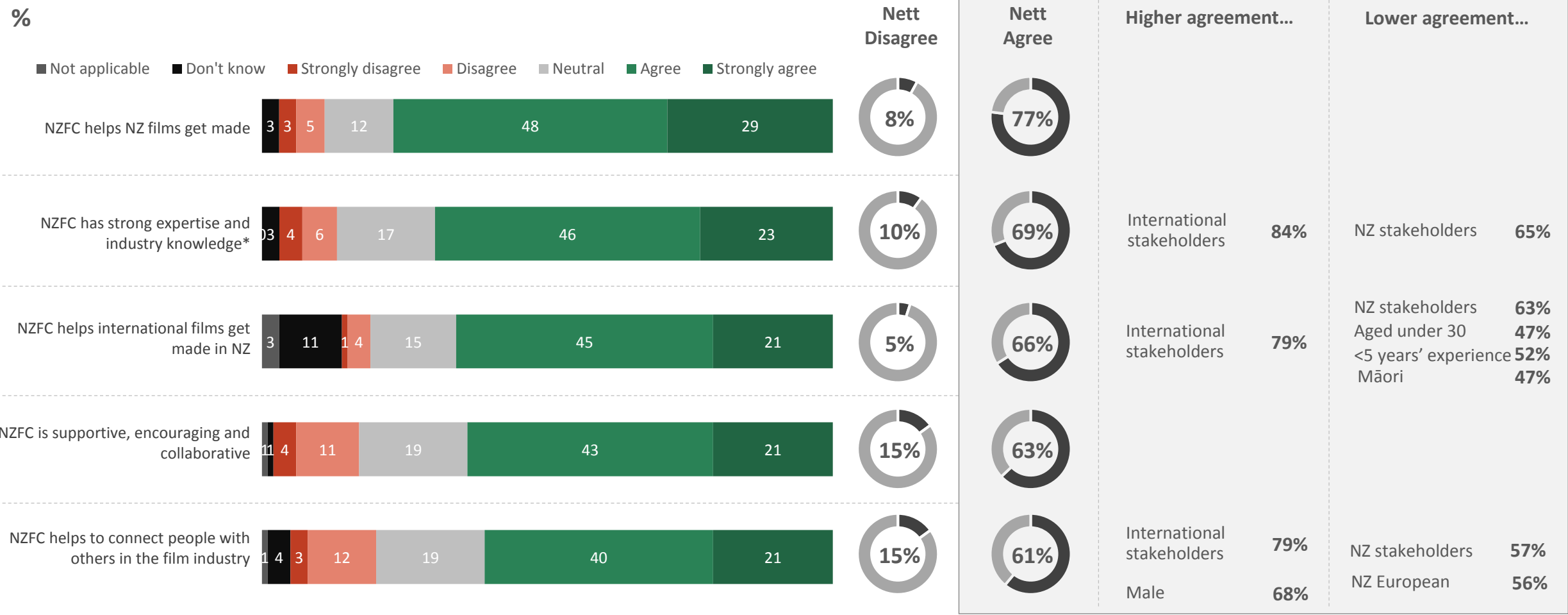


Priorities for improvement



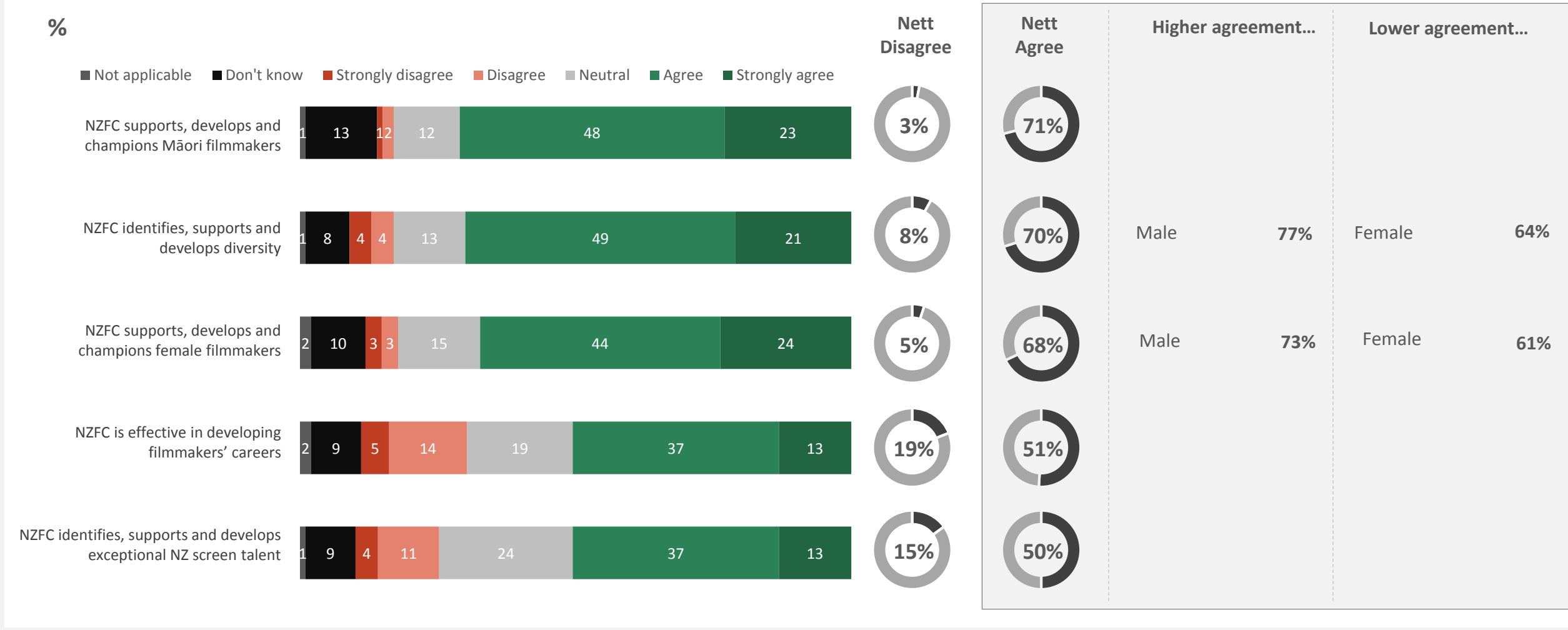
The NZFC's support for industry collaboration

The NZFC is viewed especially positively for helping NZ films get made (77%). Impressions are somewhat weaker for the softer measures of being supportive, encouraging and collaborative, and facilitating connections.



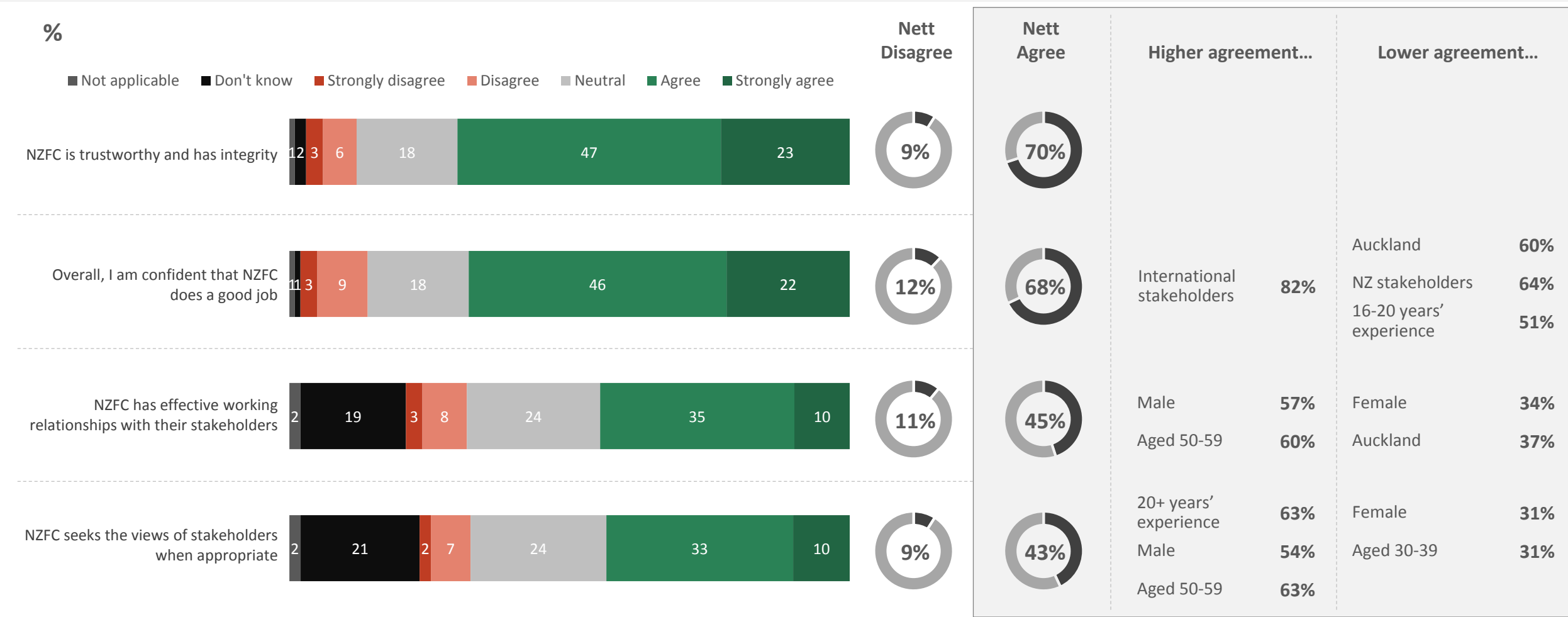
NZFC support of industry diversity

Around seven in 10 view the NZFC positively for supporting and developing diversity, including Māori and female filmmakers. In comparison, about half agree that NZFC is effective in developing filmmakers’ careers and exceptional NZ screen talent.



General Perceptions of the NZFC and stakeholder relationships

Seven in 10 stakeholders agree that the NZFC does a good job overall, and a similar proportion agree that the NZFC is trustworthy. Just under half favourably rate the NZFC's relationships with stakeholders as many stakeholders feel they don't have enough knowledge to rate this (one in five are unsure).

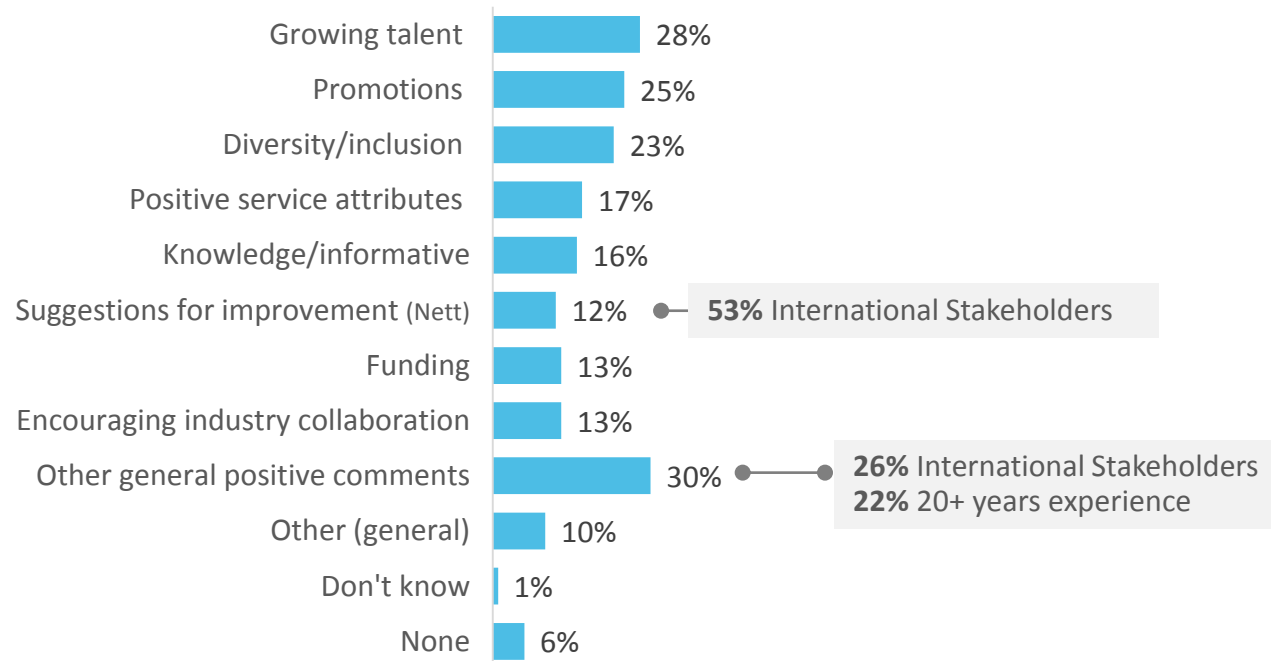


**What NZFC
does well**



Stakeholders' positive perceptions of the NZFC

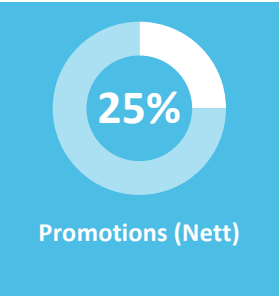
Stakeholder positive perceptions most commonly relate to growing talent, promoting NZ films/industry/NZFC, and encouraging diversity and inclusion. See the next page for a more detailed explanation of these.



Stakeholders under the age of 30, and those with less than five years' experience, were more likely than average to believe the NZFC was growing talent well (50% and 41% respectively).



What does the NZFC do well?



Supporting NZ content	9%
Attracting international films to NZ	7%
Promoting NZ films	7%
Marketing of NZFC	4%
Promoting the NZ film industry/NZ film industry	3%



Encouraging diversity	9%
Improving, more inclusive	8%
Supporting women filmmakers	7%
Supporting Māori filmmakers	5%
Sense of community	3%



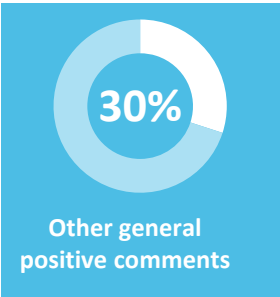
Good communication and information	11%
Knowledgeable	4%
Available/accessible	3%



International connections	7%
Connecting filmmakers and crew - domestic	3%
Great that there is a NZFC	3%
Connecting filmmakers and crew - local industry with international partners	1%



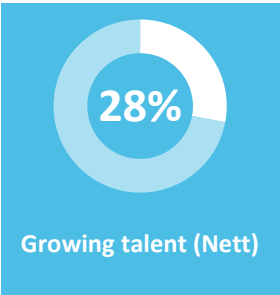
Fund films/fund short films/targeted funding (domestic)	9%
Incentives/grants (attracting international films to be made in NZ)	4%



Supportive	13%
Doing a good job	12%
Trustworthy	5%
Represents NZ and stakeholders	4%
Positive comments about the new CEO	3%
Growing the industry	2%



Helpful and friendly	10%
Approachable	9%
Efficient/professional	3%



Developing talent/careers, providing workshops	19%
Supporting NZ filmmakers	12%
Marketing of NZFC	4%

Negative comments	12%
Other	10%
Nothing	6%
Don't Know	1%

In their own words...

“I think their commitment to getting films made is amazing and they have definitely helped put NZ films on the international market.”

- Female, 16-20 years in industry, NZ based

“The Commission is setting a high standard in its talent development schemes. My own experience with the NZFC over the last 3 years has provided me with valuable insight on the industry, given me the tools to look at my craft more critically and I've been able to maximise the value I get from my own work. Overall, it's been a fantastic experience!”

- Male, less than 5 years in industry, NZ based

“NZFC and therefore NZ content has a unique cultural identity, which handled with support, will continue to find a niche market in the global expansion of online viewing.”

- Female, Over 20 years in industry, International based

“It is a much better organisation to deal with than it has been previously. It is open, considered, consistent, more reliable, fair. They are pro-active, much more communicative. Overall, the team are more enablers than hurdle makers and it makes a massive difference to film makers. Thank you!”

- Female, 16-20 years in industry, NZ based

“From my point of view, maintaining international relationships, evangelising for NZ as a production location and making connections between the local industry and international partners”

- Male, 11-15 years in industry, International based

“Making NZ an attractive film destination, clearly communicating the incentive and other benefits of shooting there, and serving as ambassadors for the NZ film community to the world.”

- Male, 20+ years in industry, International based

“Certainly feels like staff are more empowered to support filmmakers. Good to see funding being allocated to support diverse voices i.e. Māori and women.”

- Female, 11-15 years in industry, NZ based

“The talent development team and their initiatives do a great job of supporting local emerging talent. Newer initiatives like the 125 Fund and the interactive development fund are a step in the right direction as well.”

- Male, <5 years in industry, NZ based

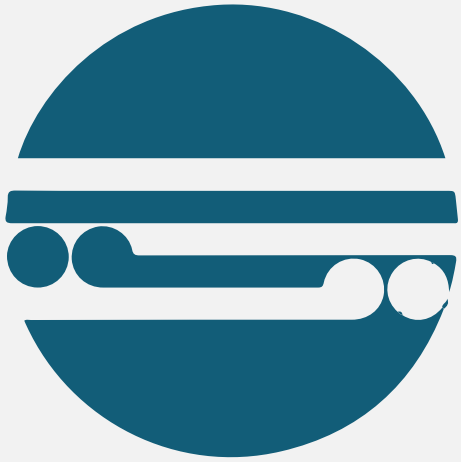
“NZFC has established a strong international reputation in multiple territories. I am especially impressed with the Commission's understanding of the Chinese market. I think most foreign industry members who have dealt with NZFC and the NZ industry feel a strong sense of confidence in what the country has to offer.”

- Female, 20+ years in industry, International based

“Encouraging and facilitating foreign production. Talent training and development - people who ask for/need support often get it. Support for the guilds, film festival, script to screen and industry events is useful and important.”

- Male, 11-15 years in industry, NZ based

Suggested areas for improvements



Stakeholder suggestions for improvement

Suggestions for improvement most commonly relate to transparency and communication, encouraging greater diversity, and providing more support and funding. See the next page for a more detailed explanation of these.



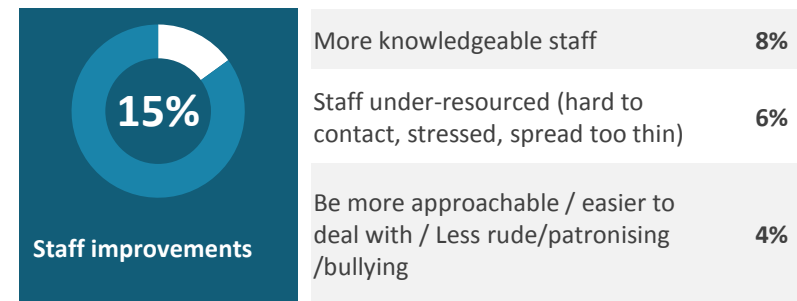
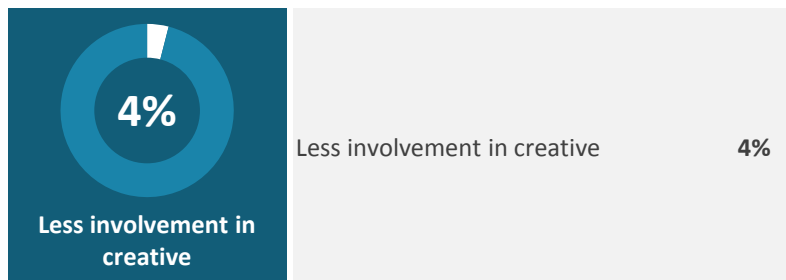
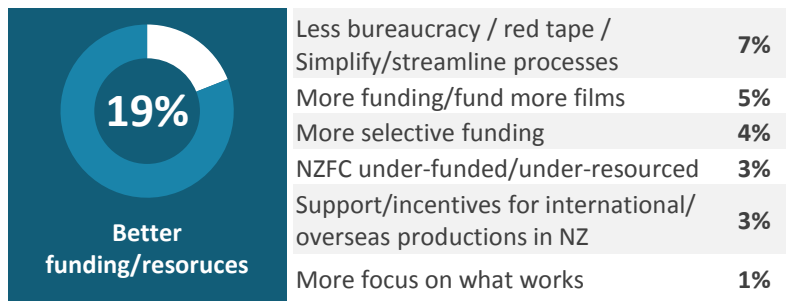
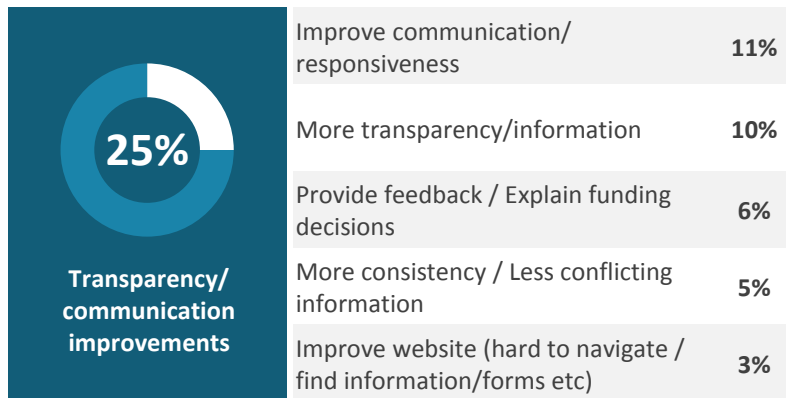
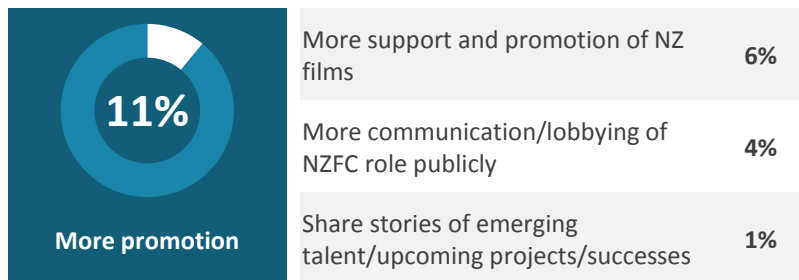
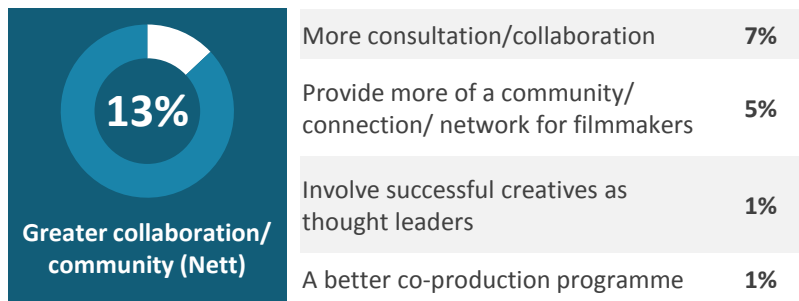
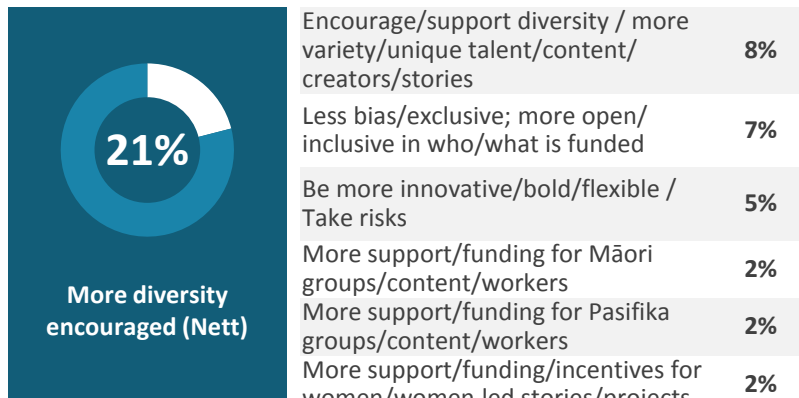
Female stakeholders are more likely to suggest improvements are needed in transparency and communication (31%).

Improvements in funding and resources available are more likely than average to be suggested by stakeholders under the age of 30 (38%). Alternatively those with 16-20 years' experience are more likely to want better promotion of NZFC films and filmmakers (23%).

Stakeholders aged 60+ (31%) and those based outside of NZ (37%) and are more likely to suggest no improvements.



What could the NZFC do better?



Nothing	17%
Other	10%
Positive comments/satisfied	8%
Don't Know	5%

What could the NZFC do better?

“Identify talent and stick with them longer term in a meaningful way, invest in their growth, take a long-term view. Also, how can you make it be less of a lottery to get funding? Be more diverse in storytelling. It's time to move on from stories of children losing their innocence. We make too many shorts that are miserable and no-one wants to watch.”

- **Male, Less than 5 years in industry, NZ based**

“Communicate clearly and within a reasonable time. There is too much conflicting information from the development team giving the impression that key members aren't doing their job well.”

- **Female, 16-20 years in industry, International based**

“They need to be less swayed by monotonous expectations of what a film 'should' be. More flexibility and imagination would lead to a stronger industry.”

- **Gender diverse, 6-10 years in industry, NZ based**

“As someone who is constantly scouting for emerging and diverse writers, directors, I pay close attention to talent delegations that Australia sends to the US. Wondering if NZFC does the same? Would love to know more about exceptional up-and-comers.”

- **Female, 16-20 years in industry, International based**

“They could better communicate their successes and future intentions for international markets. If they did we could better align with them. I don't feel we give NZFC as much support as we could if we had a clearer sense of what they were striving towards.”

- **Male, 6-10 years in industry, International based**

“More communication and not just with the "producer" but the whole team so everyone is on the same page. Better support with first-time filmmakers especially for producers. An actual handbook or guidelines as to what is exactly expected at what milestones. Basic steps for first-time filmmakers to check off.”

- **Female, 11-15 years in industry, NZ based**

“Develop a better range of films, be more consistent with feedback to projects.”

- **Male, less than 5 years in industry, NZ based**

“It is quite hard to know who exactly you have to speak to in some departments. It's not a very personable organisation. Connection is so important to our culture that it's hard to trust people that aren't the same. It's like business comes first, and I get that, but relationships nurture good business.”

- **Male, 6-10 years in industry, NZ based**

“International outreach/promotion, especially to "new studios" like Netflix. Promote NZ beyond Wellywood. Go beyond the exclusive "club" of filmmakers they support.”

- **Female, Over 20 years in industry, NZ based**

“Fund short films and other projects better. I recently worked on 2 NZFC funded short films - both were way under funded. This means that everyone who works on these are paid below the minimum wage - if that. I am sick of having to scrounge and ask for favours whenever doing any short that is NZFC funded. Fund these films properly”

- **Male, 16-20 years in industry, NZ based**

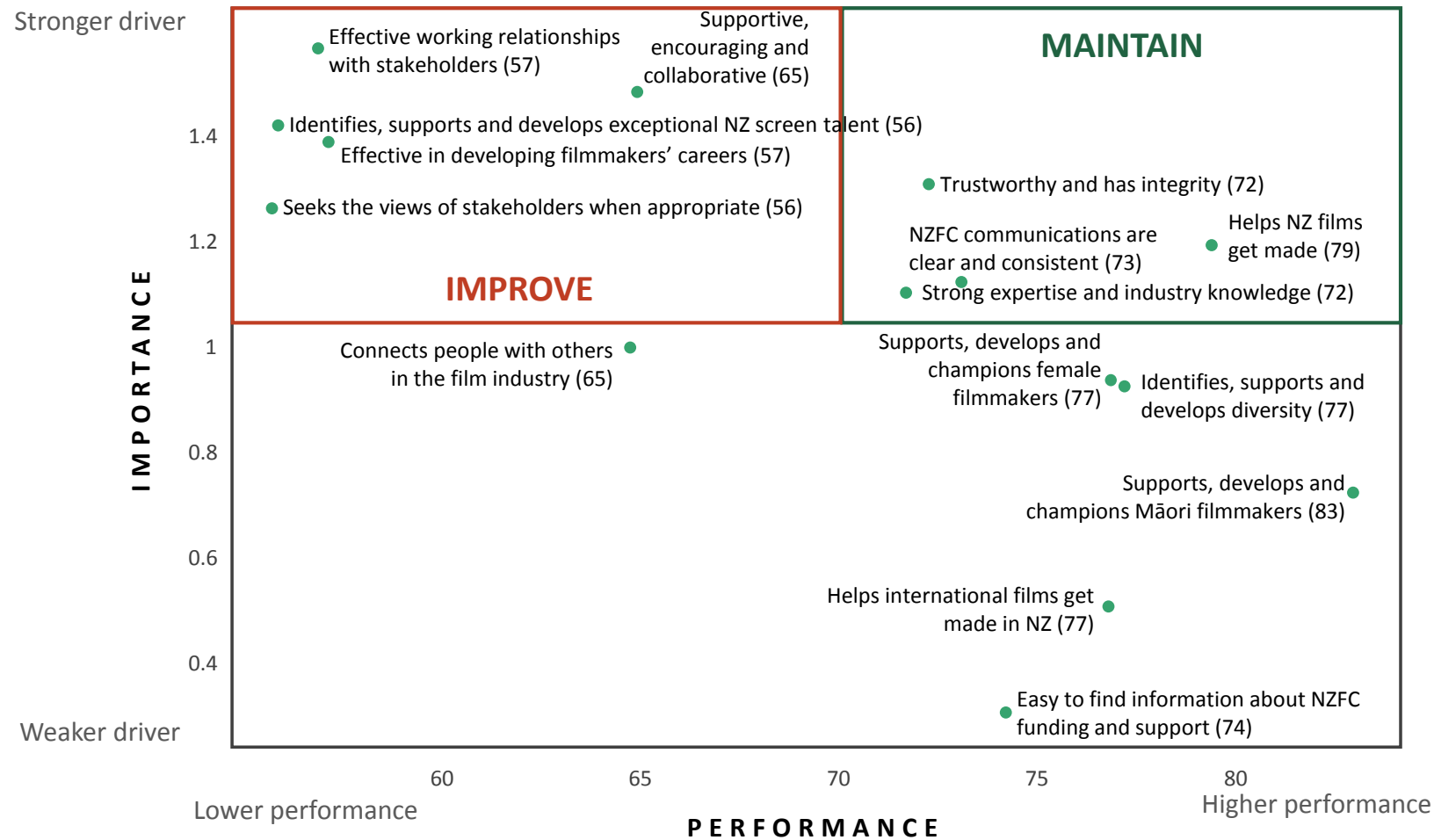
Priorities for improvement

The next chart (page 22) indicates which attributes the NZFC should focus on to increase stakeholder satisfaction. Attributes towards the top are important to stakeholders (they are strong drivers of overall satisfaction*). Stakeholders think there is room to improve on attributes towards the left (relative to attributes towards the right). To lift stakeholders’ satisfaction, the NZFC’s first priority should be to focus on improving attributes in the top left ‘improve’ box. It is also important to maintain stakeholder satisfaction with attributes in the top right (as stakeholders rate these highly and they are important drivers of satisfaction). The chart on page 22 looks at drivers of overall satisfaction. A similar analysis is presented on page 23, but for drivers of a positive outlook on the NZ film industry.



Priorities for improving overall satisfaction with the NZFC

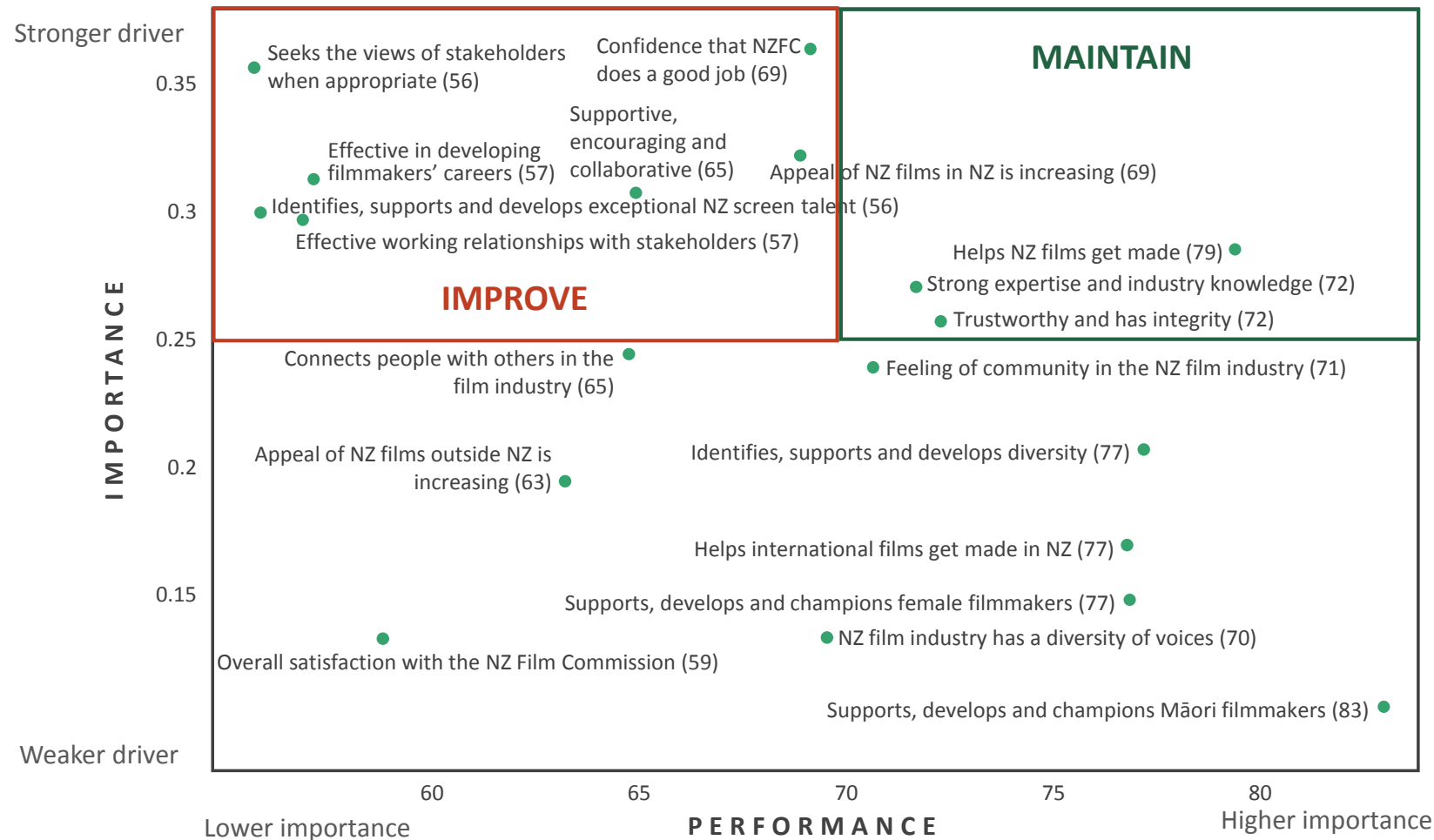
Effective working relationships with stakeholders strongly drive overall satisfaction with the NZFC. Further development of these relationships, as well as supporting industry collaboration and the development of filmmakers and screen talent, will likely improve overall stakeholder satisfaction. Proactive efforts to seek the views of stakeholders will also pay off.



NZFC are performing well on measures shown on the right of this chart (which are rated positively by 70% or more stakeholders).

Priorities for improving stakeholders' positive outlook on the NZ film industry

The top priorities for improving overall satisfaction (seen in the last chart) are also evident in the priorities for improving industry outlook. NZFC-initiated engagement with stakeholder views is an especially strong driver of a positive outlook. There is a clear relationship between stakeholder confidence in the industry’s future and confidence in the job that NZFC does. Likewise, enhancing confidence that the appeal of NZ films is increasing will improve industry outlook.



IMPORTANT INFORMATION

Research Association NZ Code of Practice

Colmar Brunton practitioners are members of the Research Association NZ and are obliged to comply with the Research Association NZ Code of Practice. A copy of the Code is available from the Executive Secretary or the Complaints Officer of the Society.

Confidentiality

Reports and other records relevant to a Market Research project and provided by the Researcher shall normally be for use solely by the Client and the Client's consultants or advisers.

Research Information

Article 25 of the Research Association NZ Code states:

- a. The research technique and methods used in a Marketing Research project do not become the property of the Client, who has no exclusive right to their use.
- b. Marketing research proposals, discussion papers and quotations, unless these have been paid for by the client, remain the property of the Researcher.
- c. They must not be disclosed by the Client to any third party, other than to a consultant working for a Client on that project. In particular, they must not be used by the Client to influence proposals or cost quotations from other researchers.

Publication of a Research Project

Article 31 of the Research Association NZ Code states:

Where a client publishes any of the findings of a research project the client has a responsibility to ensure these are not misleading. The Researcher must be consulted and agree in advance to the form and content for publication. Where this does not happen the Researcher is entitled to:

- a. Refuse permission for their name to be quoted in connection with the published findings
- b. Publish the appropriate details of the project
- c. Correct any misleading aspects of the published presentation of the findings

Electronic Copies

Electronic copies of reports, presentations, proposals and other documents must not be altered or amended if that document is still identified as a Colmar Brunton document. The authorised original of all electronic copies and hard copies derived from these are to be retained by Colmar Brunton.

Colmar Brunton™ New Zealand is certified to International Standard ISO 20252 (2012). This project will be/has been completed in compliance with this International Standard.

This presentation is subject to the detailed terms and conditions of Colmar Brunton, a copy of which is available on request or

